# accilium's first 100 days with Microsoft 365 Copilot

Enhancing productivity with AI

March 2024

awarded in the categories:

› **STRATEGY DEVELOPMENT**
› **INNOVATION, GROWTH**
› **ORGANIZATION**
› **DIGITALIZATION**
› Energy & Environment
› Automotive & Supplier
› Public Sector, Infrastructure

# Agenda

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# The world is changing - FAST

## 70%
of users were convinced they were being more productive using Copilot[1]

## +29%
faster across a series of tasks and caught up on missed meetings nearly four times faster[1]

## 77%
want to keep Copilot and use it in their work routine[1]
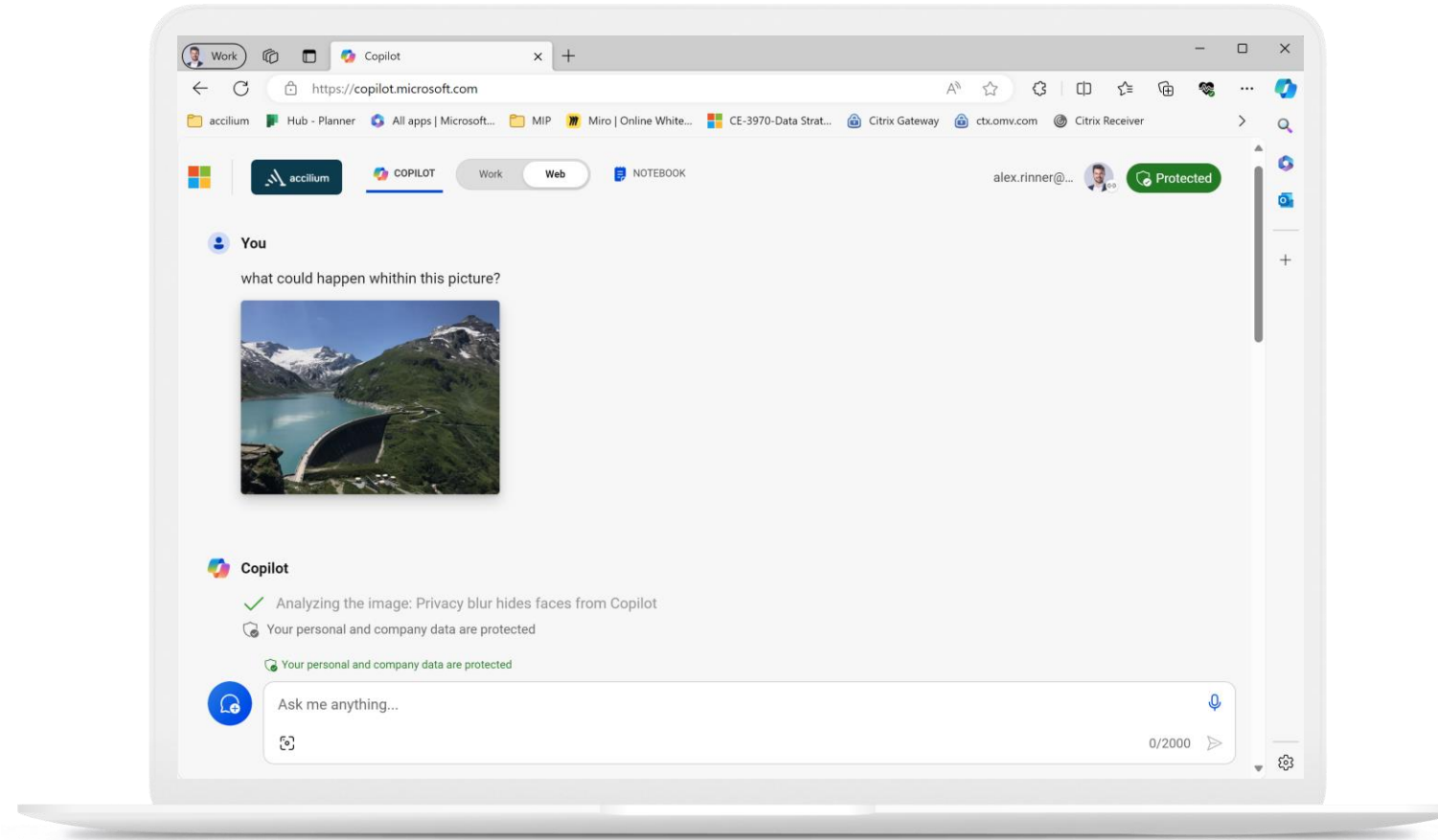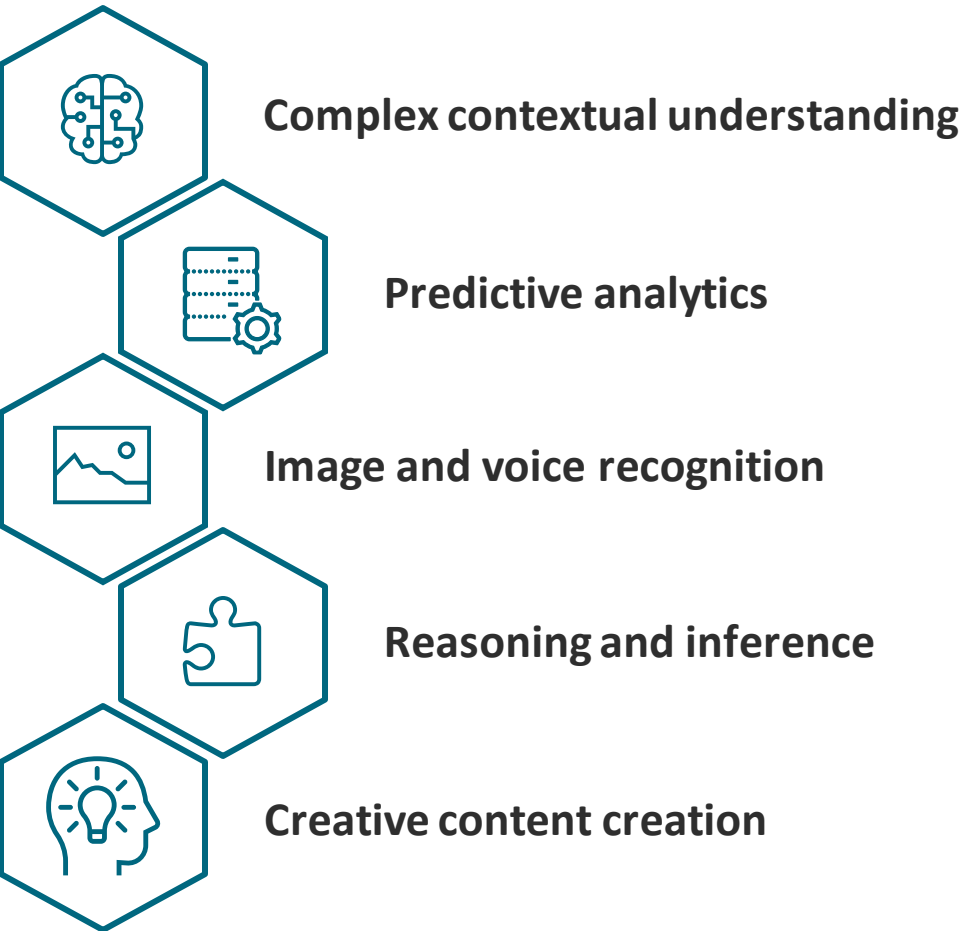
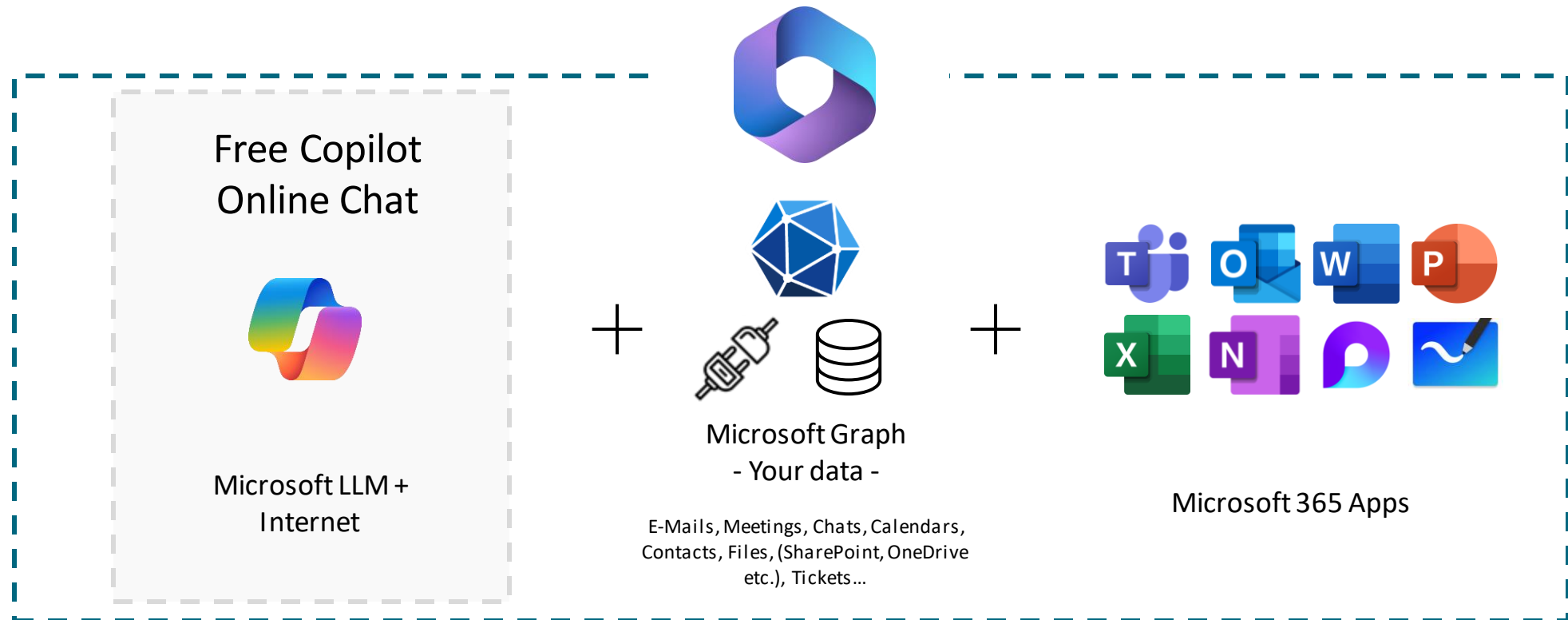**Sounds great !**

**BUT…**

**we did the REALITY CHECK**

[1]: What Can Copilot's Earliest Users Teach Us About Generative AI at Work? (microsoft.com)

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# Why is M365 Copilot called a game changer

**Complex contextual understanding**

**Predictive analytics**

**Image and voice recognition**

**Reasoning and inference**

**Creative content creation**

# What is Microsoft Copilot?

## Microsoft Copilot M365



**Free Copilot Online Chat**

Microsoft LLM + Internet

+

**Microsoft Graph - Your data -**

E-Mails, Meetings, Chats, Calendars, Contacts, Files, (SharePoint, OneDrive etc.), Tickets...

+

Microsoft 365 Apps

# Agenda

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# M365 Copilot maturity varies strongly across the apps

Copilot in Microsoft 365 Apps

Microsoft Whiteboard
★★★☆☆

Microsoft Loop
★★★☆☆

Microsoft OneNote
★★☆☆☆

Microsoft Excel
★★★★☆

Microsoft PowerPoint
★★☆☆☆

Copilot Chat for M365
★★★☆☆

Microsoft Teams
★★★☆☆

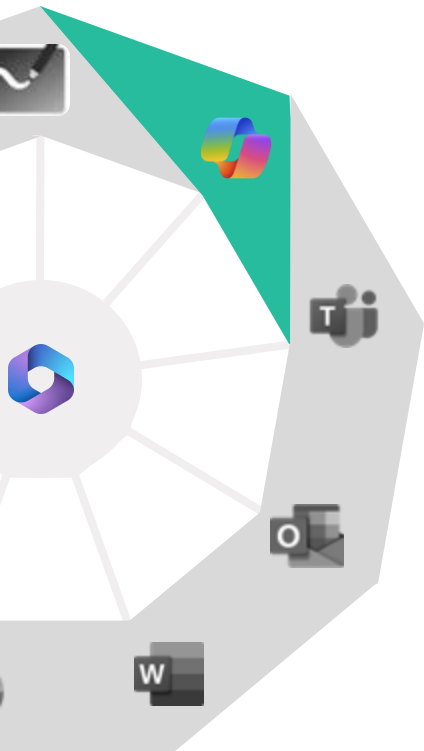Microsoft Outlook
★★★☆☆

Microsoft Word
★★★☆☆

## Method applied

Multiple use cases per M365 App were tested and evaluated based on the following criteria:

› Employee efficiency increase

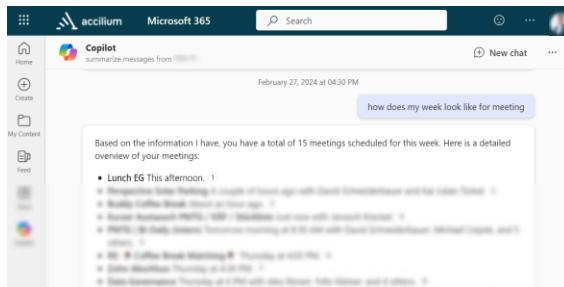› Usability for end-users

› Technical performance of use case

Our favorites for each M365 App are summarized for you

# Microsoft Copilot Chat in M365

Copilot in Microsoft 365 Apps
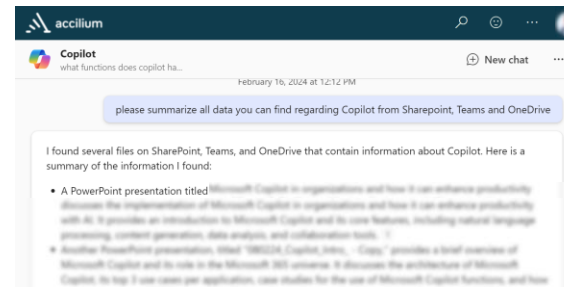
## Manage meeting schedule

★★★☆☆



Challenge
› Full Outlook meeting schedule
› Preparing, prioritizing, getting an overview
Copilot
› On-prompt summary of all your meetings
› Extract key points, targets for preparation
Verdict
› Helpful capability but value depending on user requirements

## Get quick answers

★★★☆☆



Challenge
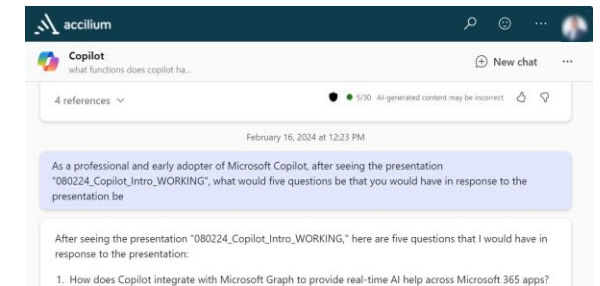› Manual search through internal database
› Different sources SharePoint, OneDrive

Copilot
› On-prompt search through different sources
› Results within seconds
Verdict
› Search and summary works fast and well but accuracy heavily depending on prompts
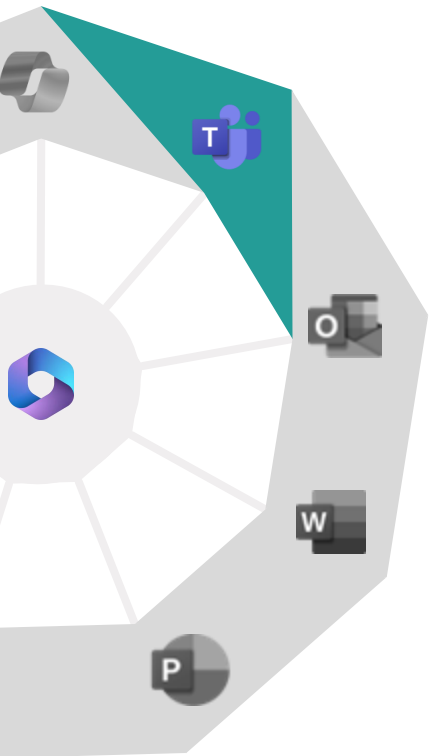
## Preparing FAQs

★★★☆☆



Challenge
› Need to quickly grasp the most important questions to ask within a document
Copilot
› Questions have been directly generated
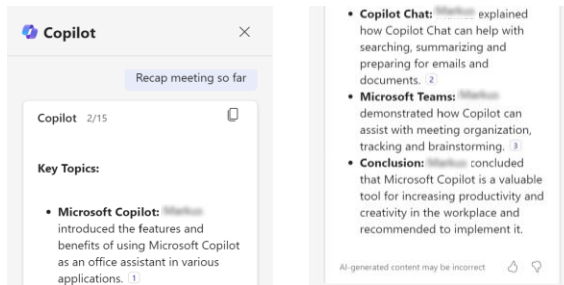› Few attempts were needed to get result

Verdict
› Precise prompting required
› Quality of questions beyond simple summary of slides

# Copilot in Microsoft Teams

Copilot in Microsoft 365 Apps

## Meeting Catch-Up

★★★★☆

**Challenge**
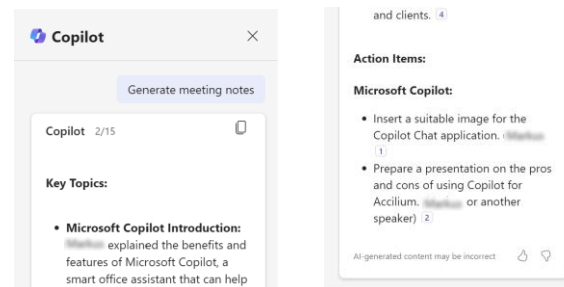› Staying on top of all meetings
› Processing meeting topics

**Copilot**
› Delivers content summary in seconds
› Ad-hoc meeting content summaries

**Verdict**
› Effective for quick recap
› May rely on slide content

## Automated meeting notes

★★★★☆

**Challenge**
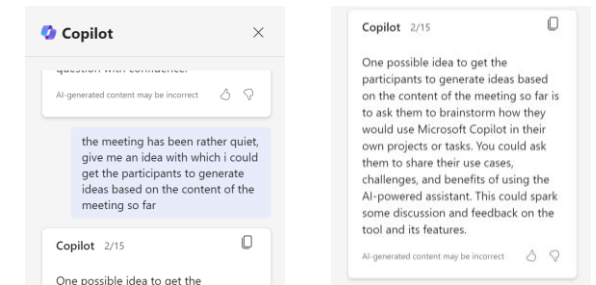› Taking notes while participating
› Capturing key points in meetings

**Copilot**
› Automated summaries with notes, action items, shared files

**Verdict**
› Identifies content well
› Tasks also deciphered from meeting

## Keep meetings moving

★★☆☆☆

**Challenge**
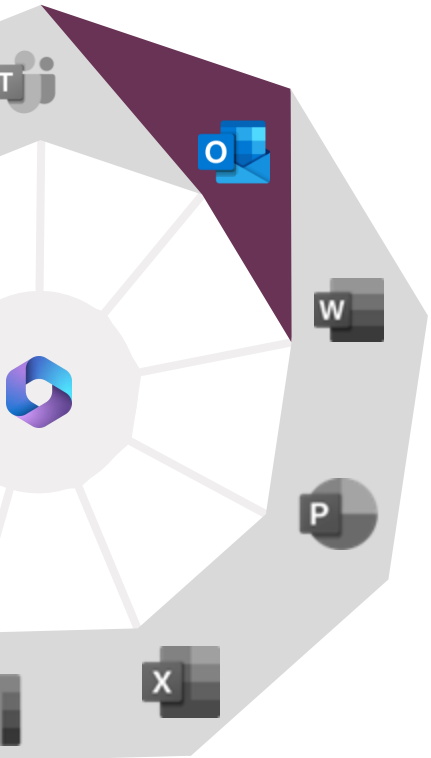› Moments of awkward silence during meetings
› Loss of momentum

**Copilot**
› Prompts to spark discussion
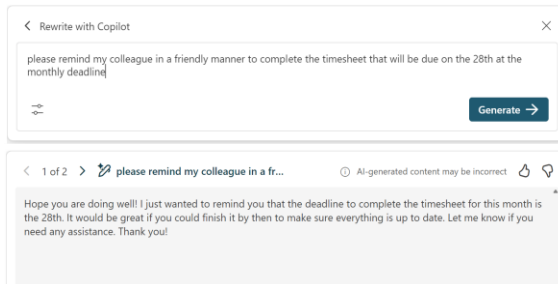› Encourage creativity and productivity

**Verdict**
› Function works as described
› Value is depending on user

# Copilot in Microsoft Outlook

Copilot in Microsoft 365 Apps

## Autodraft E-Mails

★★☆☆☆

**Challenge**
› Starting E-Mails from scratch
› Find right words and phrasing

**Copilot**
› Auto-drafting E-Mails
› Customizable writing

**Verdict**
› Functions as advertised
› Value depending on user

## Summarize long threads

★★★★★

**Challenge**
› Identifying critical information from long conversations
› Finding key points for meeting prep

**Copilot**
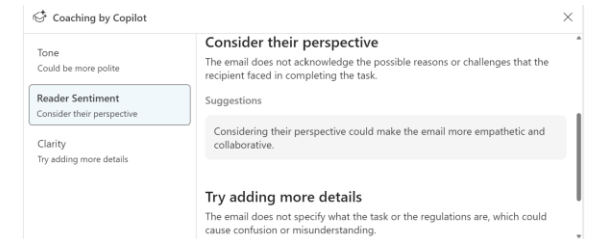› Automated concise summaries of conservations
› Critical topics & action items

**Verdict**
› Summarizes threads in seconds
› Time saving application

## Writing coach

★★☆☆☆

**Challenge**
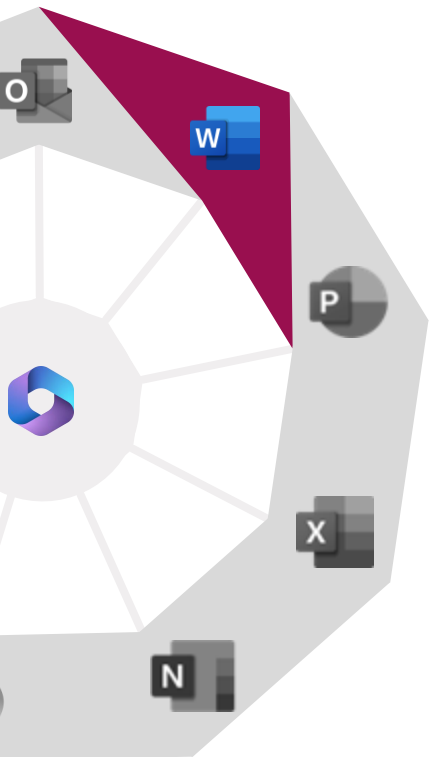› Finding right approach for phrasing, tone
› Reader sentiment

**Copilot**
› Auto-check while writing
› Suggestions for context-aware sentences
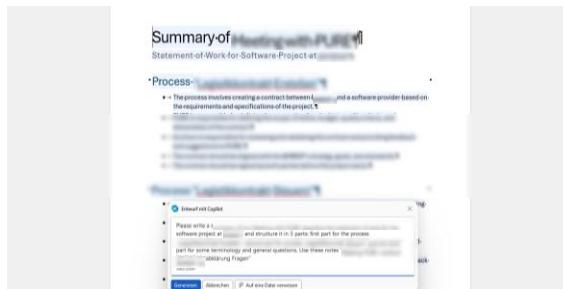
**Verdict**
› Rephrasing makes sense in most cases
› Value depending on user

# Copilot in Microsoft Word

Copilot in Microsoft 365 Apps
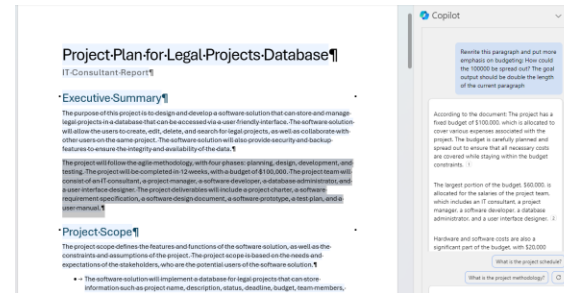
### Draft blank or with reference

★★☆☆☆



**Challenge**
› Starting proposals or reports from Scratch
› Transforming reference files to Word

**Copilot**
› Leverages reference files
› Analyzing sources, context and drafting documents

**Verdict**
› Notes not ideal base for documents
› PPT seamlessly transformed to Word

### Rewrite paragraphs

★★★★☆



**Challenge**
› Unsatisfied with tone, wording, structure
› Transforming whole paragraphs can be tedious

**Copilot**
› Proposes alternative paragraphs
› Tone is adaptable

**Verdict**
› Can be helpful but value highly dependent on writing skills of user

### Create concise summaries

★★★★☆
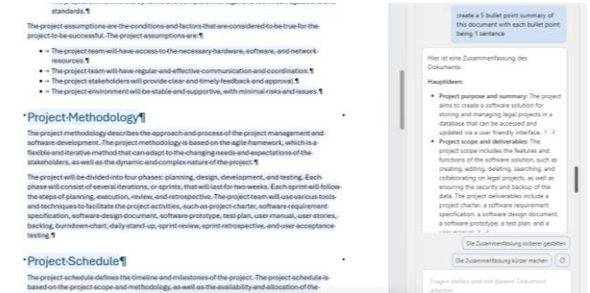


**Challenge**
› Reading long reports in Word
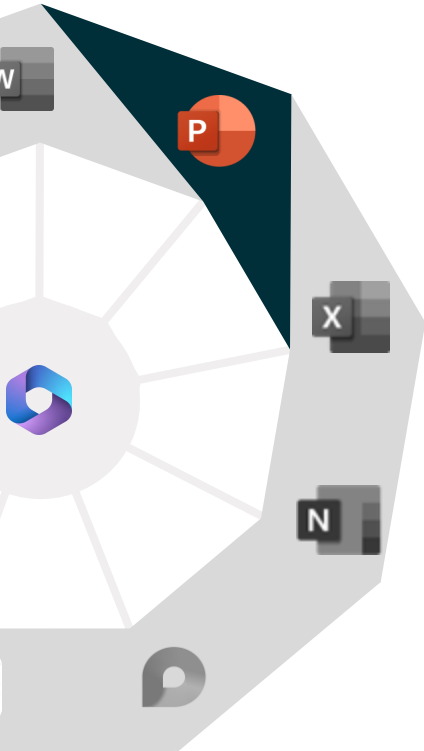› Extracting relevant information

**Copilot**
› Creating context-based summaries
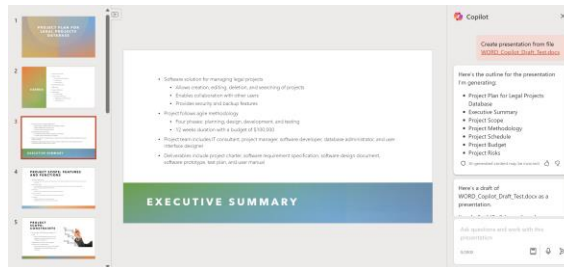› Reducing time for comprehension and decision-making

**Verdict**
› Brings great value through time saving
› Summarizes 50-pagers in seconds

# Copilot in Microsoft PowerPoint

Copilot in Microsoft 365 Apps

## Use reference points to start

★★★☆☆

**Challenge**
› Creating a presentation corresponding to an existing Word document
    › E.g., for a proposal
**Copilot**
› Automated presentation drafting from input file
    › Relevant graphics and structure
**Verdict**
› Works well with Copilot-created content
› Slides are generic

## Transform slides on demand

★★☆☆☆

**Challenge**
› Transform wordy slides into visual content
› Convey info through relevant visuals
**Copilot**
› Automated selection of graphics
› Creating informative and visually appealing content
**Verdict**
› Fast transformation
› Visual preference highly subjective

## Automated speaker notes

★★☆☆☆

**Challenge**
› Drafting speaker notes that compliment slides
    › Non-repetitive from slide content
**Copilot**
› Automated creation of speaker notes
› Providing context to slide content
**Verdict**
› Time-efficient process
› Notes are generic

# Copilot in Microsoft Excel

Copilot in Microsoft 365 Apps

## Analyze data in seconds

★★★★☆



**Challenge**
› Analyzing Excel Worksheets
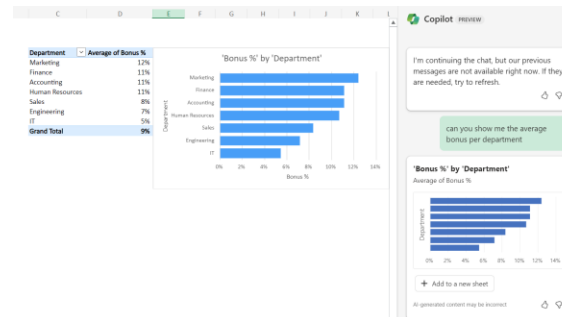    › E.g., employee data incl. personal data and salaries

**Copilot**
› Automated pattern recognition
› Detection of out

**Verdict**
› Faster analysis through automation
› Solution opens analysis to wider user pool

## Click&Go Pivot Tables

★★★★☆



**Challenge**
› Conclusions from diverse and cluttered datasets

**Copilot**
› Instant pivot tables
› Enabling meaningful conclusions

**Verdict**
› Works easy and fast
› Pivot tables easily accessible

## Formula Guidance

★★★★★
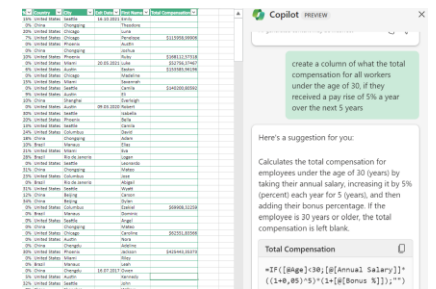


**Challenge**
› Entering complex formulas
› Dragging formulas over whole table

**Copilot**
› Generates formulas on-prompt
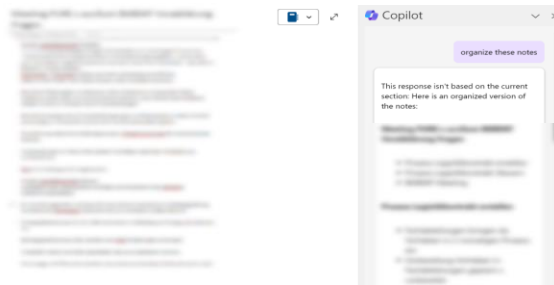› Adds column with formulas automatically

**Verdict**
› Formula generation works on-prompt
› High value for everybody not an Excel expert

# Copilot in Microsoft OneNote

Copilot in Microsoft 365 Apps

## Organizing research notes

★★☆☆☆

**Challenge**
› Documenting notes during research
    › Clear framework during research

**Copilot**
› Automated structuring of notes
› Suggesting headings and bullet points

**Verdict**
› Generic structure is created
› Highly specific notes may be misinterpreted

## Transfer notes to E-Mail

★★☆☆☆
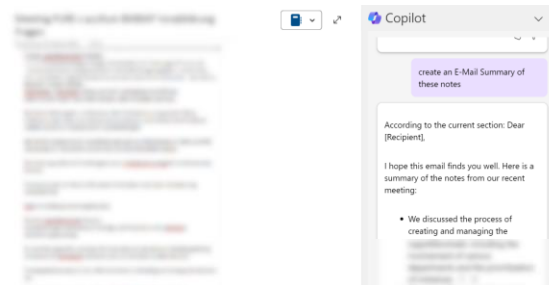
**Challenge**
› Reporting to superior about a meeting
› Transforming unstructured notes to E-Mail form

**Copilot**
› Automated concise summaries delivered in E-Mail form

**Verdict**
› Fast, helpful summaries
› Auto-E-Mail draft but no dispatch

## Generating To-Do lists

★★☆☆☆

**Challenge**
› Deciphering tasks from idea collection
› Structuring and dissecting broad information

**Copilot**
› Smart suggestions for prioritization
› Capturing deadlines

**Verdict**
› Recognizes most tasks from notes taken during meetings

# Copilot in Microsoft Loop
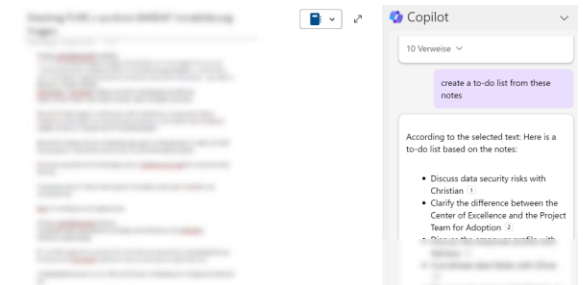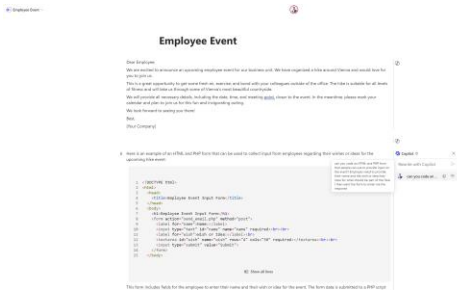
Copilot in Microsoft 365 Apps

### Collaboration on various platforms

★★★★☆



Challenge
› Structuring collaboration sessions
› Organizing result of idea gatherings

Copilot
› Autodraft text
› Create interactive components such as forms or tables

Verdict
› Valuable for loop users
› Coding forms for getting input becomes available for everybody

### Onboarding new hires

★★★☆☆
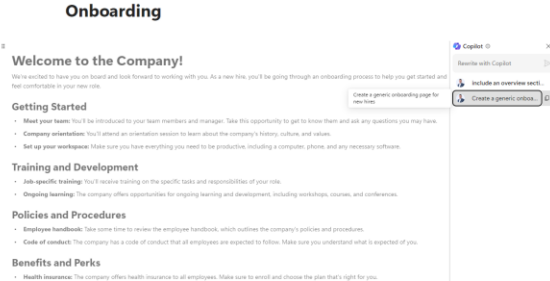


Challenge
› Up-to-date Information for new hires.
› Process descriptions, culture etc.

Copilot
› Seamless integration of text components and task lists
› Smooth onboarding experience

Verdict
› Saving time during creation of onboarding material

### Effective Brainstorming and Ideation

★★★☆☆



Challenge
› Enabling creativity and still capturing all ideas
› Balancing spontaneity with structure

Copilot
› Copilot enhances real-time collaboration
› Facilitates effective teamwork

Verdict
› Useful tool for enhancing idea generation on more generic topics

# Copilot in Microsoft Whiteboard

Copilot in Microsoft 365 Apps

## Instant inspiration

★★★★☆
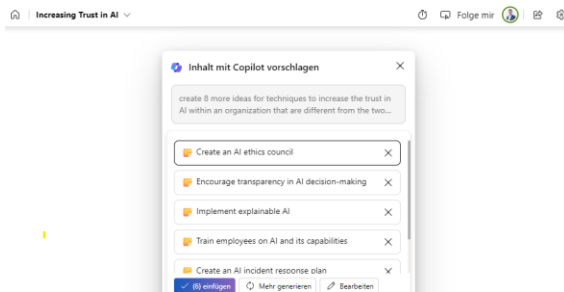
### Challenge
› Stalwarts during team collaboration sessions on Whiteboard
› Running out of ideas

### Copilot
› New ideas on discussed topics
› Generating real-time sticky notes with new input

### Verdict
› Helpful to spark ideation or dissolve blockades

## Automated organization

★★☆☆☆
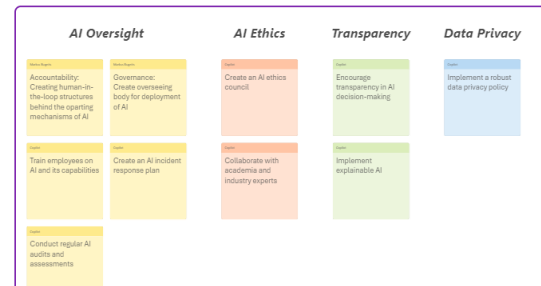
### Challenge
› Organization of ideas
› Clustering output of brainstorming in meaningful themes

### Copilot
› Clustering based on keywords
› Common topic groups

### Verdict
› Time saving especially in bigger brainstorming sessions with different dimensions

## Summarizing sessions

★★☆☆☆
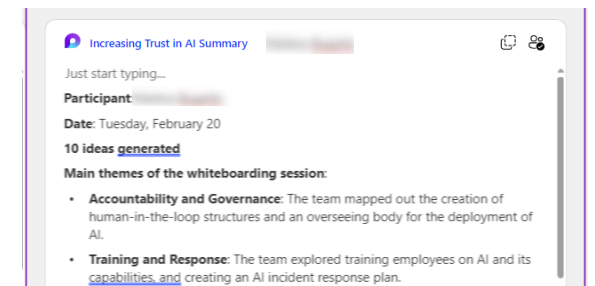
### Challenge
› Keeping Track of all ideas
› Writing structured summary

### Copilot
› Creates instant summaries
› Incl. meta data such as participants, date, stats

### Verdict
› Fast summaries work well
› Value dependent on user

# Copilot in Loop and Outlook

Copilot in Microsoft 365 Apps
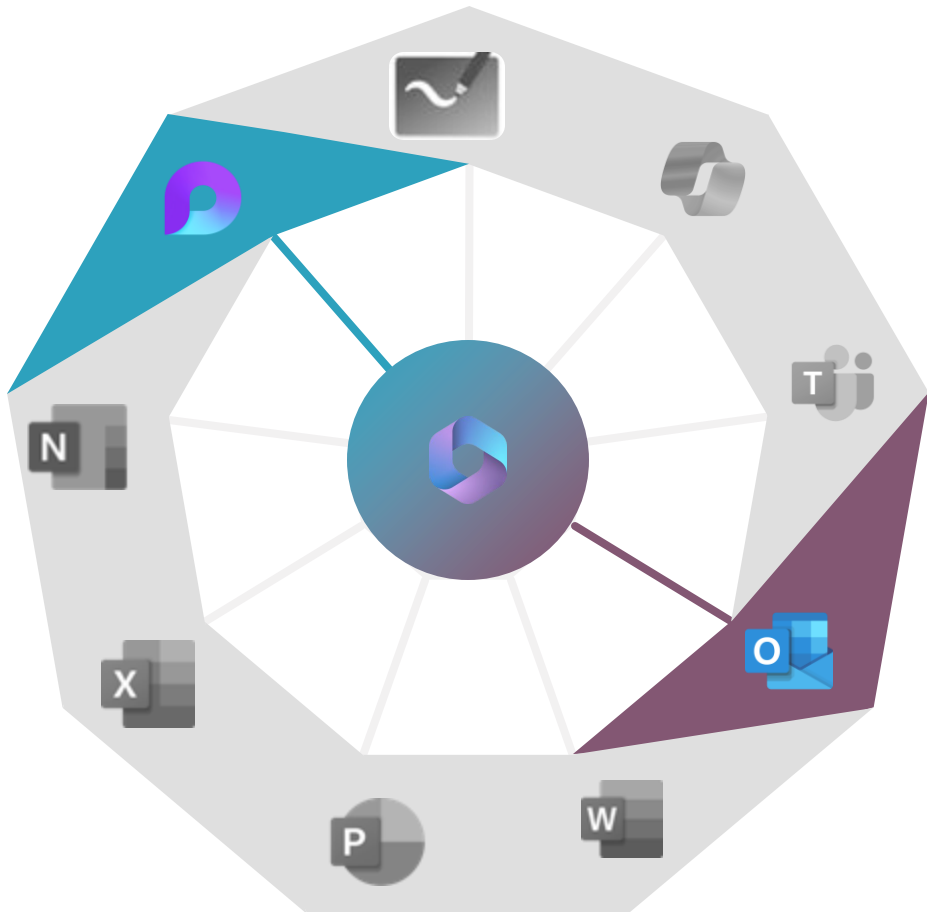


## Loop Components in Outlook

★★☆☆☆
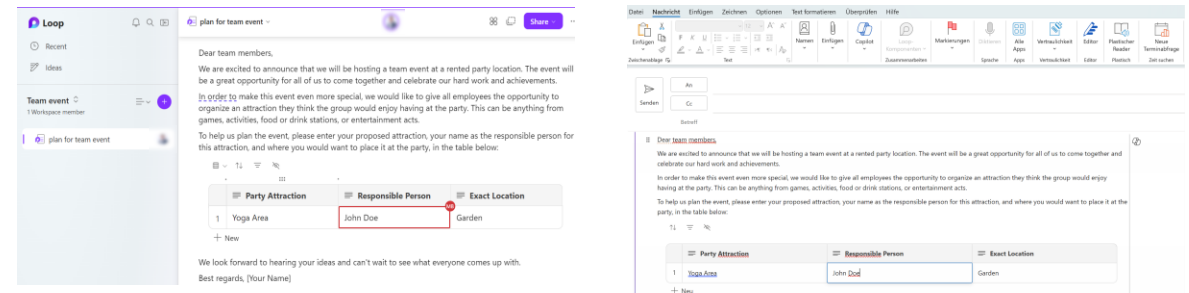


Use Case
› Create interactive collaboration components using Copilot in Loop
› Export components to other apps (e.g., Outlook) to enable real-time collaboration
Challenge
› Open up Loop collaboration to people that prefer working in Outlook
› Creating collaborative forms and content in a quick way
Copilot
› Can quickly draft Loop components via Copilot assistant and export to E-Mail
› Automated synch between Loop & Outlook during collaboration
Verdict
› Offers attractive alternative to other collaboration options

# Copilot Chat, Microsoft Teams and Outlook

Copilot in Microsoft 365 Apps
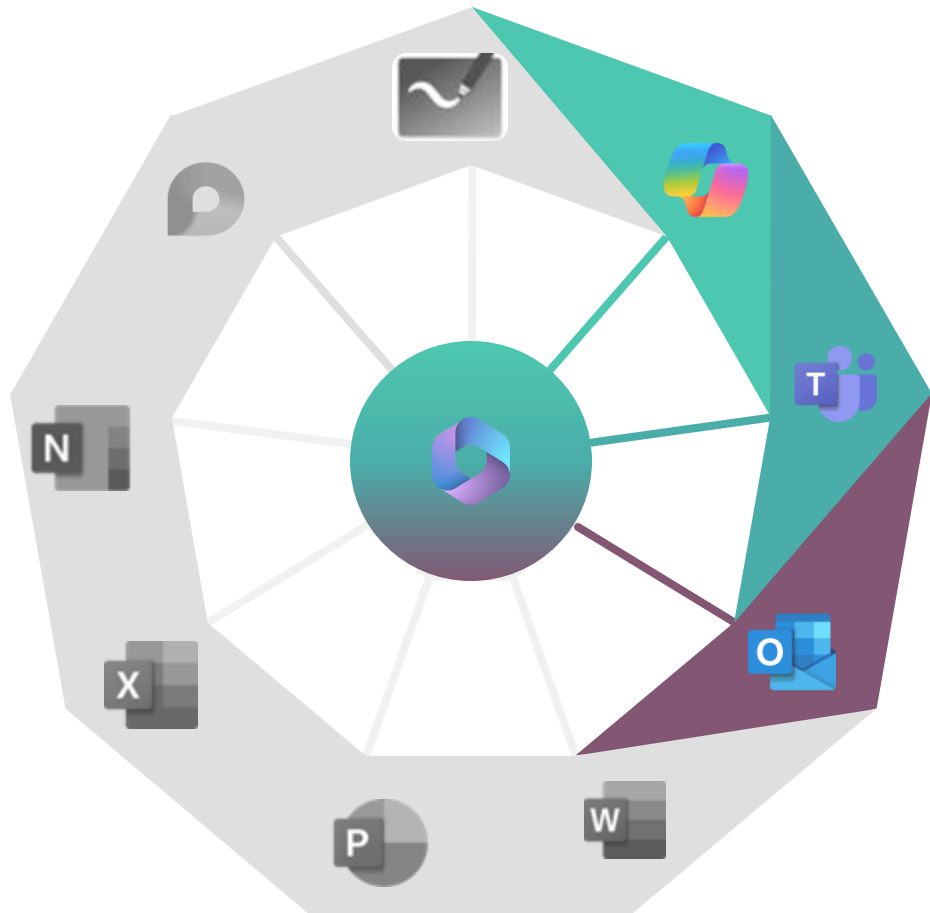


## Dig through all your inboxes
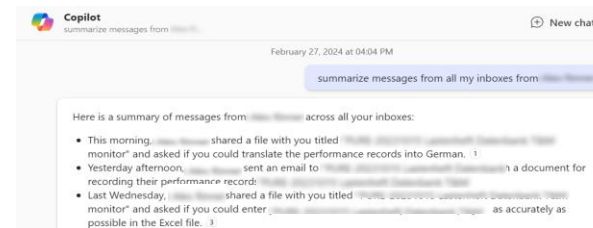
★★★☆☆



**Use Case**
› Obtain a quick overview of certain topics based on your communication
› Get ad-hoc summary of chats, E-Mails from certain sender or regarding specific topic
**Challenge**
› Separately check all E-Mails and chats you received on Outlook or Teams
› Sorting, prioritizing, getting an overview of discussions, pain points, action items
**Copilot**
›   Provides on-prompt summaries within seconds
›   Extract key points, urgent messages and processes topics for you
**Verdict**
›   Helpful capability but only very precise prompts generate desired results
›   Can hallucinate depending on-prompt

# Agenda

# 5 step approach to benefit from Copilot M365

Given the rapid pace of innovation in this field, the most successful companies will be those which can apply the right approach and the right model for their specific use cases

| 1. | 2. | 3. | 4. | 15. |
|----|----|----|----|----|
| Set your goals right | Find the business impact | Start small – go big | Invest in people – not just Tech | Enhance your LLM capabilities |

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# Define your goals with Copilot for M365

## 1.

## Set your goals right

› This intelligent assistance technology requires a well thought through approach from the beginning onwards.

› Involving all necessary parties right from the beginning like (executives, business divisions, HR, legal, works council etc.) will be beneficial to get everybody affected involved early in the process.

› Ensuring the alignment of these technologies with business goals, coupled with robust data governance to foster trust and transparency among stakeholders is critical.

› The implementation of Copilot requires comprehensive compliance frameworks and risk assessment methodologies that are specifically designed to navigate the complex landscape of AI ethics, privacy laws, and industry-specific regulations ensures.

› A concrete communication and trainings plan will support addressing potential fears and resistance early in the process.

› Set your ambition/ambition level based on your current maturity level and define success criteria of the implementation.

### Critical success factors

› Executive buy-in from the beginning

› Involving all necessary parties

› Frameworks to navigate AI ethics, laws and regulations

› Business objectives and non-objectives

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# Embrace a humble start, ascend to remarkable success

**2.**

**Find the business impact**

**1. Performance boost areas:**
LLM's support in a broad range of business activities. Nevertheless, they work best in the following areas:

› **Coding:** Productivity can be significantly improved by generative AI. Tasks like code generation, optimization, understanding of code, error handling and documentation

› **Creating:** Support creative tasks like writing/summarizing texts, creating presentations, research support, new idea generation, personalized content

› **Advising:** Customer support, sales enablement, data analysis, research base advising (legal, HR, tax etc.)

› **Automating**: business process automation will be at a transformative new level with generative AI code creation and automation platforms

**2. Application areas:**
Which of my current job portfolios have the highest potential to be supported by a generative AI-tool (check against current level of automation, data literacy, human feedback)

**3. Value case definition:**
Calculate value cases to prioritize focus areas in the transformation journey. Define job descriptions of the future.

**Critical success factors**

› Deep understanding of the capabilities and limitations of LLM's

› Identify areas with high potential and data readiness for support

› Structured approach to evaluate prioritized business areas & check against Copilot maturity for those areas

› Value case calculation to efficiently allocate resources

# Bringing a horse to water is only half the battle; you still need to make it drink

## 3.

## Start small – go big

4 areas that need to be addressed and aligned with each other to ensure a successful and expansive implementation of Copilot are the following:

**1. Governance**
› Copilot needs to be effectively integrated into the organization's operations. This includes identifying key business processes that can be supported with Copilot for M365.

**2. Technology**
› Check your organizations Microsoft suite adoption level (current channel) and evaluate data storage locations (SharePoint, OneDrive or other storage locations) and existing Active Directory capabilities.

**3. Data Privacy**
› Copilot complies with GDPR and EU Data Boundary regulations, not retaining chat history and ensuring privacy. Organizations need to ensure that their data privacy policies and practices are in line with these regulations. Check for data sensitivity labeling and automated data retention labeling capabilities for a safe usage. Check your companies' data sharing standards

**4. Training**
› Employees need to be trained on how to use Copilot to its full potential. This includes providing resources and support to help them learn how to use the tool effectively.

### Critical success factors

› Clear picture of current capabilities (technological & organizational/ cultural)

› Start focused & become big. A rolling approach might be most suitable for majority of companies

› Generative AI is here to stay – and capabilities will rapidly increase

› Organizational change & training initiatives are crucial success factors

# Generative AI-tool implementations should rather be seen as marathons not sprints

## 4.

### Invest in people – not just Tech

› This step will require the biggest investments.

› This phase is followed by a comprehensive training program designed to familiarize users with the capabilities and functionalities of Artificial Intelligence, Generative AI, M365 suite, Microsoft Copilot Chat and Copilot for M365.

› Internal competence development (technical and organizational) will require dedicated investments and newly defined roles to embed the change and build internal communities.

› Training often includes hands-on sessions, tutorials, self paced courses and support materials tailored to various roles within the organization to address different skill levels and use cases.

› Setting up an organizational model to be ready for further technical developments within the generative AI area.

› Continuous support and updates are essential to help users adapt to new features and optimize their use of the tool over time.

### Critical success factors

› Manage change by addressing resistance and fostering a positive attitude

› Develop internal (and use external) trainings tools for each skill level by applying the ADDIE[1] model

› Continuously monitor adoption and evaluate programs efficiency

› Permanent upskilling due to newly emerging applications and use cases

[1]: Analysis, Design, Development, Implementation, and Evaluation

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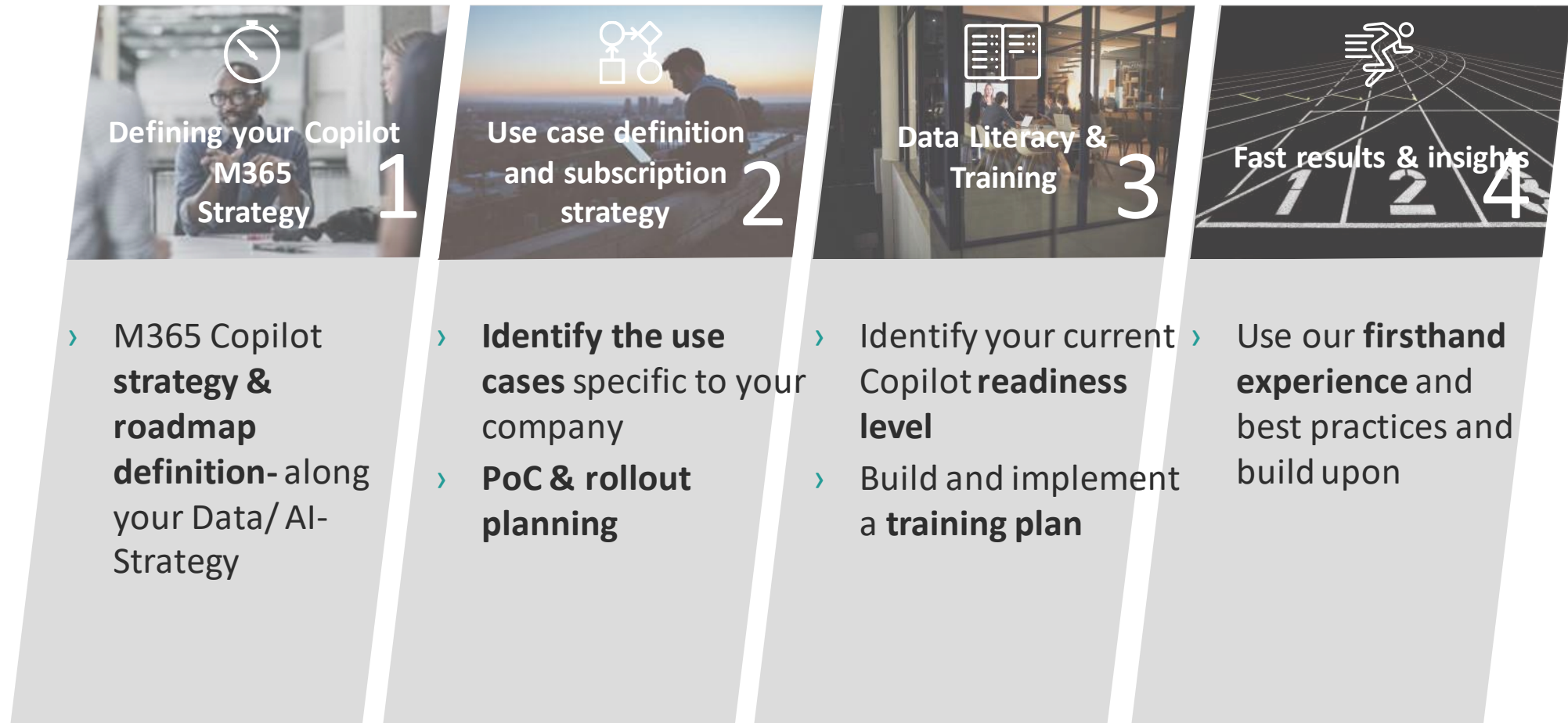# Continuously innovate and improve your maturity

## 5.

### Enhance your LLM capabilities

› Your personal Copilot is only as good as your underlying data quality (e.g., unbiased data) allows it to be.

› Encourage users to become proficient with Copilot, fostering an environment of innovation where employees are motivated to explore and create new value.

› Regularly explore and implement new features and updates released for M365 Copilot, aiming to continuously enhance its capabilities.

› Companies will be required to continuously improve their internal capabilities; technologically and people wise to stay relevant in the competition.

› Implement robust data governance and security measures to protect sensitive information while using Copilot for M365.

› Cultural embedment is key to success – your users will get a Co-Pilot and will still be in the driver's seat

### Critical success factors

› Staying informed about the latest developments in AI and machine learning technologies that Microsoft integrates into Copilot

› Continuously evaluate and identify business processes that can be optimized or transformed with Copilot

› The responsible use of AI and environmental impact of these tools will become even more important for customers
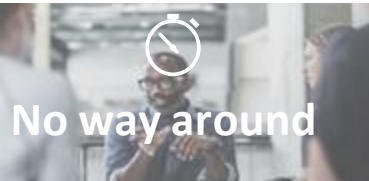
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# How accilium supports you along the way

**Defining your Copilot M365 Strategy**  1

**Use case definition and subscription strategy**  2

**Data Literacy & Training**  3

**Fast results & insights**  4

› M365 Copilot **strategy & roadmap definition-** along your Data/ AI-Strategy

› **Identify the use cases** specific to your company

› **PoC & rollout planning**

› Identify your current Copilot **readiness level**

› Build and implement a **training plan**

› Use our **firsthand experience** and best practices and build upon

# Agenda

# Our conclusions from 100 days with Microsoft Copilot

| | | |
|---|---|---|
| **No way around** | The technology will become more mature at incredible speed – those who will not adapt will fail | |
| **Still in infancy** | We experience huge time saving for specific tasks and use cases while others are still buggy | |
| **Training is key** | The potential remains dependent on the user's commitment to use the technology at hand | |
| **Start yesterday** | The speed of innovation will only increase so get ready | |

👍 Our Top 3 Use Cases

| | | |
|---|---|---|
| Formula Guidance | ★★★★★ |
| Creating concise summaries | ★★★★☆ |
| Summarizing long threads | ★★★★☆ |

Our Flop 3 Use Cases 👎

| | |
|---|---|
| ★★☆☆☆ | Transforming slides on demand |
| ★★☆☆☆ | Automating speaker notes |
| ★★☆☆☆ | Drafting blank or with reference |

**The future with Copilot paints a picture of office workers as orchestra where the music of productivity is composed by AI, but the soul and finesse remain humanly guided[1].**

[1]: Composed by M365 Copilot

# accilium facts and figures

What started 2017, has been a fantastic journey so far. More to come ...

accelerating the digital transformation within the

## mobility ecosystem

Automotive & Transport
Energy & Environment
Public & Infrastructure

Growth to

## >130 employees

in 7 years

Winner of the brand eins
"Best Management Consultants" Ranking

2020, 2021, 2022, 2023, 2024:

**STRATEGY DEVELOPMENT, INNOVATION, GROWTH, ORGANISATION, DIGITALIZATION**

**ARTIFICIAL INTELLIGENCE, AGILITY, CHANGE MANAGEMENT, IT-IMPLEMENTATION, SUSTAINABILITY, Energy & Environment, Automotive & Transport, Public Sector, Infrastructure**

## 9 DAX & ATX

listed clients

## 5 Ventures

to develop and master the concrete skillsets themselves within the mobility ecosystem

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# FAQs (1|2)

› **Q: Can I register content created by Copilot for copyrights?** A: AI generated work is not covered under copyright law. Work created by anyone else than a human author cannot register for copy rights.

› **Q: If Copilot responses with copyrighted content, can I be sued for using that content?** A: If a third party sues a commercial customer for copyright infringement for using Microsoft Copilots or the output they generate, Microsoft will defend the customer and pay the amount of any adverse judgments or settlements that result from the lawsuit, as long as the customer used the guardrails and content filters Microsoft has built into its products.

› **Q: What measures are in place to ensure that Copilot does not inadvertently expose sensitive information in its responses?** A: Copilot adheres to existing data permissions and policies, and its responses to you're based only on data that you personally can access.

› **Q: What are the specific data retention policies for Copilot? How long is data stored, and how can a user request data deletion?** A: Microsoft Copilot for Microsoft 365 messages are automatically included in the retention policy location named Teams chats and Copilot interactions because they are retained and deleted by using the same mechanisms. See here how to set your own customized retention policies.

› **Q: Does Copilot provide analytics or usage metrics to help organizations understand how it's being used?** A: The system stores the copilot interaction data. You can use the information to build custom metrics in reporting and analytics and understand how Copilot is being used in your organization.

› **Q: What security compliance certifications does Copilot adhere to?** A: Copilot complies with General Data Protection Regulation (GDPR) and European Union (EU) Data Boundary.

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# FAQs (2|2)

› **Q: How is the authorization concept implemented in Copilot?** A: Only data is used in responses to prompts where the user has at least viewing permissions.

› **Q: Where is my data located/ processed?** A: EU data traffic stays within EU data boundary, regulations in other regions differ. All features of Copilot aren't available in all regions and languages. Depending on where your environment is hosted, you might need to allow data movement across regions to use them. Microsoft describes when and how data can move across regions for copilots and generative AI features here.

› **Q: Will my data be used for training the LLM?** A: Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation LLMs, including the LLMs used by Copilot for Microsoft 365.

› **Q: Can I train Copilot on company specific data sets to improve its accuracy?** A: There are two options to create a customized Copilot. 1. A non-code option with Copilot Studio. 2. You can use Azure AI Studio to build multi-modal applications, using language, vision, and speech, as well as Search, which includes hybrid with semantic ranking for more precise information retrieval.

› **Q: How is it ensured that customer data is not used in the cloud for training purposes?** A: Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation LLMs, including the LLMs used by Copilot for Microsoft 365.

› **Q: Can employees be tracked by employers with Copilot?** A: Admins can view and manage the content of interactions (Prompts and responses) of users. User can delete their interaction history themselves, or admins can set retention policies. Other forms of 'tracking' are not possible with Copilot.

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