Amanda Sumner, EC Utbildning, 2025-03-25

# Use case: Ekonomiboken-bot

## Information extracted by the AI Agent:

- Goal: Create a chatbot (Ekonomiboken-bot) to answer employees' frequently asked finance-related questions, reducing the CFO's workload.
- Key Functionality:
  - Natural Language Processing (NLP) to understand Swedish language queries.
  - Knowledge Base Integration (SharePoint, Excel, Dataverse, intranet).
  - Topic creation for common questions.
  - Fallback mechanism for unhandled queries (human escalation via Teams, email, or Power Automate).
  - Conversation Analytics.
- Integration Needs:
  - Data source connectivity (SharePoint, Dataverse, SQL Server, intranet).
  - Human escalation (Microsoft Teams, email, Power Automate).
  - Optional: User authentication (Entra ID).
- Risks:
  - Inaccurate responses.
  - Data security/privacy.
  - Misinterpretation of questions.
  - Over-reliance.
  - Lack of contextual understanding.
  - Limited scope.
  - Maintenance.
  - Integration challenges.
  - User adoption.
  - Bias.
- Missing Information:
  - Specific question types.
  - Budget.
  - Platform.
  - User base.
  - Existing system integrations.
  - Response times and accuracy levels.
  - Employee types.
  - Agent name and integration.

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# Proposed integration strategy:

- Research and planning
    - Identify data sources for the knowledge base
    - Collaborate with Ekonomichefen to identify common questions and create a list of topics, as well as address missing information
    - List possible trigger phrases for each topic (in Swedish)
    - Determine human escalation method (Teams, email, Power Automate) and strategy (workflow for transferring conversations if needed)
    - Consult with IT about compliance with GDPR and data handling and security in Copilot Studio
    - Create a risk assessment and mitigation document
    - Consult with UX specialist on user interface for the bot

- Development
    - Set up Copilot studio, create a new bot, connect to the chosen data source
    - Create topics for the identified questions
    - Add trigger phrases
    - Define conversation flows
    - Train the Copilot bot on the sample questions and answers
    - Create a fallback topic to handle unanswerable queries
    - Set up an escalation method
    - Collaborate with UX specialist to create an intuitive and accessible user experience
    - Test the bot with various questions, use a pilot group of users for feedback
    - Refine the bot based on pilot group feedback

- Deployment and maintenance
    - Deploy the bot to the chosen channel (Teams?)
    - Communicate to the employees about the availability and functions of the bot
    - Use Copilot Studio analytics to monitor the performance of the bot
    - Update the knowledge base with new information
    - Address user feedback and refine the bot as needed