

## CASE STUDY

# Transforming Sales with a Custom Copilot at Mathis Home

## INTRODUCTION

eGroup Enabling Technologies is dedicated to helping clients harness the power of AI to address their unique challenges. The team collaborated with Rich Mitton, IT Director at Mathis Home, to develop a custom copilot solution that has transformed their sales process.

## SOLUTION

eGroup Enabling Technologies collaborated with Mathis Home to develop a custom sales manager chatbot. This copilot enables the sales team to quickly and securely ask questions and receive answers. By restricting the AI to specific documents and integrating generative AI on their website, the solution addressed security concerns while providing a powerful tool for sales associates.

## OUTCOMES

The custom copilot launch was successful and has received positive feedback from Mathis Home's sales team. It has enhanced the speed and efficiency of their sales process while offering valuable insights into AI's capabilities and limitations. Rich Mitton, IT Director at Mathis Home, remarked, "It's given us the opportunity to really believe bigger, probably even more than we did when we started the process. I'm glad we started; it's important just to take a step forward so that you can learn from that."

## CONCLUSION

The project with Mathis Home showcases the transformative power of AI when implemented thoughtfully and securely. Organizations interested in exploring how AI can benefit their operations can connect with eGroup Enabling Technologies for guidance in navigating their AI journey.

## CHALLENGE

Mathis Home, a furniture retailer with locations in Oklahoma, California, Arkansas, and Texas, wanted to embrace AI but had concerns about security and data access. They needed a solution that would allow their sales team to quickly access information without compromising sensitive data.

## TECHNOLOGIES

Copilot Studio, Power Automate, SharePoint Online, Microsoft Teams



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### RICH MITTON

IT Director, Mathis Home