



E-book Series

Copilot for Microsoft 365

Are you ready for the new way of working?

Author: Alexander Singer
Business Lead Secured Productivity
Microsoft Germany GmbH

Content

01

Introduction

04

Is your organisation ready
for Microsoft Copilot?

07

Links and resources

02

The role of Copilot
in a modern working
environment

05

Six tips for successfully using
Copilot in your company

03

Get your organisation ready

06

Customers Story
Scottish Water

“Arguably the most powerful productivity tool on the planet”

Will the use of artificial intelligence (AI) impact a lot in the company? Or are we talking about a trend that is currently being hyped and will then level off at some point? AI solutions are currently finding their way more and more into companies, their processes and business activities. The last major revolution in the world of work was not so long ago: the switch to remote, hybrid and flexible working models was significantly driven and supported by Microsoft thanks to innovations such as Microsoft Teams. And even now, Microsoft is a pioneer when it comes to how AI solutions are fundamentally changing the way we work.

Imagine a workforce fuelled by a combination of irreplaceable human ingenuity and the innovative capabilities of a secure, easy-to-use AI system. With the right tools and the right mindset, any organisation

can make the transition to an AI-enabled workforce. That’s exactly what Microsoft Copilot is – nothing less than “arguably the most powerful productivity tool on the planet”.

It’s a regular occurrence in the workplace: You’re working in PowerPoint to create a compelling, data-driven pitch deck for a new potential client. Finding the right background information and figures can take a lot of time. Copilot helps you do this, pulling relevant research from other documents you’ve already created to highlight the key topics of your pitch. What might have taken hours in the past is done in no time at all.

Or imagine returning from a week-long holiday and trying to check your emails. With Copilot in Outlook, clearing a cluttered inbox is a task that only takes a few minutes, so you can quickly get back to being productive.

Join us on an exciting journey through the world of Microsoft Copilot, from the early days of preparation to the exciting moment of launch. Be inspired and learn how Microsoft Copilot changes the rules of the game while always keeping an eye on your data security.

The role of Copilot in a modern working environment



Copilot is far more than just a tool; it is a powerful productivity tool that is seamlessly integrated into everyday life and can be used in applications such as Word, Excel and PowerPoint. It doesn't take over the work of content production, but boosts it with productivity-enhancing support, powerful tools and intelligent insights. A unique feature is the ability to interact with Copilot through natural voice commands, enabled by the innovative Microsoft 365 Chat in Teams. This feature uses organisational data from calendars, emails, chats, documents, meetings and contacts to complete tasks that were previously unimaginable. For example, Copilot can generate a product strategy update on demand based on information from meetings, emails and chat histories.

Here are six use cases of how Copilot could help you in your day-to-day work:

1. Automated data analysis in Excel:

Copilot can quickly analyse trends, perform advanced calculations and generate comprehensive reports to save hours of manual work. Copilot automates complex data analysis. This is particularly useful for employees in the finance department.

2. Efficient email management in Outlook:

Let Copilot optimise your email management by prioritizing important emails and scheduling appropriate responses. Inboxes are organised efficiently to ensure you spend less time sorting through emails. This can be of particular benefit to administrative and customer service staff.

3. Improved document creation in Word:

Create more effective documents with Copilot by suggesting optimisations for content, formatting options and even text generation based on short instructions, significantly speeding up the document

creation process. Administrative and marketing staff in particular can achieve better results in less time.

4. Automated scheduling in Teams:

Sometimes it seems almost impossible to find a suitable date for everyone involved in a project. Copilot helps with scheduling meetings in Microsoft Teams by analysing calendar information and availability of participants and automatically scheduling meetings to ensure that all participants are available. This is particularly useful for administrative staff or large teams with different availabilities.

5. Improved presentation creation in PowerPoint:

Use simple prompts and create professional and creative presentations with Copilot. Copilot automatically adds relevant content from your source documents.

6. Improved data visualization in Excel:

Copilot can help you create professional data visualizations in Excel by automatically generating charts and graphs and adding relevant data from your source documents. Employees in finance departments will have appealing and meaningful charts and documents ready in no time.

Further information can be found on the official Microsoft website:

[Microsoft Copilot for Work](#)

Increase efficiency in everyday work with Copilot

Summarize PDF files



Summarize a 20-page PDF file into 5 bullet points with the help of Copilot in Edge

Create email drafts



Use Copilot as your professional on demand writer to draft emails, captions and more

Generate images



Ditch stock images and text-only reports and use AI-generated images for emails, presentations and more

Learn new skills



Ask questions tailored to your needs and interests to get consolidated content from the web

Get answers to specific, complex questions



Get answers to questions that require multiple data points or some level of analysis

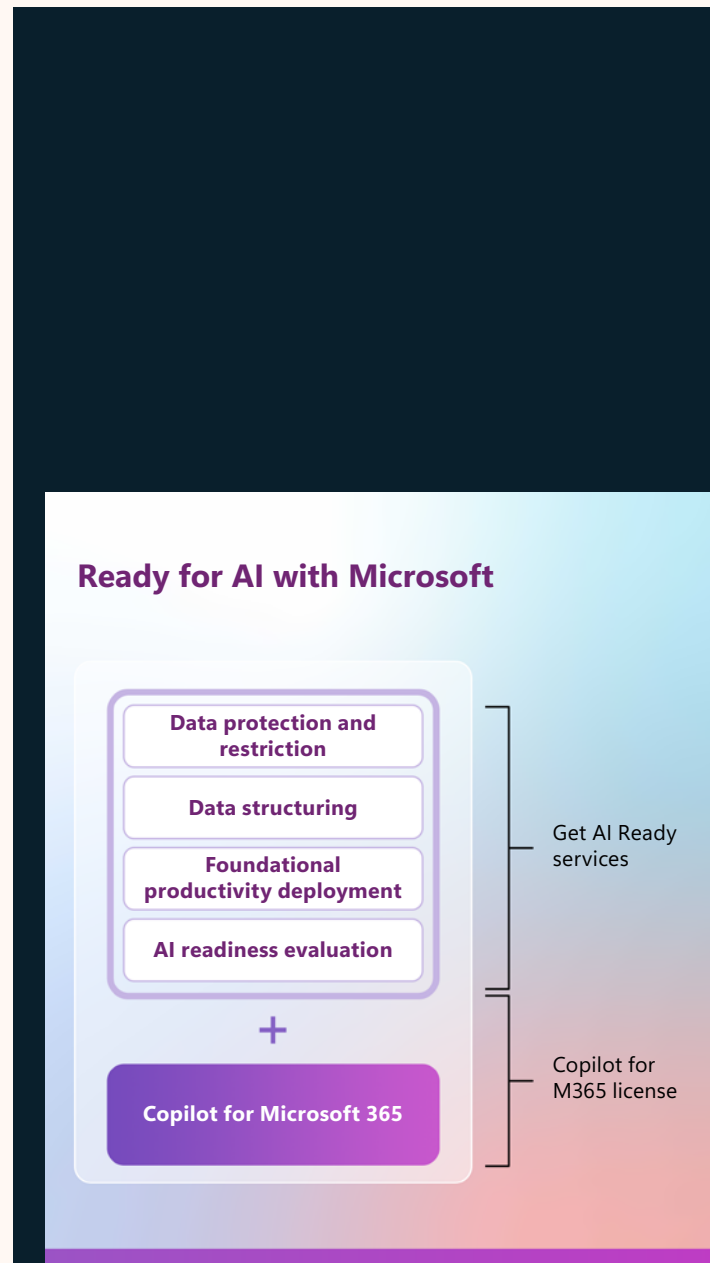
Get your organisation ready

Platform transition to AI cannot happen without clear leadership and targeted investment. Implementing AI technology may be complex, especially without a clearly defined plan. It requires a culture of productivity and collaboration, a secure foundation for endpoint management and a willingness to embrace change.

Are you ready to enter the era of AI? Ask yourself the following four questions to find out:

- **Do you have a comprehensive “zero trust” architecture?**
- **Are your endpoints and apps easy to manage?**
- **Is your data standardised and easily accessible?**
- **Is your company AI-ready?**

Can you answer ‘yes’ to all these questions? Great, then your company is well positioned for the use of artificial intelligence. If not, don’t worry – let’s work on it together.



Our offer for your AI readiness

What does AI readiness look like?

A company that is ready for AI understands its potential as a strategic resource, knows how it can be used to the company's advantage and is able to guide employees and customers in the responsible use of AI.

Assessing your readiness is the first step in transforming your organisation into one that embraces the changes and challenges of this new world of work with next-generation technologies such as AI. There is no question that Copilot has the potential to inspire new levels of creativity, productivity and collaboration in our workforce.

It helps people rediscover fulfilment and increases efficiency in an exciting, transformative way. Supported by an engaged workforce and its unique human qualities – intuition, empathy, and critical thinking – Copilot can empower people to work better and with greater purpose.

Optimise company data

The quality of your company data is also crucial to the success of Microsoft Copilot. Careful organisation and cleansing of data is essential to achieve optimal results. Incorrect or inappropriate data can affect or even hinder Copilot's performance.

It is essential to store, manage and categorise your data effectively to get the most out of Copilot and prevent unintended access to sensitive information. Key steps to implementing Copilot include revoking outdated permissions, identifying and protecting sensitive data, and monitoring for anomalies and potential risks.

By applying data access controls early and paying close attention to data protection compliance, you can ensure that your sensitive information and your organisation are protected. If necessary, you can enlist the expertise of data specialists to safely accelerate your progress. This step is crucial to reap the full benefits of Copilot from the outset, boost adoption and ensure its ongoing value to your organisation.

Zero Trust

The Zero Trust model forms a crucial foundation for the use of Copilot and AI in the corporate context. In an era where data is both a valuable resource and a potential security risk, Zero Trust's "never trust, always verify" philosophy guarantees the security and integrity of data, which is essential for AI applications like Copilot.

By continuously checking every access attempt on the network, Zero Trust ensures that only authenticated and authorised requests are processed, creating the basis for the secure and effective use of AI technologies in the company. Microsoft supports the implementation of the Zero Trust model with its robust security solutions and services.

With tools such as Entra ID and Microsoft Defender, companies can implement strong identity verification, continuous monitoring of network activity and advanced threat detection.

Centrally manage and protect endpoints

Centralised endpoint management is crucial for the use of Copilot and AI in companies, especially in a working world characterised by flexibility and hybrid working models.

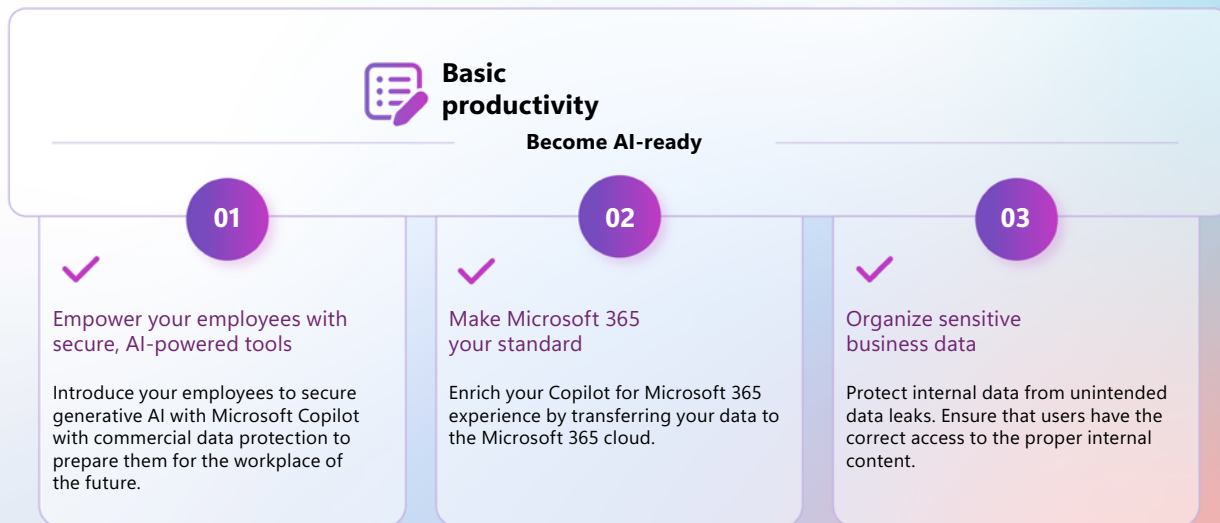
Modern ways of working often involve the use of different devices such as laptops and smartphones, both in the office and when working from home or on the move.

Centralised management of these endpoints ensures that all devices remain secure, up-to-date, and efficient. This is particularly important as the processing of sensitive information and protection against cyber-attacks are key challenges.

In addition, efficient device management improves the user experience and supports adherence to compliance guidelines. All these aspects are essential to maximise the benefits of AI technologies such as Copilot in a secure and efficient working environment.

**Is your
organisation
ready for
Microsoft
Copilot?**

The AI-powered business



Preparing for Copilot for Microsoft 365

Let us use a short test to determine how well your company is prepared for the use of Copilot. Each question has three possible answers. Choose the one that most closely matches your company's current situation and then add up the answers you have given (A, B, C).

At the end of the AI check, you can assess whether your company is fully ready, almost ready or needs further support.

Open-mindedness towards change and innovation:

- A Our company is very innovative and open to change.
- B We are basically open, but some areas are still hesitant.
- C We tend to be traditional and hesitate when it comes to innovations.

Confidence in productivity with current technology:

- A We are confident that our employees can work effectively with current technology.
- B There are uncertainties, but we are generally confident.
- C We have concerns about our employees' technology skills.

Importance of AI for corporate success:

- A AI is a decisive factor for our success.
- B AI has a certain significance but is not decisive.
- C AI does not currently play a significant role for our company.

Open-mindedness of the workforce towards AI:

- A Our employees are very open-minded towards AI.
- B Some are open-minded, others are sceptical about AI.
- C There is a general scepticism towards AI.

Modernity of the IT infrastructure:

- A Our IT infrastructure is completely up to date. We rely on cloud identities and have already implemented Zero Trust.
- B We have partly cloud-based systems, but also on-premises components.
- C Our IT infrastructure is mainly based on a local infrastructure.

Data protection and security measures:

- A Comprehensive data protection guidelines and strong security measures are in place.
- B Basic guidelines and measures are in place, but there is a need for improvement.
- C There is a lack of clear guidelines and measures on data protection and security.

Use of Microsoft 365 products:

- A We use Microsoft 365 products intensively in our day-to-day work. Our data is stored in the cloud and Teams is one of our most important communication tools.
- B Microsoft 365 products are partially used.
- C We do not use Microsoft 365 products and our data is not stored in the cloud.

Implementation of an evergreen IT strategy:

- A Our IT strategy is continuously updated and adapted to keep pace with technological changes.
- B We strive to be up to date, but there are areas that still need to be modernised.
- C We traditionally rely on patch days and fixed rollout cycles and like to wait before deploying new product versions.

Investing in change management:

- A We actively invest in change management and have, for example, change agents to ensure that our teams can deal effectively with change and develop further.
- B There are some efforts around change management, but these are not comprehensive or systematic.
- C We have not yet invested in change management and there is a lack of structures to support change processes.

Result:

Add up the answers you have given here:

- A times
- B times
- C times

Evaluation of the quiz:

Majority a) Answers: Your organization is well positioned to use Copilot effectively. You have an advanced IT infrastructure, an open-minded team, and the necessary resources to successfully integrate Copilot. It is advisable to use these strengths to drive the implementation forward and take full advantage of Copilot.

Mixture of a) and b) Answers: Your company is well on its way, but still needs some adjustments to get the most out of Copilot. It is advisable to identify specific areas where improvements are needed, such as further employee training or updating the IT infrastructure. A targeted plan to address these areas will facilitate the use of Copilot.

Mostly b) or c) Answers: Your organization needs further support to use Copilot effectively. This could include a fundamental overhaul of the IT infrastructure, more intensive employee training or a strategic realignment in relation to new technologies. It is important to be aware that the introduction of Copilot requires extensive preparation and customization. Consider consulting experts or using external resources to support this process.

Six tips for successfully using Copilot in your company

Copilot has the potential to revolutionise the way you work, but successful implementation depends on strategic planning and execution. Here are seven valuable tips to help you get started:

1. Prepare your data:

Copilot requires a large amount of data to work effectively. Make sure that your databases and data sets are up to date and that they are in a format that Copilot can process.

2. Train your employees:

Copilot is a powerful tool, but it also requires some training to use it effectively. Make sure your employees have the necessary skills and knowledge to use Copilot.

3. Create a clear authorisation structure:

Copilot accesses a variety of data sources, and it's important that your employees can only access the data they should. Create a clear authorisation structure to ensure that your data is secure.

4. Create a clear strategy:

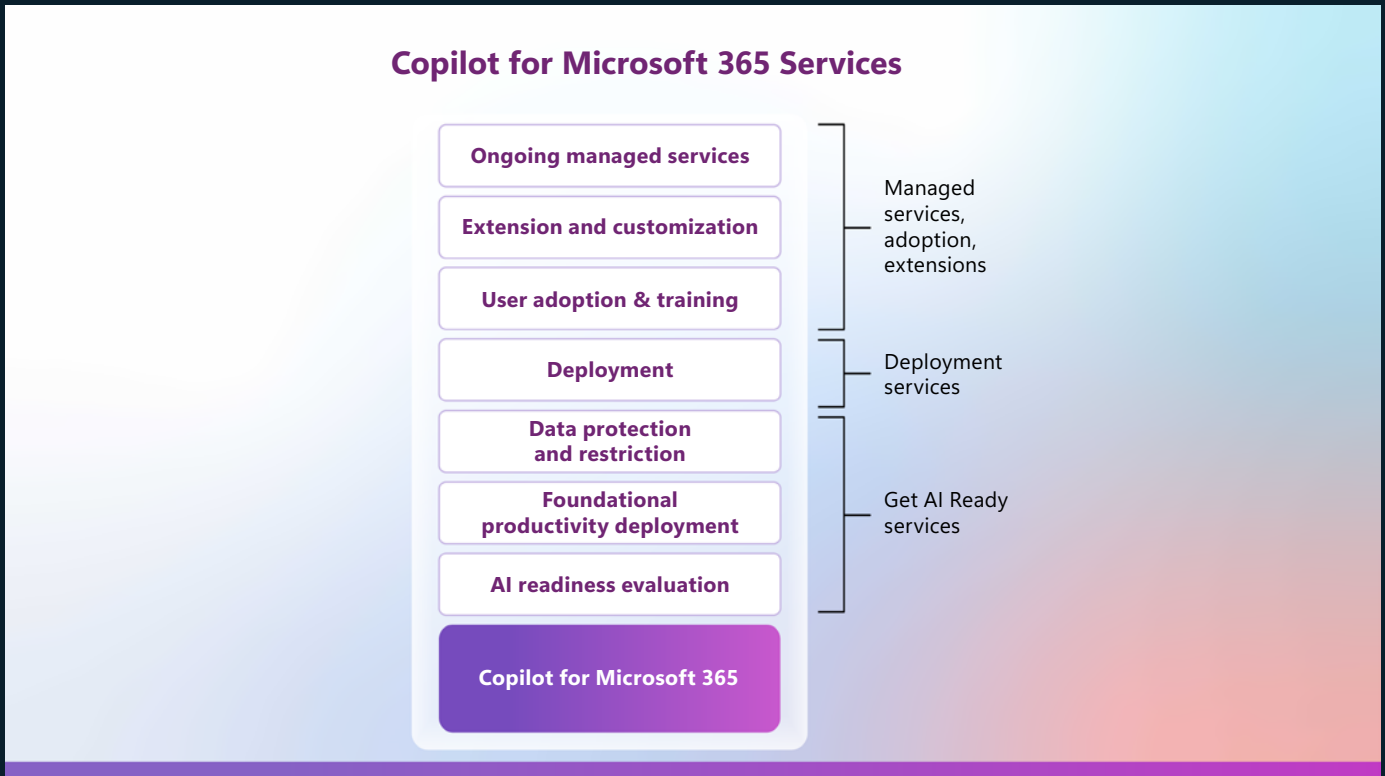
Before you introduce Copilot, you should develop a clear strategy on how you want to use the tool. Set goals and define how you will measure the success of Copilot.

5. Make sure your employees use Copilot:

Copilot is only as good as the data it can access. Make sure your employees are using Copilot to ensure that the data Copilot accesses is up to date.

6. Create a clear communication strategy:

Make sure your employees are aware of the introduction of Copilot and how it can help them. Create a clear communication strategy to ensure your employees are aware of the benefits of Copilot.



Our offer for your AI readiness

Would you like to find out more about Copilot for Microsoft 365 or would you like personal contact on the subject?

[Get in contact with us!](#)

Customers Story Scottish Water

AI-assisted water supply: Scottish Water uses Copilot for Microsoft 365 to eliminate mundane tasks and free up time for work that really matters

Water is the planet's most precious resource. It is life. In Scotland, Scottish Water's 4,500 employees provide water and wastewater services to 2.6 million households. In addition to field operations at the waterworks themselves, digitalisation plays a big role at Scottish Water: it helps the company to analyse the water supply cycle and better understand water demand. This crucial work is often interrupted by tedious tasks that keep people from doing what they love most – delivering water to Scotland's homes. Reducing mundane tasks to a minimum, and thus freeing up time for employees to work on the more meaningful

tasks, makes for an even more motivated workforce. This is exactly what Scottish Water achieved when it implemented Copilot for Microsoft 365.

Further lifting the level of purposeful work at Scottish Water

Picture 230 water treatment works supplying 1.52 billion litres of water per day to Scottish households through a total of 50,000 kilometres of water mains. Then add the 1,800 treatment works that collect and treat over 900 million litres of wastewater from Scottish homes, businesses, and industrial sites. That's the critical infrastructure that the people at [Scottish Water](#) need to do what they love. "We look after Scotland's most precious natural resource: water – from source to tap.

"It's our responsibility to deliver water and provide wastewater services to Scottish homes and businesses every day," says John Cairney, Head of Digital Strategy & Architecture at Scottish Water. "To do this, we rely heavily on operational technology and IT: mobile devices, smart devices, laptops, sensor technology, analytics software and, of course, workplace technology and software." No matter whether the focus is on the science of supply or marketing, Scottish Water always wants to give its people tasks and projects they can be proud of. After all, that's why

”

In our best week, we saved around 200 hours across all Copilot users. That's time that we can now spend on more meaningful tasks directly related to supplying Scottish households with water.

John Cairney

Head of Digital Strategy & Architecture /
CTO, Scottish Water

they joined Scottish Water in the first place. And the company wants to give them the latest technology to reduce the amount of manual, mundane tasks.

We've all been there: meetings where some people talk while others take notes or write minutes, some people come in late and miss the most important points, and still others can't remember what was discussed at last month's meeting so they start riffling through their notes. "It actually makes me really sad," says Andrea McCheyne, Project Delivery Coordinator at Scottish Water. "Meetings like that are less engaging for some people, aren't they? Also, writing minutes and structuring actions afterwards is so time-consuming. It takes our people away from much more meaningful tasks." And there are many other similar tasks, including reading and summarising large documents, creating a new Word document and staring at a blank page until inspiration strikes, creating a new communication asset such as an email or presentation, and combing through large datasets to track down a particular piece of information.

“We call it ‘lifting the level of work,’” Cairney explains. “We’re already working with our data analysts to explore where we can use traditional artificial intelligence. And now that generative AI has reached a high level of maturity, we decided to make it available to a wide spectrum of our employees as well.” As part of an early access program, Scottish Water implemented [Copilot for Microsoft 365](#) to reduce the time needed to perform mundane tasks and thus free up more time for more meaningful work.

Copilot for Microsoft 365 increases productivity and allows staff to focus on more meaningful tasks

Scottish Water is seeing a great uptake of Copilot in conjunction with all traditional Office applications, especially [Microsoft Teams](#), [Word](#), and [Outlook](#). Employees use it to help organise their daily schedule, to minute meetings, or to create new documents. “In our best week, we saved around 200 hours across all Copilot users. That’s time that we can now spend on more meaningful tasks directly related to supplying Scottish households with water,” Cairney says.

Based on feedback from across Scottish Water, the Teams use case is the one that brings the most relief to employees, and it is clear why. As long as a meeting

has a transcript, Copilot can be used to answer any questions that participants may have: Can you summarise the meeting? What were the main points discussed? What tasks were assigned to whom? “Copilot gives us all the answers we might need about a meeting in a matter of seconds,” McCheyne says. “This completely eliminates the need to take notes, manually summarise a meeting, or prepare a post-meeting report. It increases post-meeting productivity and saves a huge amount of time.” No more searching through handwritten notes for points made in a meeting a week ago. Just ask a quick question in Copilot and the answers appear.

What’s more, this allows meeting participants to be fully present. They listen, they engage, and there is more conversation in the meeting. “Copilot helps people to focus more on what’s being discussed in meetings, which in turn makes the meetings much more effective,” McCheyne says. “Also, after a meeting, I can ask Copilot about my presentation style, for example, if there was enough time for questions between topics, or how engaged the other participants were.” This adds an educational aspect to meetings and helps to improve how we prepare and run them, which has a positive effect on both quality and, of course, meeting time.

”

A very important return on our investment in Copilot is not necessarily the time itself, but the much higher quality of work we create for our employees by implementing such technologies.

Andrea McCheyne

Project Delivery Coordinator, Scottish Water

McCheyne is noticing a huge upswing in productivity relating to the creation of any type of communication or text: “Everyone knows the blank page syndrome, where you’re sitting in front of an empty document and it takes a while to get started because you’re lacking inspiration or information. Copilot eliminates this completely. You just tell it what you want to write, what information the document or email should contain, and it suggests a structure, a text, or whatever you need.”

People in analyst roles can now ask Copilot to explain code or datasets, saving them a lot of time that they would otherwise spend searching for useful information or calling a colleague for help. “A very important return on our investment in Copilot is not necessarily the time itself, but the much higher quality of work we create for our people by implementing such technologies,” McCheyne explains.

”

Copilot helps people to focus more on what's being discussed in meetings, which in turn makes the meetings much more effective.

Andrea McCheyne

Project Delivery Coordinator, Scottish Water

It's all about spending less time on tedious tasks so that there's more to spend on the ones that really matter. Cairney explains: "The name Copilot is one of Microsoft's best ideas yet because it is so spot on: the solution works like a copilot, an assistant that takes over those tasks that keep you from doing work that holds more purpose.

For our people, that's delivering water to Scotland's homes. Going forward, Scottish Water will continue to focus on the areas where Copilot has been most successful and learn from them. The plan is then to roll Copilot out to all employees so they can spend more time doing the work they are rightly proud of.