

Banking Copilot Use Case: Relationship Managers

How JPW Consulting helps banks turn Microsoft Copilot into measurable productivity gains for client-facing teams.

Before the Meeting <ul style="list-style-type: none">• Summarize client emails• Generate agendas• Prep talking points	During / After Meeting <ul style="list-style-type: none">• Auto meeting summaries• Action items• Client follow-ups	CRM & Documentation <ul style="list-style-type: none">• Standardized notes• Internal memos• Compliance-ready formatting	Ongoing Relationship Mgmt <ul style="list-style-type: none">• Quarterly summaries• Renewal prep• Cross-sell insights
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JPW Banking-Specific Copilot Training Module

Audience: Relationship Managers, Commercial Bankers, Wealth Advisors

Format: 90-minute live, hands-on session (virtual or onsite)

Tools: Outlook, Teams, Word, Excel

Key Focus Areas

- Safe & compliant Copilot usage in banking
- Prompting for client communications
- Meeting summaries and follow-ups
- CRM-ready documentation
- Daily workflow acceleration

Measured Outcomes

- 45–60 minutes saved per banker per day
- Adoption increases from ~20% to 40–60% within 60–90 days
- 🏠 ■ More consistent, compliant client communications

Why JPW Consulting? We focus on the part Copilot rollouts miss: hands-on training, role-based workflows, governance employees understand, and adoption that sticks.