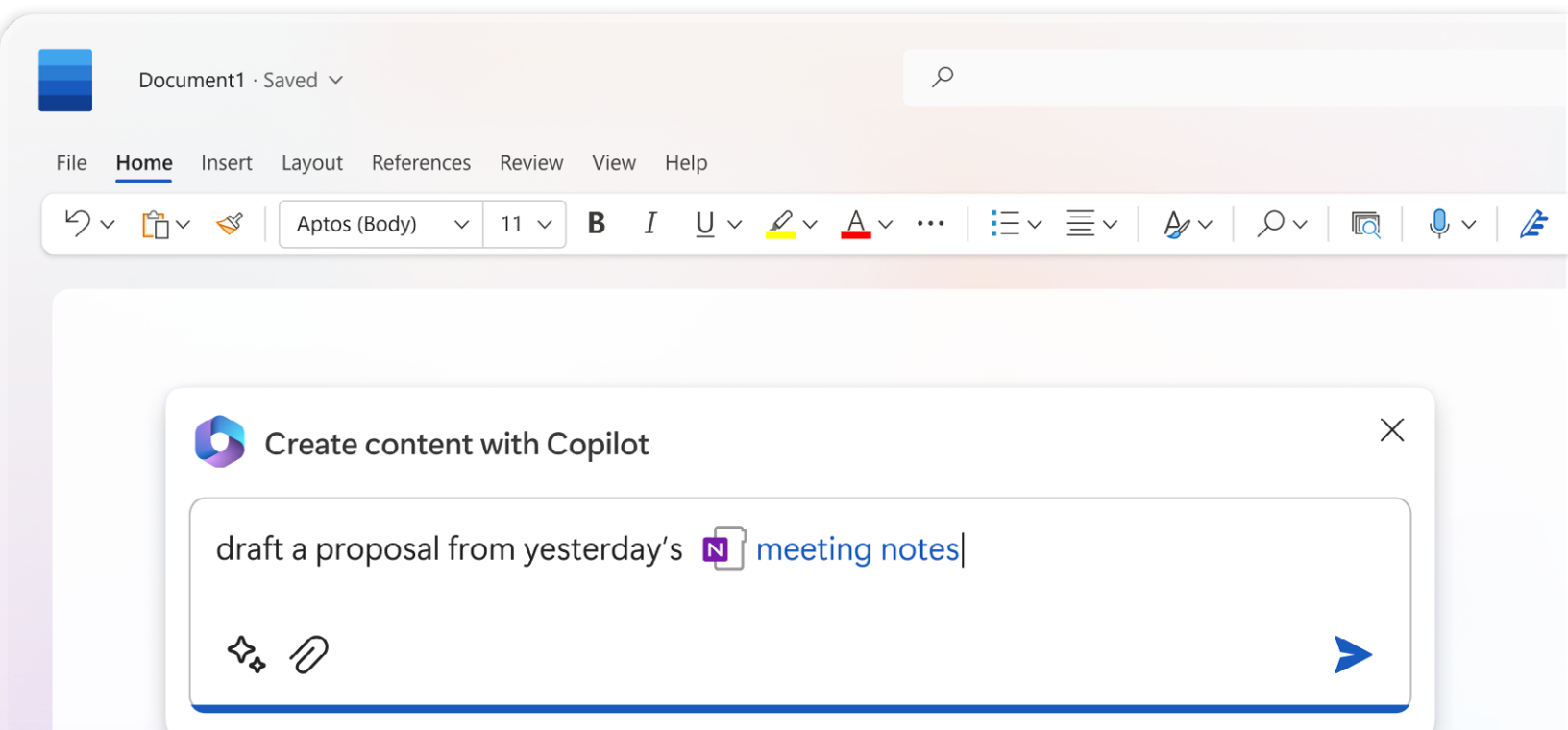# Improving business outcomes with Microsoft Copilot

Microsoft Copilot helps users to navigate Microsoft Dynamics™ business applications more efficiently, while enabling businesses to drive innovation, enrich customer and employee experiences, boost productivity, reduce costs, and enable growth.

Generative Artificial Intelligence (AI) is taking the world by storm

Generative AI is a transformative technology that is already having an enormous impact on businesses and society. However, with advancements in AI capabilities moving so fast, organizations are struggling to keep pace.

Since ChatGPT was launched in November 2022, followed by Microsoft introducing Copilot in March 2023, this technology has changed dramatically, continuing to improve, accelerate, and grow exponentially.

The next-generation AI capabilities built within ChatGPT and Microsoft Copilot create significant opportunities for businesses to benefit—across all industries. The potential to drive innovation, enrich customer and employee experiences, boost productivity, reduce costs, and enable growth is perceived by many to be a game-changer.

Results from a 2023 KPMG Generative AI survey[1] state that:

78% of respondents believe Generative AI will help them to drive innovation.

65% believe Generative AI will help them to gain competitive advantage.

62% believe that Generative AI presents an opportunity for them to grow revenue/market share.

Despite many organizations buying into the overall promise of AI, our recent survey also shows many struggling to take those first steps.

60% of respondents said they are at least a year or two away from implementing their first Generative AI solution, with a lack of willingness amongst executives to immediately adopt the technology stated as a major roadblock.

Under 50% of respondents believed they have the necessary tech, talent, and governance capabilities to successfully implement Generative AI.

[1] https://info.kpmg.us/news-perspectives/technology-innovation/kpmg-Generative-ai-2023.html

Copilot is the world's first Generative AI solution built natively for both CRM and ERP applications

This technology brings next-generation AI capabilities to every business function, providing AI-powered assistance to sales, service, marketing, and supply chain operations—helping users navigate their Microsoft Dynamics and ERP applications more efficiently by providing AI tools that empower them in their roles.

Copilot is designed and built to support modern work and augment a workforce's daily activities—helping to improve productivity, reduce effort and automate repetitive tasks. **Copilot does not replace workforces - it strengthens them.**

With AI and Copilot bringing the future of productivity, employees will be able to access new tools and skills that haven't previously existed. **Copilot will transform how businesses and workforces operate.**

So, what is Microsoft Copilot?

Microsoft Copilot provides AI capabilities natively in Microsoft Dynamics business applications. It leverages the data inherent in a client's systems to train and learn in order to provide users with more insightful recommendations, answers and solutions.

By conversing with Dynamics across applications, asking relevant questions, and receiving answers, previously manual activities such as data entry, scheduling, drafting emails, and conducting analysis will be automated.

Additionally, Copilot provides guidance and feedback to support their writing, presentation, and analysis skills. These value-add capabilities empower workforces to spend more time focusing on improving customer engagement and fulfilling sales tasks.

Copilot and Dynamics 365 capabilities

Sales

Helps sellers to reduce the time they spend on administrative tasks.

Customer Service

Empowers agents to deliver improved customer service.

Customer Insights

Allows marketers to curate highly personalized and targeted customer segments.

Marketing

Enables marketers to generate engaging content for their campaigns based on their audience insights and best practices.

Supply chain management

Assists operations and helps supply chain managers to optimize their resources and processes.

With this technology easily integrating with different applications and data sources within the business, tasks that were previously impossible, tedious, or technically complex to complete are delivered with ease.

The potential benefits of Copilot for Microsoft Dynamics reach far and will help organizations improve business outcomes.

Copilot impacts for users and their business applications

Users	Business applications
Improved skillset	Insertion of data into warehousing/data mart
Streamlined routines	Integration with 3rd party apps
Informed decision making	Insights delivered from datamarts
Responsible intelligence	Modernized applications leveraging curated data in the data lake
Reduced noise	Automation of functions including GenAI apps
Secured data	

The flipside to Generative AI and Copilot

Undeniably, perceived risk is an inhibitor to Generative AI adoption and it's crucial that organizations identify and address the potential risks of implementing Copilot early.

To help minimize these issues, Copilot utilizes responsible AI filters to keep content secure. All company data is encrypted via a company's Azure subscription, preventing data from being used to train or improve Microsoft's foundation modules.

KPMG enhances these filters through our Responsible AI framework—this approach is enabled by our guiding principles, allowing us to help companies accelerate value and mitigate risk.

KPMG responsible AI framework

Our responsible AI offering is a set of frameworks, controls, processes, and tools to help ensure AI systems are being designed and deployed in a trustworthy and ethical manner so that companies can accelerate value. We understand responsible AI is a complex business, regulatory, and technical challenge, and we are committed to helping clients put responsible AI into practice.

Fairness
Enable models to be free from bias and remain equitable.

Explainability
Enable the understanding and documentation of AI algorithms.

Accountability
Establish mechanisms to drive ownership and responsibility across the AI/ML lifecycle.

Security
Help protect against unauthorized access, corruption, or attacks.

Privacy
Drive compliance with data privacy regulations and consumer data.

Safety
help protect against a negative impact to humans, property, and environment.

Data integrity
Embed trust with data quality, governance, and enrichment steps.

Reliability
Enable the performance of AI systems at the desired level of precision and consistency.

A poorly executed program or a failed adoption could lead to litigation, negative media attention, customer churn, reduced profitability, and regulation scrutiny.

Companies must clearly define how they plan to address these potential issues before they arise.

Considerations for next generation technology adoption

AI and Copilot are becoming a top priority and competitive differentiator for leading organizations.

While organizations stand to benefit greatly through the implementation of Copilot, it's important to acknowledge that this is relatively new technology with many untested capabilities.

As this technology rapidly evolves, it's crucial that organizations plan for how they intend to responsibly realize the value of its capabilities.

01 Review their existing Microsoft Dynamics implementation and understand how customized it is to their operating environment.

02 Understand their technical debt and implement a remediation plan prior to the Copilot implementation to recover their investments.

03 Identify areas that can immediately benefit from Copilot and recognize areas that should be avoided until the technology matures, to help assess the potential ROI and associated risks.

04 Assess data they have readily available as a source for AI. *AI systems are only as good as the data and questions asked.* Without data, Copilot has limited use.

05 Clearly define use cases.

06 Develop a governance framework and policies to handle AI bias and data security.

07 Develop plans to determine the roles that should and should not have access to Copilot.

08 Understand ethical and regulatory requirements today and into the future!

09 Plan budgets, resources, and roles.

10 Develop a change management strategy and identify champions to raise awareness and manage expectations.

11 Review the existing technology portfolio to understand other usable AI technologies and define how this impacts future plans.

KPMG can help companies prepare for the future of Generative AI

Drawing on our extensive experience with Microsoft, Machine Learning, AI, and natural language processes, KPMG can guide your organization through strategy development and implementation. This helps us successfully implement next-generation AI capabilities like Copilot that can help you improve employee and customer experiences, increase productivity and efficiencies, reduce effort and costs, and drive innovation.

KPMG understands the promise of Generative AI and the processes and cultural changes needed to successfully deploy a Generative AI program. We know how to embed responsible AI practices across the organization to help create value and mitigate risk.

As an early and enthusiastic advocate for the power of artificial intelligence, KPMG can help your organization to leverage Copilot as you transform your front- and back-office.

Our approach

Assess
your processes

Develop
a roadmap
and strategy

Configure
and customize
Microsoft Copilot to
your business needs

Train
and coach
company's
employees

Companies can benefit from:

A faster and smoother adoption of technology

Enhanced user engagement and satisfaction

Higher ROI with decreased risk

Improved business outcomes - enabling more:
Innovation, productivity, efficiency across business functions

Copilot is not an autopilot for your working practices, it supports your creativity and enhances your productivity, unlocking the potential of your workforce. Work with KPMG to unleash its power.

For more information on how we can help you implement Copilot contact:

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