

Investment Agent

Solution Overview

Investment Agent is an AI Assistant that answers questions related to Deal Desk and Global End Customer Investment Funding and Azure Credit Offer programs using internal knowledge sources. It centralizes access to guidance, enabling users to quickly retrieve accurate, context-relevant information and apply the correct rules to investment and deal structuring decisions.

Business Use Case

Deal teams must navigate complex investment programs such as End Customer Investment Fund (ECIF) and Azure Credit Offer (ACO), but guidance is often fragmented across multiple internal tools and documents. This makes it difficult to quickly understand eligibility, funding rules, and approval requirements, leading to delays, inconsistent application of policy, and reliance on subject matter experts for clarification.

Benefits

- **Consistency and Standardization:** Reduces dependency on individual expertise for investment programs
- **Speed to Insights:** Enables faster, more confident decision-making, improves alignment with program intent,
- **Enhanced User and Stakeholder Experience:** Improved engagement with clear and accurate guidance.

Key Results

1.2K hours

Annual time savings

Technology

- Copilot Studio
- Azure Analytics
- Office O365

Time taken

Launched in 1 month