ANDERSON TECHNOLOGIES

AI at Work

Where Is AI Actually Paying Off?

A practical look at Copilot and responsible adoption

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AI Is at Work Today

AI adoption is happening with or without a formal plan. Employees may be using AI in these ways.

- Draft emails and documents.
- Summarize information and research unfamiliar topics.
- Analyze spreadsheets and create presentations.
- Prepare for meetings and answer customer or internal questions.

AI has entered the workplace. Leaders now decide whether its use will be intentional and secure and whether it will create value.

The Question Leaders Should Ask

"Where should we trust **AI to do work?"**

Where is AI producing meaningful value today?

What information should it be trusted to access?

Where must a person remain accountable?

How will we know whether the investment paid off?

Today’s Roadmap

1

What is working.

See where AI is producing practical results.

2

What is changing.

AI assistants are becoming digital coworkers.

3

What responsible adoption requires.

Learn the guardrails that make AI safe to trust.

4

How to start.

Select, test, and evaluate a real use case.

A live Microsoft Copilot demo is part of today’s session.

Where AI Is Paying Off Today

Most of the value is coming from ordinary work.

Meetings

Prepare, recap, capture decisions, and follow up

Inbox

Triage, prioritize, draft, and follow up.

Research

Gather, compare, synthesize, and brief.

Documents

Review, summarize, extract, and create.

Data

Document, instruct, delegate, and approve.

Repeatable work

Analyze, identify patterns, explain, and report.

The best opportunities take real time and come up again and again.

The AI Value Equation

A few minutes saved can become real capacity.

Time Saved × Frequency × Number of People × Weeks Worked

15 minutes saved × 3 times per week × 20 employees × 48 working weeks = 720 hours of potential annual capacity

What could the business do with those 720 hours?

- Serve more customers.
- Respond faster.
- Reduce administrative backlog.
- Avoid or delay additional hiring.
- Give skilled employees more time for higher-value work.

Saved time becomes value when the business redirects it toward a meaningful outcome.

Four Levels of AI at Work

1 ASK

Copilot Chat helps you research, draft, summarize, and answer questions.

2 WORK WITH CONTEXT

Microsoft 365 Copilot works with permitted emails, meetings, files, and Microsoft 365 applications.

3 DELEGATE

Copilot Cowork and Skills take on multi-step work and apply reusable instructions.

4 CUSTOMIZE AND AUTOMATE

Agents and Copilot Studio build AI around a specific role or business process, using your own knowledge base.

Each level adds more AI involvement, and each business chooses the level that fits its work.

Where AI Still Falls Short

AI can deliver confident work that’s incomplete, inaccurate or occasionally unsuitable.

VERIFY

Check these before relying on AI output.

- Facts and figures
- Dates and sources
- Assumptions
- Completeness

PROTECT

Keep these safe when using AI tools.

- Customer and employee data
- Intellectual property
- Approved systems and accounts
- Existing access permissions

Treat AI as a copilot. Human judgment remains accountable.

Four Questions Before AI Touches the Work

SEE | DO | APPROVE | MEASURE

What may AI SEE?

- Public information.
- Internal and customer documents.
- Financial and employee information.
- Emails, meetings, and chats.

What may AI DO?

- Summarize and draft.
- Recommend.
- Update and send.
- Take action in another system

Where People Approve and How You Measure

SEE | DO | **APPROVE** | **MEASURE**

Where must a HUMAN APPROVE?

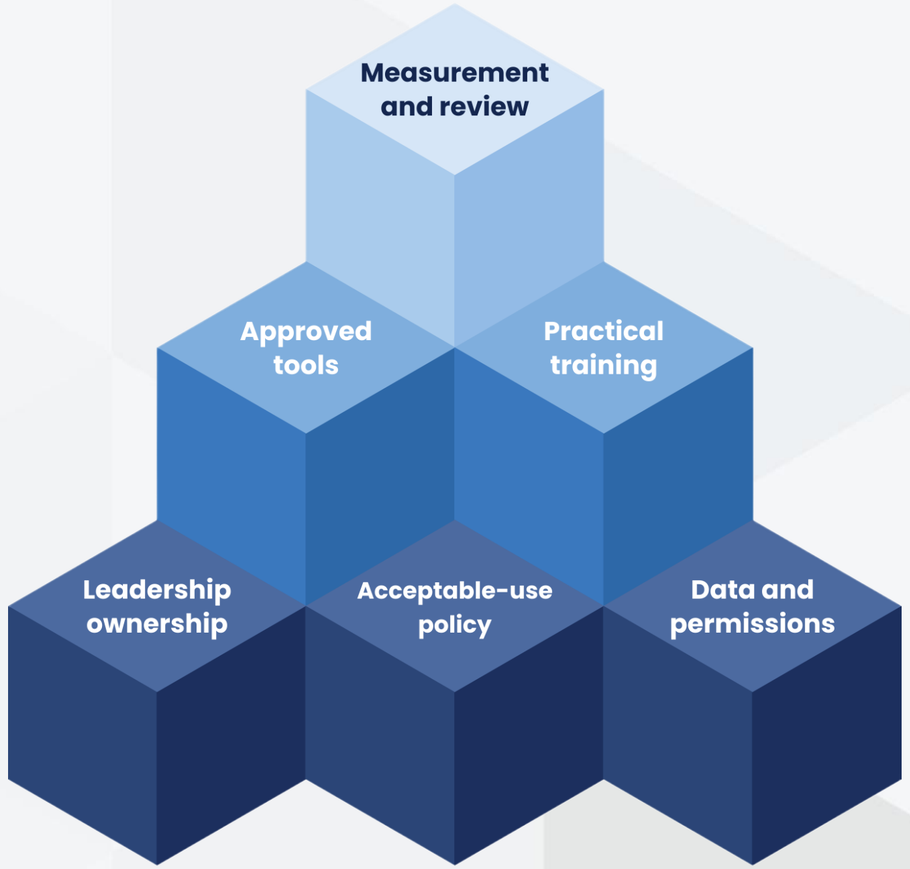
- Customer and external communication.
- Financial decisions.
- Legal or contractual conclusions.
- Changes to business records.
- Final decisions and high-impact actions.
- Exceptions and escalations, with human judgment documented

How will we MEASURE success?

- Time saved and faster completion.
- Fewer errors.
- Greater capacity and better service.
- Revenue or cost impact.

Six Building Blocks for Responsible AI

Licenses are one piece of a larger foundation. These six building blocks support responsible AI.



Unmanaged AI creates invisible risk and invisible spend, and the value stays invisible too.

Look for Work Worth Improving

"What work consumes meaningful time without requiring meaningful judgment?"

Search for work that involves these tasks.


Searching and summarizing


Comparing and reformatting


Preparing and updating


Following up


Moving information between systems



Answering the same questions repeatedly

Where to Hold Off

A few starting points make weak first projects.

- A novelty with no business owner
- A process no one fully understands
- Unreliable or inaccessible data
- High-stakes decisions with no review point
- A vague goal to “increase productivity”

Map the Workflow First

Before redesigning the work, understand how it works today.

Trigger → Gather Information → Perform Work → Review → Approve → Deliver → Follow Up

Mark **each step** with these details.

- **Systems**
- **Information sources**
- **People**
- **Delays**
- **Review points**
- **Current measures**

Seven Questions About the Current State



1. What triggers the work?

1. Who performs each step?



1. What does the process cost today?

1. Where do delays, rework, and errors occur?



1. What result would make improvement worthwhile?

1. Which decisions require human judgment?



1. Which systems and information sources are involved?

The AI Opportunity Matrix



Organizations build momentum through early adoption before they take on high-value, high-effort initiatives.

Scoring Each Opportunity

Business Value

Rate the value an opportunity could deliver.

- Time or cost savings
- Increased capacity
- Better customer service
- Quality improvement
- Revenue potential
- Strategic importance

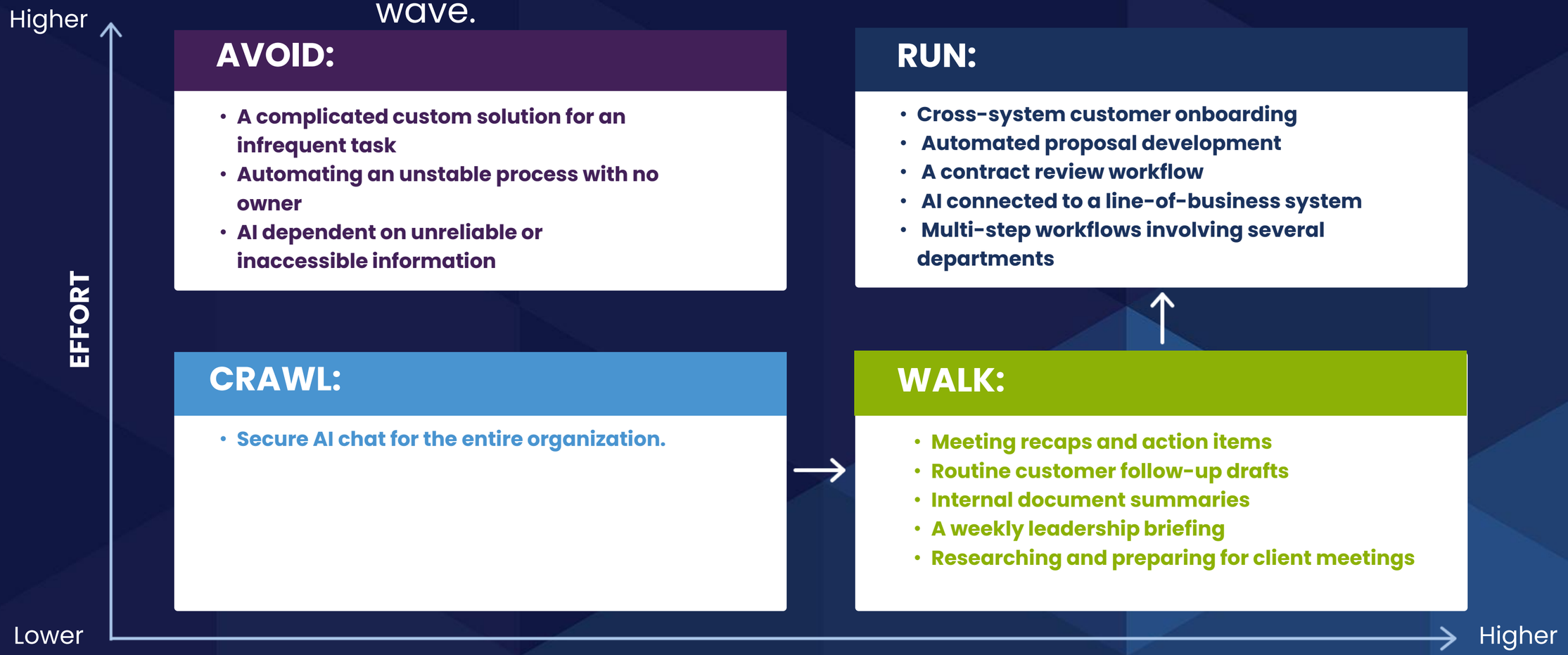
Implementation Effort

Rate the work required to deliver it.

- Process complexity
- Information and data readiness
- Integration requirements
- Security and compliance needs
- Change management
- Implementation and ongoing cost

Example AI Opportunities

Some useful ideas belong in a later wave.



Illustrative examples only. Placement varies with the organization, process, information sensitivity, intended outcome, and existing technology.

Define Success Before the Pilot

A pilot without a definition of success never ends. See the example use case on preparing client meeting briefs.

Decision:
Scale | Adjust | Pause | Stop

Savings beat the target, but rework and AI cost both missed theirs, so tighten the review step before scaling.

Success means a measurable business outcome has changed.

Measure	Before	Target	Actual
Hours spent per brief	3h	1.5h	ⓘ **1.75h**
Briefs per week	10	10	✓ **10**
Weekly labor cost	**$1,500**	**$750**	✓ **$625**
Error or rework rate	5%	2%	✓ **3%**
Monthly AI cost	$0	$30	✕ **$40**
Business outcome	**Briefs finished the same day as the meeting**	**Briefs ready a day early**	✓ **Briefs ready a day early**

Met or beat target Missed target, but improved Missed target

Live Demonstration

Let’s take a practical look at AI in the flow of work.

The Takeaway

Start with work worth improving.

Find the friction.

Measure the cost.

Give AI appropriate access.

Keep people accountable.

Prove the value.

Then scale.

Questions?

Where might AI do real work in your business?

THANK YOU

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Practical AI begins with work worth improving.

Appendix A

Microsoft Copilot Overview

Tool	Best used for	Information context	Typical complexity	Human oversight	Potential cost model
Copilot Chat	Questions, drafting, research, and quick analysis	Web information and content the user shares in the conversation	Low	The user reviews each response	Included with eligible Microsoft 365 plans, with agents billed on usage
Microsoft 365 Copilot	Work inside Microsoft 365 applications	Permitted emails, meetings, files, and chats	Low to medium	The user reviews drafts and summaries	Per-user add-on license, with Business pricing from $21 per user per month (promotional $18) and Enterprise pricing at $30.
Copilot Cowork	Delegated, multi-step work across tools	Permitted Microsoft 365 data and connected tools	Medium	The user reviews plans and results and approves actions	Microsoft 365 Copilot license plus usage-based Copilot Credits
Skills	Repeatable work done the same way each time	Reusable instructions plus whatever the host tool can reach	Low to medium	An owner maintains and reviews each skill	Tied to the tool that runs the skill
Agent Builder	Focused assistants for a role or team	Defined knowledge sources and instructions	Medium	An owner sets boundaries and reviews performance	Included with Microsoft 365 Copilot for internal agents
Copilot Studio	Custom agents built around business processes and systems	Chosen knowledge, systems, and connectors	High	Governance, testing, and named ownership	Included for internal agents with Microsoft 365 Copilot and credit-based for standalone use