



VELOSIO CASE STUDY:

Navigating with Copilot

Global IT Leader Boosts Productivity and Streamlines Operations with Microsoft 365 Copilot

OVERVIEW

Software Solutions:

- Microsoft Copilot

Challenges:

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

Benefits:

- Time Savings
- Informed Decisions
- Integrated Experience
- Custom Chatbots
- Ensured Data Security

Background

The ability to adapt and innovate in the rapidly evolving industry is crucial for a global IT leader.

In October 2024, the organization attended a Copilot workshop with Velosio to explore features like automated meeting summaries, data analytics, and chatbot creation. Inspired by the session, they decided to implement Copilot to optimize meeting management, data analysis, and document creation.

Key Benefits

Microsoft 365 Copilot helps the IT leader boost productivity and streamline operations. This AI-powered tool assists in document creation, data analysis, and task automation across Microsoft apps like Word, Excel, and Teams—reinforcing their commitment to innovative, efficient solutions.

Meeting summaries and action items generated by Copilot are now accessible in OneNote, improving follow-ups and transparency.

Copilot’s Excel capabilities enabled the organization to identify financial trends, helping them make data-driven decisions that positively impacted their bottom line. Additionally, the team established a dedicated Teams channel to share Copilot tips and updates, fostering user adoption and encouraging skill development.



Additional benefits include:

- ✓ **Time Savings:** Copilot automates routine tasks like email drafting, meeting summaries, and task reminders, freeing up time for strategic work.
- ✓ **Informed Decisions:** Using Excel's data insights, Copilot helps users analyze financial trends, providing a strong basis for decision-making.
- ✓ **Integrated Experience:** Copilot's seamless integration across Microsoft 365 apps enhances collaboration and user experience.
- ✓ **Custom Chatbots:** With Copilot Studio, the organization built chatbots for quick access to HR, technical, and policy information, reducing search time.
- ✓ **Data Security:** Copilot ensures data security by keeping business data private and protected, giving them peace of mind.
- ✓ **Usage Tracking:** Copilot's insights into user activity helped them optimize license allocation
- ✓ **User Engagement:** Velosio's guidance on reminders and email templates encouraged the team to maximize Copilot's potential.

Microsoft 365 Copilot has been a game-changer for the global IT leader, enhancing productivity, fostering collaboration, and providing data-driven insights. This success showcases the power of AI in modernizing workflows and optimizing team performance.



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