



VELOSIO CASE STUDY:

Navigating with Copilot

Construction Equipment Services Organization Enhances Productivity and Efficiency with Microsoft 365 Copilot

OVERVIEW

Software Solutions:

- Microsoft Copilot

Challenges:

- Inefficient meeting management, data analysis, and document creation
- Constrained data insights

Benefits:

- Increased productivity
- Better data insights
- Smooth integration
- Custom chatbots
- Improved data security

Background

In October 2024, a construction equipment services organization joined Velosio's Microsoft Copilot workshop, where they explored features like automated meeting summaries, PowerPoint creation, and chatbot development with Copilot Studio. Impressed by its capabilities, they implemented Copilot across their organization, focusing on meeting management, data analysis, and document creation.

Meeting summaries and action items generated by Copilot now populate OneNote, improving accessibility and follow-up. They also leveraged Copilot in Excel for data analysis, leading to informed financial decisions that positively impacted their bottom line.

The organization noted that Copilot effectively addressed:

- **Meeting and Document Summaries:** This will allow departmental heads to quickly get executives up to speed by summarizing Teams meetings, email threads, Word documents, and more.
- **Presentation Creation:** Faster, consistent PowerPoint production with branded templates and image generation.
- **Custom Chatbots:** Quick access to training materials and technical documentation.



Key Benefits

The organization has embraced Microsoft 365 Copilot to enhance productivity and efficiency. This AI-powered tool assists in drafting, summarizing, and analyzing data across Microsoft applications like Word, Excel, PowerPoint, and Teams, supporting their commitment to leveraging technology for streamlined workflows and improved performance, and delivering:

- ✓ **Increased Productivity:** Copilot automates tasks like drafting emails, summarizing threads, and creating meeting recaps, freeing employees to focus on strategic activities.
- ✓ **Better Data Insights:** Copilot helps analyze financial data by creating pivot tables and graphs, enabling data-driven decisions.
- ✓ **Smooth Integration:** With seamless integration across Microsoft 365 apps, Copilot boosts collaboration and consistency.
- ✓ **Custom Chatbots:** Using Copilot Studio, the organization can develop chatbots for quick access to HR policies and technical guides.
- ✓ **Improved Data Security:** Copilot ensures data security by isolating business information from its language model, protecting sensitive documents.

Microsoft 365 Copilot has transformed the organization's workflows, enhancing productivity, collaboration, and decision-making, underscoring the potential of AI in the modern workplace.



Velosio[®]

☎ 888.725.2555

✉ insider@velosio.com

📍 5747 Perimeter Dr., Suite 200, Dublin, OH 43017

🌐 www.velosio.com