wavex

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Making the most of AI within your organisation

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"AI (Artificial Intelligence) is the defining technology of our times. It's augmenting human ingenuity and helping us solve some of society's most pressing challenges."
— Satya Nadella, CEO of Microsoft

Contents

For many years, organisations have been pouring the collective intellect of their staff into documents, generating vast volumes of data, much of which is stored in unstructured formats like Word, PowerPoint, and Excel documents. These unstructured formats make it challenging to unlock the value of the information within these documents.

AI (Artificial Intelligence), in the context of systems like Microsoft CoPilot, now enables organisations to harness this untapped asset and use it to answer questions, create content, and inform business decisions.

It's like having an "assistant" that can read every document, review every presentation, and analyse every meeting before answering any question you ask. Would you hire someone like this for a relatively small cost?

Without leveraging AI solutions, organisations will quickly find themselves at a significant disadvantage compared to competitors who embrace these technologies, which empower their staff and help them cut costs and work more efficiently.

What do staff think about AI?

Looking specifically at Microsoft's AI (called CoPilot):

Research findings from early Copilot users

70%
said they were more productive

29%
faster overall in a series of tasks (searching, writing, and summarizing)

4x
Nearly 4X faster catching up on a missed meeting

77%
said they didn't want to give it up

Perceived productivity gains:

- 71% said they saved time on mundane tasks.
- 68% said Copilot improved the quality of their work.
- 86% said Copilot made it easier to catch up on what they missed.

Impact on meetings, email, and writing:

- Copilot users were 29% faster doing a series of three tasks.
- A blind panel rated emails written with Copilot 18% more clear and 19% more concise.
- Copilot users were 27% faster when pulling together information from multiple sources.

Role-specific pain points and opportunities:

- On average, Copilot for Sales users reported saving 90 minutes a week.
- Agents with Copilot had a 12% reduction in time spent resolving a case with Copilot in Dynamics 365 Customer Service.

What types of AI exist?

With billions invested in AI (global estimates at $200 billion in 2025, and growing to $3.5 trillion by 2034 *as stated by Polaris), there are many variations of AI appearing, with significant improvements made every month.

AI Model	Developer	Key Features	Strengths	Use Cases	Cost/Accessibility
CoPilot	Microsoft	Chatbot functionality; customisable 'Agents' for specialised tasks; integrates with Microsoft 365 (M365)	Seamless integration with Microsoft Office (Word, Excel, etc.); productivity-focused	Office productivity, coding assistance, business workflows	M365 £24/user/month (annual commit); Agent £154/month
ChatGPT	OpenAI (with Microsoft investment)	Conversational AI with multimodal capabilities (text, images, voice); web browsing in Plus tier	Versatile, creative text generation, strong coding support, widely adopted	Creative writing, coding, general-purpose conversations, research	Free tier (GPT-3.5); Plus £20/month (GPT-4o); Enterprise plans available
Gemini	Google	Multimodal (text, images, audio, video); deep integration with Google ecosystem	Real-time web access, multimedia processing, productivity within Google Workspace	Research, multimodal tasks, Google Workspace users (Docs, Gmail, etc.)	Free tier; Advanced subscription ~£20/month
Meta AI	META (previously Facebook)	Multimodal (text, images, voice); real-time information, image generation, business offering	Accessibility (embedding into META apps), free, strong image manipulation, open-source foundation (built on Llama)	Personal use, business applications (i.e., lead-gen), education, content creation	Free, no subscription or premium tiers.

AI Model	Developer	Key Features	Strengths	Use Cases	Cost/Accessibility
Grok	xAI (Elon Musk)	Designed for truthfulness and curiosity; integrates with X platform	Quick responses, unfiltered commentary, strong reasoning, social media trend analysis	Social media analysis, general inquiries, users seeking candid AI responses	Free with X subscription; standalone pricing TBD with Grok 3 release
DeepSeek	DeepSeek AI (China)	Conversational AI with multimodal capabilities (text, images, voice); web browsing in Plus tier	Excels in coding, math, and logical reasoning; affordable compared to Western models	Technical problem-solving, coding, budget-conscious users	Free tier available; paid tier ~£0.50/month; API from £0.0008/1K tokens
Perplexity	Perplexity AI	AI-powered search engine with real-time web data and citations	Accurate, sourced answers; great for research and fact-checking	Academic research, real-time internet information retrieval,data-driven inquiries	Free tier; Pro version ~£20/month

*Data compiled March 2025

CoPilot: Benefits from Microsoft's partnership with OpenAI, leveraging GPT-4 technology, but its strength lies in its ecosystem integration rather than standalone chatbot versatility. This is the AI we will discuss further in this whitepaper.

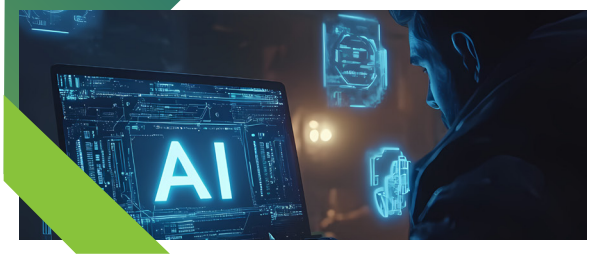
ChatGPT: The pioneer in the chatbot space, it remains a benchmark for conversational AI, with recent updates like GPT-4o enhancing its multimodal capabilities.

Gemini: Google's AI leverages its vast search and data resources, making it particularly strong for users already in the Google ecosystem.

Grok: Positioned as a unique offering from xAI (owned by Elon Musk), it appeals to users valuing straightforward answers and ties closely to the X platform (previously known as Twitter), with Grok 3 promising significant advancements and reduced restrictions.

DeepSeek: China's answer to OpenAI ChatGPT, this stands out for its cost-efficiency (e.g., DeepSeek-V3 trained for ~$6 million vs. hundreds of millions for competitors), though it may lack polish in creative tasks and is subject to China's view of the world.

Perplexity: Differentiates itself as a research tool rather than a traditional chatbot, prioritising factual accuracy and source transparency over conversational flair.



"AI is one of the most profound things we're working on as humanity. It's more profound than fire or electricity."
— Sundar Pichai, CEO of Google and Alphabet

Roles that benefit from AI

"Artificial intelligence and generative AI may be the most important technology of any lifetime."
— Marc Benioff, CEO of Salesforce

(Image created by OpenAI Dall-E to the prompt "Draw an image that represents the users that benefit from the use of AI within a business")

The best way to currently think about AI is that of an assistant to your team who can make suggestions and pull together documents, but the content produced does need review by someone more experienced. And for many tasks, this "assistant" can help staff save a significant amount of time.

Microsoft CoPilot, particularly with Microsoft 365 integration, is designed to enhance productivity, creativity, and efficiency across various tasks. Based on its capabilities, there are some obvious roles within organisations that benefit from its use:

1. **Administrative Assistants**

   Why: CoPilot can automate repetitive tasks like drafting emails, scheduling meetings, and summarising documents, allowing assistants to focus on higher-value coordination and support tasks.

2. **Content Creators (Marketing, Communications, PR)**

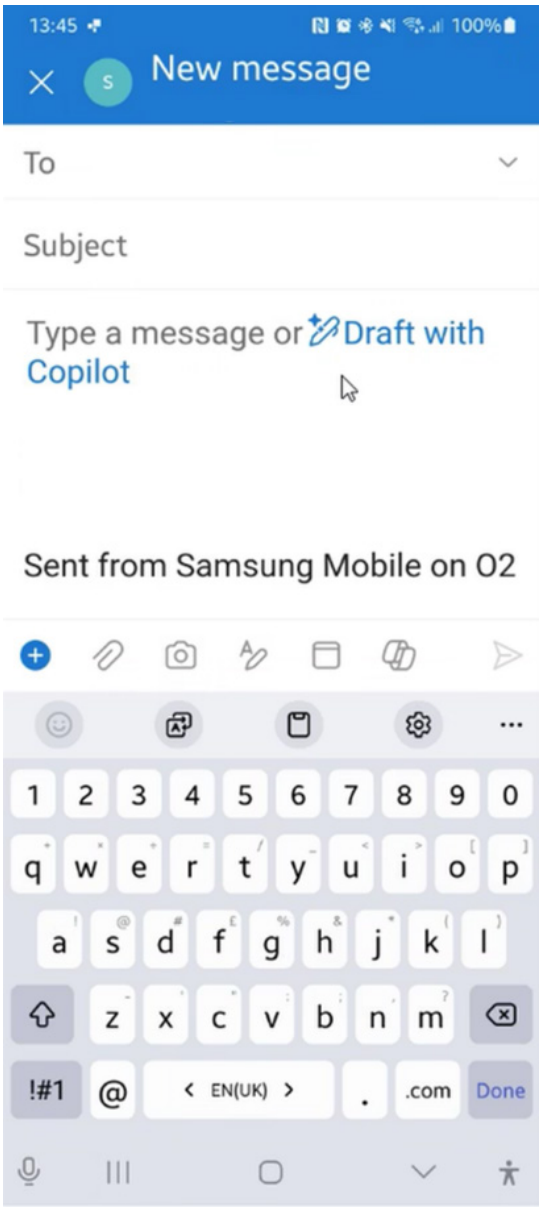
   Why: CoPilot assists in generating drafts for blog posts, press releases, social media content, and presentations in tools like Word and PowerPoint, speeding up the creative process and providing a starting point for refinement.

3. **Data Analysts**

   Why: In Excel, CoPilot can analyse datasets, suggest formulas, and generate insights or visualisations, enabling analysts to quickly interpret data and produce actionable reports.

4. **Project Managers**

   Why: CoPilot can help draft project plans, summarise meeting notes in Teams, and track progress by pulling relevant data from Microsoft 365 apps, streamlining project oversight and communication.



5. **Administrative Assistants**

   Why: With features like CoPilot for Sales, it integrates with CRM systems to prioritise leads, draft proposals, and summarise client interactions, helping sales teams close deals faster.

6. **Human Resources Professionals**

   Why: CoPilot can draft job descriptions, employee communications, and policy updates in Word, as well as summarise feedback or survey data, improving efficiency in recruitment and employee engagement.

7. **Executives and Senior Leaders**

   Why: CoPilot can summarise lengthy reports, emails, or meeting discussions, providing quick insights and freeing up time for strategic decision-making.

8. **Customer Service Representatives**

   Why: CoPilot can draft responses to common inquiries, summarise past interactions, and suggest solutions based on organisational data, improving response times and customer satisfaction.

9. **Researchers**

   Why: CoPilot can fetch and summarise vast quantities of information from trusted sources within Microsoft 365 apps (like SharePoint, OneDrive, or Outlook), aiding in literature reviews, report writing, and data synthesis.

10. **Finance Professionals**

    Why: CoPilot in Excel can assist with financial modelling, budgeting, and forecasting by analysing trends and generating reports, reducing manual calculation time.

11. **Educators or Trainers**

    Why: CoPilot can create training materials, surveys, or presentations in PowerPoint and summarise feedback or learning outcomes, enhancing instructional design.

These roles benefit from CoPilot's ability to integrate with Microsoft 365 tools (Word, Excel, PowerPoint, Outlook, Teams, etc.), leveraging organisational data to provide contextually relevant assistance. Its value is maximised in roles involving repetitive tasks, data analysis, content creation, or collaboration, where it can save time and enhance quality. Organisations should assess specific business cases to determine where CoPilot's AI-driven support aligns best with their needs.

"AI is the ultimate amplifier of human intelligence."
— Arvind Krishna, CEO of IBM

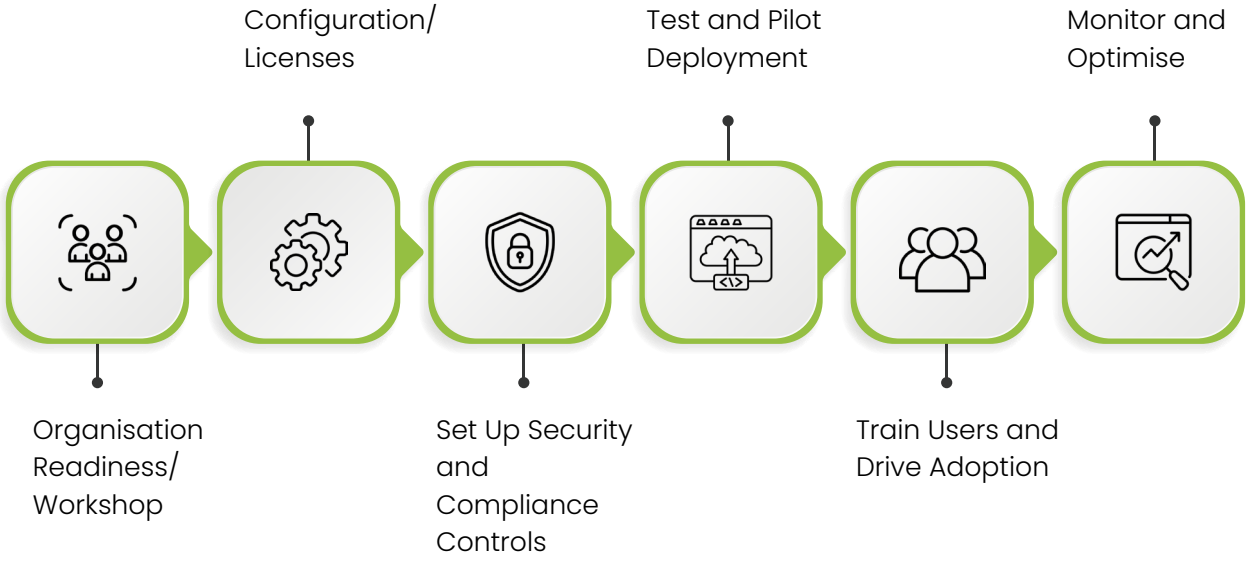
Your AI journey

(Image created by X.AI Grok to prompt "Draw an image that represents the journey a business should take to deploy AI")

The flexibility of AI systems contributes to the confusion created within businesses as to the best AI strategy to harness its capabilities with many simply "turning it on" or worse, having no controls over how staff are using it (and they will be using it!)

The best AI strategy is delivered in phases, with each stage delivering value and providing feedback into the implementation of the next phase of delivery. A successful AI strategy is never-ending but a cycle of continuous improvement.

The approach Wavex takes in deploying Microsoft's AI (CoPilot) for clients includes the following steps:



Organisation Readiness / Workshop

- Evaluate your current Microsoft 365 (M365) environment to ensure compatibility with M365 CoPilot. This includes checking that your tenant is on a supported version and that necessary subscriptions (e.g., M365 CoPilot licenses) are available.
- Review data governance policies, as CoPilot relies on Microsoft Graph to access organisational data like emails, files, and chats. Ensure data in SharePoint is well-organised, irrelevant data is archived, and permissions are appropriately set to avoid oversharing risks.

Configuration / Licenses

- Purchase the required M365 CoPilot licenses for users who will access CoPilot Chat. These are typically add-ons to existing M365 plans (e.g. Business Premium, E3 or E5).

  Define test groups (those individuals who can run through a set of scenarios and provide feedback.)
- Configuration CoPilot for use by test group.

Set Up Security and Compliance Controls

- Recommended, but not essential, leverage Microsoft Purview to apply sensitivity labels and data loss prevention (DLP) policies to protect sensitive information accessed by CoPilot.
- Configure enterprise data protection (EDP) settings, which are enabled by default for Entra account users, to ensure data privacy and compliance with organisational standards.
- Decide whether to allow web grounding (access to Bing search) and manage it via admin controls if needed.

Test and Pilot Deployment

- Conduct a pilot with a small group of users to test functionality, gather feedback, and identify potential issues (e.g., data access errors, performance lags, or erroneous answers).
- Verify that CoPilot Chat integrates correctly with Teams, Outlook, and the Microsoft 365 app and that it meets user expectations for tasks like summarising emails, answering questions, or drafting content.

Train Users and Drive Adoption

- Provide training sessions or resources (e.g., Microsoft's CoPilot Success Kit) to educate users on how to use CoPilot effectively, including crafting good prompts.
- Highlight key use cases like catching up on chats, drafting messages, or accessing work data to encourage adoption. The focus here is to slowly change behaviours so staff actively leverage the value of these tools within their workflows.

Monitor and Optimise

- Use analytics to track usage and performance.
- Collect user feedback to refine the deployment and address any concerns.
- Adjust configurations as needed, such as expanding licenses, expanding learning sources, or tweaking permissions based on pilot results.

"There's no question we are in an AI and data revolution, which means that we're in a customer revolution and a business revolution. But it's not as simple as taking all of your data and training a model with it. There's data security, there's access permissions, there's sharing models that we have to honour. These are important concepts, new risks, new challenges and new concerns that we have to figure out together." —
Clara Shih, CEO of Salesforce AI

What are the risks of AI?

Without focusing on the “terminator” apocalypse, with AI taking over the world, there are some tangible issues organisations must consider.

As with all new technology, both benefits and risks should be carefully considered and managed.

(Image created by CoPilot to prompt “Draw an image that represents the risks associated with AI use in businesses”)

Data Exposure and Oversharing:

Microsoft 365 CoPilot pulls data from across your Microsoft 365 environment, emails, documents, chats, and calendars based on a user’s existing permissions. If permissions are too broad (e.g., a user has access to sensitive HR files they shouldn’t), CoPilot can surface that data in responses, exposing it to unauthorised eyes. Some organisations have messy access controls, and CoPilot amplifies this weakness, so this needs to be corrected before it's launched.

Privacy Breaches:

While Microsoft states that CoPilot doesn’t use your data to train its foundational LLMs and encrypts data in transit and at rest, prompts and responses are stored as part of your CoPilot activity history. If sensitive info (e.g., PII, financials) is included in prompts, it could be logged and potentially accessed by admins or leaked in a breach, especially if governance isn’t tight.

Security Vulnerabilities:

CoPilot's deep integration with M365 apps means it inherits any vulnerabilities in those services. A compromised user account with high privileges (e.g., a SharePoint admin) could allow an attacker to use CoPilot to extract sensitive data quickly. Plus, CoPilot's ability to generate content increases the risk of phishing or social engineering if outputs are misused. Good security measures must be in place to minimise this risk.

Compliance Risks:

In regulated industries (e.g., healthcare with HIPAA, finance with FCA/PCI-DSS), CoPilot's outputs might not align with strict data-handling rules. For example, if it generates a report from mislabelled or unprotected files, you could violate GDPR or other regulations. Its dynamic nature also makes it harder to audit compared to traditional workflows.

Generated Content Issues:

CoPilot can create new sensitive data, like summarising a confidential meeting or drafting a document with proprietary information that inherits the permissions of its source but might not be properly labelled or secured. If users don't catch this, it could be shared inappropriately, multiplying exposure risks.

Over-Reliance and Skill Degradation:

Employees might lean too heavily on CoPilot for tasks like writing emails or analysing data, reducing critical thinking. This could lead to errors going unnoticed (e.g., inaccurate summaries) or a workforce less equipped to operate without AI, impacting long-term resilience.

Cost and Governance Overhead:

While most AIs are marketed as a productivity booster, they require setup, classifying data, tightening permissions, and monitoring usage to avoid pitfalls. This can inflate total costs and demand ongoing resources.

Green initiatives:

In more general terms, looking at the environmental risks, AI's footprint is hefty. Training a single large model can pump out 626,000 pounds of CO2, equivalent to hundreds of international flights. Data centres, the backbone of AI, use huge amounts of electricity (projected to hit 4% of global electricity usage by 2026) and water (300,000 gallons daily for cooling), often powered by fossil fuels in many regions. By 2030, the use of AI could generate 5 million tons of e-waste from obsolete hardware. Google's emissions alone jumped 48% since 2019, largely due to AI-driven data centre growth.

Microsoft emphasises that CoPilot respects existing M365 permissions and includes security features like encryption and compliance with GDPR and HIPAA. But the real risk often lies in your organisation's pre-existing data hygiene. If your environment has over-permissive access (people with access to lots of folders that may not necessarily be necessary), unclassified files, or lack of policies, CoPilot will expose those flaws (not fix them). Mitigation means locking down permissions (least privilege principle), using tools like Microsoft Purview and DLP for data classification, and training users to avoid poor prompts.

"AI regulation is inevitable, whether through unitary measures like the EU AI Act or the sector-based approach advocated by the UK. Now is the time to think responsibly about getting your own house in order and proactively manage your own enterprise AI."

— John Buyers, Osborne Clark

The different flavours of AI

Currently, there are two distinct flavours of several of the popular AIs (namely CoPilot, and ChatGPT). These are notably Chatbots and Agents.

Microsoft 365 CoPilot is a chatbot designed to integrate seamlessly into the familiar suite of Microsoft 365 applications (e.g., Word, Excel, PowerPoint, Outlook, and Teams) to boost individual and team productivity in daily workflows.

(Image created by Grok AI to prompt "Draw an image which shows a traditional AI chatbot with an AI Agent")

Its primary business use case is to assist users in creating, analysing, and managing content within these tools by leveraging AI to automate repetitive tasks and provide intelligent suggestions. For example, it can draft emails in Outlook, generate reports in Word, or analyses data trends in Excel, all while pulling context from your organisation's SharePoint data (emails, documents, calendars, etc.). This makes it ideal for general knowledge workers, such as marketers, administrators, or executives, who need to streamline routine tasks, improve content quality, and save time without leaving their existing workflows. It's about making the tools you already use smarter and more efficient, grounded in your business data.

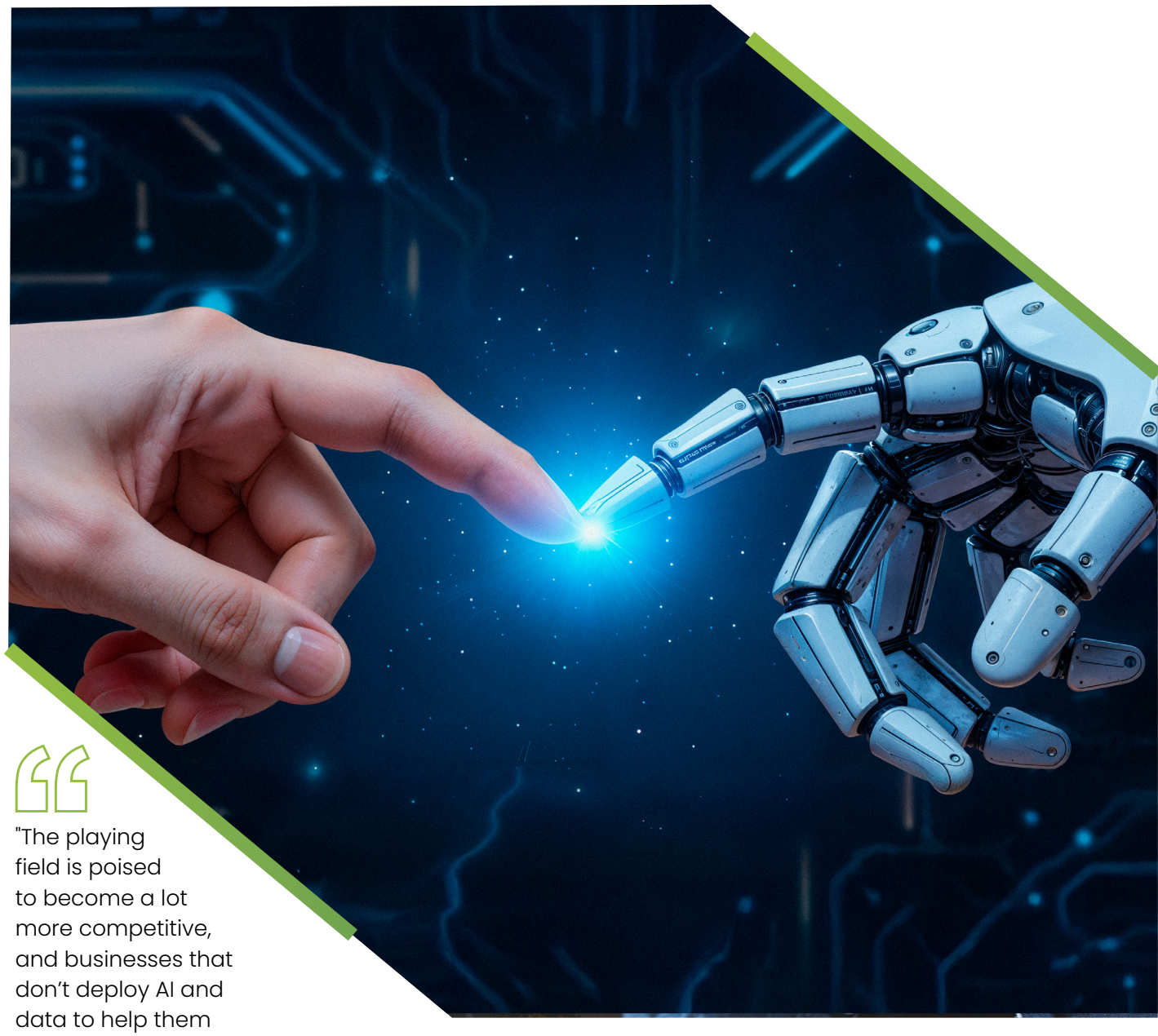
On the other hand, Agents are designed to operate more autonomously, built using tools like "Microsoft CoPilot Studio" and focus on automating and executing specific business processes or tasks tailored to an organisation's unique needs. Their main business use case is to act as specialised AI that can handle complex, domain-specific business processes by connecting to organisational data sources (e.g., SharePoint, external APIs, the Internet, or CRM systems) and performing actions autonomously or semi-autonomously. For instance, a Customer Support AI Agent could create customer tickets and provide clients real-time order updates by integrating with CRM platforms. Unlike M365 CoPilot's broad productivity focus, CoPilot Agents need to be purpose-built for scenarios requiring customisation, such as industry-specific processes.

Next steps

It is vital that all organisations have an AI strategy with appropriate policies, even if the strategy states “do nothing”. This is an invasive technology which many of your staff are currently using without controls or policies. And your competitors will be using or planning its use to empower staff and help them reduce their operating costs.

At the very least, we recommend an initial AI workshop, which provides the Board a business-case with potential options and costs, to allow the organisation to decide on their future AI strategy.

It is an exciting advancement in technology that will revolutionise businesses, but only for those who understand the opportunity.



"The playing field is poised to become a lot more competitive, and businesses that don’t deploy AI and data to help them innovate in everything they do will be at a disadvantage."
— Paul Daugherty, Accenture

Lexicon of AI

To help you become more familiar with AI, here are some of the terms often used by AI experts.

Prompt

What you type or say to start a conversation with an AI chatbot. It's like giving it a nudge to get it going, like asking, "What's the weather like?". Because current technology realised on matching words, verbose prompts tend to provide a better response because it matches to many more datapoints.

Artificial Intelligence (AI)

A fancy term for computer systems that can do smart things humans usually do, like learning, thinking, or chatting. Think of it as a super clever robot brain. Although now-adays this term is abused as current chatbots are not "intelligent" but apply word matching through vast datasets to answer questions.

DeepSearch / Search

This feature of an AI chatbot is its ability to dig into external resources, like the web, social media platforms, or uploaded content, to gather relevant information and provide a more informed response. It's like giving the AI a web-browser to perform lots of searches for answers beyond its built-in knowledge.

Think / Reason

This on the other hand, is about the AI's capacity to process information logically and critically. It's not just repeating facts, it's weighing up possibilities, and offering a coherent line of thought. Sometimes these features are behind pay-walls as they require a lot more computing power.

Chatbot

An AI program designed to talk with people. It's like a virtual buddy you can text or speak to.

Machine Learning

How AI gets smarter over time by learning from examples, not by being told exactly what to do.

Natural Language Processing (NLP)

The tech that helps AI understand and reply to human language. It's what lets AI figure out what you mean when you type something.

Training Data

The huge pile of info (like books, websites, or chats) used to teach the AI how to think and talk.

Model

The “brain” of the AI, built from tons of data and training. It’s like a recipe book the AI uses to cook up answers. Your prompts are put though the “Model” which generates a response. As models evolve, so the output gets better (and faster).

Context

The background info the AI uses to keep the conversation making sense. If you say, “I like pizza” and then ask “What toppings?” it knows you’re the context of your question is pizza. Some AIs have a memory, and will build up “context” over time, so future prompts will factor in previous conversations.

Generative AI

AI that can create content - like text, images, or even music, from scratch. Chatbots are generative because they “generate” replies.

Inference

When the AI uses what it’s learned to guess or figure out an answer.

Response

What the AI says back to you after you give it a prompt. If you ask, “What’s 2+2?” the response is “4.”

Algorithm

A set of rules or steps the AI follows to solve problems or answer questions.

Token

A small chunk of text (like a word or punctuation mark) that AI uses to process what you say. Like breaking a sentence into bite-sized pieces.

Bias

When AI leans toward certain answers because of the data it was trained on.

Conversation Flow

How the chat moves from one thing to the next. Good flow means the AI doesn’t jump from “Hi” to “Here’s a random fact about turtles” without a reason.

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