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Getting the most out of your Microsoft 365 Copilot investment

Microsoft 365 Copilot has been one of the most rapidly adopted technologies in history, with nearly 70 percent of the Fortune 500 using it within a year of its introduction.[1] It seems few want to miss the artificial intelligence (AI) train.

There have been reports indicating that some companies are experiencing challenges in achieving a satisfactory return on their AI technology investments. This signal can discourage enterprise customers from investing in technologies such as Microsoft 365 Copilot as the UI for their AI, especially if they are seeking out of the box immediate value. A large factor in driving Copilot adoption across the entire organization, resides in increasing their employee's AI fluency. By overcoming this initial hesitancy of AI, customers are leveraging Copilot, combined with agents, to be an extremely powerful solution in unlocking and accelerating their AI transformation journey.

As with any transformative enterprise technology, there is no "easy button" to Copilot value. Essentials of a good technology adoption program simply cannot be skipped over. In their haste to adopt the technology, companies may have taken a fragmented approach to Copilot implementation or failed to estimate the required effort and investment. Their strategic goals and technology investments may be misaligned. There may be a lack of training for both developers and end users, inadequate standardized development and usage guidelines, or a lack of transparency into Copilot usage and therefore no way to even measure ROI.

More fundamentally, however, is that many organizations may see Copilot as the end unto itself—an assistant that helps write emails or take meeting notes, for example—rather than as a platform on which to build solutions that create value.

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1 "Ignite 2024: Why nearly 70% of the Fortune 500 now use Microsoft 365 Copilot," Frank X. Shaw, Microsoft, November 19, 2024.

The Copilot maturity model

Realizing ROI from Copilot is an evolutionary process. Among other things, organizations that have matured in their journey with Copilot are able to leverage Copilot agents more effectively. These AI-powered assistants allow businesses to customize Copilot to meet specific functional needs, creating value through business transformation, integrating with enterprise data sources, and enabling customization to align with unique workflows. There are five key milestones along the way:

1 **Base Copilot functionality:** At the start of the journey, companies may use only base, "out-of-the-box" Copilot functionality—to summarize documents, for example. No Copilot agents are involved. Many of the clients we work with today are at this initial stage, and so it's not surprising the value they realize is limited.

2 **Functional transformation:** Next, companies may use one of the prebuilt, function-specific agents offered by Microsoft, such as Copilot for Finance or Copilot for Sales, to enable more functional transformation and larger productivity gains.

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3 **Business Process Agents:** Here, businesses are developing declarative agents with Microsoft Copilot Studio to extend and tailor Copilot to their specific needs. For example, a Copilot agent could help employees conduct supplier market analysis and research based on a pre-defined supplier profile and characteristic. Here is where we start to see significant increases in productivity for certain tasks.

4 **Large-scale AI applications or agents:** At the next milestone, companies are developing fully autonomous agents. Such agents could, for example, automatically evaluate supplier contracts and then notify employees if further review is required. At this point, companies have started to fully transform their enterprise, achieving large scale cost savings, reductions in risk, or increases in revenue.

5 **Copilot as a platform:** The last milestone on the journey is to use Copilot as a platform, where multiple autonomous agents could work together to completely automate or enhance entire business processes or functions. For example, multiple agents could work together to reduce commercial leakage, where the first agent identifies leakage, the second triggers alerts to internal finance teams, and the third manages tracking issue resolution with the affected supplier.

Try these steps to help improve Microsoft 365 Copilot value

Through our work with many clients, we have identified five things you can do to prepare your organization to leverage Copilot agents and create value:

1 **Identify business value opportunities.** Identify value-based opportunities for Copilot agents aligned with your business strategy. Build a strategic digital and workforce transformation roadmap to help to increase the effectiveness and strategic fit of the Copilot solutions within your organization.

2 **Assess technical and data readiness.** Focus on deployment readiness and data landscape, and outline a robust deployment and readiness roadmap.

3 **Implement change and adoption management.** Empower users with an AI-first mindset. Train your teams on using Copilot and Copilot Studio. This will help establish wide-spread organizational knowledge of building and using function-specific Copilot solutions.

4 **Evaluate current and target state architectures for Copilot agent development.** With this foundation in place, you can then begin to create custom, thoughtfully integrated Copilot agents designed specifically to enhance productivity within your organization's functions and advance its business strategy.

5 **Establish a Copilot Center of Excellence (COE).** A COE, equipped with essential governance standards, guardrails, and value-driven usage guidelines and measurement mechanisms, will offer visibility into Copilot usage and assist in securely managing that usage in accordance with trusted AI practices. Additionally, it will aid in comprehending what constitutes effective Copilot use and in pinpointing opportunities to maximize return on investment (ROI).

The first three steps are necessary to set the stage and get you going, but these last two steps—developing custom, Copilot agents and establishing a Copilot COE—are where sustainable value should begin to appear. They become an enduring part of your organization and its culture—a "factory," if you will, that's designed to produce consistent value-based results.

Contact

Let us know if you have questions about Copilot ROI or want to know more. You can contact David Muir, Andrew Gemmell or Dominik Fiebig. We would be happy to continue the conversation.

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