

Transformative Productivity with Copilot 365: Five Key Considerations



Introduction

Microsoft 365 Copilot integrates AI with Microsoft's suite of applications, creating a powerful tool for businesses to improve efficiency and innovate processes

This technology can be transformative for organisations looking to stay competitive by improving productivity, enhancing decision-making, automating routine tasks, and personalising customer interactions.

When considering the adoption of this technology to boost organisational productivity, there are five key considerations that should inform the hypothesis that shapes a pilot program: 1. relevant use cases; 2. integration with Microsoft applications; 3. value drivers within business functions; 4. strategic implementation and value assessment; and 5. governance, training and change management.

1 Top enterprise use cases for adopting AI Copilot solutions

1. Proactive Assistance

- **Application:** AI Copilots provide context-aware assistance, responding to user needs based on contextual information.
- **Benefits:** Enhances decision-making and support during critical processes.
- **ROI:** Reduces time spent on seeking information, leading to faster decision-making.

2. Automating Repetitive Tasks

- **Application:** Copilots handle high-volume tasks like form filling, data collection, and file transfers.
- **Benefits:** Frees up employee time for more strategic work.
- **ROI:** Increases operational efficiency and reduces labor costs.

3. Data Analysis and Insights

- **Application:** Processes large datasets to identify trends and present actionable insights.
- **Benefits:** Informs strategic decisions with data-driven insights.
- **ROI:** Improves market responsiveness and potential revenue growth.

4. Streamlining Communication Workflows

- **Application:** Manages communication tasks, such as reminders and alerts.
- **Benefits:** Ensures timely communication and reduces oversight.
- **ROI:** Enhances productivity and minimises communication delays.

5. Orchestrating Cross-Application Workflows

- **Application:** Integrates with multiple platforms for end-to-end automation.
- **Benefits:** Provides a seamless workflow across various systems.
- **ROI:** Reduces manual intervention and streamlines processes.

6. Custom Support Chatbots

- **Application:** Develops AI-powered chatbots for customer and employee inquiries.
- **Benefits:** Offers instant support and improves customer and employee satisfaction.
- **ROI:** Can lead to increased customer retention and sales, and employee engagement.

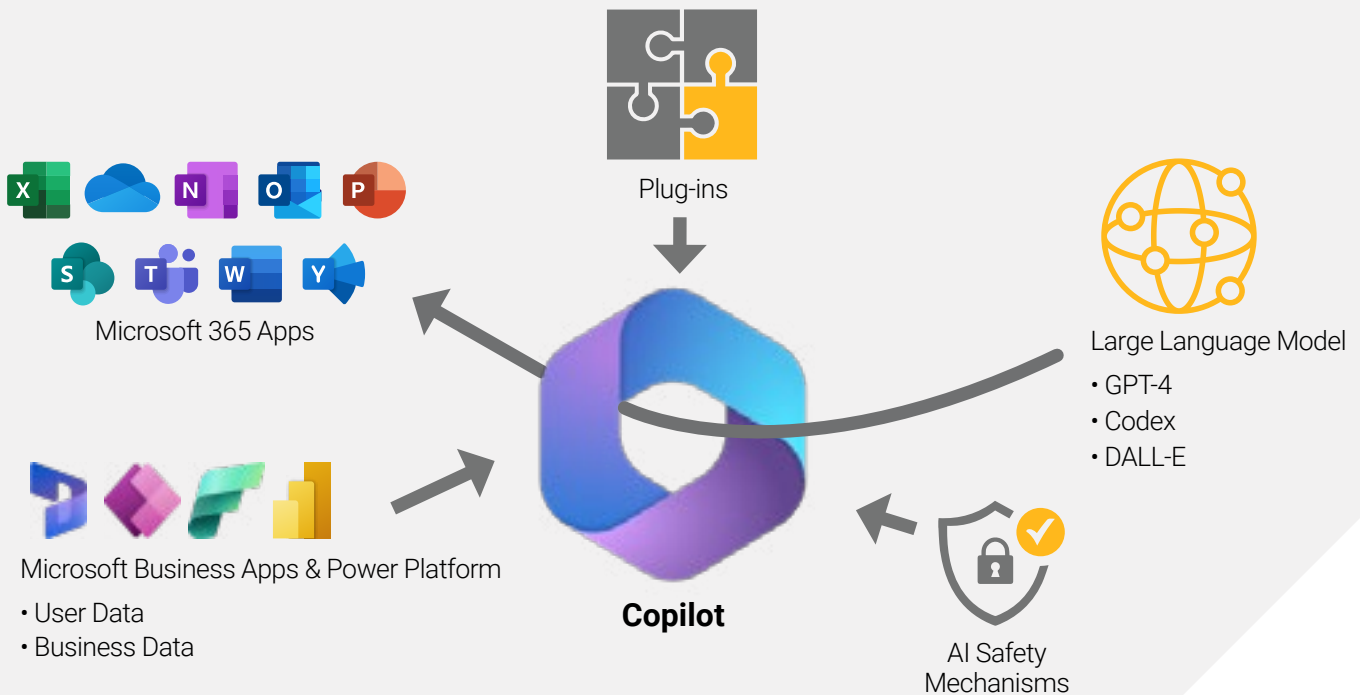
7. Tailored Data Analytics Tools

- **Application:** Creates custom tools for specialised data analysis.
- **Benefits:** Delivers industry-specific insights for better planning.
- **ROI:** Enhances competitive advantage through tailored analytics.

8. Industry-Specific Document Automation

- **Application:** Automates documentation processes with industry understanding.
- **Benefits:** Reduces errors and improves compliance.
- **ROI:** Saves time and reduces risk associated with manual documentation.

Microsoft Copilot: AI for Workplace Productivity



2 Copilot 365 & Copilot Studio Use Cases

By utilising Copilot 365 for daily productivity enhancements and Copilot Studio for specialised solutions, businesses and individuals can achieve new levels of efficiency and innovation by significantly enhancing productivity in routine tasks.

Illustrative Use Cases for Microsoft 365 Copilot:

- **Automated Data Analysis in Excel:** Copilot 365 can automate intricate data analysis functions in Excel. It efficiently analyses trends, executes sophisticated calculations, and produces detailed reports, eliminating numerous hours of manual labor.
- **Efficient Email Management in Outlook:** The system facilitates effective email management by highlighting critical emails, automating response scheduling, and organising the inbox efficiently. This ensures minimal time is spent on email management.
- **Automation of Notes, Questions, Meeting Actions & Summaries in Teams:** Copilot 365 can create summaries of meetings including key actions, next best question asked, sentiment and POV insights and more.
- **Enhanced Document Creation in Word:** Copilot 365 supports the creation of documents by recommending improvements in content, offering formatting options, and generating text based on brief inputs, which accelerates the document creation process.
- **Copilot Studio:** Is a low code tool that provides the opportunity to create custom Copilots designed to meet specific business requirements.

Illustrative Use Cases for Copilot Studio:

- **Custom Support Chatbots:** Employ Copilot Studio to develop AI-driven chatbots that manage customer and employee queries. These chatbots are programmed to respond to frequently asked questions, provide product details, and escalate complex issues to human agents.
- **Tailored Data Analytics Tools:** Design bespoke tools for detailed data analysis. For example, a retail company might create a Copilot to scrutinise sales data to forecast future trends and determine inventory requirements.
- **Industry-Specific Document Automation:** Construct Copilots that are attuned to the specific documentation requirements of specific industries. For example, in the legal sector, a custom Copilot might help in drafting legal documents by suggesting relevant clauses and examining compliance matters.

3 Top Copilot for Applications by Business Function

According to Microsoft, the top applications of Copilot for business functions are designed to enhance efficiency, streamline processes, and support decision-making.

Finance

- **Automated Data Reconciliation:** Copilot can review transactions across systems for anomalies and unmatched data.
- **Streamlined Variance Analysis:** Copilot simplifies the comparison between budget forecasts and actual expenditures.
- **Financial Reporting Automation:** Copilot generates financial statements and reports, saving significant time each month.

Sales

- **Improve Customer Meetings:** Copilot can summarise recent customer communications across emails, chats, and documents. Sellers can also use Copilot to create presentations, and pull in deal information from CRM systems.
- **Create a sales pitch:** Copilot can summarise a client's Annual Report for goals, risks, and financial information. Copilot in Loop can help sales teams refine customer discovery session goals and components.
- **Respond to RFPs:** Copilot enhances comprehension and content for communications, proposals, and presentations. It organises RFP information by generating categorised lists, summarising external company details, and creating custom RFP repositories. Additionally, Copilot Studio can create custom Copilots for specific RFP questions.

Human Resources

- **Augmented Hiring Workflow:** Copilot assists in writing job descriptions, summarising interviews, and improving candidate communications.
- **Streamline Benefits and Compensation:** Copilot helps research competitive compensation rates and benefits.
- **Employee Engagement:** Copilot analyses employee feedback to improve satisfaction and retention.

Marketing

- **Content Creation and Distribution:** Copilot automates content creation, scheduling, and distribution across multiple platforms.
- **Campaign Analysis and Optimisation:** Copilot aggregates and analyses marketing data to measure campaign effectiveness.
- **Audience Insights and Segmentation:** Copilot generates detailed consumer behavior insights for tailored marketing strategies.

Operations

- **Process Automation:** Copilot automates complex data analysis tasks in Excel, improving operational efficiency.
- **Project Management:** It assists in brainstorming project plans and categorising ideas.
- **Risk Assessment:** Copilot helps analyse risk assessments for various operational scenarios.

Legal & Compliance

- **Contract Review and Analysis:** Copilot reviews contracts, identifies missing terms, and provides negotiation guidance.
- **Compliance Document Management:** Copilot organises and secures the archiving of compliance documents.
- **Regulatory Updates:** Copilot drafts responses to legal complaints and summarises key provisions of new regulations.

IT

- **Efficient Document Creation:** Copilot aids in creating effective documents by suggesting content improvements and generating text based on prompts.
- **Data Management:** Copilot enables efficient email management and improved efficiency in Excel.
- **Custom Solutions:** Copilot Studio allows the creation of custom tools tailored to specific IT needs.



4 Strategic Implementation and Value Assessment

To effectively integrate Microsoft 365 Copilot, adopting a structured approach is recommended:

Technology Assessment and Pilot Programs:

- **Pilot Programs:** Before a full-scale rollout, conduct pilot programs to test Copilot's capabilities within the organisation. This involves selecting a diverse group of users to use Copilot in their daily tasks and provide feedback on its functionality and impact.
- **Assessment Metrics:** Establish clear performance indicators such as time saved, error reduction, user satisfaction, and cost efficiency to evaluate the success of the pilot programs.

Security and Compliance:

- Ensure that the AI implementations are secure and compliant with all relevant data protection regulations. This includes regular audits and updates to adapt to new security challenges.

Cost Management and ROI:

- Analyse the financial impact of deploying Copilot, including initial costs, expected savings, and productivity gains. Negotiate licensing terms to maximise ROI and consider potential indirect costs or savings from reduced labor and error rates.

Driving and Assessing Value from Copilot

To maximise the benefits of Microsoft 365 Copilot, businesses need to focus on both qualitative and quantitative measures:

- **Quantitative Benefits:** Measure improvements in productivity metrics, such as time to completion for routine tasks and reduction in manual errors. Financial metrics should include ROI analysis based on cost savings and revenue enhancements.
- **Qualitative Benefits:** Assess improvements in employee satisfaction and customer service quality. Surveys and feedback tools can be used to gauge internal and external perceptions of the AI's impact.

Microsoft's Viva Insights includes a Copilot dashboard for data collection and visualisation, providing metrics for readiness, adoption, impact, and sentiment.

- **Adoption statistics by group and by app.** Leaders need to know how many users with licenses are actively using Copilot and in which applications.
- **Before and after Copilot comparisons.** The Dashboard can tell you whether Copilot users are spending less time in meetings than non-users – the supposition being that they're relying on Copilot summaries instead of attending.
- **Employee sentiment analysis.** You can survey your Copilot user base and compare their results to a global survey conducted by Microsoft.

Reported Productivity Improvements

Microsoft conducted a survey involving 18,100 individuals across 12 countries in six key functions to better understand the broader opportunity for generative AI to transform business processes.

The results reveal a significant issue of "digital debt," where participants report spending: 27% of their day searching for information, more than they spend on creating (24%), communicating (24%), or consuming (25%) content. Remarkably, only 50% of the information consumed daily is deemed necessary for their jobs.

Specific improvements noted by function include:

- **Sales:** Identifying sales opportunities (75%) and unifying marketing and sales data (74%).
- **Customer Service:** Intelligently routing issues (70%) and detecting trends in interactions (68%).
- **Finance:** Simplifying financial reporting (73%) and validating data quality (72%).
- **Marketing:** Drafting efficiency (85%) and improved productivity (70%).
- **Operations:** Significantly reduced time for data analysis (50%) and increase in automation of processes (40%).

Gartner suggests five key steps to effectively assess the value of Microsoft 365 Copilot:

1. **Assess the Microsoft 365 Environment:** Evaluate the current setup to ensure proper information protection and governance are in place, addressing any issues like overshared workspaces.
2. **Specify Participation Obligations:** Clearly communicate to pilot participants the requirement for active usage and the need to provide detailed feedback on use cases, accuracy, usefulness, and their general sentiment towards the tool.
3. **Include a Diverse Group of Participants:** Involve a mix of AI sceptics and enthusiastic C-suite leaders in the pilot, providing them with the necessary training and resources to use Copilot effectively.
4. **Reallocate Licenses:** Periodically redistribute Copilot licenses among participants to maximise the diversity of feedback and insights.
5. **Establish Criteria and KPIs:** Set specific criteria and key performance indicators related to the added value to employees and the business, such as enhancements in productivity and efficiency, to measure the success or shortcomings of the pilot program.





5 The Role of Governance, Training and Change Management in Driving Success

Any implementation of AI within an organisation requires both technical and ethical considerations. Responsible implementation of these technologies requires a careful and strategic approach that includes targeted workforce training and development, change management, and the mitigation of significant risks.

In addition to targeted training and adoption strategies, creating a robust governance framework is essential. Ensuring an organisation's AI practices are responsible, ethical, and compliant, is fundamental to mitigating potential risks, and safeguarding business reputation, people and stakeholders.

By helping to facilitate and measure the implementation and adoption of this AI-powered tool within an organisation, change management plays a crucial role in driving value. Here are some key aspects of change management that contribute to maximising the value of Copilot:

- **Leadership Journey:** It involves guiding leaders through the AI enablement process, helping them understand the potential of Copilot and how it can be leveraged to achieve business goals.
- **User Enablement:** This includes providing users with the necessary resources, training, and support ethically, compliantly and effectively use Copilot in their daily work.
- **Technical Readiness:** Ensuring that the technical infrastructure is in place to support the deployment and smooth operation of Copilot across the organisation.
- **Adoption Playbook:** Offering actionable steps for business leaders to quickly become an AI-powered organisation, informed by insights from early access programs.
- **Feedback and Engagement:** Gathering user feedback through surveys and listening sessions and tracking adoption with tools like the Microsoft Copilot Dashboard, are essential for continuous improvement and value realisation.



Conclusion

Every organisation has its own unique challenges and opportunities when considering the adoption of generative AI to improve business processes and productivity.

Establishing the most relevant use cases, developing an adoption strategy, and ensuring a robust value framework are fundamental to creating successful pilot programs.

Microsoft 365 Copilot integrates artificial intelligence with Microsoft's applications to optimise business operations across many functions. By automating tasks, providing proactive assistance, and delivering custom solutions through

Copilot Studio, this technology can help to improve efficiency and innovate business processes.

The wide range of use cases, from automating data analysis in finance, to improving content creation in marketing, demonstrate some of Copilot's abilities to transform business operations.

Strategic implementation, including thorough environment assessments, well-defined pilot programs, and detailed value assessment, can ensure organisations effectively integrate, quantify and maximise the benefits of Copilot for their unique business environment.

How we can help

Akkodis has developed a 5-Step Accelerate Program to accelerate pilot deployments of Copilot over an 8-to-10-week period.

This Accelerate Program focuses on user experience, change management and adoption, and technical subject matter expertise to enable and empower users to confidently identify personas, use cases and adopt new ways of working. The program captures key metrics, developed use cases and success criteria to optionally support business case development, full deployment activities and next steps.

About Akkodis

Akkodis is a global Smart Industry leader, with digital, engineering and R&D capabilities that leverage the power of connected data to accelerate innovation and digital transformation.

Akkodis' combined IT and engineering expertise brings a unique end-to-end solution offering, with four service lines – Consulting, Solutions, Talent, and Academy – to support clients in rethinking their product development and business processes, improve productivity and minimise time to market.



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Find out more

If you would like to learn more about how Akkodis can help, please contact our team.

Carol Gobby, GAICD

VP of Sales and Growth

E carol.gobby@akkodis.com

M +61 414 339 992

Joshua J Morley, GAICD

Global Head of AI, Data & Analytics

E joshua.morley@akkodis.com

Engineering a Smarter Future Together

Leveraging the power of connected data to accelerate innovation and digital transformation.

AKKODIS

Perth | Sydney | Melbourne | Canberra | Brisbane | Adelaide

T: (08) 9324 8400

E: salesoperations@akkodis.com

akkodis.com