



PwC and Microsoft

Elevate your AI transformation

with PwC and Microsoft Copilot for Microsoft 365





Introduction

In today's dynamic business landscape, the swift pace of technological advancements and the advent of generative AI (GenAI) have created unprecedented opportunities and challenges. GenAI necessitates a new, human-centric and technology-powered approach, essential for transformative business impact and enhanced employee productivity.

PwC and Microsoft Copilot for Microsoft 365 together provide a powerful, multifaceted strategy tailored to the evolving AI landscape, enhancing business operations, communication, and problem-solving. At PwC, we embody this transformation by deploying Copilot for Microsoft 365 across our global network, transforming our operations across all functions to better serve our clients through the power of AI. This includes

deploying Copilot to 8,000 staff members in PwC Canada, with 102,500 Copilot licenses globally. This commitment makes us one of Microsoft's largest global alliances.

Our considerable use of AI not only deepens our alliance with Microsoft but also exemplifies our dedication to leading digital transformation. Over the next three years, we're investing \$1 billion to scale our AI capabilities further, helping clients reimagine their businesses with advanced GenAI solutions that can drive significant productivity gains in tax, audit, and consulting.

In this e-book, we offer guidance based on our experience to further your own AI transformation with PwC and Copilot for Microsoft 365.

Transform and amplify your enterprise AI approach

At the heart of digital transformation, PwC and Microsoft aren't just participants but pioneers, leading enterprises through the evolving world of AI. Our collaboration goes beyond technology implementation – it's about building trust and delivering real value across five strategic domains with Copilot for Microsoft 365. Together, we're setting new standards for what AI can achieve in business.



Strategy and governance

Seize the potential of Copilot for Microsoft 365 by identifying your strategic objectives. We can help you define a strong governance framework, clarify roles and responsibilities, and make sure all employees are adept at using AI to enhance your organization's capabilities. For this to work, employees should be equipped with the necessary training to draw insights from the tool's findings.



Data and security

Build a holistic plan to tackle security and privacy challenges, old and new. We can guide you through AI, cybersecurity, and privacy risks, helping you to be confident that your data is appropriately managed – through tools such as Purview.



Responsible AI

Navigate the complexities of ethical AI with Copilot. We'll guide you through understanding AI decision-making processes and enabling transparency, fairness, and accountability – all while aligning with your corporate values and ethics.



Employee experience and change management

Transform your workplace culture with AI that supports and enriches employee experiences. Copilot for Microsoft 365 enables more effective collaboration and communication, using data-driven insights to boost productivity and mitigate change fatigue – all while fostering a company culture that celebrates new ways of working.



Return on investment (ROI)

Increase efficiency and drive business growth while keeping costs under control by using Copilot. This powerful tool streamlines company operations, identifies opportunities for automated tasks, assigns work, analyzes data, and enables employees to do more in less time.



A day in the life of a PwC user of Copilot for Microsoft 365

At PwC, Copilot for Microsoft 365 isn't future state – it's happening at scale, now.

As the first adopters – what we call “client zero” – our experience with Copilot for Microsoft 365 has been nothing short of transformative. It's more than just embracing new technology; it's a complete reimagining of our workflows, putting our people at the

forefront and reshaping every aspect of our operations to better meet client needs. We're not just adapting to change at PwC; we're driving it.

Consider this: Over 102,500 Copilot licenses are active within our walls, empowering not just our teams but our clients as well.

Each day, these tools drive us toward greater achievements by:

Improving data entry: Copilot for Microsoft 365 takes over routine data input, drastically reducing errors and freeing our staff from one of the most tedious tasks.

Streamlining schedules and emails: It manages scheduling and email workflows with ease, allowing our team to focus on more strategic initiatives.

Enhancing meeting efficiency: With automatic transcription and summarization of meetings, Copilot confirms that key points and decisions are easily accessible and never overlooked.

Accelerating information retrieval: Its advanced search capabilities allow for swift location of documents and emails, significantly reducing time spent searching.

Let's walk through a typical day to show you how Copilot is transforming the way we work.

Paige, PwC Associate



I use GenAI throughout my day across a variety of different tasks. It helps me save an average of two hours per day!

9:00 AM **Review emails** 15 minutes saved

I start the day by reviewing emails and checking for urgent client communications and follow-ups from the previous day. I ask Copilot for Microsoft 365 for a quick summary of a few long email threads.

10:00 AM **Client meeting preparations** 20 minutes saved

I have a client proposal meeting today, so I upload recent news articles into Copilot and ask for market standing and trends, which gives me a better understanding of their organization.

10:30 AM **Translate jargon from client meeting** 15 minutes saved

During the meeting, my client uses unfamiliar acronyms and phrases. I leverage Copilot to ask questions and capture notes.

11:00 AM **Create presentation** 20 minutes saved

I put my notes from the last meeting into Copilot in PowerPoint to draft an initial deck and make it easier for my manager to review.

2:00 PM **Conduct analyses** 20 minutes saved

I use Copilot in Excel to help update formulas, analyze trends, and forecast.

4:00 PM **More meeting preparations** 30 minutes saved

I receive a last-minute request to lead a meeting tomorrow morning with documentation for review. I ask Copilot to provide a summary of the documentation and prepare a meeting agenda.



Powering innovation across industries

Clients across many sectors and industries are looking to PwC for guidance in realizing the benefits of Copilot for Microsoft 365 implementation. From financial services to retail and consumer goods, the following use cases illustrate how PwC is also helping clients use innovative strategies to navigate change and increase business value.

Financial services use case

Financial service and private equity firms are navigating a fresh wave of change, going beyond the solutions of the past and looking at their businesses from fresh angles. **Many of our clients have explored GenAI, but are hitting roadblocks when it comes to:**

- Enabling their people to embrace AI and Copilot in a way that aligns with corporate culture and values.
- Deploying AI and Copilot capabilities in a way that balances risk, security, and compliance.

Our co-creation approach confirms that our client teams are building capabilities to maintain and innovate on an ongoing basis. We empower teams to create new use cases, champion global roll outs, and continuously improve through successful pilot implementations, enterprise deployments, and training assistance – all while confirming data sensitivity and compliance standards are met.

Retail and consumer goods use case

When it comes to enabling GenAI and Copilot for Microsoft 365 adoption across large multinational retail and consumer companies, a focus on the workforce is as essential as the technology. PwC and Microsoft are helping executives understand how to use the right technology and strategy to increase the impact of Copilot for employees, companies, and societies. We confirm that investments (both financially and from a time perspective) are matched to true business value.

PwC is helping clients accomplish more with Copilot for Microsoft 365 through the development of personalized customer insights and engagements, increased supply chain efficiencies, and streamlined financial operations.

As a result:

- In a recent implementation, 77% of the surveyed users agree that Copilot saves them time.
- An external customer team created 100 use cases in the first 14 days of use.
- Sharing and scaling success across workstreams has accelerated adoption and improved business value.
- Users can build a salient business case for leadership to roll out Copilot to other business areas.



Why work with PwC for your AI journey?

Unlock the overall potential of AI with PwC as your advisor. The journey with Copilot for Microsoft 365 is about more than just technology – it's about transforming the very core of your business. PwC doesn't just implement technology; we energize people and processes to harness the transformative power of AI.

Our deep collaboration with Microsoft, enhanced by our team of over 11,600 certified consultants and a rich history of serving more than 780 global clients, provides us with unparalleled insights into the practical applications of GenAI. This experience translates into tailored strategies that align with your unique business needs, confirming that the integration of Copilot for Microsoft 365 not only enhances operational efficiency but also elevates your decision-making and employee experience.

With PwC, you gain more than just a service provider; you gain an advisor committed to your growth and adaptation in an AI-driven world. We offer holistic training, upskilling, and support to navigate the new landscapes of AI adoption, reshaping organizational structures and cultures to utilize the benefits of AI. Our balanced approach to risk management and AI ethics confirms that your journey into AI is both innovative and trustworthy.

Are you ready to transform your organization with AI? Let us be your advisor to unlock new levels of efficiency and insight that can propel your company forward in this new digital age.

Contact us today to see how we can help.

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