



Microsoft 365
Copilot

Leadership Strategies for AI Transformation

A business executive's playbook



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Introduction

Is AI working for you, or for your competition?





Generative AI is the
prelude to a tsunami
of innovations.”

Brice Miranda, Deputy Director in charge
of Data, AI and Automation, Orange France¹

¹“Orange: creating value for its lines of
businesses in the age of generative AI with
Azure OpenAI Service and GitHub Copilot.”
Microsoft, Inc., June 03, 2024

AI is rapidly becoming essential for business strategy, enabling innovation, efficiency, and a competitive edge across industries.

Executive leaders are key to this revolution, with the insight to identify and lead impactful AI initiatives.

Adoption rates for generative AI have rapidly expanded, considering the technology's relative newness to market. Seventy-five percent of organizations surveyed **in this IDC study** report they are currently using AI to support their business objectives—up from 55% in 2023.

In today's competitive landscape, delaying AI initiatives is costly. Organizations that hesitate miss out on benefits and fall behind competitors.

Executive leaders must embrace AI now to ensure future success. This involves guiding and maximizing the value of AI initiatives to drive innovation and strategic change.



Case study: Eaton implements AI to centralize knowledge, reduce costs, and prepare for an evolving workforce



83% **time reduction** to create 1,000 SOPs

650 **hours saved:** about 33% of a full-time workload

20% **expected reduction** in customer response times



We're rolling out Copilot at scale and prioritizing advancements in areas that will see significant impact."

Katrina Redmond, CIO, Eaton



Explore Eaton's full story

Chapter 01

Create an AI-driven culture





A lot of pilot programs really don't scale because, in the enterprise, it's all about changing people and processes."

Delphine Zurkiya, Senior Partner,
McKinsey & Company²

² "Want Real AI Transformation?
Focus on Your People and Processes,"
Microsoft, Inc., November 4, 2024

Strong executive leadership is as essential to a successful AI rollout as technical requirements and infrastructure.

While it's possible to execute an AI launch without executive influence, to do so would be missing a major opportunity for AI value creation. That value can be significant:

\$3.70 average ROI for every \$1 invested in generative AI

\$10.30 ROI for the top leaders using generative AI

<8 months for AI average deployment

<13 months to realize value for organizations³



Unlocking this value begins with establishing a reliable foundation for AI adoption. How can executives take the necessary steps to ensure their organizations are ready, willing, and able to roll out an AI initiative? Additionally, how can they move the business closer to its overarching goals?

³ "IDC's 2024 AI opportunity study: Top five AI trends to watch," Microsoft, Inc., Nov 12, 2024

Establish and communicate your AI vision

Business objectives, investment strategy, and resourcing all start at the top and require ongoing leadership support. An AI initiative is no different. Establishing and communicating the company's intentions for AI, organization-wide, will build your AI initiative on a stable footing.

Are you looking for AI to bridge a skills gap, or to streamline organizational complexity? More specifically, how will AI be used across certain business functions—for example, to enrich employee experiences, reinvent customer engagement, optimize business processes, or bend the curve on innovation?



In every case, your people will want to know the details that are relevant to their roles, and how they'll be directly affected. AI solutions enable employees to focus on higher-value activities, yet 53% of people who use AI at work worry that using it on important work tasks makes them look replaceable.⁴

High levels of transparency leave little room for these negative assumptions. Alleviate fears by communicating the role you anticipate AI playing, how it will support your organization's goals, and how employees will be necessary for success.

Discover insights from a McKinsey & Company senior partner about the importance of being completely transparent about when and how you utilize AI.

⁴"AI at Work is Here. Now Comes the Hard Part," 2024 Work Trend Index Annual Report, Microsoft, Inc., and LinkedIn, Inc., May 8, 2024



Develop and build on momentum

Strong leadership is essential to drive AI adoption and create a culture of innovation. Integrate these activities into your internal culture to generate excitement around AI:



Engage early and often. Schedule town halls, Q&A sessions, and workshops to address concerns, celebrate successes, and gather feedback.



Establish AI champions. Provide your AI leaders with direct executive sponsorship.



Foster innovation. Create an ecosystem where experimentation is welcomed, and learning from failure is part of the journey.



Reward participation. Celebrate milestones and acknowledge team members who engage with AI initiatives. Offer public recognition and rewards for innovation.



Highlight success stories. Showcase early wins and success stories to build momentum and demonstrate value.



Lead by example. Use AI tools in leadership workflows and decision-making to set a precedent for the organization.

Encourage continued learning

Fostering a culture of continued learning and development is crucial to keep pace with AI advancements and maximize its potential.

Business leaders can assemble a variety of resources and guidance to promote collaborative sharing of best practices. This way, AI users can stay updated on new features, troubleshoot issues, and learn from each other's experiences.



Help your team members gain the skills that will enhance their AI experience, and their output, by providing direction to resources like the [Copilot Prompt Gallery](#).



Or provide more in-depth, role-specific training through a live, one-hour Copilot training session through the [Microsoft Events Catalog](#).

Case study: Dairy Farmers of America supercharges efficiency

20 hours per month saved on routine tasks

83% of employees would recommend Copilot to colleagues



We weren't uncovering new information. We were uncovering new ways to work better with the information we already had."

Jonathan Oufnac, Senior Director of Emerging Technology, DFA



Explore DFA's full story

Chapter 02

Define how AI will help your business thrive





Executive leaders must become keen and discerning creators of AI investment strategies in order to obtain optimum value from AI initiatives.”⁵

⁵“Quick Answer: What Is the True Return on AI Investment?” Gartner, Inc., April 26, 2023

Successful AI implementation starts with a clear strategy and roadmap that aligns with your business goals.



Take inspiration from a simple question: “Can AI help with this?”

Evaluate your existing processes and consider your current challenges. Ask yourself, what single improvement would have the most profound effect on my business? And how can AI help?

For the pain points you uncover, consider two factors. Where does AI have high potential for measurable business impact? And where is it easiest to implement? A good place to begin is where those two opportunities intersect.

Keep in mind that short- or near-term wins will generate buy-in and support from users and broader stakeholders that could pave the way for larger, longer-term gains.



Cross-department collaboration

Collaboration across departments is essential to integrate AI solutions effectively and ensure they meet the needs of the entire organization. When departments operate in silos, opportunities are missed, and inefficiencies grow.

True collaboration isn't just about sharing data. It's about aligning perspectives to achieve shared objectives. You can break down collaborative barriers with AI solutions like Microsoft 365 Copilot, which enables seamless cross-department collaboration—empowering teams to co-create, communicate, and innovate with greater efficiency.

Copilot fosters business alignment by ensuring that every stakeholder, regardless of role, has the context and tools they need to contribute meaningfully. This paves the way for:



Accelerated decision-making. With all relevant data and insights consolidated, leaders can make decisions faster and with greater confidence.



Increased innovation. By connecting diverse perspectives Copilot fosters creative problem-solving that drives new ideas and opportunities.



Enhanced employee experience. Your teams can feel empowered and included when collaboration becomes seamless and outcomes improve.





Assemble and lead an AI council

Many companies form cross-functional AI councils to supervise and guide the strategy, execution, and evaluation of AI solutions within their organization.

How you choose to appoint and direct your AI council will uniquely reflect your company's needs, but here is some guidance that can [help you get started](#).

Meeting regularly with your AI council will help you understand how you can support their efforts. Change happens quickly with a Copilot implementation. Discuss what's working well, potential areas of opportunity, and any challenges related to the new way of working.

Continuous improvement

AI implementation isn't a one-and-done project. Successful AI initiatives, like any transformative endeavor, require ongoing monitoring, evaluation, and refinement. This commitment to continuous improvement isn't just a best practice—it's a strategic imperative for executives who want to unlock the full potential of AI and demonstrate their ability to drive sustained business transformation.

Copilot can be a dynamic element in your organization's journey toward continuous improvement. Copilot helps your teams not only implement AI effectively but refine its impact over time through:



Real-time feedback loops. Copilot analyzes patterns, extracts insights, and identifies inefficiencies, providing executives with actionable feedback. It can highlight areas where workflows are bottlenecked or where employee adoption of AI tools is lagging, enabling immediate course correction.



Proactive opportunity identification. Continuous improvement is as much about uncovering new opportunities as it is about solving existing challenges. Copilot surfaces emerging trends and patterns within your organization's data, helping leaders stay ahead of the curve and make proactive, data-driven decisions.



Scalable customization. No two businesses are alike. Copilot learns and adapts to your organization's unique needs, ensuring its recommendations and actions grow increasingly relevant and impactful over time. As teams interact with Copilot, its AI models become more attuned to your priorities, delivering more tailored insights.



Built-in evaluation tools. With Copilot, tracking the success of your AI initiatives is built into the process. From providing comprehensive dashboards that visualize key performance indicators (KPIs) to generating automated summaries of progress, Copilot ensures executives have a clear picture of what's working, and what needs adjustment.



The result? A long-term competitive edge that fuels growth and innovation.

Case study: Access Holdings limits the time employees spend on routine tasks

25% **increase** in staff engagement during meetings

83% **reduction** in development time for projects

45 **minutes** to prepare reports, down from six hours



Typically, a project of this nature might take two to three months, but with Copilot, it can be completed in approximately ten days.”

Lanre Bamisebi, Executive Director,
IT and Digitalization, Access Holdings Plc.



Explore Access Holdings' full story



Chapter 03

The strategic benefits of an AI initiative





There's really no future without this kind of technology. This is the direction that work will go. The longer you wait, the further behind you will be."⁶



⁶ "New Technology: The Projected Total Economic Impact™ Of Microsoft Copilot For Microsoft 365," Forrester, Inc., and Microsoft, Inc., April, 2024

Once your organization is prepared to move forward with your transformative AI deployment, in terms of both its culture and desired outcomes, it's time to start realizing the business advantages of AI.

Interviewees from organizations using Copilot have noted both early successes and great future potential. The early successes include decreasing information overload and worker fatigue, and compressed time frames for innovation.

As organizations continued to leverage Copilot, they noted business transformation across three major pillars: go to market, operations, and people and culture. Collectively, these transformations increased revenues, lowered internal and external operating costs, and improved employee experience and company culture.

External research shows the benefits of Copilot:

1-4% revenue lift from existing and new business

0.7% reduction in total operational expenditures

51.9% of companies surveyed cite employee wellbeing as a top outcome⁷



⁷ "New Technology: The Projected Total Economic Impact™ Of Microsoft Copilot For Microsoft 365," Forrester, Inc., and Microsoft, Inc., April, 2024

Copilot achieves these results through three powerful capabilities:

- 1 Reinventing business processes and reducing costs.** Customize, extend, and enhance Copilot to unlock data, information, and knowledge across every line of business from systems of record, enabling you to streamline and automate business processes.
- 2 Increasing productivity, creativity, and time savings.** By integrating AI into the tools your teams are already using daily—like Microsoft Word, Excel, Teams, and PowerPoint—Copilot provides an intelligent layer that connects people, data, and workflows across departments.

This puts new skills at their command while reasoning over all your organization's content and context using natural language, enabling teams to work smarter, not harder, and freeing them to focus on the work that fuels innovation and sparks joy.

- 3 Protecting your data with secure, enterprise ready-AI.** Copilot is built on Microsoft's existing commitments to data security and privacy in the enterprise, enabling stringent controls over data usage and appropriate governance.

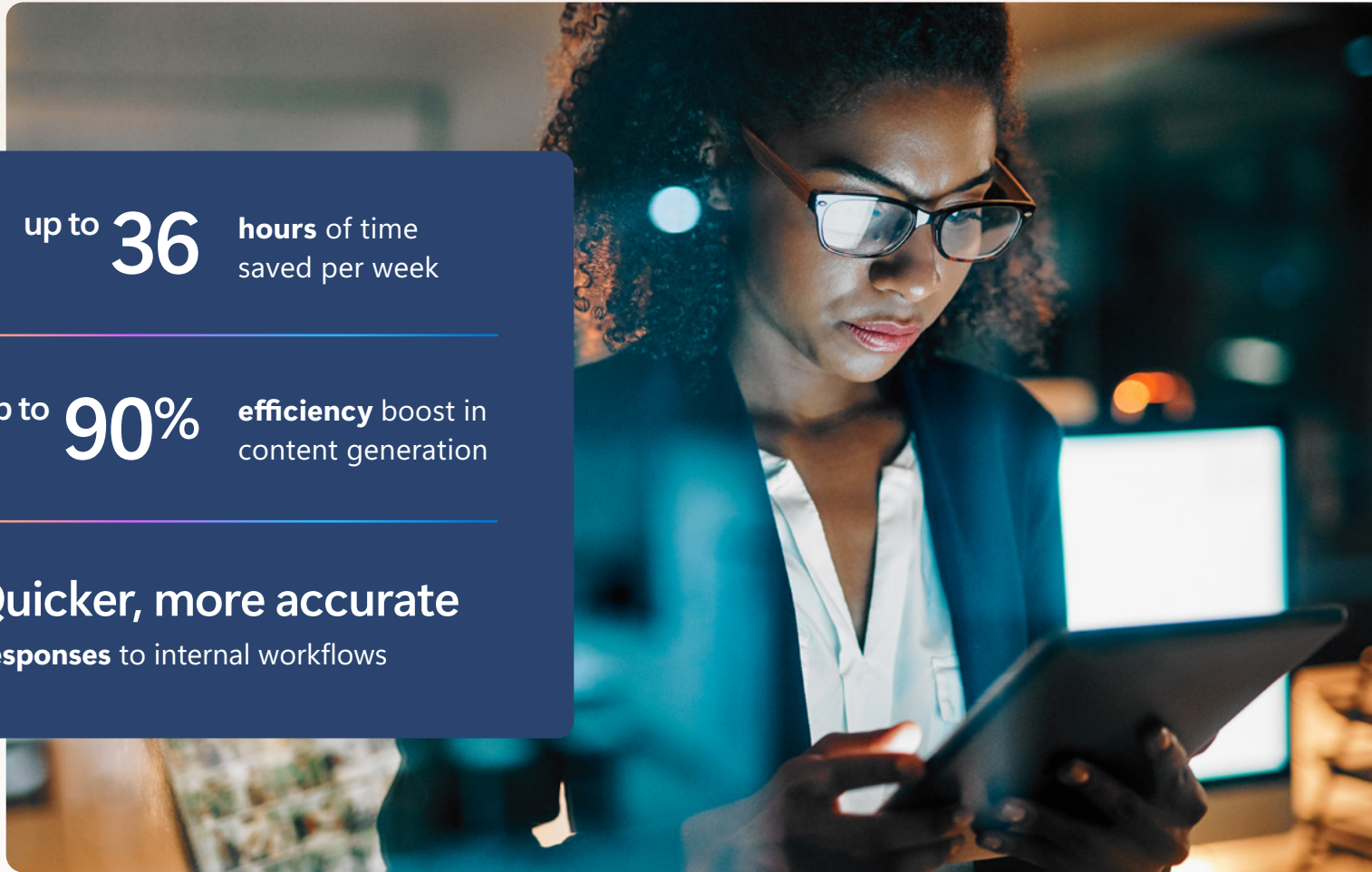


Case study: DLA Piper's journey with Copilot is a blueprint for legal innovation

up to **36** hours of time saved per week

up to **90%** efficiency boost in content generation

Quicker, more accurate responses to internal workflows



Copilot helps identify what should go on the slide, what goes in the notes, and even find imagery. The head start is huge.”

Barbara Taylor, Chief Knowledge Officer,
DLA Piper



Explore DLA Piper's full story



Establishing and maintaining responsible AI practices

When implementing any AI tool, it's important to establish a principled and actionable framework that ensures organizations deploy and use AI responsibly.

Microsoft's aim is to provide insights into the workings of AI technology, the decisions that can affect its performance and behavior, and the significance of considering the entire system—including the technology, people, and environment.

You can also assess your AI models and make user-facing decisions, faster and easier, using the [Responsible AI toolbox](#): a collection of integrated tools and functionalities to help operationalize responsible AI in practice.

Copilot is part of a broader effort to put [Microsoft's responsible AI principles](#) into practice around its generative AI tools. The technology used in Copilot is designed to align with responsible AI principles that include:



Fairness



Inclusiveness



Reliability
and safety



Transparency



Privacy
and security



Accountability



Chapter 4

Customer success stories: AI in action





Forward-thinking organizations are maximizing the value of Copilot. Across industries, businesses are transforming how they work, collaborate, and innovate, while driving measurable results.

The following examples demonstrate how business leaders can harness AI to deliver meaningful outcomes for their teams, customers, and their bottom line.



Lumen redefines productivity and employee engagement

As Lumen shifts from traditional telecom services to a technology-driven, innovative, and efficient enterprise, key leaders advocate for the role Copilot can play in increasing productivity without expanding the workforce.

This initiative has not only strengthened Lumen's competitive edge but has also redefined the inclusion of technology in corporate strategies.



Learn how Copilot is transforming Lumen's daily operations

Dow reimagines supply chain efficiency

Dow, a global leader in materials science, faced challenges in cost management and operational efficiency within its supply chain.

Dow adopted Copilot to empower employees with AI-driven insights and automate tasks across departments. Copilot supports logistics by reviewing freight rates, flagging billing discrepancies, and optimizing workflows for efficiency.



Discover Dow's strategy for saving millions with Copilot

Microsoft: Our year with Copilot

Explore Microsoft's company-wide Copilot rollout, marked by creative experimentation, continual learning, and thoughtful reflection about the role of AI within an organization.

Continue exploring how other organizations within your industry have used AI to accomplish more. Browse Microsoft's library of [customer stories](#).



Gain insights into Microsoft's approach to AI adoption

Conclusion

The era of AI is here. Executive leaders can drive innovation, agility, and success by embracing AI with vision and purpose.

This journey requires leadership, adaptability, and continuous improvement, with transformative rewards. To stay competitive, leaders should adopt AI with focus and clarity. Aligning AI strategies with organizational priorities unlocks innovation and equips teams to act precisely.

Microsoft 365 Copilot provides the framework for this transformation, translating vision into measurable outcomes and fostering data-driven decision-making.

Copilot empowers organizations to work smarter, collaborate seamlessly, and deliver greater value. The technological decisions made today will shape the future trajectory of organizations. Copilot brings the future within reach, enabling impactful change and achieving extraordinary results.



**Learn more about leading
in the era of AI with Copilot**

