Unlocking Potential: Microsoft Copilot in Action



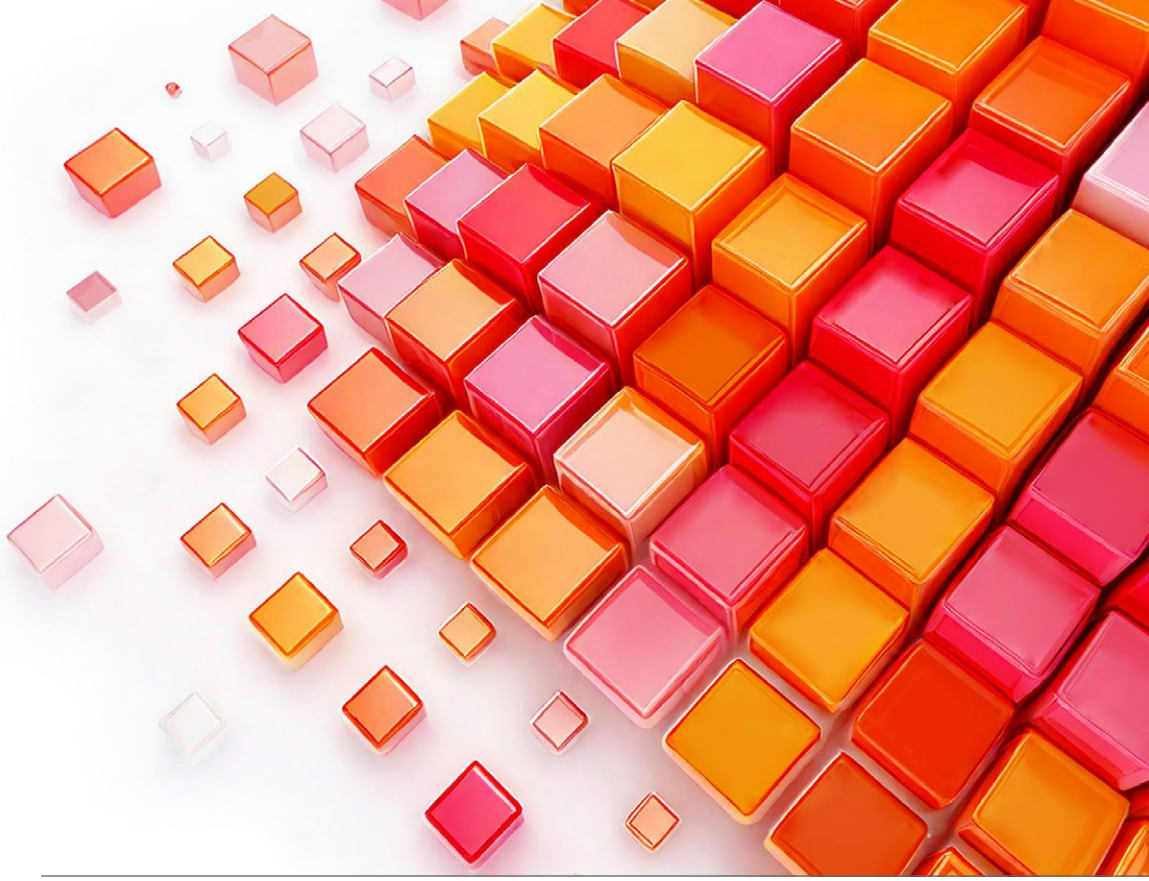


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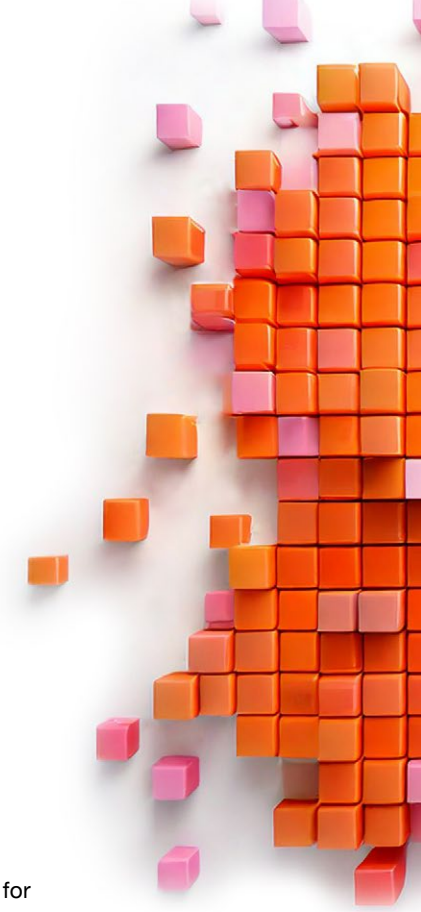
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Introduction: AI Adoption as a Game Changer



Mastering change through the power of Generative AI.

Our world is changing. The global economic landscape is shifting. New and often highly impactful regulations are coming into force. Customer demands and employee expectations are increasing ever faster. Companies need to be agile and flexible to respond quickly and appropriately to these challenges.

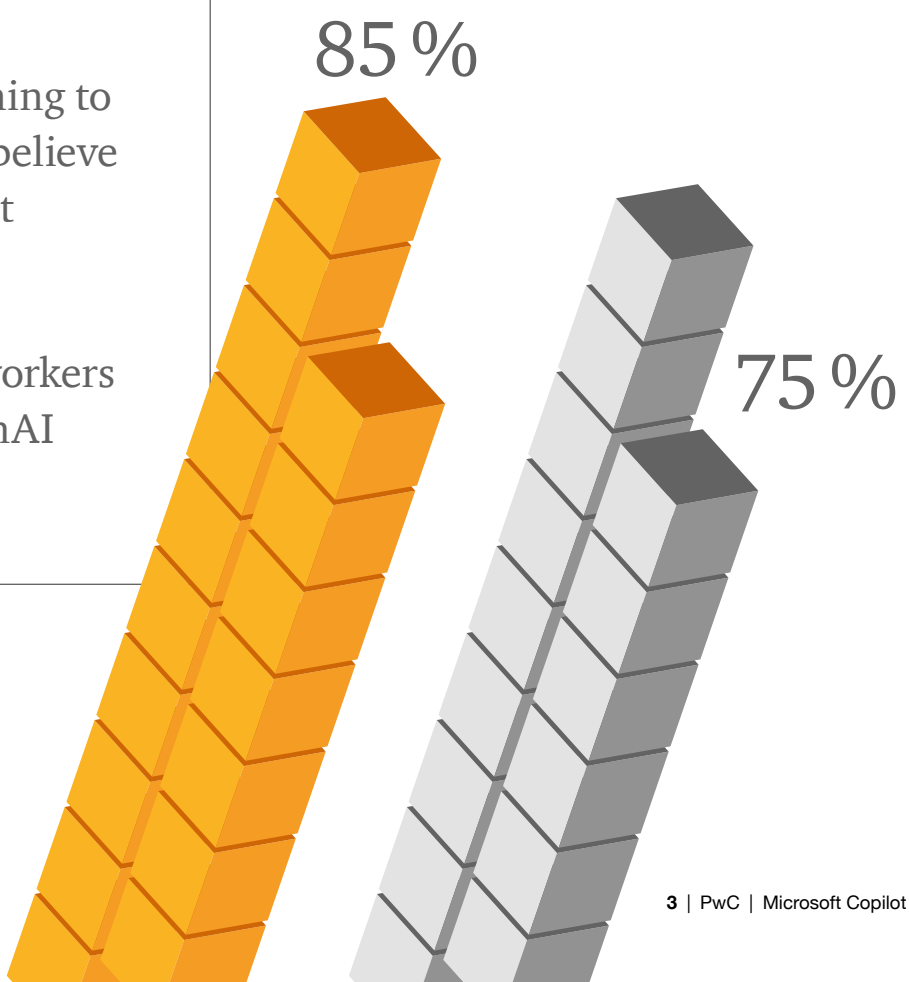
Generative artificial intelligence (GenAI) is the key to successful business transformation. It can help solve the challenges that change brings. As a leading-edge technology, it is a springboard for innovation across all areas of business. However, GenAI itself is a core driver of change and is considered one of the most disruptive technologies of our time. It is transforming the business world on an unprecedented scale and reshaping how we work.

Many companies are either exploring or utilising artificial intelligence. Those that lag risk struggling to keep up with the rapid pace of development and falling behind their competitors. As your trusted partner, our alliance with Microsoft can help your business realise the full potential of AI. At our recent event for industry leaders, 'Unlocking Potential: Microsoft Copilot in Action', we presented the many exciting opportunities and potential use cases for Microsoft 365 Copilot.

AI on the rise

85 % of leaders planning to use GenAI within a year believe it will significantly impact employees' daily work.[1]

75 % of knowledge workers around the world use GenAI at work.[1]



[1] Build your Business Case for Microsoft 365 Copilot, Forrester, 2023

The Huge Potential of Microsoft Copilot

AI agents: Personal assistants help manage routine tasks and complex processes.

By leveraging the power of GenAI to elevate ways of working, Microsoft Copilot helps businesses reinvent themselves in the age of AI. Integrated into Microsoft 365, Copilot enables employees to work more efficiently, tackle complex tasks faster, and make informed decisions based on trusted data. It not only increases productivity but also creates new possibilities for collaboration and creativity.

AI Agents Revolutionise Our Way of Working

With the introduction of Copilot agents, Microsoft 365 opens a new dimension of support. Acting as personal assistants, these AI-driven agents automate routine tasks, analyse data, and generate content, freeing employees to focus on creative, strategic, and value-adding activities.

Copilot agents offer extensive capabilities, actively collaborating with users on a variety of tasks, from answering simple questions to handling complex, multi-step processes. Additionally, they can specialise in specific fields and provide round-the-clock assistance, such as reviewing delivery invoices or approving return requests in supply chains.



What are AI agents?

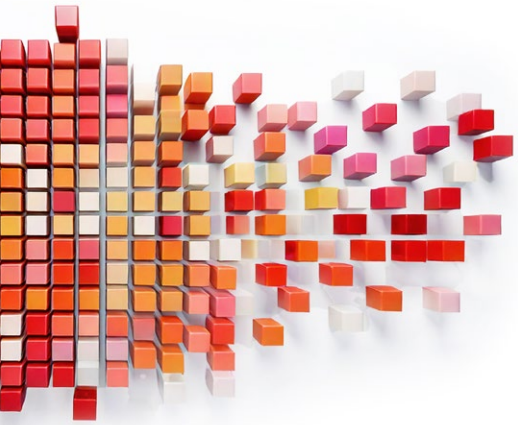
AI agents are the new apps of an AI-based world. Three characteristics make them particularly valuable:

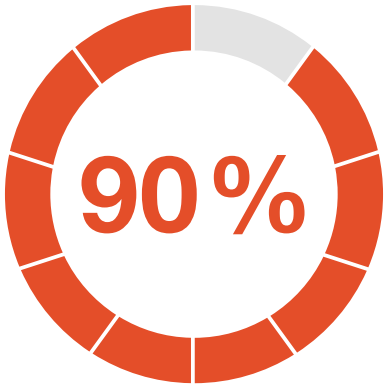
- Memory: They can remember past interactions and data, resulting in more personalised and relevant responses.
- Access Rights: Users can grant the AI agents specific access rights and permissions. The agents' secure and controlled access to data and systems allows for more complex task automation.
- Operations: They can operate digital tools autonomously, streamlining workflows and increasing productivity.

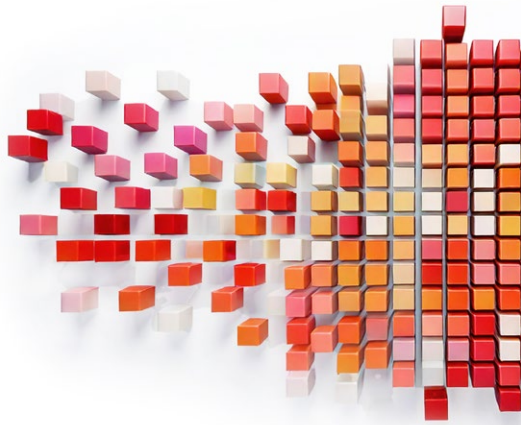
“With Microsoft 365 Copilot, companies can transform the way they work. Everyone can create their own agent. This changes the way we collaborate, make decisions, and innovate.”



Alain Genevaux,
Modern Work Sales
& AI Lead, Microsoft







of employees would never want to be without Microsoft Copilot[2]

What benefits have been identified at our clients

Time savings

Copilot **users saved 91.6 minutes** per week on average

Productivity

Efficiency, delivery speed, and creativity were the top 3 benefits

Experience

Users would rate Copilot **8,1/10** when recommending it to peers.

High value cases

>100 individual high value cases that are being elaborated across functions.

Elevated quality

70% report an improvement in work quality through the use of Chat, Teams, and Word

Digital culture

Cultivating an **evolved mindset** through **Copilot pilots** and established Change momentum

[2] Digital Workplace GenAI Survey, Gartner, 2024

The Dilemma with Microsoft Copilot and How PwC Solves it

What obstacles exist to using AI, and how does PwC remove them?

In practice, many executives face a dilemma with Microsoft Copilot; they recognise its enormous potential but are not fully leveraging it. Why is this? Often, companies don't sufficiently identify what roles Copilot could play in their specific environment, nor do they set clear goals. There is also a lack of understanding about its prerequisites and capabilities. Challenges in technical implementation, concerns around compliance and security, and insufficient employee guidance and training on AI technology exacerbate the dilemma.

Pulling the Right Levers for Maximum Impact

Realising the AI solution's full potential requires strategic integration into working practices and daily routines. PwC helps you achieve this through highly targeted implementations. We conduct a thorough assessment of the business benefits to identify the most valuable use cases, ensuring that Copilot delivers tangible advantages. To leverage AI successfully, we recommend:

- Identify and prioritise use cases: Evaluate and analyse processes that could be best optimised with AI.
- Pinpoint bottlenecks that are slowing value creation: Find out which processes are getting stuck and impacting value.

We start by determining the potential value of Copilot and the specific benefits for your company. Next, we assess your company's AI readiness using our maturity model. We leverage our experience as practitioners with deep technological knowledge and demonstrate progress using measurable KPIs. Our multidisciplinary teams – including subject matter experts, transformation and change specialists, and legal professionals – span all business functions and possess extensive insights into numerous industries.

Through our learnings from running 40 Copilot projects over 18 months, we utilised our **AI Compass** to develop and document around 600 use cases. Consequently, we can show you the precise levers to adjust to set up optimal AI-based processes.



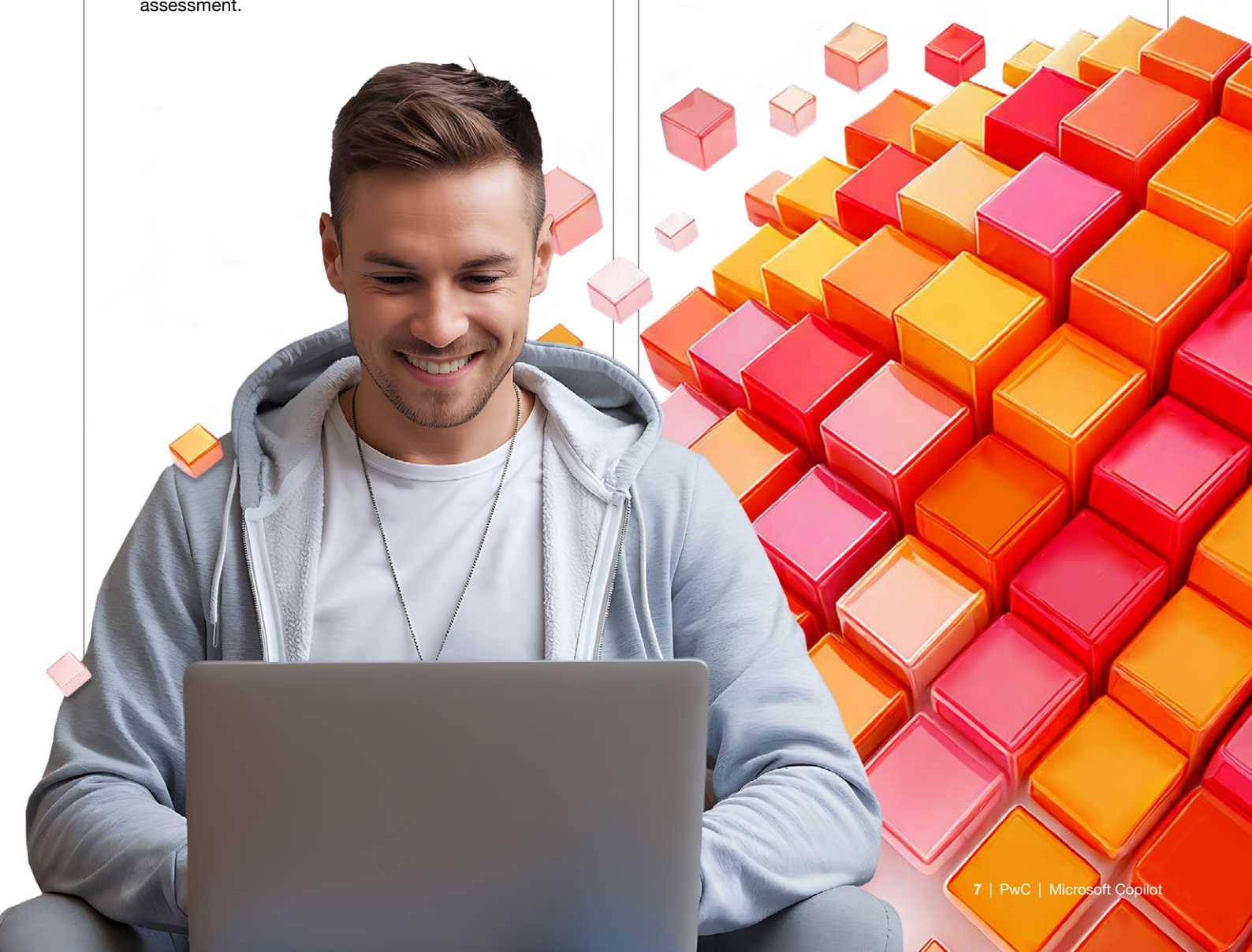
We demonstrate how Copilot improves value creation through the following:

PwC's Business Value Assessments for Microsoft 365 Copilots

- Explore how Copilot can enhance your business operations and identify high-value use cases, such as automating project management and applying AI-driven insights to improve efficiency.
- Discover your readiness for AI. Evaluate not only the functional, but also the technical and legal readiness towards the Copilot journey and ensure cyber security and overall compliance.
- With your foundational understanding of Copilot, we will jointly uncover its true potential and business value through Copilot AI Labs and a comprehensive ROI assessment.

PwC's Adoption Services for Microsoft 365 Copilot

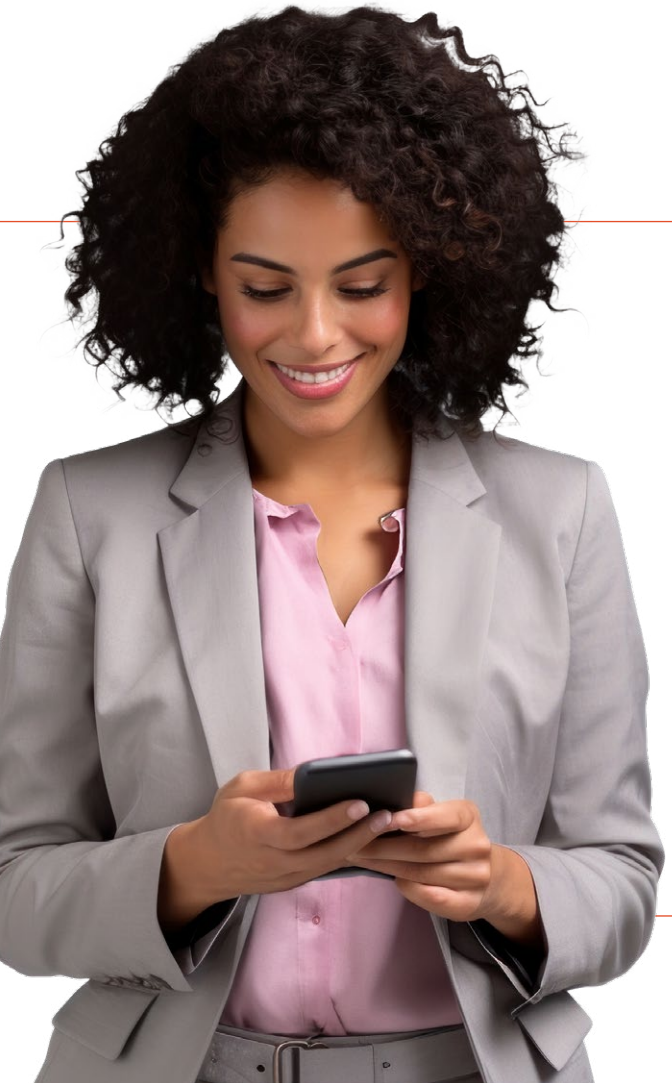
- You're ready to move beyond experiments and implement perfectly tailored solutions that meet your specific needs and challenges, including, for instance, a cybersecurity review or a Copilot employee adoption plan.
- We will empower your organisation to scale Copilot and GenAI technologies at an enterprise level seamlessly and efficiently.





Sebastian Paas,
Leader Cloud & Digital,
PwC Germany

> “Integrating generative AI into everyday working life requires more than just technology – it needs clear goals and a strategic approach to create real value.”



What we observed in our 40+ Copilot projects in EMEA in the last 18 months

What didn’t work...

- **Hunting** benefits and forgetting prerequisites
- **Trying** out Copilot out of pure curiosity
- **Waiting** for high value use cases from others
- **Starting capsuled**, e.g. within ITdepartment
- **Relying** solely on the project team

and what did...

- **Do your homework** within Microsoft 365, esp. Security
- **Set clear goals** connected to value chain
- **De-/refine high value** use cases that matter
- **Leverage** BUs and enabling functions
- **Drive change** with strong leadership involvement

Best Practices for Finance, HR and Frontline Workers

How PwC's Copilot agents make users more productive and enhance collaboration.

The possibilities of Copilot are limitless. For inspiration, imagine use cases for conversational chatbots that answer questions about corporate guidelines and compliance. Or picture a virtual customer service assistant that responds to frequently asked questions and forwards complex queries to the relevant employees.

Our experts have created AI agents specifically for finance, HR, and frontline workers, saving employees considerable time and making their lives easier.

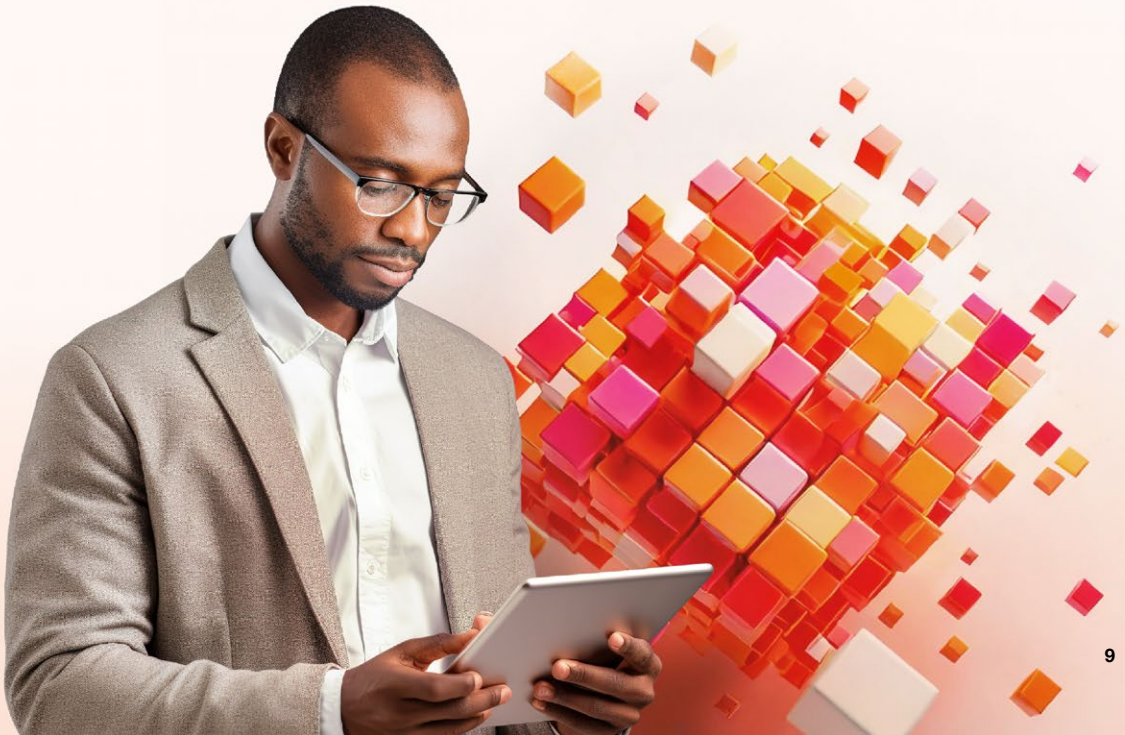
Copilot for Controlling

Challenges: Enhancing productivity, improving data management and reporting, and increasing user satisfaction while maintaining strict security and compliance standards.

Solutions: A conversational Copilot chatbot that allows secure access to relevant operational and financial data. The applicable data is collected from upstream systems, validated, and connected to the Copilot agent as curated sources. This ensures that all information is consistent and trustworthy. It is also possible to connect and use existing data warehouses, which protects previous investments.

We have also created an AI agent for autocommenting reports. Thanks to automated pre-commenting, the time-consuming process of analysing deviations is eliminated and helps finance teams identify outliers and drivers more efficiently. Key indicators can be derived not only from the data itself but also from other internal or external information stored in PDF files accessible by the AI agent.

Benefits: Significant time savings due to the elimination of tedious routine tasks. The AI agents offer automated processes and consistently high data and reporting quality across business functions and locations.



Copilot for HR

Challenges: Due to the economic climate, the pressure on work-force performance is steadily increasing. Additionally, managers and HR often need to work with a multiple number of tools leading to inefficiency (e.g. by searching for information, switch between systems, scattered communication channels). Another cost factor is a high turnover of new employees due to poor onboarding experience. A profound, engaging and proactive onboarding can be cumbersome and time-consuming.

Solutions: To ensure seamless employee experiences across all (HR) tools and systems, we have developed an Employee Experience Layer with Microsoft Viva Connections and Copilot. This layer acts as a unified interface that integrates various applications and provides employees with personalised experiences, simplified access and increased productivity

We also created an onboarding buddy 'Charly' based on Microsoft Viva Learning and Copilot. This AI agent proactively supports new starters in their onboarding journey providing orientation, proactively reminding on mandatory tasks and evaluating feedback to increase the onboarding experience. It consolidates key onboarding resources and enables seamless and engaging experiences in their new job.

Benefits: HR leaders leverage the potential of AI to create better employee experiences by automating routine tasks, and improving overall HR processes. The data intelligence layer – like e.g. the onboarding buddy – lays the foundation for immersing People Functions into the corporate network. Ultimately, Copilot benefits employees by taking over repetitive tasks and simplifying their access to collaboration tools.



Copilot for Frontline Workers

Challenges: According to market researcher Gartner, 2.7 billion employees worldwide work in frontline roles[3], whether in customer service, as service technicians, or in manufacturing. They comprise 80% of the global workforce but are often not yet actively involved in the digital transformation. Why is this? Companies do not prioritise the digitalisation of frontline workers, even though they have direct contact with customers and products. As a result, they can provide incredibly important data and insights for optimising services or products. Frontline workers typically have limited access to digital devices, while shared IT workstations offer restricted app and system functionalities. Technology and training gaps due to a lack of time or insufficient digitalisation are also difficult to bridge. Moreover, frontline workers are key players in the direct value chain, which is why companies are hesitant to change 'running systems'.

Solution: In today's manufacturing environments and services, frontline workers often face fragmented workflows and inefficiencies. A heterogeneous application landscape shapes their daily work. A unified assistance system integrated with Microsoft Copilot and Microsoft Viva provides a seamless platform for task management, real-time data access, and intelligent guidance.

Benefits: The platform – supported through Microsoft Viva, Copilot and Teams – enables modern working methods through seamless digital experiences, promoting greater efficiency and well-being for frontline workers. For example, it streamlines manufacturing and field service processes from task management to diagnostics to ordering spare parts, providing a personalised, centralised experience that increases productivity and minimises machine downtime.

[3] What Does a Human Employee Value Proposition Look Like for Frontline Workers? ThinkCast, Gartner, 2022



PwC and Microsoft: A Perfect Match

A trusted and close partnership between PwC and Microsoft for over 20 years.

Working closely together, PwC and Microsoft support clients by combining PwC's expertise in achieving strategic business objectives with Microsoft's proven technologies and applications. PwC is a trusted partner for advisory and consulting services for leading global companies, from strategy to implementation. Our expertise in business processes and innovations significantly advances companies and accelerates their development.

Microsoft 365 and Copilot play a vital role in PwC's AI strategy. For us, AI is a game-changer that is fundamentally changing how we work, enabling us to keep a competitive edge. Our AI strategy is rooted in a 'Human-led, Tech-powered' approach, where human expertise drives strategic decision-making and innovation while technology amplifies our capabilities.

PwC is 'Client Zero': Rollout in full swing

With Microsoft 365 Copilot, we are expanding our AI toolkit and leading the way in AI adoption. As 'Client Zero', we are establishing ourselves as trusted advisors in AI-enabled consulting by harnessing our combined expertise to deliver the insights our clients need.

PwC is integrating Microsoft Copilot into our own business, training teams, and bringing new solutions to the market. As Client Zero, we leverage our alliance with Microsoft to help our clients unlock new opportunities, deliver sustainable results, and build trust in an AI-driven world.



Sharing our Learnings as Client Zero for Microsoft 365 Copilot

We have gathered valuable insights that can help your organisation successfully implement and take full advantage of Copilot. Here are some key learnings:

Leadership alignment:



Involve leaders to drive the vision and help effect change by coaching and modelling behaviours at a senior level.

Consistent messaging:



Develop an overarching change narrative and impactful messaging that engages stakeholders and users. Promote Copilot as a tool that enhances human potential rather than replacing it.

Change champions:



Beyond influencers, identify champions at all levels who exemplify AI use and foster enthusiasm in their teams.

Customised training:



Provide role-specific training to ensure employees understand how Copilot improves their specific workflows.

Continuous listening:



Early feedback through pulse surveys enables bottom-up listening, and employees feel seen and heard.

Measure success:



Establish clear KPIs, such as time savings, efficiency improvements, or error reduction, and report on them regularly.

We are proven Microsoft specialists

11,000+

Globally certified Microsoft consultants

2,800+

Microsoft projects carried out worldwide

25,000+

Microsoft certifications worldwide

Into the Future of AI with Strong Partners

The introduction of Microsoft Copilot marks a significant step in digital transformation. Copilot will become an indispensable tool for modern businesses by automating routine tasks and supporting creative processes. The future of artificial intelligence promises even more advances in machine learning and data analytics, opening further potential for innovation.

PwC and Microsoft are your reliable partners for fully exploiting the potential of AI and future-proofing your business processes. Together, we are paving the way to an era in which humans and machines work hand in hand. Join us in shaping the future.



Learn more about our Microsoft 365 Copilot solutions and services.

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