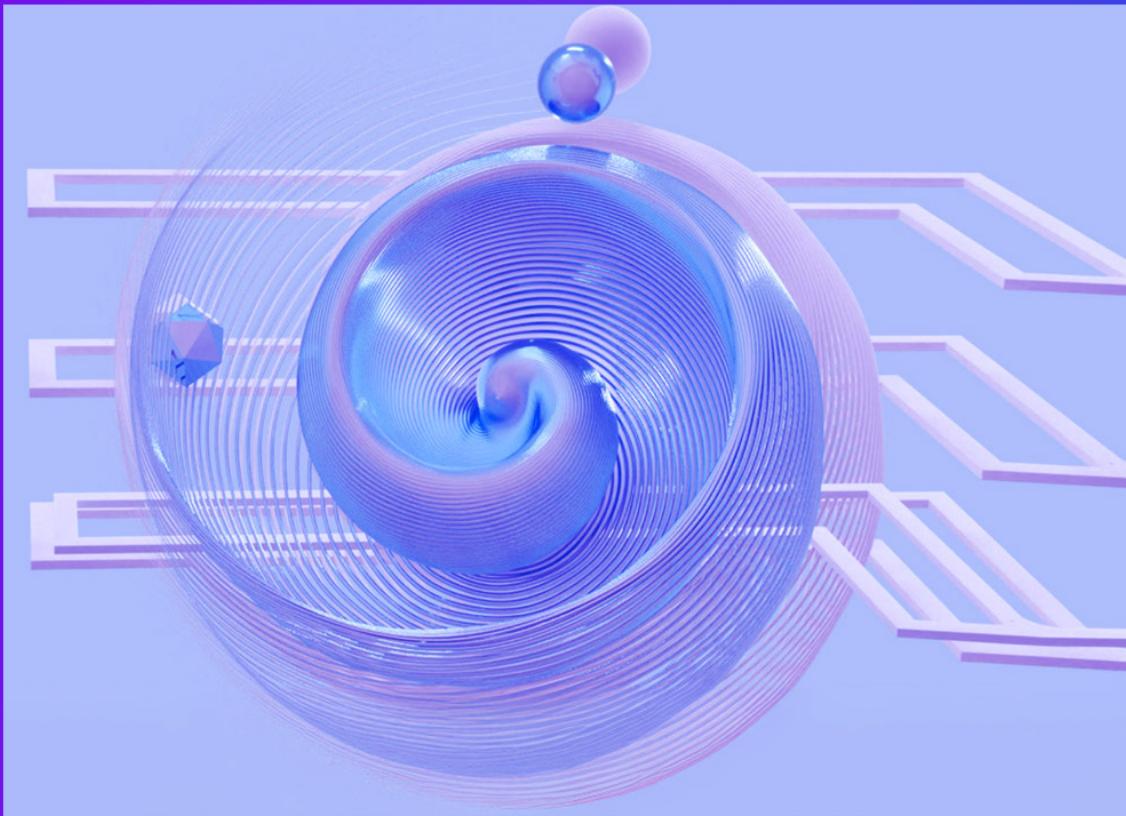




Unlock the value of Microsoft Copilot

for Microsoft 365 with KPMG



kpmg.com/microsoftcopilot

2024

Introduction

Organizational leaders across industries are seeking to harness the potential of generative AI (gen AI) — and for good reason.

Today's advancements hold enormous possibilities for organizations to enrich employee experiences, reinvent customer engagement, reshape business processes and bend the curve on innovation.

KPMG professionals and Microsoft are working together to deliver the latest gen AI innovations. With Microsoft Copilot for Microsoft 365, we're creating scalable and responsible digital AI solutions to help you unlock the potential of your workforce, transform your data into valuable insights and actions, and achieve some of your most pressing business outcomes.

We combine the deep industry insights, functional expertise, and business acumen of KPMG professionals with Microsoft's leading cloud and AI capabilities to offer digital data and AI solutions that are powerful and innovative, while also being ethical and trustworthy.

With the KPMG value realization framework for Copilot, KPMG professionals can help you identify the specific value of Copilot for Microsoft 365 and build a strategic roadmap for your business. The framework focuses on short-term value and long-term outcomes, using gen AI centered on Copilot for Microsoft 365 with the broader gen AI strategy in mind. The framework helps you achieve quantifiable transparency on functional roles and processes, so you can aim to maximize your value from Copilot. It uses KPMG's set of gen AI-enabled enterprise role profile examples derived from KPMG firms' own experience and various client projects.





KPMG Australia redefines productivity with Microsoft Copilot for Microsoft 365

For nearly a decade, KPMG Australia has used AI technologies to increase the efficiency, accuracy, and quality of a range of data discovery tasks. Seeing the potential of gen AI to further enhance its services, KPMG Australia participated in an early access program for Copilot for Microsoft 365. Through the early stage of testing, KPMG professionals saw the potential that Copilot offers for enhancing employee productivity and delivering high-quality outcomes for employees and clients.

To pilot Copilot, KPMG Australia built a proof of concept of an enterprise Comply AI platform using Copilot for Microsoft 365 as one of the primary AI technologies from Microsoft. This initiative aimed to transform employee workflows by accelerating data discovery, automating administrative tasks, and enhancing coworker and client collaboration.

This section highlights some of the ways Copilot and the Comply AI platform have redefined productivity and client engagement across several dimensions for KPMG subject matter specialists and contributed to the launch of the KPMG value realization framework for Copilot.

Making more of KPMG professional's experience

The integration of Copilot enhanced the ability of KPMG professionals to efficiently generate and manage detailed reports and communications, including detailed email drafts and action plans. This tool streamlined the review of results with colleagues and clients via Microsoft Teams, facilitating deep dives into specific standards for discussions and next steps. Additionally, Copilot enabled the creation and dispatch of summarized emails and to-do lists and the scheduling of follow-up meetings.

Enhancing the value of time

Time savings were evident in the pilot of Copilot with the KPMG Comply AI platform, enabling the automation of tasks like summarizing assessments and creating emails and action items. This efficiency allowed KPMG professionals to focus on managing compliance activities and developing insights to help reduce client risk and drive success. The enhanced productivity also meant the team could handle more business, setting the stage for potential revenue growth.

Increasing client and career satisfaction

KPMG professionals discovered that reallocating time from routine tasks to more complex, judgment-heavy areas improved both service speed and quality for clients, and enhanced career satisfaction by enabling employees to focus on more meaningful aspects of their work.

The interoperability of Comply AI and Copilot within Teams facilitated seamless, real-time collaboration between KPMG, clients and coworkers. Familiarity with Teams among clients and KPMG firms also simplified training, speeding up processes and enhancing transparency, consistency and service excellence.

KPMG firms' vision is to extend the reach of Comply AI and Copilot globally, benefiting KPMG professionals and clients. To support this vision, we have developed the KPMG Value Realization Framework for Copilot for Microsoft 365, which facilitates the adoption of gen AI technologies such as Copilot for Microsoft 365.

KPMG value realization framework for Copilot

With holistic methodologies and accelerators, the KPMG value realization framework for Copilot can help your organization adopt Copilot for Microsoft 365 quickly and successfully. KPMG professionals can help you cover all aspects of Copilot for Microsoft 365 rollouts, including business value and realization, organization transition and change management, data security, technical readiness and rollout prep and Copilot extensibility.

The framework also includes the KPMG rapid value assessment, which is designed to help you scale rapidly and drive early value from your Copilot journey. In a four-week jumpstart, KPMG professionals can help you identify the potential uplift Copilot can deliver for your business and people. This also includes a detailed strategy to scale out Copilot in your organization, focused on immediate value and business impact.



With the KPMG value realization framework for Copilot, KPMG professionals provide accelerators and trained specialists to support various steps within your Copilot journey, including:



Business value and realization

Assess use case opportunities and build a strategic roadmap to help realize business value.

- Define relevant roles, personas and use cases based on industry.
- Assess strategic value creation focus areas.
- Define return on investment (ROI) calculation and setup of value realization roadmap and program.
- Strategic roadmap plan.



Organization transition and change management

Empower users to take advantage of the functionalities while being risk aware.

- Develop change impact insights framework.
- Change roadmap definition for Copilot with success criteria and key performance indicators (KPIs).
- Define core training needs and user feedback model.



Data security, technical readiness, and rollout prep

Prepare environment for successful adoption and activation of Copilot, while enhancing existing data governance.

- Conduct technical and data readiness assessment.
- Update data security and governance processes.
- Assess data governance current state.

What if you've already started your Copilot journey?

The KPMG value realization framework for Copilot for Microsoft 365 and rapid value assessment can provide an assessment of your current implementation, while the holistic deployment framework and accelerators help to support you in reaching

the next level of Copilot value realization. The framework also includes data extensibility, which can be key to helping unlock the full potential of Copilot and helps differentiate the way organizations are using modern workplace technologies today.



Embrace the future of work with Copilot for Microsoft 365

Let KPMG professionals help you unlock the potential of your organization and prepare for the future of generative AI with Copilot for Microsoft 365 as part of your holistic gen AI strategy.

KPMG firms' extensive experience with Microsoft and AI technologies, along with responsible AI and deployment frameworks, can help guide your business through strategy development and implementation. KPMG professionals have the know-how to help you successfully embed Copilot for Microsoft 365 into your organization and generate value.

By collaborating with KPMG firms and Microsoft, you can benefit from:

- A holistic implementation framework with tested accelerators.
- A focus on value and strategic gen AI ROI.
- A sustainable usage and employee engagement model.
- An integrated approach reflecting your overall gen AI strategy.

[Learn more](#) about the KPMG value realization framework for Copilot.

For more information about how we can help you unlock Copilot, please contact:

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