

Moving from fragmented insight to faster decisions

Clarity for Executive decisions



The problem and current climate

For leadership teams in regulated organisations, faster decision-making depends on having a clear view of performance, risk and operational priorities.

In practice, that visibility is often hard to maintain. Reporting is often fragmented across teams, business units and operational functions, while employees are beginning to use AI in different ways without a consistent operating structure or strategic direction.

In a financial services organisation, this can mean leadership spends a significant time consolidating operational updates, risk inputs, customer activity and change priorities ahead of executive meetings, board discussions and planning discussions. When information is gathered manually and AI adoption is inconsistent, decision cycles can slow, alignment

becomes harder, and early AI initiatives can remain disconnected from measurable value.

Leaders are under pressure to improve responsiveness, efficiency and strategic agility without adding operational overhead. A structured approach gives leadership teams clearer visibility of where AI is being used, which use cases matter most and how adoption can support better decision-making across the organisation.



Embedding Copilot Chat

Insight helps organisations turn Copilot Chat access into a structured part of executive decision preparation.

With the right rollout approach, Copilot Chat gives leadership teams preparing board, risk and operational updates a secure, governed route to use AI through Microsoft 365.

In a financial services organisation managing fragmented reporting and manual information gathering, Copilot Chat can support the moments that slow executive preparation.

Leadership can use it to summarise supplied updates, ask general questions, explore options and shape next steps from information they provide or have been approved to use.

This can help reduce reporting preparation effort, create clearer briefing inputs and support more consistent follow-up after executive meetings, board discussions and planning sessions.

For leadership, that means faster preparation, clearer discussion points and greater confidence in how AI is being used across the business.

Insight's role is to make that adoption practical and controlled. We help define where Copilot Chat fits into leadership workflows, what governance needs to be in place, which teams should be enabled first, and how adoption should be measured. Insight can also support additional activities, including readiness support, IT setup, security controls, user guidance, prompting best practice, adoption activity, use-case identification, success measurement and recommendations for where to extend next.

With a clearer structure in place, leadership teams can **improve visibility of where AI is being used**, which use cases are creating value and where Microsoft 365 Copilot or agents could support **more advanced reporting, workflow or decision-support requirements over time**.

Why Insight

Turning Copilot Chat into measurable value takes more than access. Leadership need a clear approach for adoption, governance, use-case prioritisation and measurement, so AI can support the decisions, workflows and outcomes that matter most.

For leadership, that means practical support across:

- ✓ **readiness**
and rollout planning
- ✓ **best practice**
user guidance
- ✓ **use-case**
identification to
boost efficiency
- ✓ **adoption** success
measurement
- ✓ **recommendations**
on the optimal areas to
extend into Microsoft
365 Copilot or agents

Insight helps organisations move beyond simple activation. As a leading Solutions Integrator, Insight brings licensing, deployment, adoption and optimisation expertise together, helping leadership teams introduce AI in a way that is secure, practical and aligned to decision-making, reporting and governance priorities.



A trusted Microsoft partner for Copilot Chat adoption

As a Top 1% Microsoft Partner, with 7 Solutions Partner designations, 20+ Advanced Specialisations and Azure Expert Managed Service Provider status, Insight brings the scale and specialist expertise to help organisations move from AI access to structured adoption.

Insight helps organisations decide which teams and scenarios should begin with Copilot Chat, where Microsoft 365 Copilot may be needed, and where agents could support more advanced reporting, workflow or decision-support requirements over time.

With **30,000+ Microsoft clients worldwide**, **1,000+ certified Microsoft professionals**, Insight helps reduce the complexity of introducing AI across leadership workflows and gives leaders clearer visibility of where AI can support decision preparation, improve alignment and create measurable value.



Next steps

Copilot Chat gives leadership teams a practical starting point for introducing AI into decision preparation with more structure, governance and measurement.

With Insight, organisations can identify where AI can reduce reporting effort, improve briefing quality and create more consistent follow-up across teams, business units and operational functions. From readiness and security controls to adoption activity and success measurement, Insight helps leadership teams introduce Copilot Chat in a way that supports their decision-making and governance priorities.



As adoption develops, Insight can help assess where Microsoft 365 Copilot or agents could support more advanced workflow or decision-support requirements, creating a clearer path from early AI use to measurable value.

Start with
Copilot Chat.
Improve decision-making.
Scale with Insight.

Talk to Insight about structured AI adoption for leadership