

Copilot for Microsoft 365 Use Cases that Create Positive ROI

MEET OUR PRESENTERS



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Webinar Agenda

- Identify High-Impact Use Cases for Copilot
- Present your Business Case to Stakeholders
- Calculate Copilot for Microsoft 365 ROI
- Prepare Your Microsoft 365 Tenant





Anticipated impact of Generative AI on the global workforce

- Gen AI will create millions of new jobs in five years
- Gen AI is anticipated to increase productivity and efficiency, boosting the global economy
- According to a report by PWC, Gen AI is projected to increase global GDP by 14% by 2030
- 64% of business owners expect a positive impact of AI on their productivity¹
- Companies adopting AI could potentially double their cash flow by 2030, with a forecasted additional annual net cash-flow growth of about 6% for over a decade²



The Pace and Volume of Work Continues to Increase

64%

of employees don't have
enough time or energy
to do their job

3x

More meetings
than 2020

18

Searches
per day

Copilot for Microsoft 365 by the Numbers



70%

Said Copilot made them more productive



68%

Said Copilot improved the quality of work



77%

Didn't want to give up Copilot

Defining the Uses Cases



Identify Roles and Personas

- Roles are job functions or titles within an organization, such as Human Resources Manager or Marketing Specialist.
- Personas represent the behavior patterns, goals, frustrations, and motivations of a group of users.
- Roles are focused on an employee's job function, while personas are focused on the characteristics of users.
- Identifying roles and personas within an organization can help tailor products and services to better meet the needs of customers and employees.

Copilot brings AI to everyone. Support roles like...

Executive

CEO
CIO
CMO
GM
President
Sr Manager
Team Leader

HR

Employment Specialist
HR Assistant
Recruiter
Labor Relations
Payroll Specialist
Learning Lead

Operations

Operations Analyst
Operations Manager
Quality Control Lead

Sales

Account Executive
Quality analyst
Onboarding Specialist
Sales Associate
Sales Engineer
Sales Representative

Marketing

Brand Manager
Content Strategist
Creative Director
Graphic Designer
Market Researcher
Product Marketing Manager

Finance

Accountant
Financial Analyst
Finance Manager
Investment Manager
Financial Advisor
Risk Specialist

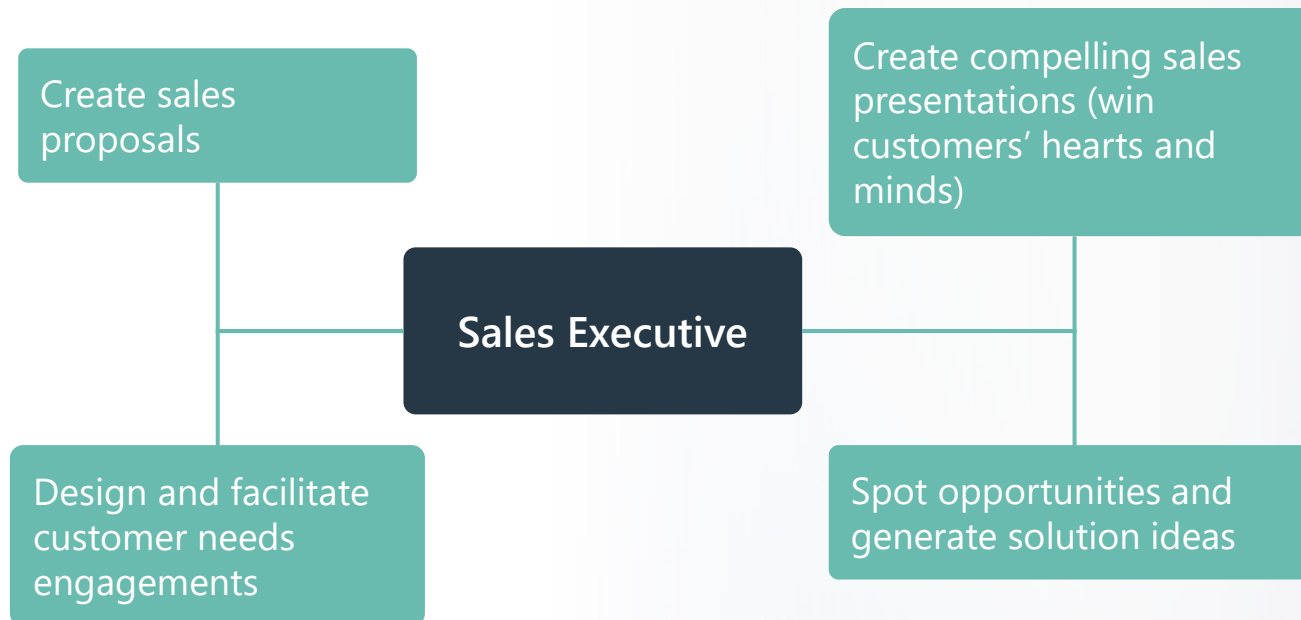
IT

Cybersecurity Analyst
Help desk Support
Hardware Technician
IT Project Manager
Network Administrator
Software Developer

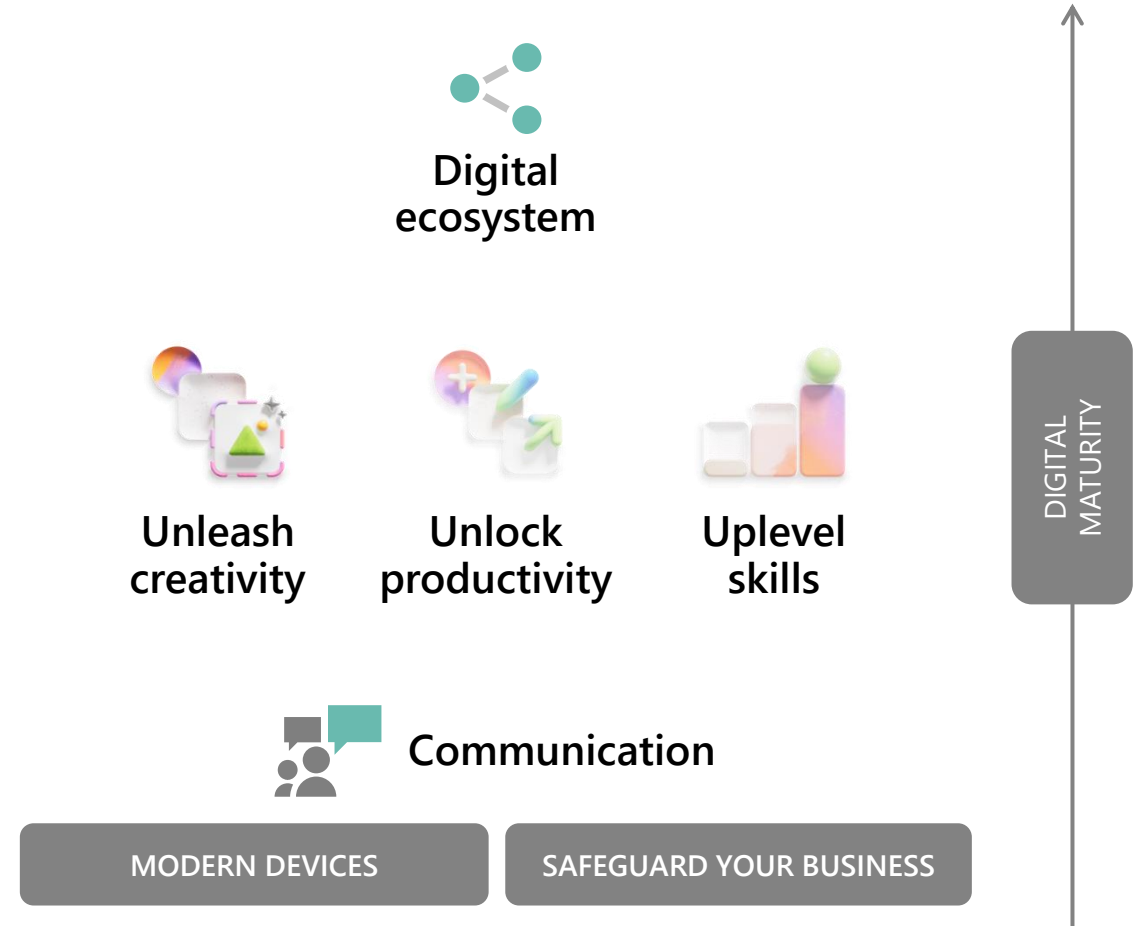
Identify the WHAT

Example: Sales persona key jobs

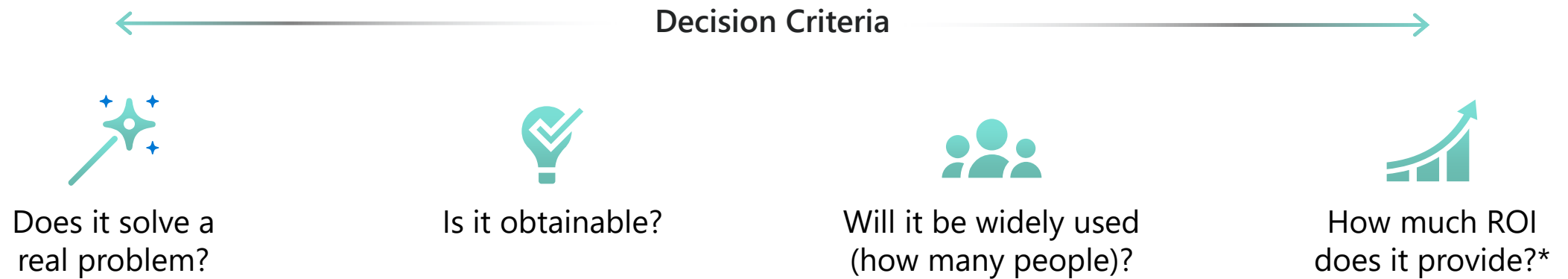
What are some of the key jobs you need to get done to meet your sales quota?



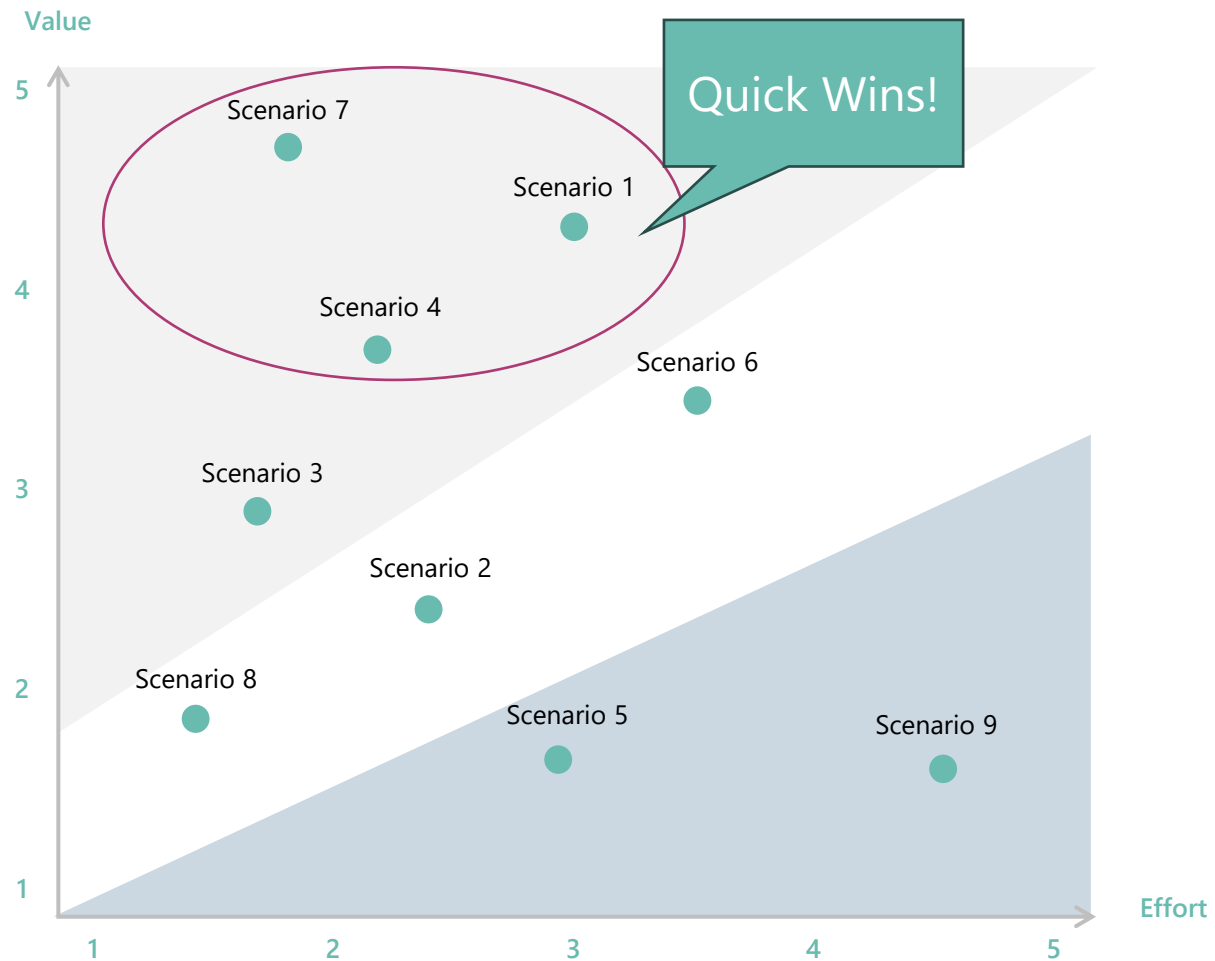
Your BIG Why – What's your goal?



How to choose a scenario



Scenario Prioritization Matrix





Scenario Card #1

The purpose of this meeting is to

- Brief description of the problem you're trying to solve and a summary of the solution.

Stakeholder

- Who is the sponsor who will benefit from and champion this solution?

Users

- List all potential users of this solution (roles and levels).

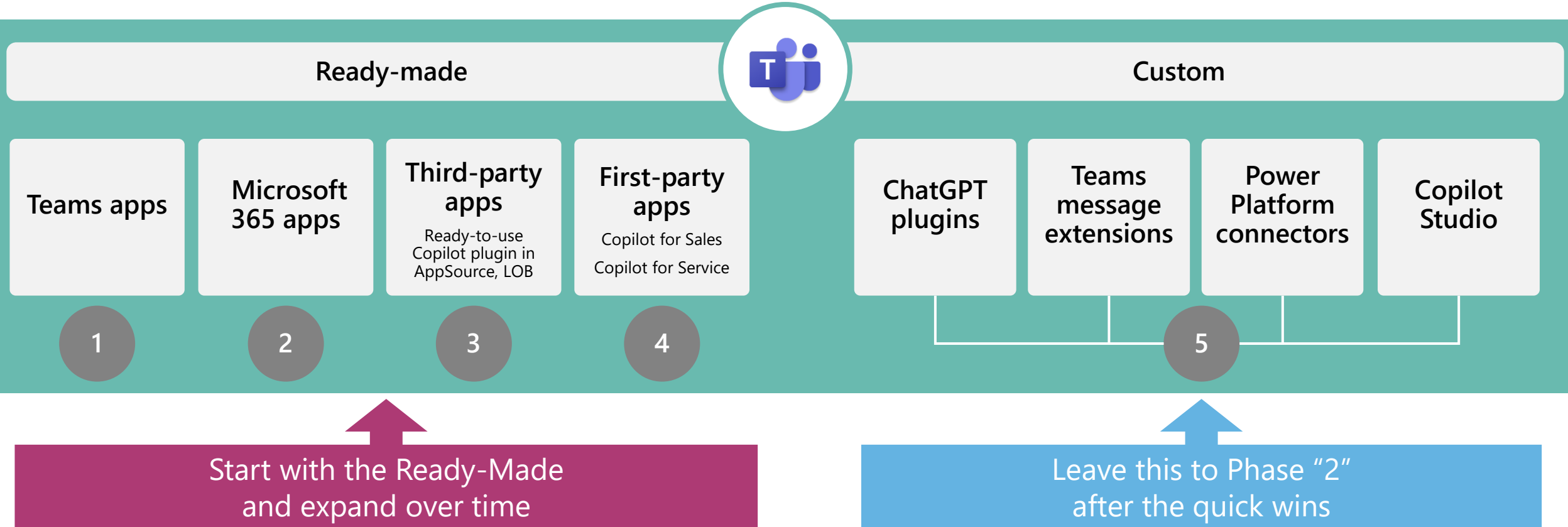
Value

- What do you expect as a ROI?



Use solution building blocks

There are many apps that can help your employees, and one way to think about the apps that you can surface for your workers falls into one of five building blocks.





Common Business Use Cases that Copilot can Tackle

Common Business Use Cases



Compliance

Use Cases

- Automate Compliance Reporting
- Document Audit Preparation
- Compliance Training

Example Prompts

- Generate a compliance status report for Board of Directors for the last quarter using the data from this [export file]
- Generate a checklist for our upcoming audit [meeting name] with the following [compliance document]
- Suggest an outline for a recurring compliance training session for [Business Unit]



Sales

Use Cases

- Sales Data Analysis & Reporting
- Sales Proposal & Doc Automation
- Efficient Client Communication

Example Prompts

- Provide me with a bulleted list of notes from my emails mentioning [Client Name] over the last two weeks.
- Generate a sales performance report for the last quarter using the following [Documents]
- Draft a sales proposal for [Client Name] using the [Template x] and meeting notes from [Meeting Name].



Human Resources

Use Cases

- Employee Onboarding Automation
- Hiring Workflow
- Employee Performance Reviews

Example Prompts

- Create an onboarding plan for new hires in [X department] based on the [Documents].
- Create a job description for a [XYZ Role], based on the [PDQ document].
- Draft an employee performance review using the meeting notes provided.



Finance

Use Cases

- Financial Forecasting & Analysis
- Budget Management
- Regulatory Compliance & Reporting

Example Prompts

- Generate a financial forecast for the next fiscal year using historical data from [Documents].
- Set up a new budget tracking system for the upcoming project.
- Summarize the information in [financial data, operations analysis, integration plan.]



More Common Use Cases



Operations

Use Cases

- Inventory Management
- Process Optimization
- Supply Chain Coordination

Example Prompts

- Analyze the trends in our inventory of [product x] and provide insights.
- Create a presentation on current operational processes outlined in [document].
- Suggest attendees for a coordination meeting with key supply chain partners and draft an agenda.



C-Suite

Use Cases

- Strategic Decision Support
- Corporate Communication Enhancement
- Leadership Development & Training

Example Prompts

- Analyze the [Current financial report] data to prepare for strategic planning session.
- Draft an email update on company performance for stakeholders.
- Develop a leadership training presentation for upper management based on [Leadership Expert's] style.



Information Technology

Use Cases

- Create a Project Plan for a new implementation
- Identify risks for an upcoming cutover
- Documentation & Knowledge Base Management

Example Prompts

- Create a project plan based on [Meeting notes]
- Identify the potential and impact and risks for [Cutover Event].
- Draft a knowledge base article on new software installation procedures for [Software X]



Project Management

Use Cases

- Project Planning & Tracking
- Risk Management
- Stakeholder Communication

Example Prompts

- Set up a [project X] timeline using Gantt chart features.
- Prepare a risk assessment presentation for the upcoming [project x] review.
- Draft an update email to stakeholders about [project X] progress.



Calculate the ROI and Make the Case for Adoption



Copilot for Microsoft 365 Requirements

\$30 per user per month

Available as an add-on to:

- Microsoft 365 E3, E5, F3
- Microsoft 365 Business Premium
- Business Standard

Purchase through a Microsoft CSP partner

Licensing is paid annually

No monthly payment option is currently offered

A lighter version of Copilot called Copilot Pro is \$20 per user per month

	For Individuals		For Organizations
	Copilot Free	Copilot Pro \$20	Copilot for Microsoft 365 \$30
Foundational Capabilities	•	•	•
Web Grounding	•	•	•
Commercial Data Protection	•	•	•
Priority Model Access		•	•
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		•	•
Copilot in Teams			•
Microsoft Graph Grounding			•
Enterprise-Grade Data Protection			•
Customization		Copilot GPT Builder	Copilot Studio



Calculate the ROI of Copilot for Microsoft 365

(⚠ WARNING MATH REQUIRED ⚠)

1. Calculate the Daily Value of Time Saved

First, determine the hourly rate in dollars of the user:

- The user earns **\$18 per hour**.

Since the user **saves 14 minutes per day** by using Copilot, calculate the value of this saved time:

- Convert the saved time from minutes to hours:
- $14 \text{ minutes} / 60 \text{ minutes per hour} \approx \mathbf{0.2333 \text{ hours}}$.

Calculate the monetary value of saved time per day:

- $0.2333 \text{ hours} \times \$18/\text{hour} = \mathbf{\$4.20}$.

2. Calculate the Monthly Value of Time Saved

To find the monthly savings, consider the number of working days per month.

- Assuming an average of 22 working days per month:
- Monthly value of time saved: $\$4.20 \times 22 \text{ days} = \mathbf{\$92.40}$

3. Calculate the Net Savings Per Month

Subtract the cost of Copilot from the monthly value of the time saved:

- Cost of Copilot: \$30/month.
- Net savings: $\$92.40 - \$30 = \mathbf{\$62.40}$

4. Calculate the Return on Investment (ROI)

ROI is calculated by comparing the gain from the investment to the cost of the investment, expressed as a percentage:

- ROI formula: $(\text{Net Profit} / \text{Cost of Investment}) \times 100\%$
- Using the figures calculated:
 $(\$62.40 / \$30) \times 100\% = \mathbf{208\%}$

This ROI indicates that for every dollar spent on Copilot for Microsoft 365, the return is \$2.08 after considering the cost of the tool.



ROI the Way – ProArch ROI Calculator

MINUTES SAVED PER DAY:

14



¹ According to Microsoft, users of Copilot for M365 report an average daily time savings of 14 minutes or about 1.2 hours per week. Additionally, 22% of users said they save more than 30 minutes daily using Copilot for M365.

HOURLY RATE (\$):

NUMBER OF EMPLOYEES:

COPILOT COST PER MONTH (\$):

30

Calculate

Result

ROI

NaN%

Breakeven Months

N/A

Total Yearly Savings

\$ NaN

Total Monthly Savings

\$ NaN

Net Monthly Savings

\$ NaN

Making the Business Case



Summarize the Key Benefits of Copilot

- Highlight the top benefits of implementing Copilot for M365. Make it relevant to your organization
- Use bullet points for clarity:
 - Increased efficiency
 - Cost savings
 - Better data utilization
 - Enhanced collaboration.
- Metrics on productivity or cost metrics before and after the implementation of similar technologies.

Detailed ROI Analysis

- Present a detailed breakdown of the ROI calculation introduced earlier.
- Include a table or chart that itemizes costs vs. benefits over time.
- Highlight when the break-even point is expected to be reached



Case Studies and Testimonials

- Share case studies from other organizations that have successfully implemented Copilot for M365.
- Include quotes or testimonials highlighting the positive outcomes.
- Optionally, show a short video clip or testimonial from a satisfied user or decision-maker.



[Microsoft Work Trend Index: What can Copilot's Earliest Users Teach Us About Generative AI at Work?:](#) Microsoft, 15 November 2023

[Work trend Index Annual Report: Will AI Fix Work?:](#) Microsoft, 9 May 2023

[Telstra: Telstra](#), a major telecommunications and technology company, saw significant efficiency gains in customer service through the implementation of Copilot

[Providence Health Services:](#) At Providence, a healthcare organization in the U.S., Copilot was implemented to manage overwhelming communication volumes in clinics

Implementation Strategy

1. Outline the steps for rolling out Copilot for M365 within the organization.
2. Include timelines, key milestones, and resource allocation.
3. Discuss any training or support that will be provided to employees.

OR

Talk to ProArch about our
“Copilot for Microsoft 365 Readiness Engagement”



Prepare Your Microsoft 365 Tenant

Assess Organizational Readiness



Evaluate Current Tech Infrastructure: Ensure that your current systems, especially your Microsoft 365 environment, are up to date and capable of integrating with Copilot.



Identify Key Stakeholders: Gather a team from IT, operations, and the departments most likely to use Copilot, such as marketing or customer service.



Define Goals and KPIs: What does success look like? Set clear, measurable goals for how Copilot will enhance productivity or streamline workflows.

Adoption Phases



Understand what Copilot is, the potential uses case, and business value



Ensure that the Microsoft 365 (graph) data estate is properly secured



Find gaps in data governance and remediate them *before* a broader Microsoft 365 Copilot deployment



Optimize costs to “right-size” licensing needs for the use of Microsoft 365 Copilot



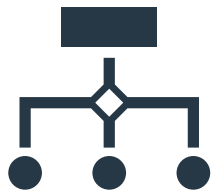
Provide a strong foundation for training end-users on the use of Copilot



Develop an internal use policy for Microsoft 365 Copilot and Generative AI



Plan and Design the Implementation



Select Pilot Departments

Choose one or two departments for initial rollout to monitor effectiveness and gather feedback.



Develop Training Programs

Tailor training sessions to the specific needs and tech proficiency of the intended users to maximize adoption and ease of use.



Create a Support Structure

Establish a helpdesk or support team specifically trained in Copilot functionalities to assist users during and after deployment.

Implement and Monitor

- **Phased Rollout:** Start with pilot departments and scale up based on the success and learning from the initial phase.
- **Collect Data and Feedback:** Regularly collect user feedback and monitor performance against the pre-defined KPIs.
- **Iterate and Improve:** Use the insights gained from the pilot phase to refine Copilot usage, address any issues, and expand capabilities as needed for wider deployment.





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