ROI Newsletter Agent (ROI-Pilot) Pilot)

From manual effort to one-prompt magic

Transforming our weekly newsletter process through intelligent automation, automation, saving time while ensuring consistency and engagement across our engagement across our communications.

Our Intelligent Solution

Copilot Studio

AI-powered conversation interface that understands context and generates generates professional newsletter content with simple prompts

Power Automate

Seamless integration connecting data sources, triggering notifications, and notifications, and automating repetitive tasks

SharePoint Excel

Centralized data repository for engagement metrics, customer highlights, highlights, ROI achievements, and team kudos
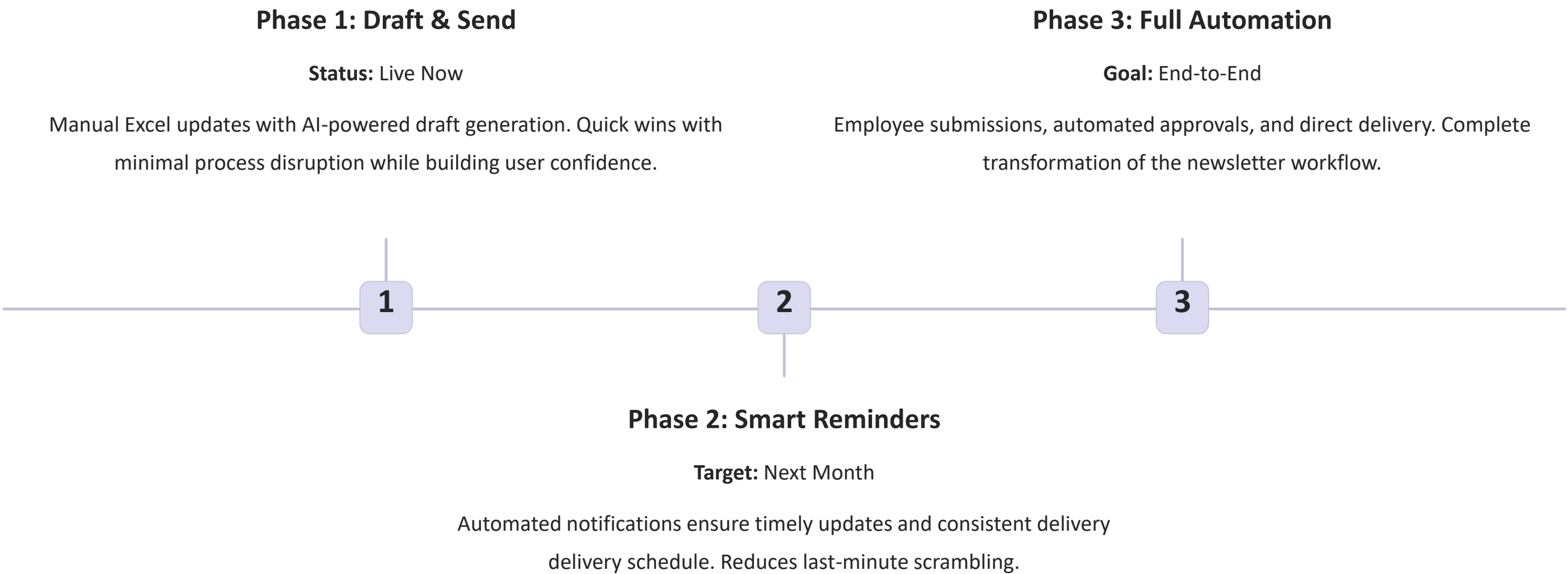
OneNote

Knowledge base storing templates, brand guidelines, and historical content historical content from our team meetings

The result: **Outlook-ready HTML newsletters** generated in minutes, not hours, with consistent formatting and engaging content that reflects our professional our professional standards.

3-Phase Rollout Strategy

Phase 1: Draft & Send

Status: Live Now

Manual Excel updates with AI-powered draft generation. Quick wins with minimal process disruption while building user confidence.

Phase 3: Full Automation

Goal: End-to-End

Employee submissions, automated approvals, and direct delivery. Complete transformation of the newsletter workflow.

1   **2**   **3**

Phase 2: Smart Reminders

Target: Next Month

Automated notifications ensure timely updates and consistent delivery delivery schedule. Reduces last-minute scrambling.

ⓘ Each phase builds upon the previous, allowing teams to adapt gradually while continuously reducing manual effort and increasing automation sophistication. automation sophistication.

Phase 1: Draft & Send (Live Now)

Quick Win with Immediate Impact

Our current phase represents a significant leap forward while maintaining familiar processes. Team members continue updating Excel spreadsheets as they always have, but now experience the magic of AI-powered content generation.

01

Update Excel Sheets

Populate data across four key areas: Engagement Summary, Customer Highlights, ROI Highlights, and Team Kudos using existing processes

02

Launch the Agent

Simply type "*Draft newsletter*" and watch as the AI agent intelligently processes processes all your data sources

03

Receive HTML Output

Get a professionally formatted, Outlook-ready HTML newsletter that maintains maintains brand consistency and engaging tone

04

Copy, Paste, Send

Simply transfer the HTML into Outlook and distribute to your audience - no audience - no formatting headaches

Key Benefit: Transforms hours of manual formatting and writing into minutes of streamlined execution, while ensuring professional quality and consistency. and consistency.

Phase 2: Smart Reminders & Consistency

Proactive Communication Communication

Automated Friday reminders sent via Teams Teams or email ensure Excel updates happen on schedule, eliminating last-minute minute rushes and missed deadlines.
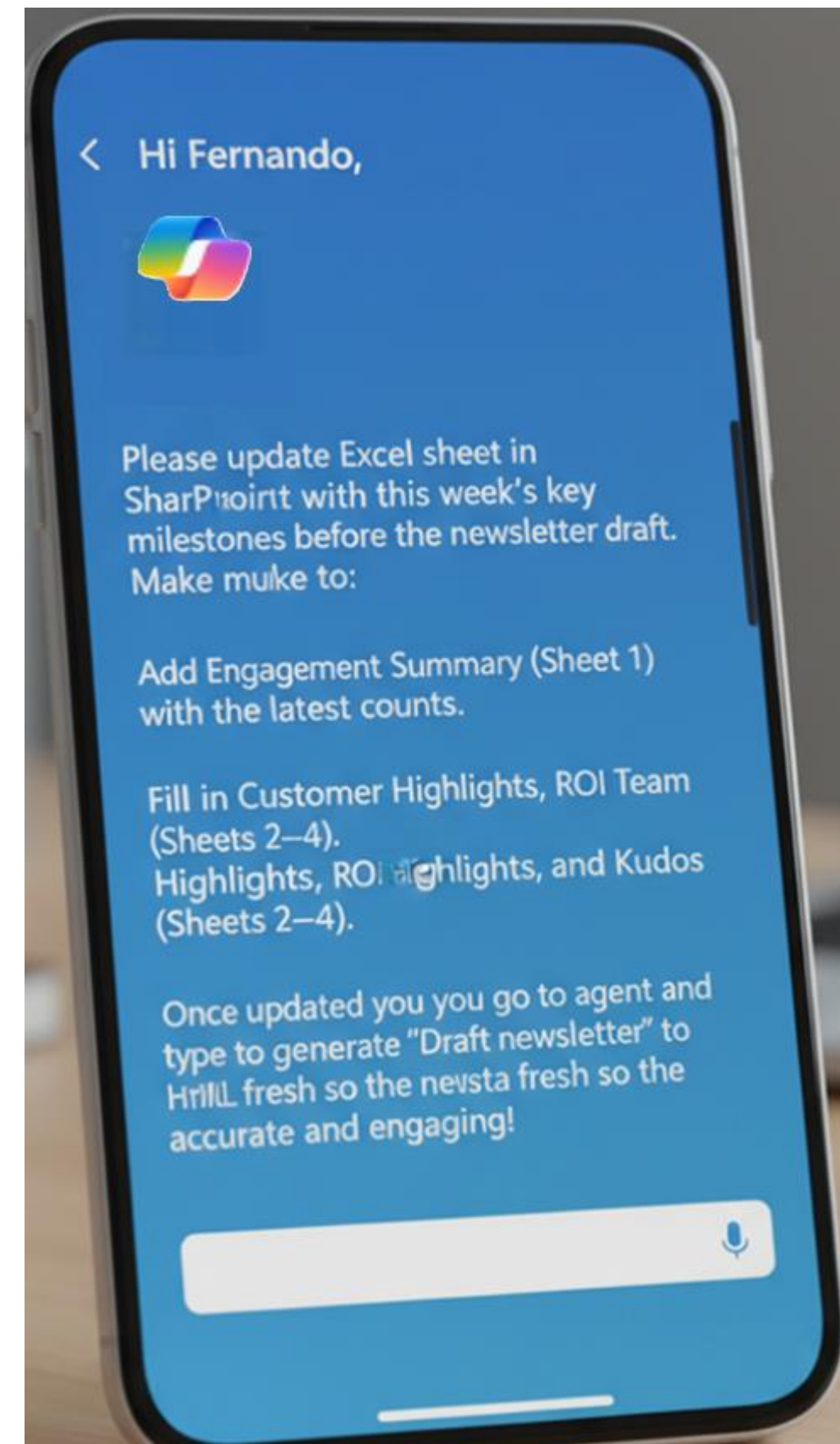
Seamless Integration

Reminder notifications include direct links to links to the agent, reducing friction and and making the process as smooth as possible for busy team members.

Maintained Workflow

Core process remains unchanged - update Excel, draft newsletter, copy HTML, and send - with enhanced reliability through intelligent prompting.

This phase addresses one of our biggest challenges: ensuring timely data updates. By implementing smart notifications, we create a more predictable and reliable newsletter production schedule that works with everyone's busy calendars.

Phase 3: Full Automation & Collaboration

Revolutionary Participation Model

Phase 3 transforms our newsletter from a centralized task to a collaborative effort. Employees across departments can contribute highlights directly through conversational AI, eliminating spreadsheet friction entirely.

Employee Experience

- Natural conversation with the agent
- Guided questions ensure complete information
- No need to access or understand Excel structure
- Submissions automatically formatted and categorized
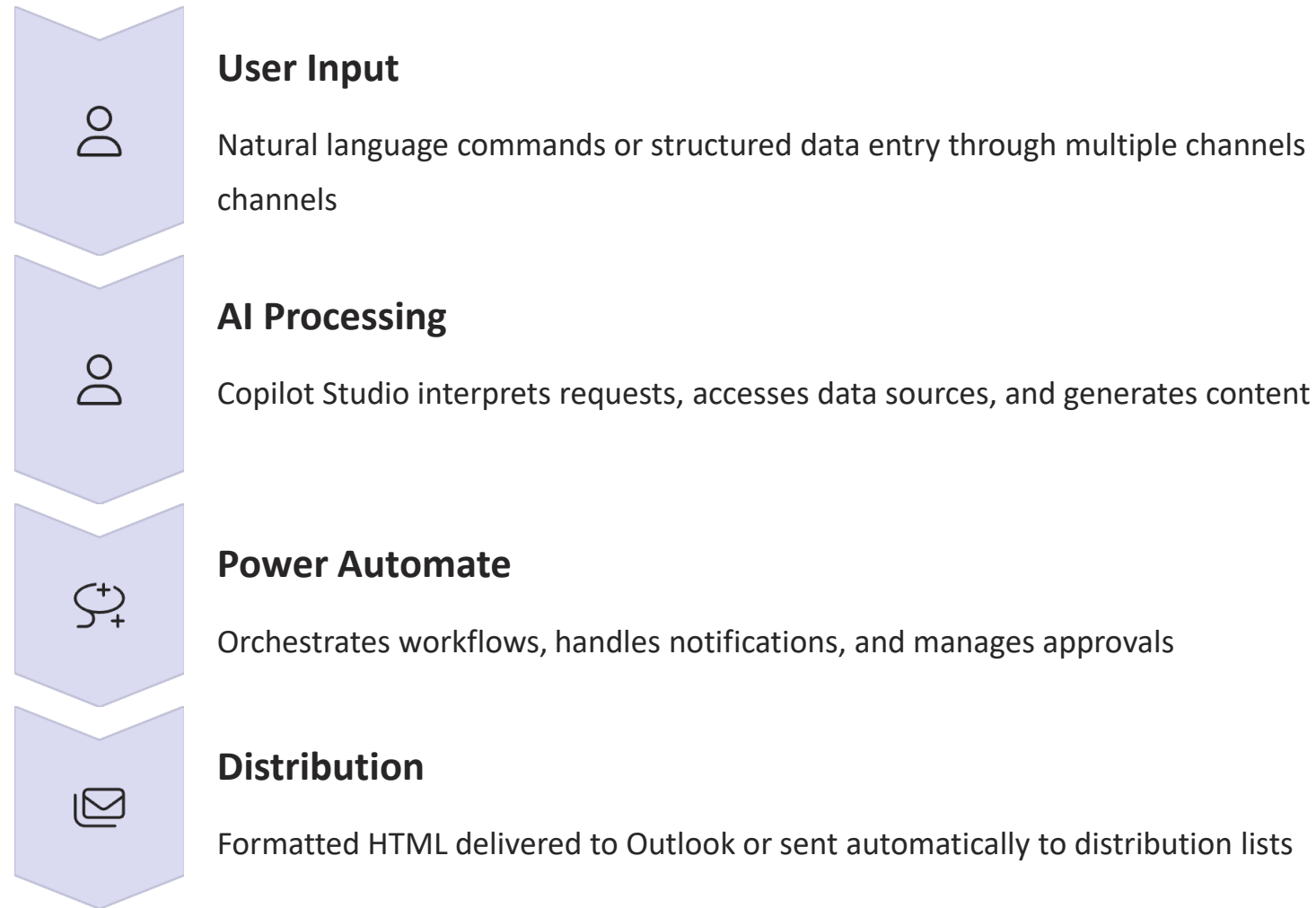
Owner Experience

- Review consolidated submissions in draft format
- Approve with a single click
- Agent handles distribution automatically
- Optional SharePoint archiving for compliance

✓ Complete automation means newsletters are delivered consistently, even when key personnel are unavailable, ensuring reliable stakeholder communication.

Technical Architecture & Integration Integration

User Input

Natural language commands or structured data entry through multiple channels channels

AI Processing

Copilot Studio interprets requests, accesses data sources, and generates content

Power Automate

Orchestrates workflows, handles notifications, and manages approvals

Distribution

Formatted HTML delivered to Outlook or sent automatically to distribution lists

Our architecture leverages Microsoft's ecosystem for seamless integration, ensuring security, compliance, compliance, and scalability while maintaining familiar user experiences across all touchpoints. touchpoints.