



This presentation provides an overview of Microsoft 365 Copilot proof-of-concept (PoC) scenarios. It is designed to assess the viability and value of Copilot in an enterprise environment. This solution will cover the PoC objectives, implementation process, core validation scenarios, evaluation metrics, and success criteria.

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Microsoft 365 Copilot PoC Design

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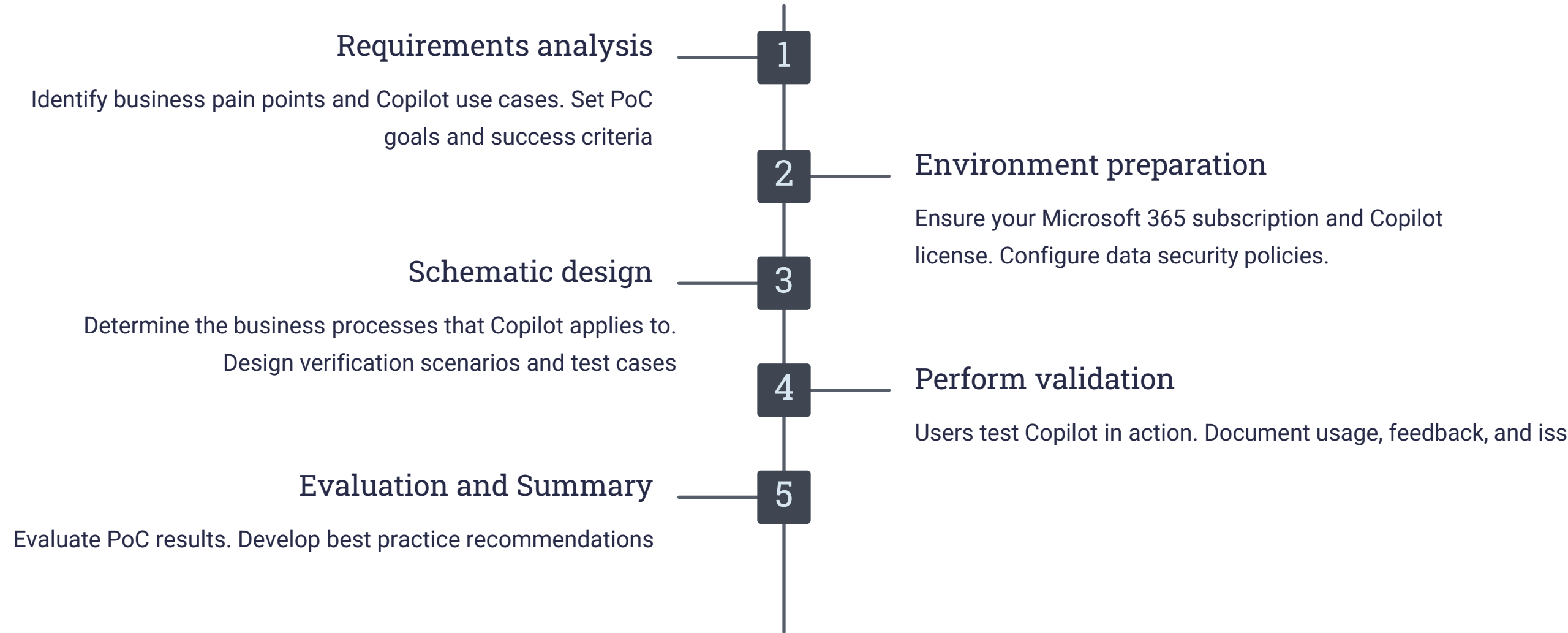
target

- Evaluate the viability and value of Copilot in an enterprise office environment
- Verify the actual business effectiveness of Copilot in Word, Excel, PowerPoint, Outlook, and Teams.
- Determine the applicability of Copilot for enterprise data security and compliance

range

- Select business scenarios (e.g., marketing, sales, finance, etc.).
- Cover core Microsoft 365 applications.
- Identify PoC participants (key users, IT administrators, etc.).

PoC Implementation Process



Core verification scenarios



Word

Smart Document Assistant.
Automatically generate contracts,
reports, and marketing copy.



Excel

Data analysis and automation.
Generate analysis reports and
intelligent recommendation
formulas.



PowerPoint

Quickly make presentations. Extract
information from text and
automatically create PPTs.



Outlook

Intelligent mail management.
Automatic email summarization and
intelligent compose emails.



Teams

Meeting Smart Summaries.
Automatically generate meeting
minutes, task tracking.

📌 Scenario Description

In daily business operations, employees frequently draft various documents such as contracts, market analysis reports, policy documents, technical documents, and project proposals. Traditionally, document creation and editing consume significant time, especially in content reuse, formatting consistency, and language refinement, often leading to inefficiencies and errors.

🔍 Problems Solved

- ✅ Reduces content creation time: Automatically generates drafts, reducing repetitive work
- ✅ Improves content quality: Enhances wording, checks grammar, and ensures professionalism
- ✅ Ensures consistency: Maintains uniform formatting, terminology, and style



Validation Point	Method	Reference Criteria
Quality of auto-generated documents	Generate a market analysis report or product proposal using Copilot and have business experts assess its accuracy	80% or more content is usable without major edits
Grammar and language optimization	Provide a manually written document, let Copilot enhance it, and compare improvements	Improved fluency and professionalism
Formatting compliance	Test Copilot's ability to adjust formatting based on corporate templates	Documents align with company standards

📌 Scenario Description

Finance, sales, and operations teams handle large datasets daily, involving sales trend analysis, cost forecasting, financial reporting, and inventory management. Traditional Excel calculations rely on manually written formulas, which are error-prone and require advanced skills for data analysis.

🔍 Problems Solved

- ✅ **Reduces formula errors:** Copilot automatically generates calculation formulas, improving accuracy
- ✅ **Enhances data analysis:** Provides automatic insights and forecasts for better decision-making
- ✅ **Simplifies data visualization:** Generates charts in one click, improving presentation quality



Validation Point	Method	Reference Criteria
Formula auto-generation capability	Provide financial data and ask Copilot to generate formulas for profit margin and growth rate	Formula accuracy \geq 95%
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📌 Scenario Description

Executives, marketing, and sales teams frequently create presentations for product launches, annual summaries, project proposals, and training materials. Preparing slides requires significant time for formatting, structuring content, and ensuring visual appeal.

🔍 Problems Solved

- ✅ Reduces time spent on slide creation: Automatically generates presentations from text content
- ✅ Improves presentation quality: Optimizes slide structure for logical clarity
- ✅ Enhances visual appeal: Automatically matches appropriate design styles



Validation Point	Method	Reference Criteria
PPT auto-generation capability	Provide a market strategy report and have Copilot convert it into a PowerPoint presentation	Slides are well-structured and content is complete
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PPT auto-generation capability	Provide a market strategy report and have Copilot convert it into a PowerPoint presentation	Slides are well-structured and content is complete

📌 Scenario Description

Employees handle large volumes of emails daily, including client communications, internal reports, meeting invitations, and approval requests, often leading to information overload and reduced efficiency.

🔍 Problems Solved

- ✅ Reduces email drafting time: Auto-generates replies, improving processing efficiency
- ✅ Enhances communication quality: Optimizes email content for professionalism
- ✅ Quickly extracts key information: Summarizes long email threads for better readability



Validation Point	Method	Reference Criteria
Email auto-generation capability	Provide a customer inquiry email and ask Copilot to generate a formal response	80% or more of the content is directly usable
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Email auto-generation capability	Provide a customer inquiry email and ask Copilot to generate a formal response	80% or more of the content is directly usable

📌 Scenario Description

Business meetings often involve **decision discussions, task assignments, and strategy updates**, but manually taking notes and tracking action items can be inefficient and prone to missing critical details.

🔍 Problems Solved

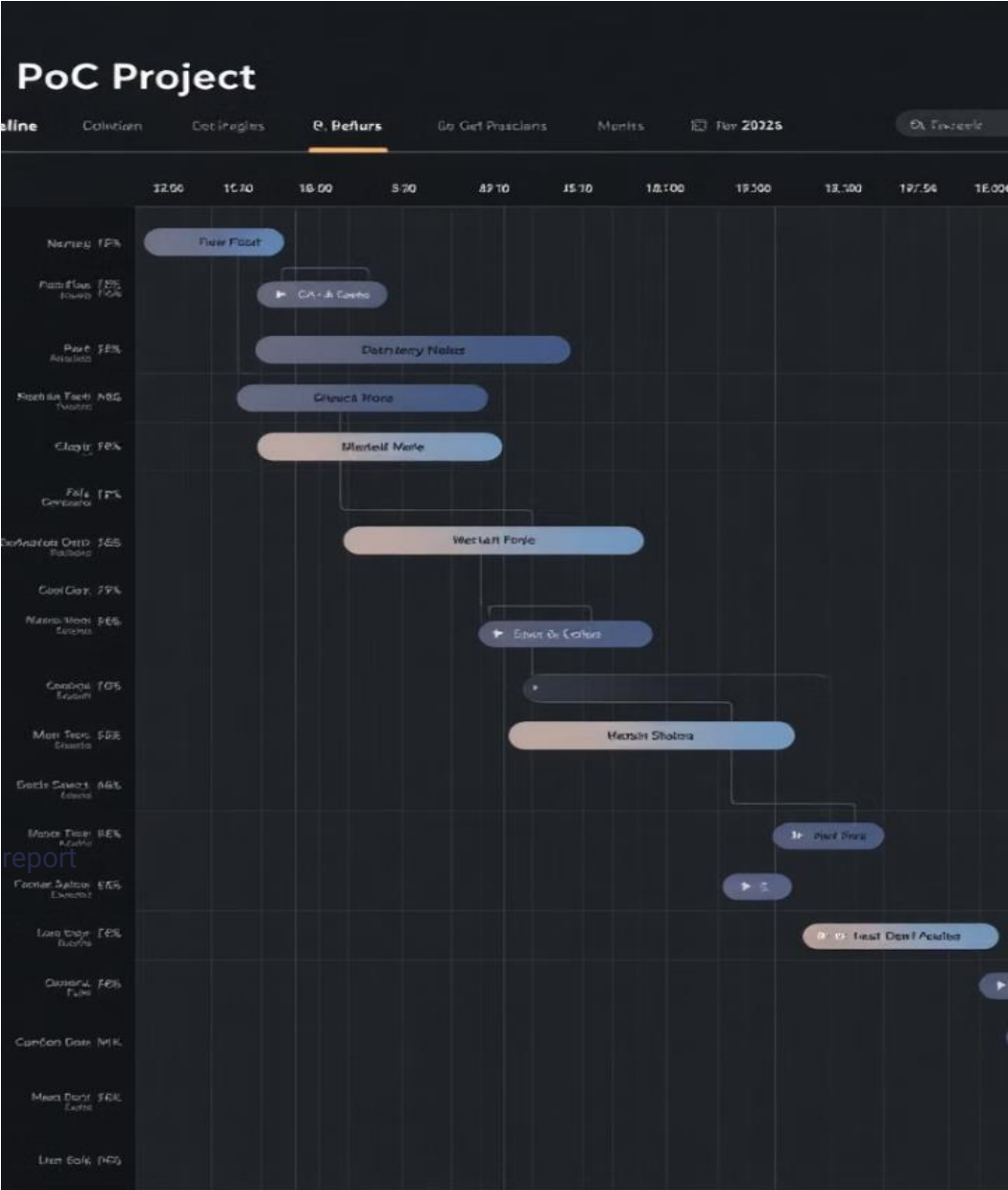
- ✅ **Eliminates manual note-taking:** Automatically generates meeting summaries for improved efficiency
- ✅ **Enhances task follow-up:** Extracts key action items for better tracking
- ✅ **Improves meeting engagement:** Analyzes discussion focus areas for more effective decision-making



Validation Point	Method	Reference Criteria
Meeting summary auto-generation capability	Record a 30-minute meeting, let Copilot generate a summary, and assess accuracy	Key discussion points captured accurately \geq 90%
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PoC Project Plan (Example)

weeks	task	owner	remark
Week 1	Determine PoC goals, scope, and success criteria	Project Leader & Business Unit	Hold a kick-off meeting
Week 2	Set up a test environment and assign a Copilot account	IT team	Ensure secure and compliant configurations
Weeks 3-4	Conduct business scenario tests and collect user feedback	Business Users & IT	Record key usage data
Week 5	Evaluate PoC results and optimize usage strategies	Project team	Organize the assessment report
Week 6	Summarize the PoC experience and develop a formal deployment plan	IT & Business Teams	Plan a global rollout strategy



PoC evaluation metrics and success criteria



1 User experience

User satisfaction $\geq 80\%$.

2 Efficiency improvement

Reduced task completion time by $\geq 30\%$.

3 Data Security

No breach of access or data breaches, 100% compliant.

4 accuracy

Copilot generates content $\geq 90\%$ accurately. It is suitable for multiple business scenarios.

PoC results and next steps



1

Enterprise-level promotion

Based on the results of the PoC, decide whether to carry out enterprise-level promotion.

2

Optimize your strategy

Identify areas for improvement and optimize your Copilot strategy and customization.

3

Deployment plan

Define a formal deployment plan, including training, support, and ongoing optimization.

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