Case Study

Executive Productivity Reimagined with AI

A leading hospitality and entertainment organization sought to help executives spend less time searching for information and more time acting on it. Judge Consulting designed and implemented an AI-powered Executive Productivity Agent that automatically transformed fragmented Microsoft 365 data into personalized, executive-ready briefings delivered automatically each week.

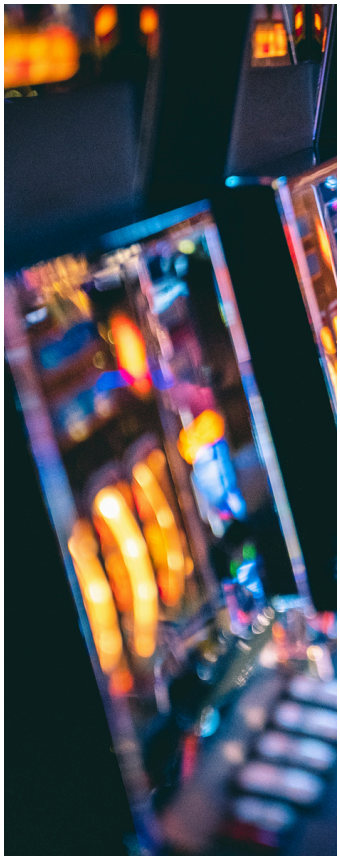
THE CHALLENGE

Reducing Information Overload and Turning it into Actionable Insights

Executives were spending valuable time reviewing emails, meetings, chats, notes, and tasks across multiple Microsoft 365 applications to stay informed and aligned with business priorities. Critical updates, action items, stakeholder requests, and emerging risks were scattered across systems, making it difficult to quickly identify what required attention.

The organization needed a secure, scalable solution that could automatically surface the most important information, identify risks and priorities, summarize key meetings, and provide visibility into both explicit and inferred deliverables. It also needed a consistent executive briefing experience that reduced administrative effort while keeping leaders informed and prepared to make timely business decisions.





THE SOLUTION

Building an AI-Powered Executive Productivity Agent

Judge Consulting met with executive leadership as well as key stakeholders to better understand the business need, drivers, and processes behind the needed solution. Judge Consulting then designed and implemented an Executive Productivity Agent using Microsoft Copilot Studio, Microsoft Graph, Microsoft Entra ID, and Power Automate. The solution functions as a digital chief of staff, securely reviewing content executives are authorized to access and transforming it into a concise weekly briefing.

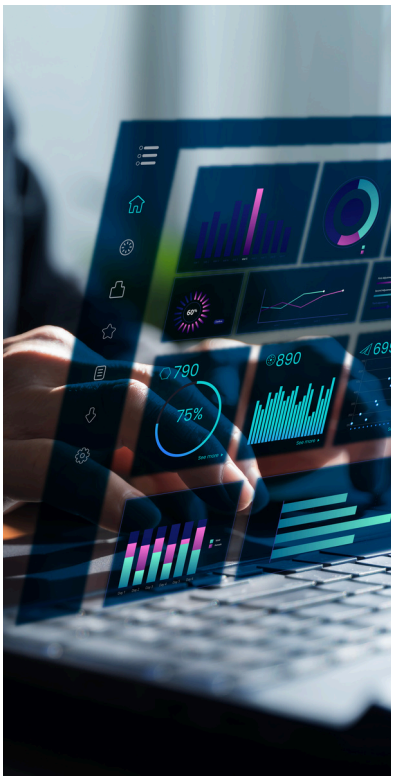
The agent aggregates information from Outlook email and calendar, Microsoft Teams, OneNote, Planner, and To Do. Using advanced prompt engineering and AI summarization to identify priorities, stakeholder requests, upcoming meetings, risks, and both assigned and inferred deliverables. Role-based access controls and Microsoft Entra ID authentication ensure compliance with organizational security and governance requirements. Automated workflows generate and distribute personalized executive briefings on a scheduled basis, providing leaders with the information they need before each week begins.

THE RESULT

Accelerating Executive Awareness and Decision-Making with AI

Judge delivered a production-ready AI-powered Executive Productivity Agent that automated the collection, analysis, summarization, and distribution of executive intelligence across Microsoft 365. The engagement included executive briefing design, AI agent development in Microsoft Copilot Studio, Microsoft 365 integrations, prompt engineering, Power Automate workflows, security configuration through Microsoft Entra ID, testing, deployment, documentation, and knowledge transfer.

By shifting executives from manually searching for information to consuming curated insights, the organization improved visibility into critical activities, stakeholder priorities, upcoming meetings, and key deliverables. The result was a scalable AI-powered productivity platform that increased operational efficiency, improved executive preparedness, and established a foundation for broader AI adoption across the enterprise.



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