

October 28, 2025

# From Chaos to Copilot: Harnessing AI in Microsoft 365

A journey from *Chaos* to *Confidence* through Clarity and Control



---

# Today's Presenters



**Gina Montgomery**

Director of AI, Automation &  
Analytics



**Michael Pacifico**

Sr. AI Solution Architect



From Chaos to Copilot

# Today's Takeaways

## Generative AI

*Clarity* – See how Copilot turns everyday work into clear, efficient workflows.

## Agentic AI

*Control* – Discover how Copilot Studio Agents automate and orchestrate simple and complex tasks.

## M365 Copilot Adoption

*Confidence* – Learn how structured adoption builds sustainable success.





M365 Copilot + Copilot Studio

# From Chaos to Copilot – The 4 C's

The AI explosion feels chaotic, but Copilot gives it context and structure!

## Chaos

Everyone's experimenting with AI without direction. Tools are fragmented and overwhelming.

## Clarity

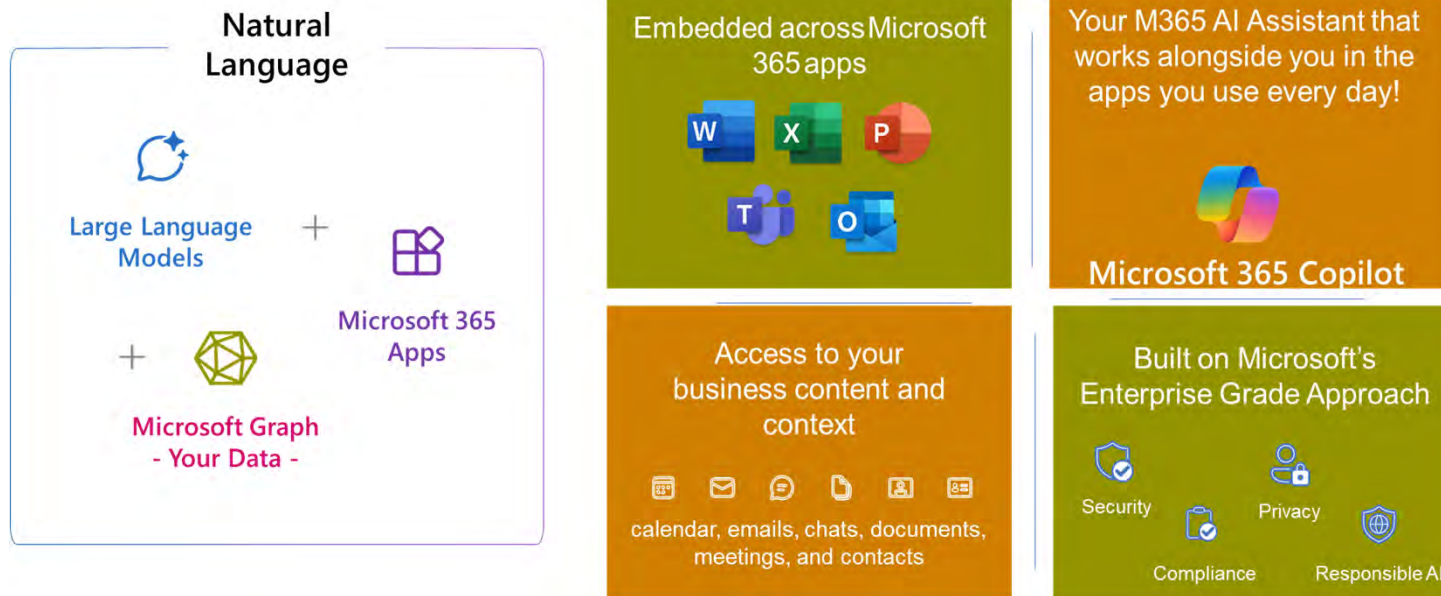
Copilot integrates AI directly into your daily flow of work and organizes information.

## Control

Agents coordinate tasks, enforce consistency, and scale across the enterprise.

## Confidence

Structured adoption ensures AI success is measurable, repeatable, and sustainable.



## AI is everywhere, but value feels scattered

- Employees experiment without structure
- Leaders feel pressure to “do AI” without a plan
- Productivity gains are unclear

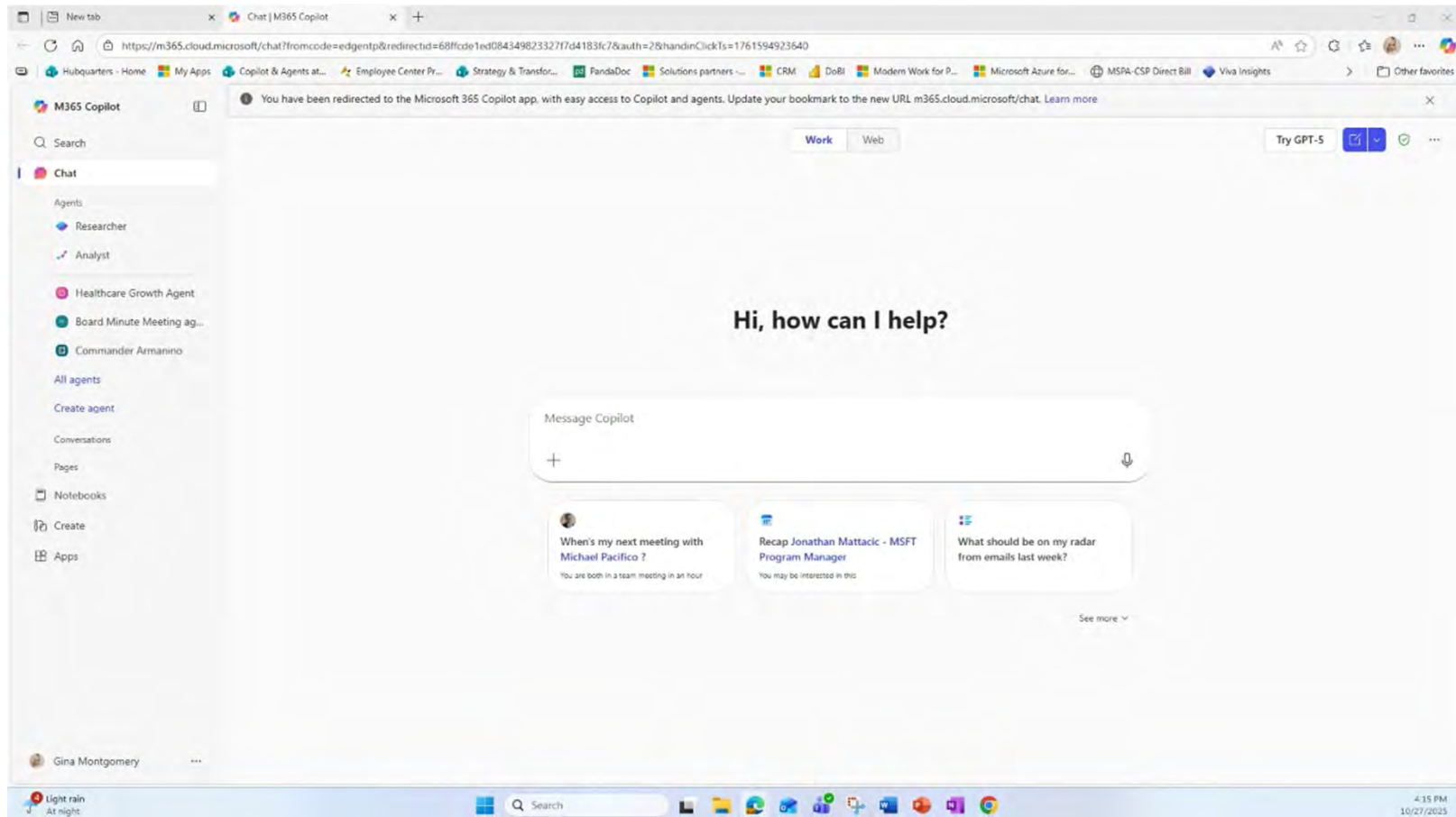
## Copilot brings order to the AI chaos

- 10 Works where employees already are inside Microsoft 365
- 10 Turns prompts into plans and context into action
- 10 Moves teams from experimentation to enablement



A Day in the Life with M365 Copilot  
Demo

# A Day in the Life: From Overload to Orchestration





# The AI Shift: From Generative to Agentic

	Generative AI	Agentic AI
What it does	Creates content and insights when prompted	Understands goals and takes action toward them
Role	Brainstorm partner	Digital coworker
Examples	Drafting emails, summarizing meetings, creating slides	Coordinating follow-ups, managing data workflows, escalating decisions
Outcome	Faster creation	Smarter execution

Generative AI thinks with you. Agentic AI works for you.



# Becoming Frontier: The Next Era of Work with Copilot

## What “Frontier” Means

- The next evolution of Copilot experiences inside Microsoft 365
- Blends **advanced reasoning models** (like GPT-5 and Anthropic Claude) with **enterprise data protection**
- Introduces **Office Agent** and **Agent Mode** for deep automation in Word and Excel
- Adds a unified **Copilot Control System** for governance, analytics, and security
- Enables organizations to build their own **custom agents** with Copilot Studio and Azure AI Foundry



# What Are Copilot Agents?

Agent Type	What It Does	Example
Knowledge Harnessing	Finds and summarizes key information across Microsoft 365 and connected sources	A research agent gathers insights for a proposal from Teams, SharePoint, and Outlook
Task-Based	Executes multi-step workflows and coordinates tasks across apps	A finance agent reconciles data and drafts a report
Autonomous	Acts on goals with minimal input, guided by governance and policies	A project agent tracks milestones and updates stakeholders automatically

Copilot helps people work smarter. Agents help the entire organization work for them.



Agents in Action: From Insight to Impact

# Demo

Chat | M365 Copilot

Work Web Try GPT-5

M365 Copilot

- Search
- Chat
- Agents
- Conversations
- Pages
- Notebooks
- Create
- Apps
- Admin

# Welcome Michael, how can I help?

Message Copilot

+ Tools

- List key points from Case\_Study\_Financial\_Services.d...  
You edited
- Analyze this text and make suggestions on how to improve...
- Show me all the unread emails from person, along with their...

See more

MP Michael Pacifico

Chat | M365 Copilot

Work Web Try GPT-5

# Welcome Michael, how can I help?

Message Copilot

+ Tools

- List key points from Case\_Study\_Financial\_Services.d...  
You edited
- Analyze this text and make suggestions on how to improve...
- Show me all the unread emails from person, along with their...

See more

MP Michael Pacifico



M365 Copilot

# So, how do we get started?



## From Demo to Deployment: Building Your Copilot Adoption Plan

# A Structured Approach is a Successful Approach





ARMANINO  
Microsoft 365 Copilot Adoption Accelerator

# Adoption Program



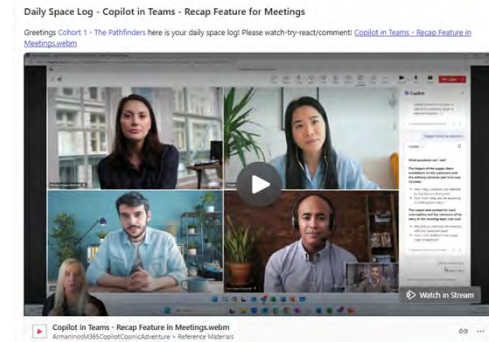
## Prep & Plan

- Define program structure
- Plan Training Content
- Design baseline and weekly survey forms
- Design a theme
- Record training videos
- Schedule content release & weekly sessions

## Theme



## Snackable Training/Prompts



## Weekly Communication Schedule

Day	Time	Activity	Status
Monday	9:00 AM	Weekly Survey	Completed
Monday	10:00 AM	Training Session	Completed
Monday	11:00 AM	Office Hours	Completed
Monday	12:00 PM	Lunch	Completed
Monday	1:00 PM	Training Session	Completed
Monday	2:00 PM	Office Hours	Completed
Monday	3:00 PM	Weekly Survey	Completed
Tuesday	9:00 AM	Weekly Survey	Completed
Tuesday	10:00 AM	Training Session	Completed
Tuesday	11:00 AM	Office Hours	Completed
Tuesday	12:00 PM	Lunch	Completed
Tuesday	1:00 PM	Training Session	Completed
Tuesday	2:00 PM	Office Hours	Completed
Tuesday	3:00 PM	Weekly Survey	Completed
Wednesday	9:00 AM	Weekly Survey	Completed
Wednesday	10:00 AM	Training Session	Completed
Wednesday	11:00 AM	Office Hours	Completed
Wednesday	12:00 PM	Lunch	Completed
Wednesday	1:00 PM	Training Session	Completed
Wednesday	2:00 PM	Office Hours	Completed
Wednesday	3:00 PM	Weekly Survey	Completed
Thursday	9:00 AM	Weekly Survey	Completed
Thursday	10:00 AM	Training Session	Completed
Thursday	11:00 AM	Office Hours	Completed
Thursday	12:00 PM	Lunch	Completed
Thursday	1:00 PM	Training Session	Completed
Thursday	2:00 PM	Office Hours	Completed
Thursday	3:00 PM	Weekly Survey	Completed
Friday	9:00 AM	Weekly Survey	Completed
Friday	10:00 AM	Training Session	Completed
Friday	11:00 AM	Office Hours	Completed
Friday	12:00 PM	Lunch	Completed
Friday	1:00 PM	Training Session	Completed
Friday	2:00 PM	Office Hours	Completed
Friday	3:00 PM	Weekly Survey	Completed

## Weekly Office Hours

**Copilot Cosmic Adventure: Office Hours**  
Friday, January 10, 2025 1:00 PM – 1:30 PM

[View recap](#)

12 speakers 1 mention 7 tasks

[Transcript](#)

2 recordings

Set to expire

## Prompt-a-Thon

<p><b>Generate first draft</b></p> <p>Draft your blog by prompting Copilot in Word, including some of your ideas, key messages, and any other elements you want to include.</p> <p>Draft a blog on our achievements and upcoming projects. Highlight recent milestones and our mission. Include the following elements on it: title, a, and the all the key, should, or well-structured, with clear headings and subheadings for each section.</p>	<p><b>Develop the content</b></p> <p>Use Copilot in Word to expand on the initial draft, adding depth and detail to your plan or blog. Ask for suggestions on specific sections or for ideas.</p> <p>Expand on the initial draft of the blog to add achievements and upcoming projects. Add depth and detail to each section. Provide suggestions for specific sections or ideas to enhance the content.</p>	<p><b>In-depth research</b></p> <p>Share your draft blog with Copilot and ask it to find points that need expanding or may be confusing.</p> <p>Review my blog draft (I title blog), and identify any points that need expanding or may be confusing. Provide suggestions for improvement.</p>
<p><b>Message test</b></p> <p>Ask Copilot how various audiences may receive your blog post. Then ask for suggestions stakeholders that should review the blog post.</p> <p>Review my draft and provide feedback on four various audiences might receive it, identify any points that need expanding or clarifying. Additionally, suggest stakeholders who should review the blog post to ensure it aligns with our company's goals and messaging.</p>	<p><b>Craft a captivating title</b></p> <p>Once your blog post is complete and you need a creative title or headline, ask Copilot for suggestions. This can spark your creativity!</p> <p>Provide prompt for creative title or headline. (suggestions for my blog post: I need some ideas)</p>	<p><b>Get feedback</b></p> <p>Use Copilot in Outlook to draft an email to your stakeholders to review the attached draft blog post. Ask Copilot to adjust the tone of your email.</p> <p>Draft an email to my stakeholders requesting them to review the attached draft blog post. The email should be professional and engaging, clearly stating the purpose and the deadline for feedback.</p>

# Business Value Framework



## Demonstrate Art of the Possible

**Required: M365 Copilot Art of the Possible (...)**  
 Monday, February 3, 2025 11:30 AM - 12:30 PM [View recap](#)

15 speakers 8 tasks

Transcript +7

59m 27s  
 Set to expire

## Stimulate User Activity

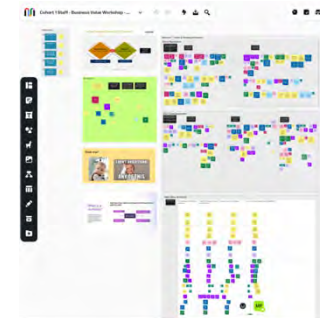
**Space Training Module - Copilot Chat**

Greetings Cohort 2 - The Navigators! Here's another assigned space training module for Launch Week on Copilot Chat!! Please watch-try-comment/react for participation credit. Happy exploring!

[Copilot in Business Chat - Overview.webm](#)

Copilot in Business Chat - Overview.webm  
 ArmaninoM365CopilotCosmicAdventure - Reference Materials

## Conduct Business Value Workshops



## Define Use Case Backlog

Use Case ID	Use Case Description	Priority	Status
UC001	Users can view their profile information.	High	Completed
UC002	Users can update their profile information.	Medium	In Progress
UC003	Users can delete their profile information.	Low	Not Started
UC004	Users can view their account settings.	High	Completed
UC005	Users can update their account settings.	Medium	In Progress
UC006	Users can delete their account settings.	Low	Not Started
UC007	Users can view their activity log.	High	Completed
UC008	Users can update their activity log.	Medium	In Progress
UC009	Users can delete their activity log.	Low	Not Started

## Measure Usage & Sentiment

**Mission Accomplished! Final Mission Status Report Due Today!**

Cohort 1 - The Pathfinders you did it! Please take a moment today to fill out your final mission status report survey by end of day. Your feedback is critical! Thank you for your follow through in our Cosmic Adventure!  
<https://forms.office.com/UKZ0461955>

**Work 6- Final Survey Armanino Copilot Cosmic Adventure Feedback Form**

**Microsoft Copilot Dashboard**

4,625  
 255 hours

## Analyze and Associate





CLIENT CASE STUDY

# Manufacturer's Copilot Treasure Hunt

# Manufacturer Adopts M365 Copilot



## Industry & Project Participation

- Manufacturing Company
- Engaged with Armanino in our 6-week M365 Copilot Adoption Accelerator
- Cross-functional participation from Engineering, Legal, Finance, Sales Operations, and Ops & Business Systems
- 54 participants across 6 global sites: US, Israel, India, Singapore, Valencia, Munich

## Client Goals

- Accelerate adoption and effective use of M365 Copilot across global teams
- Identify and activate high-value AI use cases aligned to strategic priorities
- Improve efficiency and consistency in engineering, legal, and operational workflows
- Build an internal champion network to sustain AI adoption and innovation

## Key Results

- 94% plan to continue using M365 Copilot
- 4+ hours saved per month per user (up to 10+ hours for engineers)
- 9 power users achieved full 9-app adoption
- Highest adoption: Teams (97%), Outlook (88%), Copilot Chat (88%)

## Top 3 High Value Use Cases (Agents)

- Test Data Watchdog Agent – Automates anomaly detection in engineering test results, delivering structured reports.
- Contract Clause Analyzer Agent – Flags deviations in key contract clauses, assigns risk levels, and produces summaries.
- Engineering Review Coach Agent – Standardizes design review documentation with approved language and checklists.



CLIENT CASE STUDY

# Non-Profit Grant Guru (Copilot Studio)

# Nonprofit Foundation – Grant Guru Agent

armanino 



## Context Driven Performance- Studio Agent

### Client Challenge

- The foundation has a lot of preliminary use of AI, but was struggling to find the right use cases and seeing consistent adoption
- Depending on the author the quality of the end output / deliverable for the grant making approval process differs significantly, creating inconsistencies, pain points, and latency in the approval process

### Armanino Solution

- Conducted a design thinking workshop to define successful AI adoption for the organization
- Facilitated grant making and management value stream process mapping sessions
- Validated the inputs and outputs for each of the processes to establish the appropriate knowledge base
- Created a PoC highlighting the capabilities of context engineering when coupled with the appropriate knowledge source, producing a generative AI grant agent

### Key Results

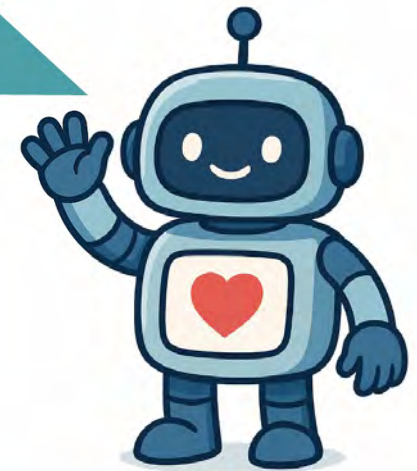
- The proof of concept for a specialized generative AI assistant trained on the specific grantmaking process, policies, and decision structures.

Hi, I'm Grant Guru! I operate in two distinct modes depending on what you need:

1. Expert Mode where I perform a specific grantmaking task for you
2. Coaching mode where I help you understand or learn how to do something yourself

I support many tasks, but I'm best at:

1. Summarize Grant Information
2. Review Grant Content for Quality





AN INTERNAL CASE STUDY

# Armanino's M365 Cosmic Copilot Adventure



# Mission Launch:

## Introduction to Armanino's M365 Copilot Cosmic Adventure

**Project Overview:** Armanino's M365 Copilot Internal Refreshed Rollout aims to enhance productivity and collaboration through the latest features of Microsoft 365 Copilot. This 24-week program in 6-week sprints ensures a smooth transition and full utilization of these new capabilities for approximately 500 licensed users.

**Mission Theme:** Embark on a "M365 Copilot Cosmic Adventure," a space exploration-themed journey that adds an engaging and creative touch to our program.

### Mission Objectives:

- Chart new territories in innovation
- Attract fellow space pioneers
- Amplify crew creativity
- Build an unstoppable fleet of future-ready explorers

### Results:

- 98% active usage month over month
- 95% say Copilot makes them more productive
- 13 hours saved per month on average
- 75% save 30 minutes or more per day
- 3–4× faster meeting recaps





# Where Productivity Meets Impact

## Everyday Copilot Use Cases

- **Teams:** Meeting summaries, next steps, brainstorming
- **Outlook:** Drafting, rewriting, summarizing email chains
- **Word:** Creating and refining reports
- **Excel / Analyst Agent:** Analyzing and visualizing data
- **PowerPoint:** Turning reports into presentations

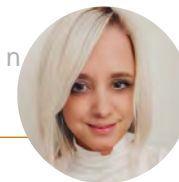
## Business Value Levers

- **Efficiency and Automation** – Reduces time spent on repetitive tasks
- **Communication and Collaboration** – Improves clarity and alignment across teams
- **Data Utilization and Insights** – Turns data into actionable intelligence
- **Standardization and Consistency** – Increases quality and reduces rework
- **Customer and User Experience** – Enhances responsiveness and personalization
- **Innovation and Creativity** – Frees up time for higher-value thinking



# Finding and Quantifying Value

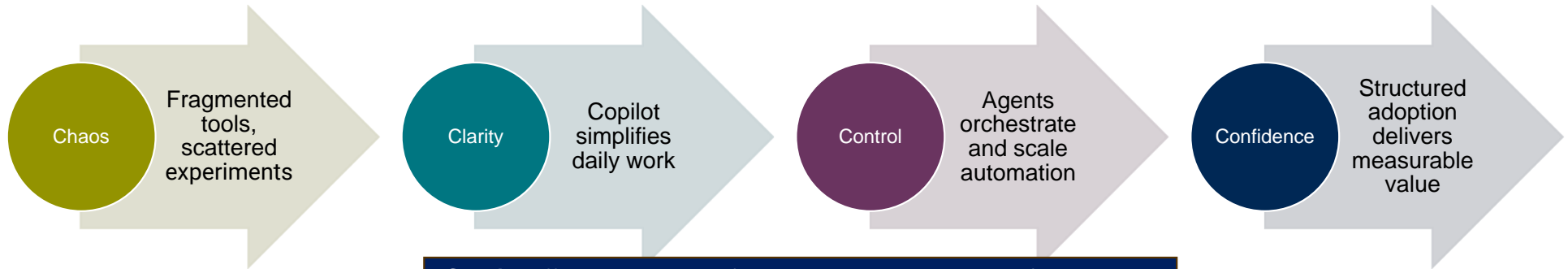
armanino



	Cohorts 1 & 2 Per User		
Use Case	Avg. Hours/Month Saved	Avg. Annual \$ Savings	M365 Components
Meeting Recap	13.4	\$13,374	
Organizing Info	7	\$6,910	
Summarizing Content	12.7	\$12,618	
Creating Content	15	\$14,933	
Refining Content	14.1	\$14,029	
Data Analysis	4.8	\$4,782	
Question Answering	24	\$23,979	



# Summary & Call to Action



**Special Offer:** 10% discount if purchased within six months of this webinar

## Option 1: AI Brainstorm Workshop

**Duration:** ½ Day      **Retail Price:** \$6K

**Purpose:** Identify high-value, high-impact use cases across your business.

**You'll Gain:**

- A prioritized AI Use Case inventory
- A use-case heatmap
- Clear next-step recommendations

**Best for:** Organizations exploring where to start or looking to focus scattered AI ideas.

## Option 2: M365 Copilot Adoption Accelerator

**Duration:** 6 Weeks      **Retail Price:** \$20K

**Purpose:** Drive fast, confident M365 Copilot adoption for up to 50 users.

**You'll Gain:**

- Themed onboarding
- 60-day Copilot training access
- Business Value Workshop & Framework Readout
- Weekly pulse surveys, office hours and a Prompt-a-Thon

**Best for:** Teams already licensed for M365 Copilot or preparing for rollout.

# Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.