Unlocking the art of potential

The buyer's guide to Copilot for Microsoft 365

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Introduction

Interest in Artificial Intelligence (AI) has been surging in the past few years. One of the most widely known examples of AI since its launch in late 2023 is Microsoft's Copilot for Microsoft 365. A generative AI (GenAI) powered 'assistant', this variant of the Microsoft Copilot suite integrates with all Microsoft 365 applications – such as Word, Outlook, and Excel. It automates tasks, supports more effective collaboration, and provides smarter search and insight capabilities to Microsoft 365 application users. As a result, it has quickly become an indispensable tool for many employees, increasing their productivity while reducing or removing many of the frustrating, mundane, or repetitive aspects of their roles. Interest in adopting Copilot for Microsoft 365 is unsurprisingly high. even with the growing recognition that adopting AI is not like adopting previous technology innovations, requiring a radical rethinking of business processes, culture, and information management.

Why read this guide?

Enterprises seeking to fully harness the power of AI and use Copilot in Microsoft 365 applications, access AI-powered chat functions, and customize Copilot capabilities, require a Business or Enterprise subscription. However, driving the full value from Copilot's capabilities requires more than a licensing change, and can only be realized once an organization has made changes to how they operate and how they manage their data.

In this guide, we will clarify what you can expect from Copilot for Microsoft 365, cover the main obstacles to getting the full value from it, and explain how you can capture the extraordinary promise of AI through its adoption with Atos and the power of our partnership with Microsoft.

By deploying Microsoft 365 Copilot to 1,000 users, Atos is expected to achieve 3-year benefits of a Net Present Value (NPV) of $2.6 million (US) and a ROI of 191%. Benefits are measured across productivity, quality, and engagement.

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A quick summary of AI and Copilot for Microsoft 365

How does AI work?

There are many forms of Artificial Intelligence. Here, we are focused on AI algorithms working in a large language model (LLM), which are designed to learn from as well as analyze massive volumes of text-based data. AI quickly sifts through digital data sets to generate a response based on a user generated query, providing that response in a fraction of the time it would take humans to achieve the same. The query could be "What are the key points from our last six meetings with finance?", or "What factors have had the biggest impact on keeping people safe in car accidents in the past three years?" – depending on the data sets available and the goals of the user.

GenAI takes this concept a stage further, creating content in response to a query or (sometimes automated) request. This might lead to GenAI creating a report, a PowerPoint presentation, blueprints, or a standardized email response – again, dependent on what data it has to work with and the defined requirements of the user. The more AI is used, the more it 'learns', influencing the responses or content it delivers.

The quality and accuracy of AI's response is reliant on the volume and quality of the data it is given access to, and the query itself. A small sample or inaccurate or out of date data can lead to AI providing erroneous responses. Over time, as AI learns, its responses can become worse under such circumstances, rather than improving. Similarly, more specific queries and requests are generally more likely to get a clearer, better result than broad queries, such as: "What keeps people safe?" or "Give me a report on last year's results". AI can therefore be incredibly powerful and revolutionary but is not an omnipotent magic bullet by itself.

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What is Copilot for Microsoft 365?

Microsoft Copilot is a suite of AI-powered, cloud-enabled services that have been designed to support a range of business functions and processes, each aligned with Microsoft applications or services.

Copilot for Microsoft 365 is one of these Copilots, which integrates with the Microsoft 365 suite of applications, including: Word, Excel, PowerPoint, Outlook, OneNote, Teams, Whiteboard, and Loop. Copilot provides tips, prompts, documents, and summaries when people use these applications, aligned with the typical tasks and requirements a user will have for each application. For example, you are more likely to search Teams for a comment from a colleague but want to summarize information in a long Word document.

The LLMs used for Microsoft 365 Copilot are hosted in the Microsoft Cloud along with the data (from files, transcripts, databases, and so on) created by your employees when using Microsoft 365 applications. This means all that data can be made available to Copilot. It also means any data not hosted in Microsoft Cloud – be that on-premise or on another cloud platform – won't be available or included in your queries or Copilot capabilities automatically.

> **Microsoft Copilot is a suite of AI-powered, cloud-enabled services that have been designed to support a range of business functions and processes, each aligned with Microsoft applications or services.**

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The real Copilot value story: better for people not just productivity

When AI became more mainstream, the main story was how it was going to improve productivity, but with the addition of scare stories about the number of people it would replace. The reality is more nuanced and significantly more positive.

People are recognizing the value Copilot offers them as well their organizations, leading to much greater readiness and openness to AI in the workplace. One study found that 95% of employees are optimistic about AI[1], while another found that 70% of people would delegate as much as possible to AI to lessen their workloads[2]. And leaders don't echo suggestions that AI will replace people, with around 10% expecting to increase their headcount even as they adopt AI[3].

This should not come as a surprise when we consider:

64% of people have struggled with finding time and energy to get their work done[4]

85% of people want digital tools that help them be more agile and automate daily tasks[5]

82% of employees are reported to be at risk of burnout[6]

[1] https://www.forbes.com/sites/avanade/2024/02/06/generative-ai-in-the-workplace-5-takeaways-from-pioneers-in-microsoft-copilot-adoption/?sh=27a0f17b68f8

[2] https://www.microsoft.com/en-us/worklab/work-trend-index/will-ai-fix-work

[3] https://www.forbes.com/sites/avanade/2024/02/06/generative-ai-in-the-workplace-5-takeaways-from-pioneers-in-microsoft-copilot-adoption/?sh=27a0f17b68f8

[4] https://www.microsoft.com/en-us/worklab/work-trend-index/will-ai-fix-work

[5] https://www.microsoft.com/en-us/worklab/work-trend-index/will-ai-fix-work

[6] https://www.mercer.com/insights/people-strategy/future-of-work/global-talent-trends/

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A better work experience for people, better productivity and performance for businesses.

The productivity-enhancing capabilities of Copilot for Microsoft 365 are impressive. 70% of users said they were more productive, and 29% reported being faster at tasks like searching, writing, and summarizing. Some users saved more than 10 hours per month[7]. But the results go beyond 'doing more, faster'. Users from the same study report Copilot also helps them 'do better' with 68% saying they felt it improved the quality of their work, and in a separate study[8] almost a third reporting 'less cognitive fatigue'.

> **77% stated they wouldn't want to give up Copilot for Microsoft 365 once they had used it.**

Benefits

→ **Enhances quality** of work, design, research, and more.

→ **Supports collaboration** by helping people identify experts and connect meaningfully.

→ **Helps people work faster and more efficiently** with automated search, summaries, document creation, and prompting.

→ **Increases accuracy** by reducing manual assessment and analysis.

→ **Improves productivity** by taking on low value, time-intensive tasks so people can focus their expertise and time more effectively.

→ **Aids informed, data-driven decision-making** by providing fast analysis and reporting on vast volumes of data.

Learn more about the real-world value you can gain from Copilot for Microsoft 365 and Atos with our eBook, outlining 10 game-changing use cases we're already delivering to customers today.

[7] https://www.microsoft.com/en-us/microsoft-365/blog/2024/01/31/the-right-way-to-ai-what-were-learning-from-customers/

[8] https://www.forbes.com/sites/avanade/2024/02/06/generative-ai-in-the-workplace-5-takeaways-from-pioneers-in-microsoft-copilot-adoption/?sh=27a0f17b68f8

How to unleash the power of Copilot: understanding the obstacles to success

As we noted at the start of this guide, adopting AI – including Copilot for Microsoft 365 – is not the same as the adoption of earlier innovations. Copilot offers a new way of operating as a business: a new way of working, a new way of working with data, a new way of serving customers, and competing. And this requires operational departments to rethink their processes and internal services. If approached simply as a new technology, you will gain advantages, but you will fail to get the full value or realize all the opportunities on offer.

Let's review the common challenges and pain points that need to be overcome.

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01

Lack of alignment, understanding, and goal agreement between business and IT

Copilot for Microsoft 365 is a business solution addressing business needs, but, AI, platforms, applications, and 'integration' are often seen as the domain of IT alone. This can lead to expectations (from the business) and metrics (set by IT) being misaligned, leading to a failure to meet often unspecified goals (demanded by senior leadership and staff).

Clear understanding and agreement on what you want to achieve from Copilot for Microsoft 365 (and potentially other Copilots) between leadership, staff, and IT before you begin your journey is key. This is the bedrock to determining the right IT metrics, business KPIs, dependencies for success, and ideal timescales to set expectations clearly and drive the maximum value from any investments. It is also key to understanding licensing requirements to manage costs and utilization.

Early adopter tip: Education is key. Address any misunderstandings about AI and be clear on what you want to achieve – and what needs to be done to achieve this – at an organizational and departmental level.

02

A need for operational and cultural change

63% of leaders recognize that their employees will need to learn new skills to make the most of generative AI[9]. But this is about more than training or reskilling. Mindset and cultural change are required to help people adapt to new ways of working and thinking about how they work, what they should work on, and to increase their awareness of new risks, methodologies, and processes.

While many employees are open to using AI, that they will use AI and use it to the best effect should not be assumed. Education, coaching, and constant review of use vs adoption should be built into any roadmap. Processes also need to be reconsidered. Copilot may be able to replace some processes and enable consolidation of others, but new processes may also be required to facilitate data management and governance.

Early adopter tip: Make the people using Copilot a core part of your deployment, adoption, and optimization process. Not only does this support employee buy-in, but it also helps foster culture change and ensures Copilot for Microsoft 365 is providing value the way your employees want and need it to.

9 https://www.forbes.com/sites/avanade/2024/02/06/generative-ai-in-the-workplace-5-takeaways-from-pioneers-in-microsoft-copilot-adoption/?sh=27a0f17b68f8

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03

Out of date data infrastructure

AI cannot function without access to data, but, in most enterprises, that data is spread across multiple platforms and silos, multi-format, poorly documented, and subject to a variety of governance, security, and access protocols. Copilot for 365 overcomes this challenge, in part through its integration with the Microsoft applications and the fact it is hosted alongside the data produced by using those applications in Microsoft Cloud. Many enterprises, however, will want to consider how they can incorporate data that resides on other platforms, and many users will want to use data from their Microsoft 365 applications in chat and other functions. Readiness for AI requires addressing this data challenge – and modernizing data management, processes, and governance. Delivering maximum value to employees rests on creating the right infrastructure for sharing data between Microsoft 365 applications and other applications your business may use, so Copilot can access all relevant data and provide more powerful, useful, and accurate outputs.

Early adopter tip: Get good content management practices and data governance in place first. Conduct detailed data audits and review your data processes to be sure all files are labeled correctly, and their access is managed in line with risk profiles, governance, and regulation.

04

Cyber security and governance

Following on from challenge three, if you will be using and serving up data in new ways, you need to be sure that your security and governance is keeping pace. What safeguards may need to be in place? What guardrails are required to ensure employees can't access or share (deliberately or inadvertently) data that could lead to a security or compliance breach?

What kinds of information might require new review and approval processes to prevent them from becoming part of the data set? For example, if an employee is using their company-owned device to create or share discriminatory or illegal materials, how do you ensure that doesn't influence the output of your AI? Getting good advice from experts who understand regulation, security, and the implication for AI is important as all aspects will need to be considered in concert.

Early adopter tip: Review your current Microsoft 365 licenses and security and governance controls. Copilot automatically inherits your organization's security, compliance, and privacy policies set in Microsoft 365 giving you a head start if these are in good order now.

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Power your Copilot revolution

01 The right partner

To address the challenges we've noted, especially given the breadth of skillsets required (and in short supply), the best path to success is with a partner who has Copilot experience and expertise.

Atos has a well-earned reputation for delivering complex transformations and being at the forefront of driving value from innovation – including AI. Building on our strategic alliance with Microsoft and more than 25 years of our teams' collaborating and co-innovating together, Atos experts in Microsoft Copilot provide a suite of services, proven methodologies, toolkits, and accelerators built on Microsoft technologies. They design, deploy, customize, and manage Copilot for Microsoft 365 across your organization. And our support goes beyond the technical aspect. Based on decades of delivering digital workplaces, we have the knowledge to facilitate and support the required cultural and operational changes so your business and employees gain the full value Copilot provides.

Atos Generative AI portfolio includes:

- Advisory services to guide you from strategy to execution and beyond
- Copilot adoption: Microsoft 365 Copilot, Security Copilot, GitHub Copilot
- AI ethics and governance development
- GenAI solution accelerators for customer experience, knowledge diffusion, process optimization, coding
- Marketplace offering on Microsoft 365 Copilot Readiness available today
- Embedded solutions including Incident Guru, Corporate IQ
- Generative AI platform

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02 Six steps to transforming with Copilot

Your team at Atos are with you every step of the way, whatever stage of your Copilot for Microsoft 365 journey you have reached, and whatever your level of maturity. Teams of Atos experts will take you through a measured approach, focusing on business value and risk reduction.

01 **Engagement**

A structured Advisory Workshop provides the foundation for understanding and developing your Copilot strategy and transformation, examining uses cases, personas, processes, and working through various scenarios. From this insight we can recommend how to ready your organization for Copilot and address data not held in Microsoft Cloud so your next steps are clear.

02 **Assessment**

We will thoroughly review your organization for Just Enough Access (JEA) and your data and regulatory posture to identify, and plan how to address, any gaps.

03 **Envision**

We review your technical readiness, including licensing requirements, and develop a roadmap for resolving any issues identified, while we showcase Copilot for Microsoft 365 and incorporate user input and experience to identify the high value use cases for your organization and assess business readiness.

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04 Build

Alongside your teams, we will deploy and enable Copilot for Microsoft 365 and Microsoft Graph or Microsoft Graph API's where required, implementing the remediation identified in the earlier stages and setting permissions for users who will be provided with licenses.

Microsoft Graph

Microsoft Graph is already familiar to teams running Microsoft 365. It provides the gateway to 365 application, user data, and intelligence, enabling users to bring data from their 365 applications into chat and other functions. With pre-built or custom Microsoft Graph connectors in place, users can also access data and intelligence from external services by making this data accessible to Copilot for Microsoft 365 via Microsoft Graph.

05 Grow

Now, you have Copilot in place, but the real work is just beginning. We support your adoption and organizational change management, providing training, establishing a Center of Excellence for Copilot, and establishing a Champions Program to capture learning, experiences, and best practices.

We will also deploy Graph Connectors, Copilot 365 plugins, and customizations as identified during our assessment phases and roadmap design. These expand the reach of Copilot across your organization, removing silos, enabling wider collaboration, and delivering more powerful and valuable insights and information to users. And you can adopt tools such as Atos Expert Finder, which intuitively maps document content to its creators, connecting users directly with the minds behind the data, information, knowledge, and insight.

06 Evolve

Once your Copilot for Microsoft 365 environment is in place, we continue to provide technical and user support. Our teams monitor use and identify trends to help continue to improve and nurture effective adoption and drive continuous increase in value for your organization and its people.

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03 Copilot licensing and expansion

As part of the assessment and roadmap development, we examine the licensing requirement for your roll-out in detail, so you don't over or under subscribe and can scale up over time at a speed that matches your needs and user maturity.

Your employees may already have some familiarity with Copilot through Microsoft Edge enabled internet searches and the Copilot Preview icon on their taskbars. However, while useful, the free Edge and Preview versions of Copilot do not provide AI capabilities within their Microsoft 365 applications.

Microsoft Copilot for Microsoft 365 is an 'add-on', meaning you need to have certain licensing agreements in place as a pre-requisite to adoption. Users need a valid Microsoft 365 E3 or E5 license and the applications running. Users also require a Microsoft Entra ID (formerly Azure Active Directory) account and may require a OneDrive account and WebSocket connection for their devices. They should be working with the new Outlook for Copilot to work across their email.

Microsoft has removed a requirement for a minimal number of licenses or seats, making Copilot now available to smaller businesses and all the way up to global enterprises.

There are also a range of smaller pre-requisites and license-related requirements that may need consideration, depending on your Microsoft 365 maturity, the use cases, and users involved. Our consultants will work with you and your users to ensure all these are in place and licensing and adoption matches the pace of your roll-out. We recommend an approach that starts with smaller groups and expands over time to aid cultural change and learn what works best for your organization and users. This also ensures your licensing costs and requirements are carefully managed as you scale up your use.

Atos and Microsoft: a strategic partnership

Atos and Microsoft have been partners for over 20 years, helping our mutual customers achieve even greater benefits from world-class software based on the M365 Suite.

1.7 m
users in Microsoft 365

1 m
Skype/Teams users

2 m
mailboxes

3,400+
certifications

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Customer reference: Global investment firm

Atos's implementation of Copilot for Microsoft 365 at global investment firm has enabled access to LLM (Large Language Model) technology and Generative AI (GenAI) capabilities; delivering significant productivity benefits to the client when working with business data held across their Microsoft Graph and beyond.

Substantial analysis was undertaken to identify the implications of Copilot for Microsoft 365 adoption in the specific business operating environment of the company and to determine optimum mechanisms of control across data governance, security, compliance, and integration. The increased user engagement and exploration of new tools within Microsoft 365 highlight the transformative impact of Copilot.

The client is now in a stronger position to capitalize on AI advancements, with a clearer understanding of AI's relationship with their data processes, and enhanced capabilities that will continue to drive their success in years to come.

The benefits included:

Wide adoption of new tools and features across Microsoft 365.

Faster, better access to information and greater efficiency when compiling related data from disparate sources.

Renewed engagement and productivity amongst employees using Microsoft 365 tools, driving better overall business outcomes.

Strengthened control over data processes and identity access management, reducing risks of unauthorized access and data breaches.

Improved understanding of how Microsoft Purview can aid with compliance and regulatory management.

Atos and Microsoft: reimaging business and work through Copilot for Microsoft 365

Ours is not a partnership in name only. We have people from Atos and Microsoft working together at every level of our organizations with one goal in mind – to help businesses transform better and securely. Atos is already serving and supporting more than 1.7 million Microsoft 365 users, and our teams have already helped many customers realize the powerful value Copilot for 365 can deliver today.

Atos is a Microsoft JumpStart Program Partner for Copilot, an exclusive membership that recognizes our skill set and proven record.

And our teams hold over

4,300 Microsoft certifications

12 Microsoft Specializations, and have extensive experience with Microsoft

Microsoft 365 tenant readiness and governance – so you know you're in safe hands with us

Learn more about how we have helped organizations like yours successfully adopt Copilot and the benefits they have realized in our paper **"Transforming your Digital Workplace"** or visit our **website**.

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Atos

Atos is a global leader in digital transformation with c. 105,000 employees and annual revenue of c. €11 billion. European number one in cybersecurity, cloud, and high-performance computing, the Group provides tailored end-to-end solutions for all industries in 69 countries. A pioneer in decarbonization services and products, Atos is committed to a secure and decarbonized digital for its clients. Atos is a SE (Societas Europaea) and listed on Euronext Paris.

The purpose of Atos is to help design the future of the information space. Its expertise and services support the development of knowledge, education, and research in a multicultural approach and contribute to the development of scientific and technological excellence. Across the world, the Group enables its customers and employees, and members of societies at large, to live, work, and develop sustainably, in a safe and secure information space.

About Atos Tech Foundations

Tech Foundations is the Atos Group business line leading in managed services, focusing on hybrid cloud infrastructure, employee experience, and technology services, through decarbonized, automated, and AI-enabled solutions. Its 52,000 employees advance what matters to the world's businesses, institutions, and communities. It is present in 69 countries, with an annual revenue of €6 billion.

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