

# Boosting Productivity with Atos for GenAI



Atos



Microsoft

# Introduction

**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.

- ➔ **Adoption of new tools and features across Microsoft 365**, such as meeting summaries and transcriptions, content creation, data analysis, and output refinement for both tone and style.
- ➔ **Successful integration of content** throughout the organization of Microsoft Graph, resulting in more expedient 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 as the result of adoption of Copilot for Microsoft 365.
- ➔ **Improved understanding of how Microsoft Purview can aid with compliance** with regulatory requirements, in addition to ensuring critical data residency and processing requirements are met from inception.



# From tradition to GenAI innovation: global investment firm's enhanced capabilities and productivity with Copilot for Microsoft 365

**Our client is one of the oldest mutual fund and asset management organizations globally. Celebrating a milestone anniversary during this engagement, this organization is proud of its long history of success and is looking forward to a future focused on innovation with technologies like Microsoft Copilot.**

Our client is a global investment firm that offers a wide range of products and strategies, including the Managed Wealth Fund, which seeks capital appreciation through diversified equity market investments. Widely acknowledged as a highly informed and skilled organization, they initially sought out Atos's specialist guidance to help the business make an informed decision about adoption of Microsoft's new Generative AI tool, Copilot. Interestingly, their initial motivation emerged not from their primary operational units but from their Client Services division, which supports all the firm's employees with necessary technological tools.

The client was not in the market for a prescribed solution but rather in need of the tools, data, and best practices needed to properly assess Copilot's relevance and impact on their operations.

**Which is why they turned to Atos who were already trusted advisors.**

# Boosting Productivity with Atos for GenAI



# Key implementation challenges for FSIs

As a financial services institution (FSI), the client needs to ensure robust security measures to protect sensitive information and comply with regulatory requirements. They operate two key divisions: fund management and customer interactions and in doing so, they must negotiate a balance between operational efficiency and strict data privacy to prevent conflicts of interest, including any insider trading. This demands a high level of control over data access and processing, with clear segregation between the fund management and customer interaction divisions.

Due to these stringent security and compliance requirements, implementing Copilot for Microsoft 365 posed a few specific challenges:

- #1 Data residency and processing:** The client needed assurance on where and how Copilot would store and process their data, given regulatory constraints on data location. They required clarity on whether their data would remain within acceptable geographic boundaries and comply with local regulations.
- #2 Shared service model:** The fact that Copilot operates as a shared service among Microsoft customers raised concerns about data isolation and security. The client needed guarantees that their sensitive information would be fully protected from potential breaches or unauthorized access in a shared service environment.
- #3 Data access and control:** Understanding precisely what data Copilot could access within the organization was crucial. They needed to ensure that Copilot would not inadvertently access highly confidential information or violate internal data segregation policies.
- #4 Data protection and security measures:** They required detailed information on the security measures and controls in place to protect their data, including encryption standards, access controls, and compliance with financial industry regulations.



## An advisory approach with close collaboration

To address these concerns, Atos worked closely with Microsoft to obtain detailed technical information and assurances. This collaborative effort involved leveraging Atos's strategic partnership with Microsoft to provide deeper insights into Microsoft's own data protection mechanisms than usual, ensuring that the client's specific needs were met. Atos was able to translate this information into a tailored set of guidance for them, helping them navigate the complexities of Copilot for Microsoft 365 implementation, while maintaining the utmost standard of data governance and compliance.

Atos adopted a structured approach to the client's GenAI journey, beginning with pre-engagement discussions and assessments, which laid the groundwork for a series of detailed workshops. These sessions, divided into "Art of the Possible," "Readiness, Security, and Compliance," and "Build the Plan," provided them with a comprehensive understanding of Copilot for Microsoft 365 capabilities and potential integration into their workflow.

Starting with a limited test environment, the client engaged stakeholders through well-defined phases that enabled them to ensure compliance and security, before finally expanding to broader production use – all while continuing to consider business value calculations.

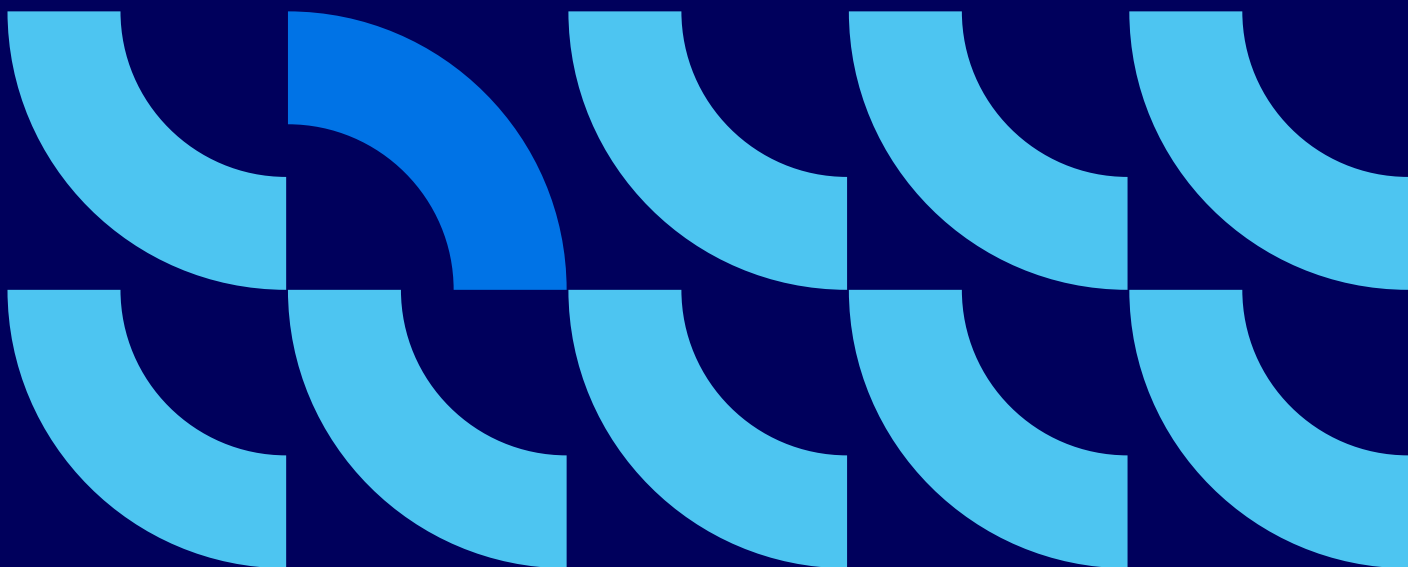


## Deep insights – and unexpected value

What set this engagement apart was the level of trust and confidence the client was able to place in Atos and its people. Atos not only has extensive, proven experience in the FSI sector, but is also among the first companies to develop a comprehensive GenAI strategy. This depth of understanding and an ability to address the client's questions in detail gave them the confidence needed to make the necessary decisions and chart the right path for their business.

The client found that preparing for Copilot for Microsoft 365 also highlighted other potential areas of improvement within their IT infrastructure. This included better data governance, streamlined access controls, and enhanced security measures – insights that they found invaluable beyond the scope of Copilot.

Ahead of the Copilot for Microsoft 365 implementation, the client realized that the necessary accommodations for GenAI would also drive overall better business practices. Along with improved security postures, cleaner data management, and more efficient operational processes, they are looking forward to further benefits Copilot will provide the organization.



## Business outcomes

The project culminated in a successful deployment of Copilot for Microsoft 365, starting with a test environment and gradually expanding to production users. The trust built during this process, along with the detailed, actionable insights provided, enabled the client to maximize the benefits of their initial deployments. This strategic approach has enabled them to make the most of their initial deployments and set themselves up for future success.



### Enhanced data governance:

The client has been able to further enhance their already robust data governance and security and bolstered their compliance posture, particularly through enhanced management capabilities within Microsoft Purview.



### Improved Integration:

Copilot's integration features have streamlined the merging of on-premises content, including NetApp storage, with Microsoft 365, improving data management and accessibility.



### Increased user engagement:

Copilot's deployment has increased user engagement at the organization, especially in Microsoft Teams and Word. Features like meeting summaries, transcriptions, and note-taking have been particularly valuable for the client, enhancing security and compliance in their operations.

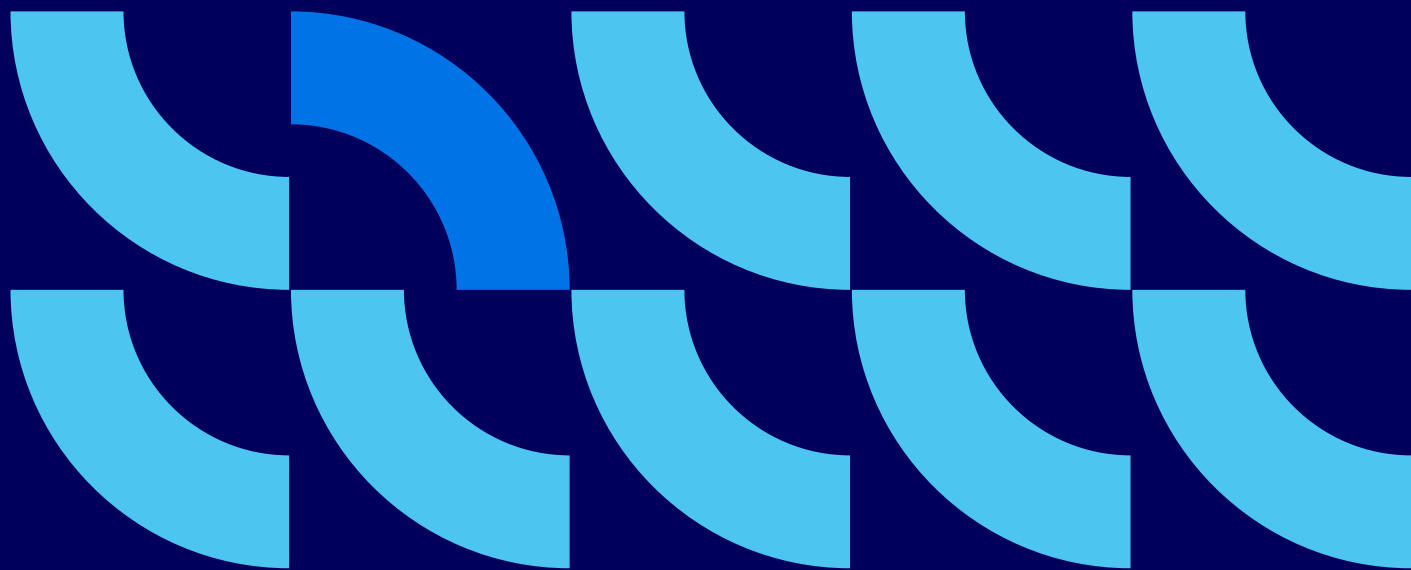


### Smoother adoption through user support:

Atos also provided invaluable preliminary support to the initial users in the form of tips and tricks, cheat sheets, and helpful guides to aid new users navigate their Copilot for Microsoft 365 adoption journey with more confidence.

## Future prospects

Looking ahead, the client plans to expand the use of Copilot to a broader user base, further enhancing their operational efficiency and user experience. They are also exploring additional applications, including Excel and PowerPoint, to leverage Copilot's capabilities for data analysis and presentation.





### About 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 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.

To learn more, visit: [www.atos.net](http://www.atos.net)



### Microsoft

Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

The Azure cloud platform supports more than 200 products and cloud services designed to help you bring new solutions to life – to solve today's challenges and create the future. Build, run, and manage applications across multiple clouds, on-premises, and at the edge, with the tools and frameworks of your choice.

To learn more, visit: [www.azure.microsoft.com](http://www.azure.microsoft.com)