



VELOSIO CASE STUDY:

Navigating with Copilot

Industrial Supply Organization Improves Productivity and Streamlines Workflows with Microsoft 365 Copilot

OVERVIEW

Software Solutions:

- Microsoft Copilot

Challenges:

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

Benefits:

- Enhanced productivity
- Data-Driven decisions
- Integrated experience
- Custom chatbots

Background

In October 2024, an Industrial Supply organization attended a Copilot workshop by Velosio to explore its features, including meeting summaries, PowerPoint creation, and chatbots. Following the workshop, they deployed Copilot for meeting management, data analysis, and document creation. Meeting summaries and action items generated with Copilot improved accessibility and follow-up, while data insights from Excel analyses helped them make key financial decisions.

Microsoft 365 Copilot improves productivity and streamlines workflows for the industrial organization. Copilot aids in document drafting, content summarization, presentation generation, and data analysis across Microsoft 365 apps, reinforcing their commitment to operational efficiency.



Key Benefits

Microsoft 365 Copilot has been transformative for the organization, simplifying workflows and supporting productivity, collaboration, and data-driven insights—demonstrating the impact of AI in the workplace. It also:

- ✔ **Enhanced Productivity:** Copilot automates routine tasks, allowing employees to focus on strategic initiatives.
- ✔ **Supports Data-Driven Decisions:** Copilot's analytical tools help make informed financial decisions.
- ✔ **Integrated Experience:** Copilot's seamless functionality across Microsoft 365 apps strengthens communication and collaboration.
- ✔ **Custom Chatbots:** Using Copilot Studio, users can create chatbots for quick access to HR and technical information.
- ✔ **Email Drafting:** Creating and editing emails to ensure content and tone are what the user is intending to convey.
- ✔ **Inbox Thread Summarization:** Time-saving and concise summaries of long email threads will provide users with need-to-know items and cut clutter.
- ✔ **Data Security:** Copilot's secure data governance policy protects sensitive business information.



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