AI-Powered Client Opportunity Navigator

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Sponsor: Eide Bailly LLP
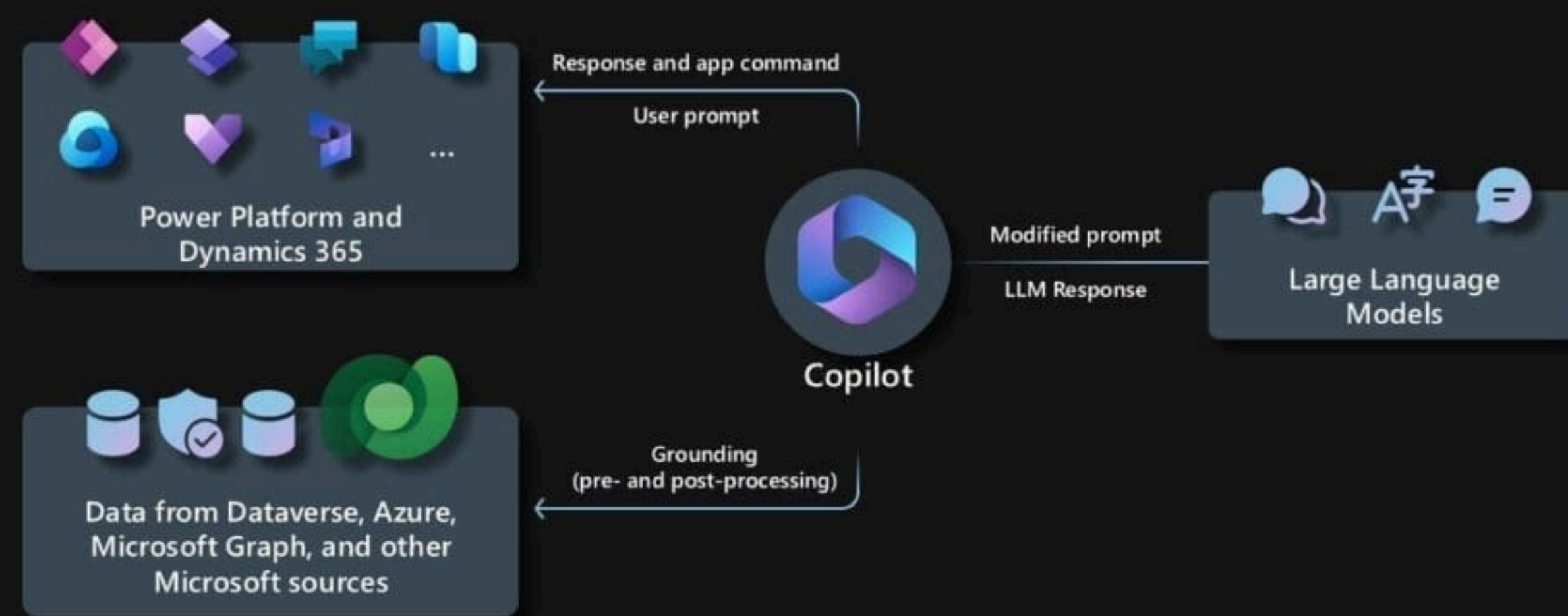
NDSU COMPUTER SCIENCE

EideBailly℠

Copilot | Dynamics 365 & Power Platform

Solution Overview

We created a Teams-based Sales Assistant bot that listens for new Dataverse opportunities, posts context-aware suggestions, and automates email and calendar tasks via Power Automate. Through custom prompt engineering and configuration tuning, the solution delivers concise, relevant guidance aligned with Eide Bailly's service catalog.
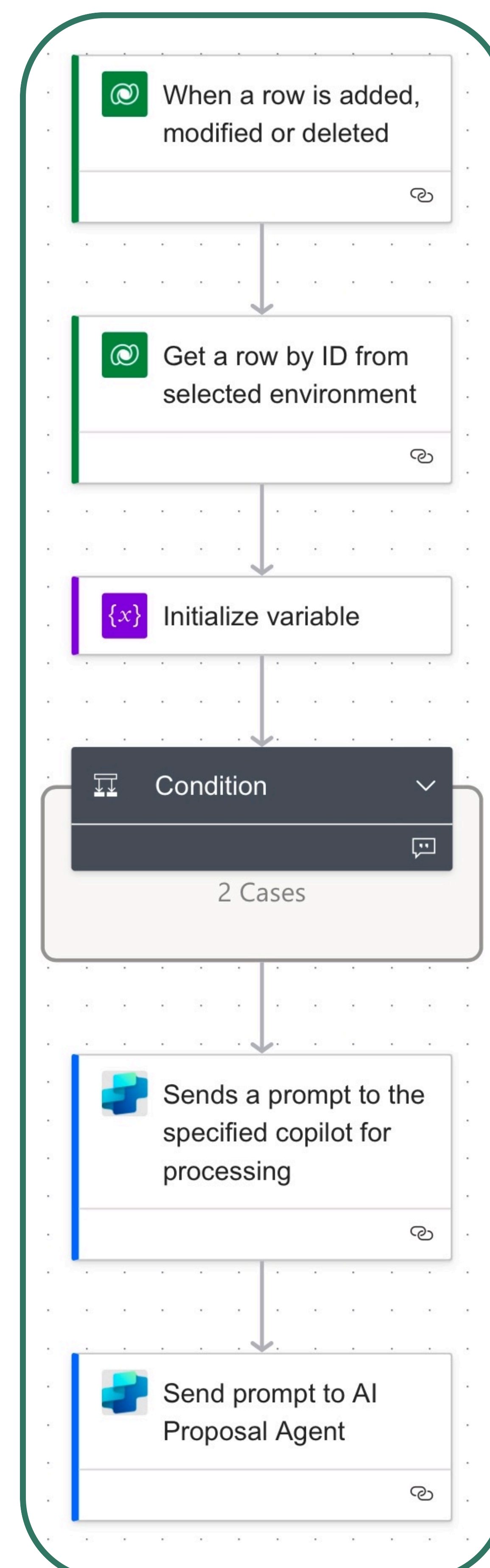
Benefits For Eide Bailly

- Faster, more consistent outreach to clients
- Reduces manual drafting time
- Employees can focus on personalizing, not starting from scratch
- Shows Eide Bailly's motivation towards utilizing modern technology

2-Opportunity Update Triggers Flow

1- Sales Opportunity Captured via Automation

New Opportunity – Unsaved
Opportunity · Opportunity

Sales Process
Active for less than one mrin

Qualify (1 Min)

Summary   Products   Quotes   Files

Opportunity details

Description
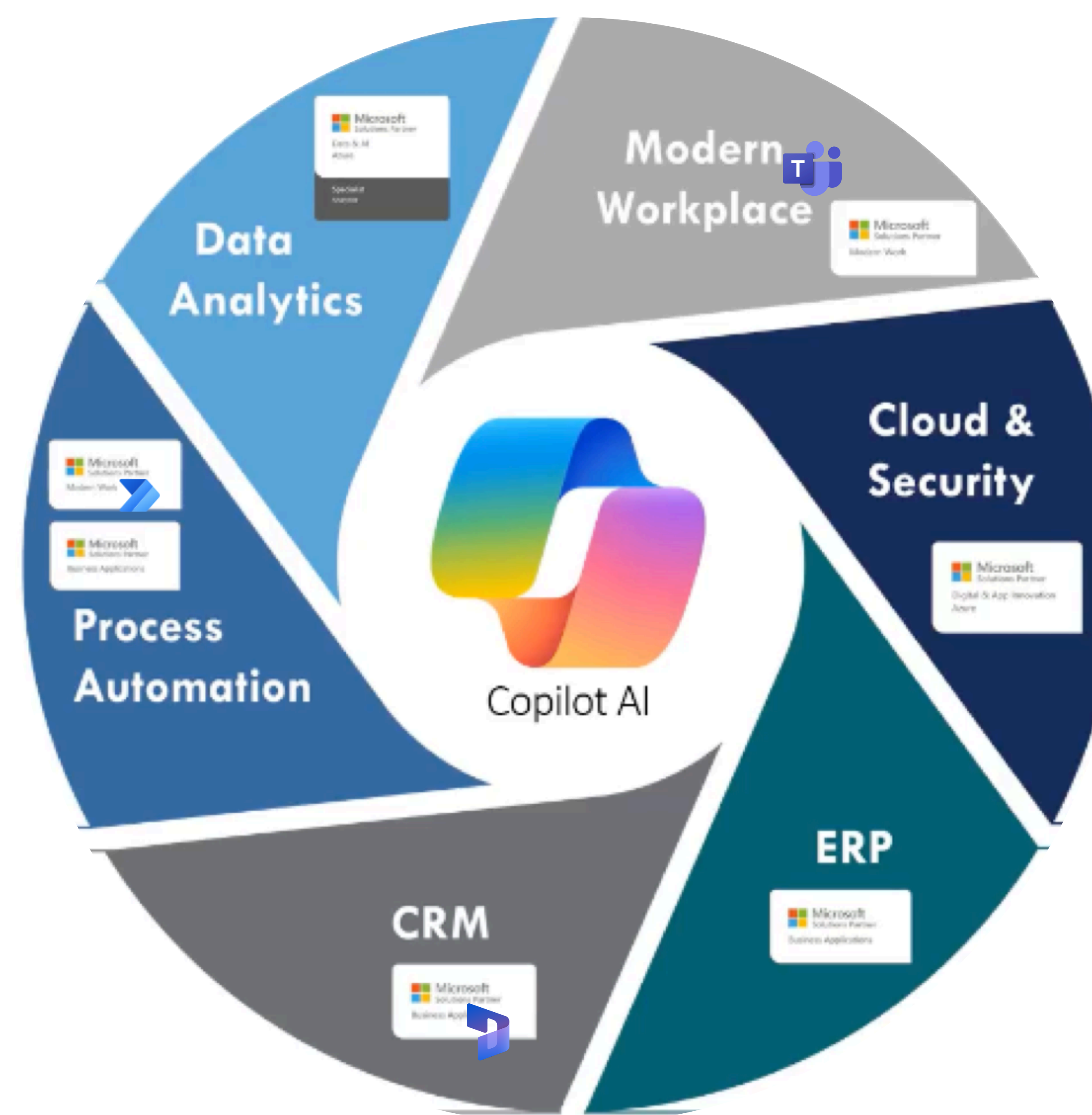This company is inquiring about our services.

Current situation
They are not satisfied with their current accounting services.
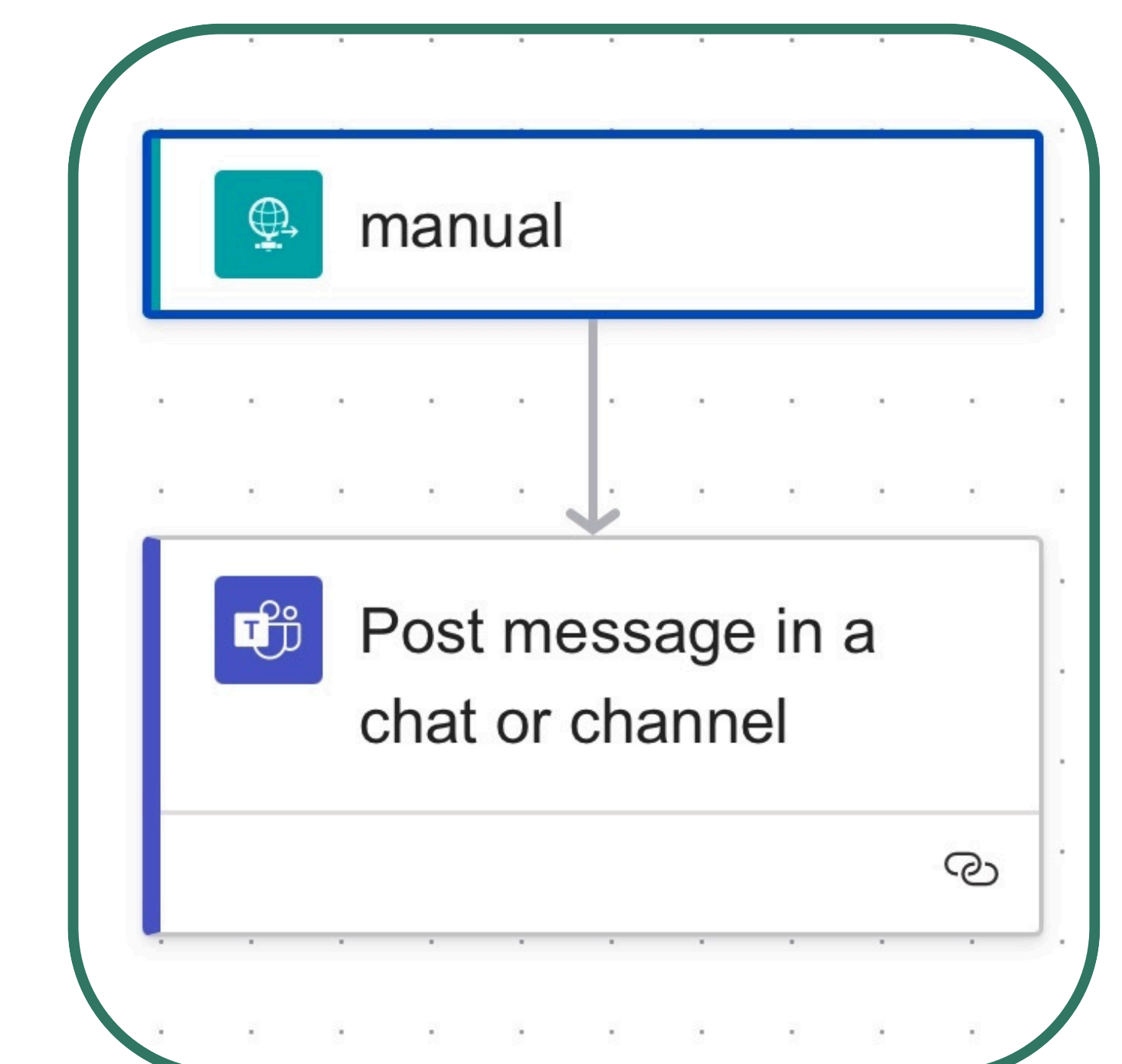
Customer need
They are in need of Accounting services.

Proposed solution
Start quoting a variety of accounting service plans that we offer and start negotiating prices.

How Custom Instructions Shape Responses

- *Match exact catalog terms*
- *List one clear primary service*
- *Suggest 3–5 cross-sell services*
- *Keep format clean and consistent*
- *Ensure services fit the scenario*

3-Copilot AI Embedded Within Microsoft Teams

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