

Digital Transformation and operational efficiencies

→ **Marcus Idle**

Head of Practice

Matt Chandler

Technical Pre-Sales

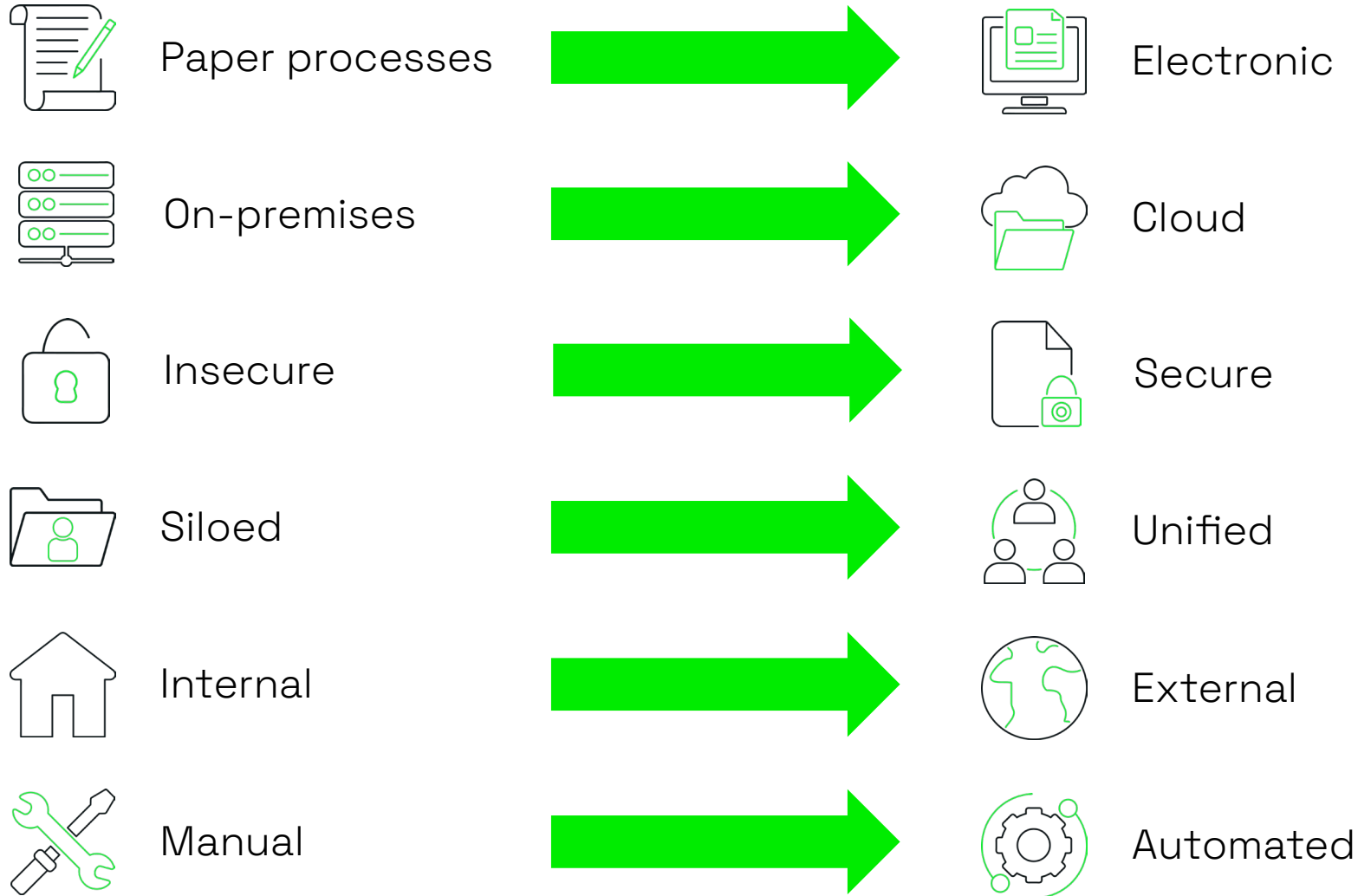


Agenda

- What is digital transformation?
- Why it's critical today
- Story of a transformation
- Copilot Agents
- Azure and M365 Optimisation: Scout
- Our success stories
- Q&A



What do we mean by digital transformation?



What are the challenges?



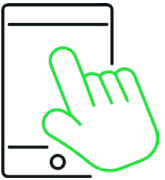
Cost

Legacy IT consuming budgets



Security

Legacy sign in and vulnerable platforms



Usability

Customer base turning to competition



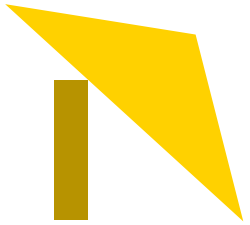
Complexity

IT support and projects



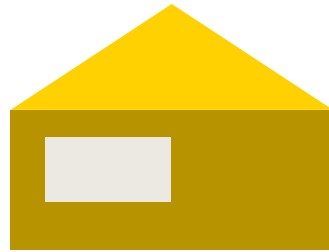
Digital Transformation Maturity Model

Level 1



Some online processes

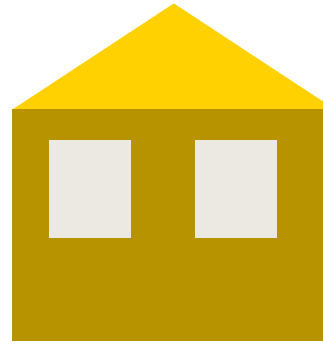
Level 2



Some SSO

Some CRM integration

Level 3



Some SSO

Usability standards

CRM

Threat mitigation

Level 4



SSO, BYOID

Usability standards

Lightweight services

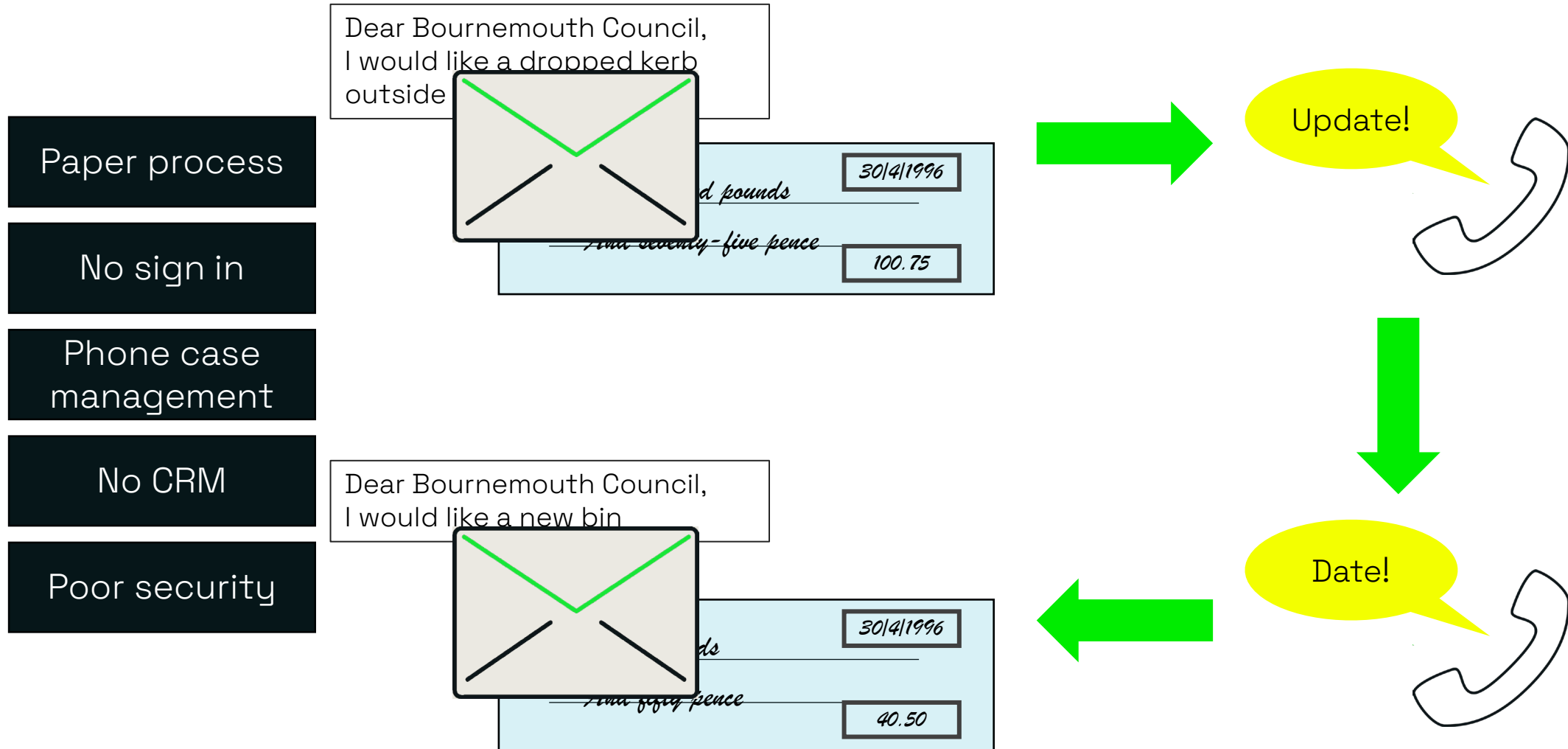
Low or no code + CRM

Threat mitigation

Analysis

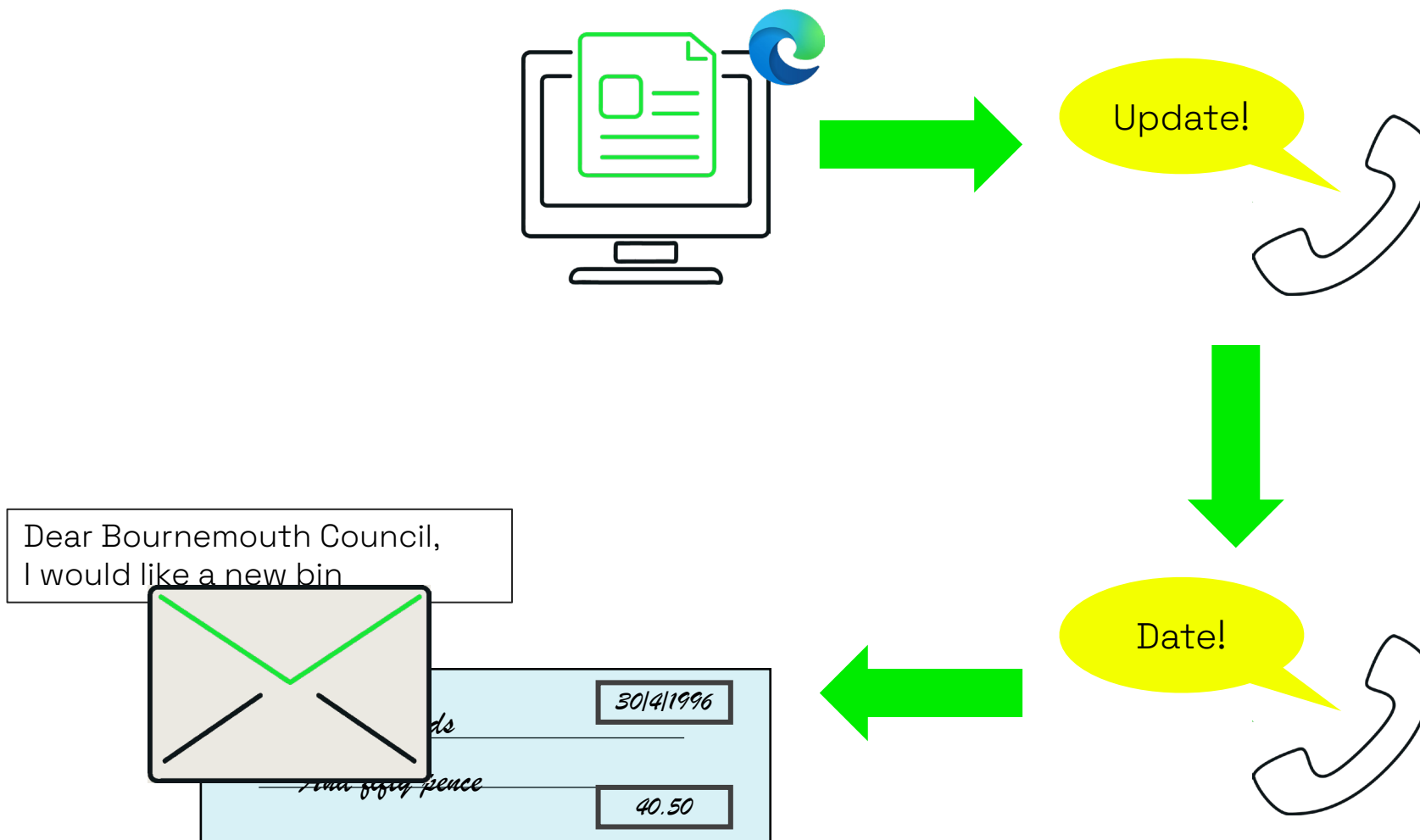


A transformation story

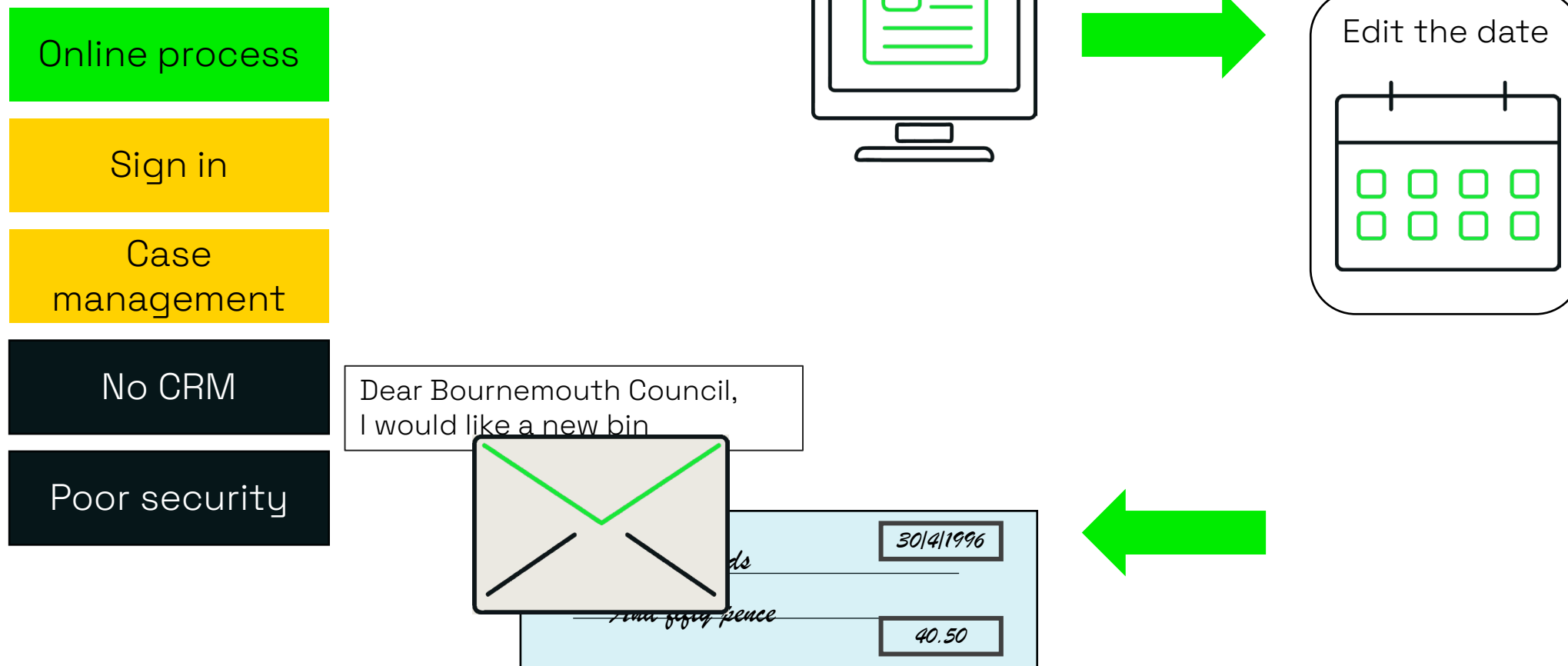


A transformation story

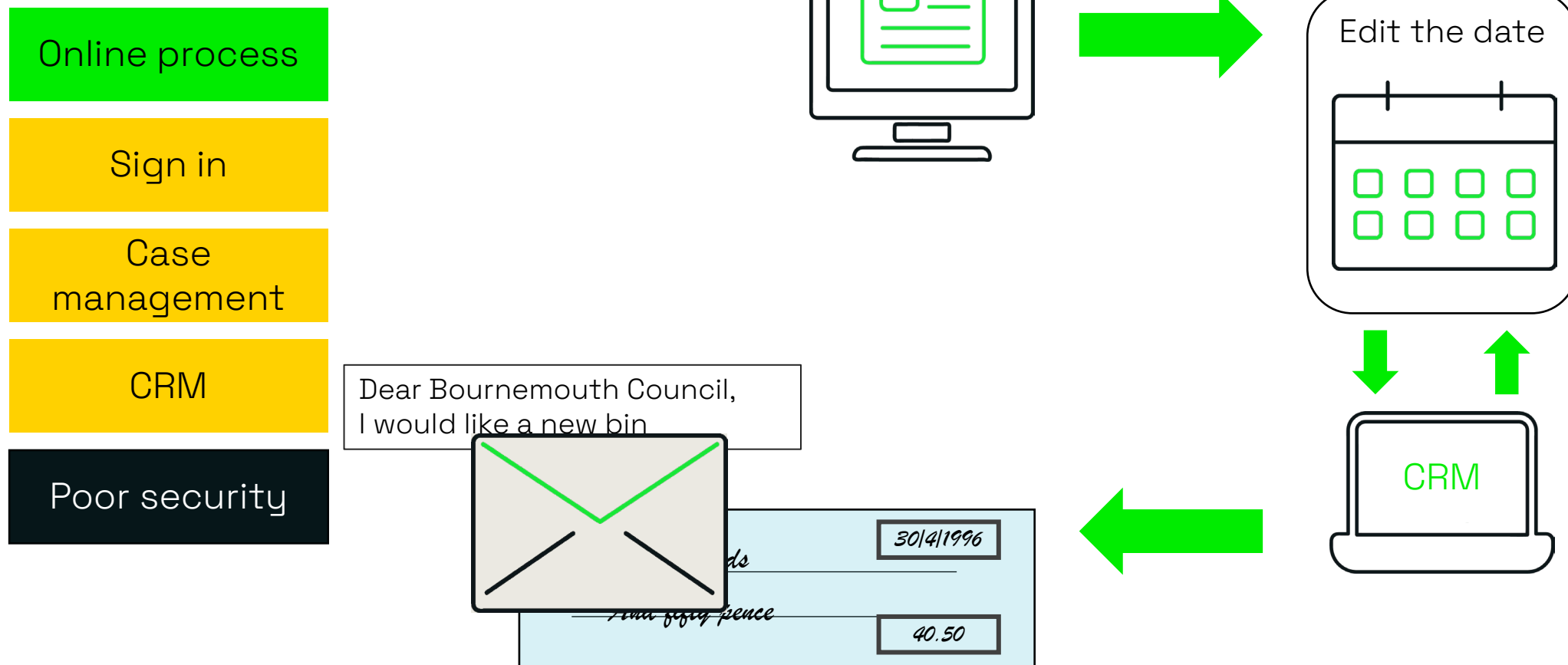
- Online process
- No sign in
- Phone case management
- No CRM
- Poor security



A transformation story



A transformation story



A transformation story

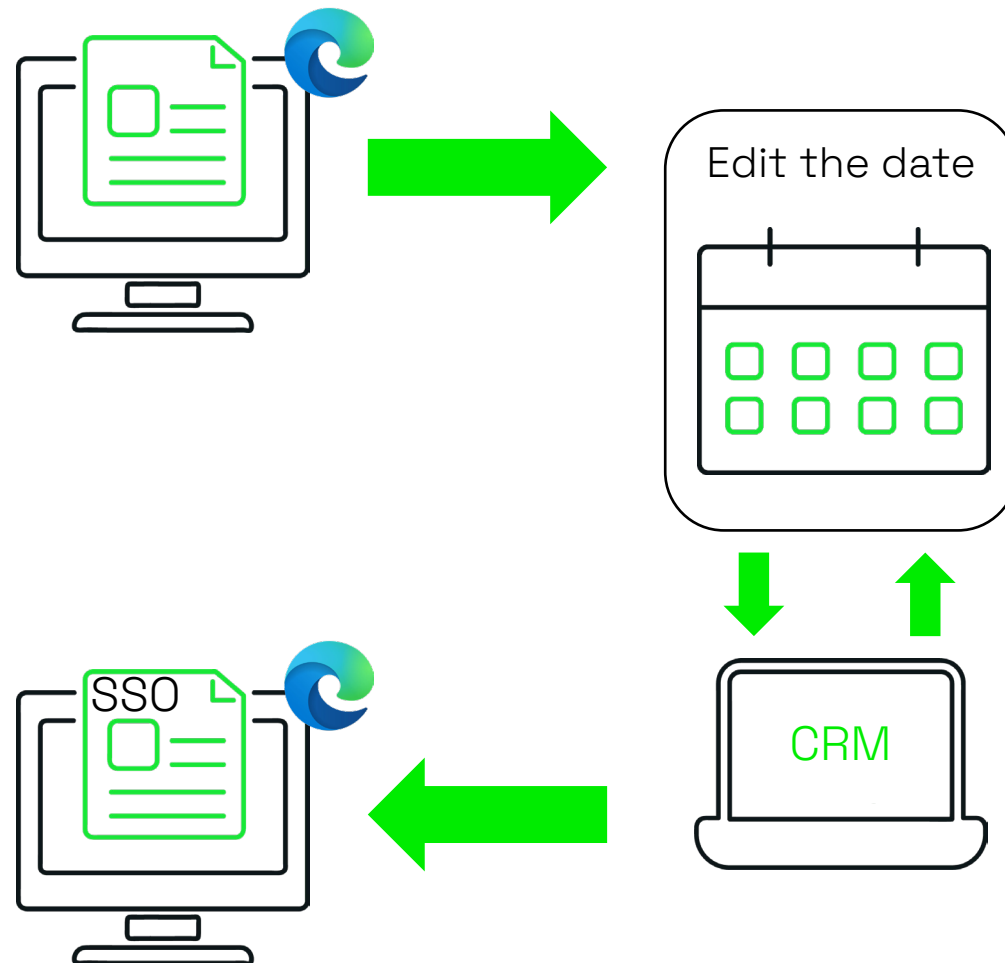
Online process

Sign in

Case
management

CRM

Threat
mitigation



A transformation story

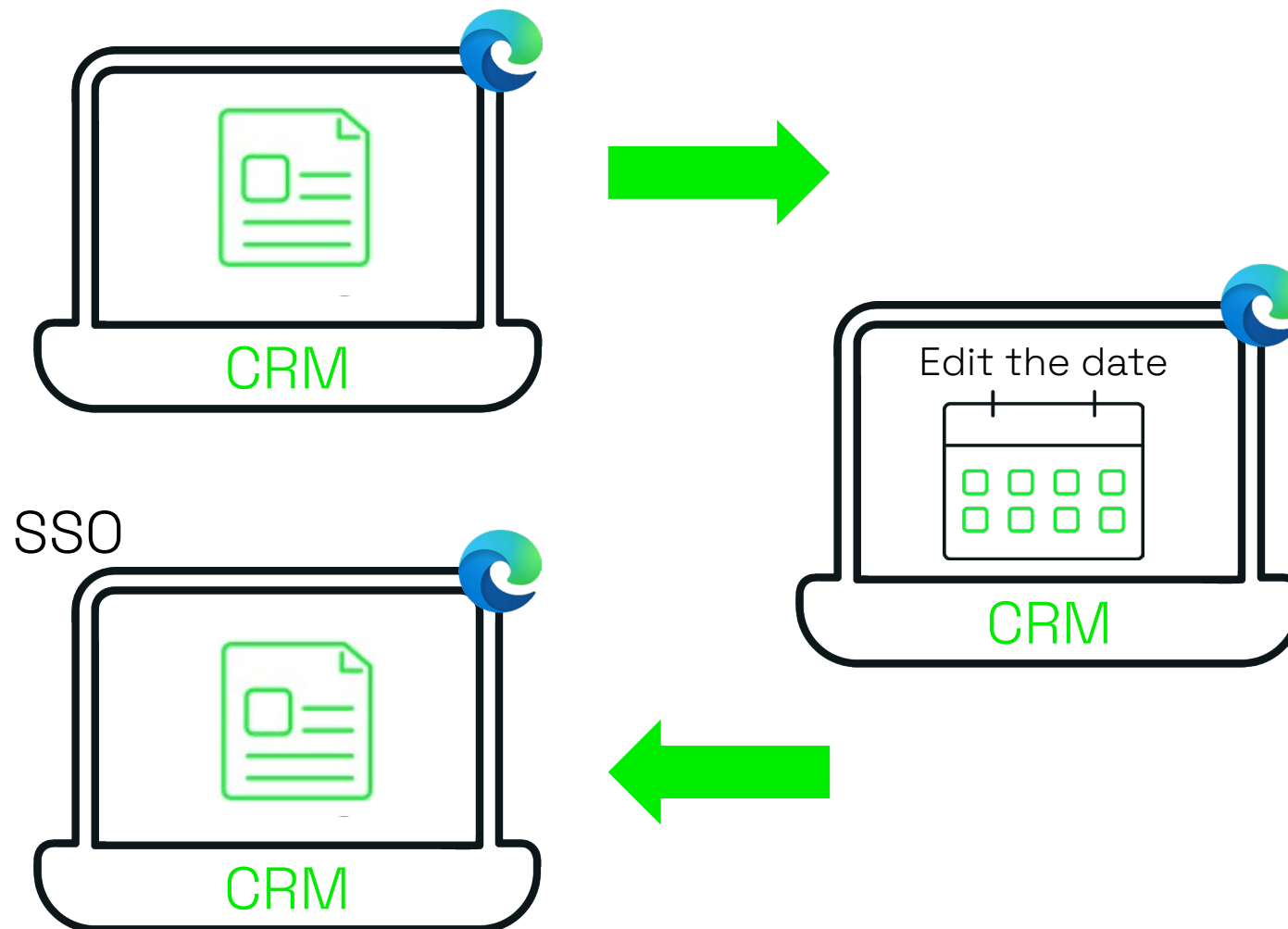
Online process

SSO, BYOD

Embedded in
CRM

Low or no code

Threat
mitigation



Enabling technologies

- Azure App Services, Azure Functions, Database Services
- Dynamics CRM, Power Apps
- Visual Studio
- Entra External ID for Customers
- Azure Landing Zones
- Azure Migrate
- Azure Arc
- Scout
- Kocho Evolve



Digital transformation benefits

- Improved efficiency and cost savings
- Better customer experience and engagement
- Data-driven decision making
- Greater scalability and innovation readiness
- Stronger compliance and risk posture



Copilot Agents



M365 Copilot vs Copilot Agents

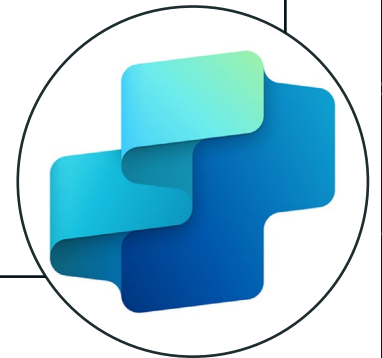
- No development needed
- Queries all information user has access to within M365 – including the unknown

M365 Copilot



- Foundations in Power Virtual Agents
- Created for specific reason using Copilot Studio
- Templates available for various Copilots (IT Helpdesk, Website Q&A)
- Limit access to specified Knowledge Sources
 - Public Websites
 - SharePoint
 - Azure SQL
 - Salesforce etc
- Teams Interactions
- Incorporate Workflows and Adaptive Cards for customisation
- Integrated with Power Automate for process automation

Copilot Agent



Copilot Agent – Licensing and costs

Creation License

Copilot Studio User License
(Free)

Copilot Studio Author (via
Power Platform Admin Center)

M365 Copilot License

Usage Cost

Pay as you go - \$0.01 per
message

Message Pack - \$200 per tenant,
per month for 25,000 messages

M365 Copilot £19.00 per user, per
month

Copilot Agent - Creation

Home

Create

Agents

Flows


Library

...

Create


+ New agent

Start with an agent template

**Safe Travels**
Agent template


Provides answers to common travel questions and related health and safety guidelines.

Government

**Website Q&A**
Agent template


Instantly answer user questions using the content of your website or other knowledge.

AI + Machine LearningCustomer Service

**IT Helpdesk**
Agent template


Empowers employees to resolve issues and effortlessly create/view support tickets.

IT & Management Tools

**Store Operations**
Agent template


Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies

Operations & Supply ChainRetail & Consumer Goods

**Financial Insights**
Agent template


Help financial services professionals get quick and concise info from their org's financial documents and other available resources.

FinanceFinancial Services

**Weather**
Agent template


Your go-to assistant for getting weather forecast.

Hospitality & Travel

**Voice**
Agent template


An agent with voice capabilities.

AI + Machine Learning

**Benefits**
Agent template

Benefits Agent provides personalized information on various benefits offered by the employer that are tailored to employee's unique circumstances.

Human Resources

**Citizen Services**
Agent template

Enable Public Sector organizations to build an agent with their publicly available websites to assist citizens navigate services and information.

Customer ServiceGovernment

Filter

Search agents

Copilot Agent – Add data source

Add knowledge

Help your agent provide more relevant information and insights. [Learn more](#)

Search for a knowledge source



Upload file

Drag and drop, or [select to browse](#), or upload and sync from



OneDrive



SharePoint

Helps your agent access knowledge from remote file locations. [Learn more](#)

★ Featured

Advanced



See suggestions



Public websites



SharePoint



Azure AI Search



Dataverse



Dynamics 365



Salesforce



ServiceNow



Azure SQL



BECOME GREATER
KOCHO.CO.UK

Copilot Agent – Publishing Agents

The screenshot displays the Copilot Studio interface for managing a Copilot Agent. The top navigation bar includes the Copilot Studio logo, environment selection (MCTest (default)), and user profile (MC). The left sidebar shows navigation options: Home, Create, Agents, Flows, and Library. The main content area is titled 'Dev Sales Assistant' and includes tabs for Overview, Knowledge, Topics, Actions, Activity, Analytics, and Channels. A banner at the top of the main area states 'Your agent is ready! Here's what's next:' with three steps: 'Add actions', 'Add trigger', and 'Publish your agent'. Below this, the 'Details' section shows the agent's name 'Dev Sales Assistant' and a description: 'Dev Sales Assistant helps users query sales data efficiently and concisely, offering suggestions for common queries while ensuring data accuracy and relevance.' The 'General instructions' section lists six bullet points: 'Assist users in querying sales data.', 'Provide concise responses.', 'Offer suggestions for common queries.', 'Ensure data accuracy and relevance.', 'Maintain a professional tone.', and 'Handle multiple types of sales data queries efficiently.' The 'Orchestration' section has a toggle switch set to 'Enabled' with the text 'Use generative AI to determine how best to respond to users and events. [Learn more](#)'. The 'Analytics' section is partially visible at the bottom. On the right, a 'Test your agent' chat window is open, showing a greeting from the agent and a text input field for the user.

Copilot Studio Environment: MCTest (default) MC

Dev Sales Assistant Overview Knowledge Topics Actions Activity Analytics Channels Published 5/27/2025 **Publish** **Settings** **Test**

Your agent is ready! Here's what's next:

- ⚡ **Add actions** so your agent can do things for you
- 🗨️ **Add trigger** so your agent can be activated by an event
- ↑ **Publish your agent** so others can use it

Details [Edit](#)

Name
Dev Sales Assistant

Description
Dev Sales Assistant helps users query sales data efficiently and concisely, offering suggestions for common queries while ensuring data accuracy and relevance.

General instructions

- Assist users in querying sales data.
- Provide concise responses.
- Offer suggestions for common queries.
- Ensure data accuracy and relevance.
- Maintain a professional tone.
- Handle multiple types of sales data queries efficiently.

Orchestration
Use generative AI to determine how best to respond to users and events. [Learn more](#) **Enabled**

Analytics [Open Analytics](#)

Test your agent

Hello, I'm Dev Sales Assistant, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago

Ask a question or describe what you need

0/2000 [🔗](#) [➤](#)

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Copilot Agent – Teams interaction

The screenshot shows a Microsoft Teams chat window. The left sidebar contains icons for Activity, Chat, Teams, Calendar, Calls, OneDrive, Copilot, Admin, and Apps. The main chat area is titled "Dev AdventureWorks Database" and has tabs for "Chat" and "Shared". The chat history shows a message from the Copilot Agent (a purple icon with a white 'C') stating: "The largest order in the AdventureWorks Database is **Sales Order ID 71784**, with a total due amount of **\$119,960.82** 1." This message is timestamped 12:10 PM. A user response in a blue bubble says "Tell me more about Sales order 71784" and is timestamped 12:11 PM. The Copilot Agent responds with a detailed list of order information, timestamped 12:11 PM. The user then asks "Which customer is this for" in a blue bubble, timestamped 12:11 PM. The Copilot Agent provides the customer details, also timestamped 12:11 PM.

Dev AdventureWorks Database Chat Shared

The largest order in the AdventureWorks Database is **Sales Order ID 71784**, with a total due amount of **\$119,960.82** 1.

12:10 PM

Tell me more about Sales order 71784

Dev AdventureWorks Database AI generated 12:11 PM

Here are the details for Sales Order ID 71784:

- **Order Date:** June 1, 2008
- **Scheduled Delivery Date:** June 13, 2008
- **Order Status:** 5
- **Total Due Amount:** \$119,960.82
- **Subtotal:** \$108,561.83
- **Tax:** \$8,684.95
- **Freight Charges:** \$2,714.05

All timestamps are in UTC 1.

12:11 PM

Which customer is this for

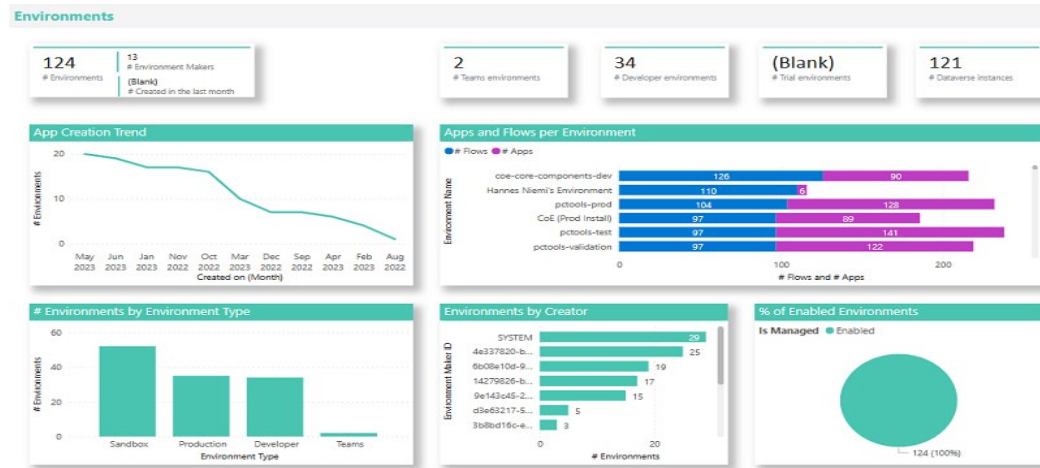
Dev AdventureWorks Database AI generated 12:11 PM

The customer details for Sales Order ID 71784 are as follows:

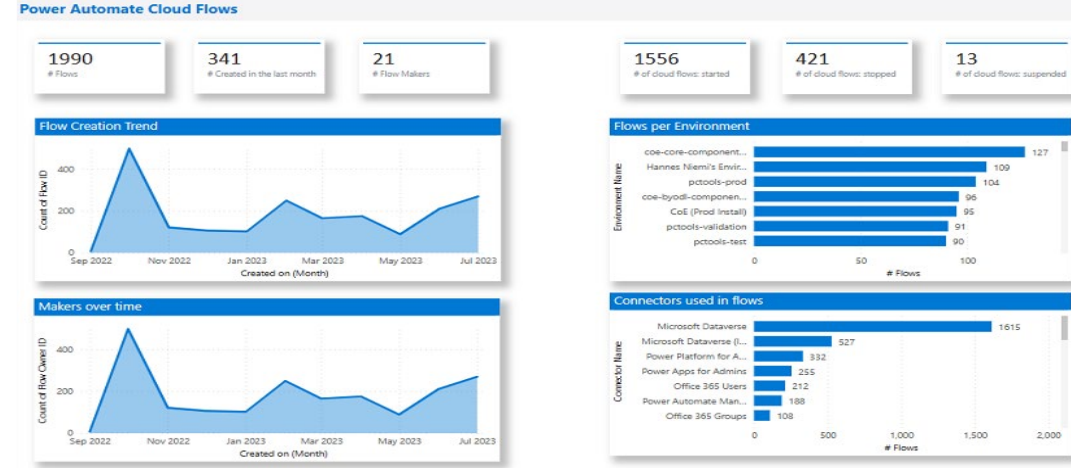
- **Name:** Terry Eminhizer
- **Email:** terry1@adventure-works.com
- **Phone Number:** 1 (11) 500 555-0176 1.

Copilot Agent – Management (Centre of Excellence)

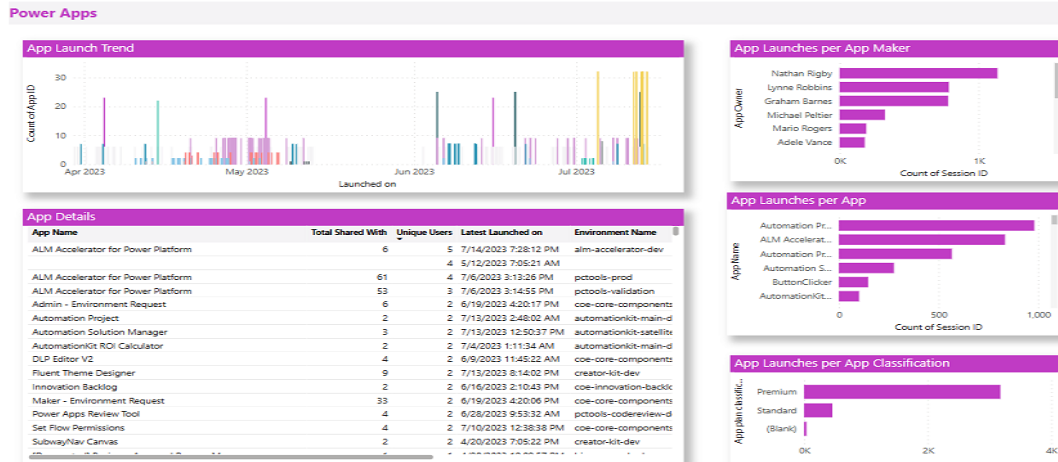
Environments



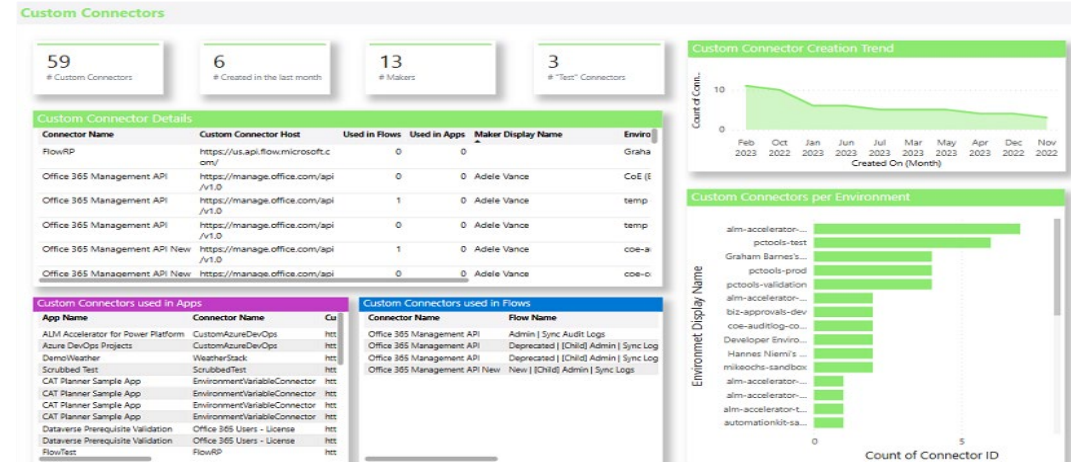
Power Automate Flows



Power Apps



Connectors



Azure and M365 Optimisation Scout Demo



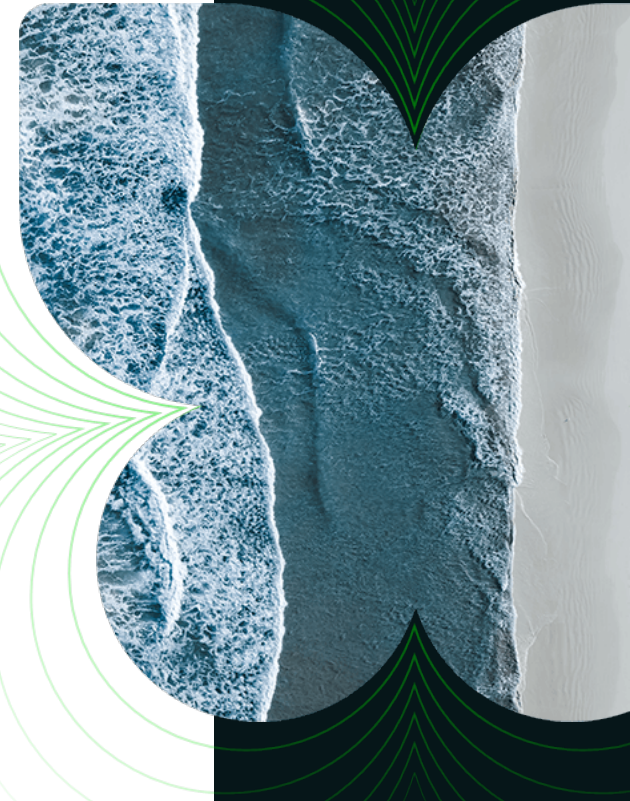
Case studies

→ Real world examples of
Digital Transformation in
action

Secure cloud migration and divestiture



- Halo owns brands like Lloyds Pharmacy and AAH Pharmaceuticals.
- Over 3000 pharmacy branches – they are the UK's largest pharmaceutical supply chain with more than 17,000 staff.
- Specialist nursing and pharmaceuticals for the most vulnerable - relies on a secure, scalable infrastructure to keep things running smoothly.
- £8 billion split from parent company McKesson.
- Halo needed to transform their IT quickly and without missing a beat in patient care.

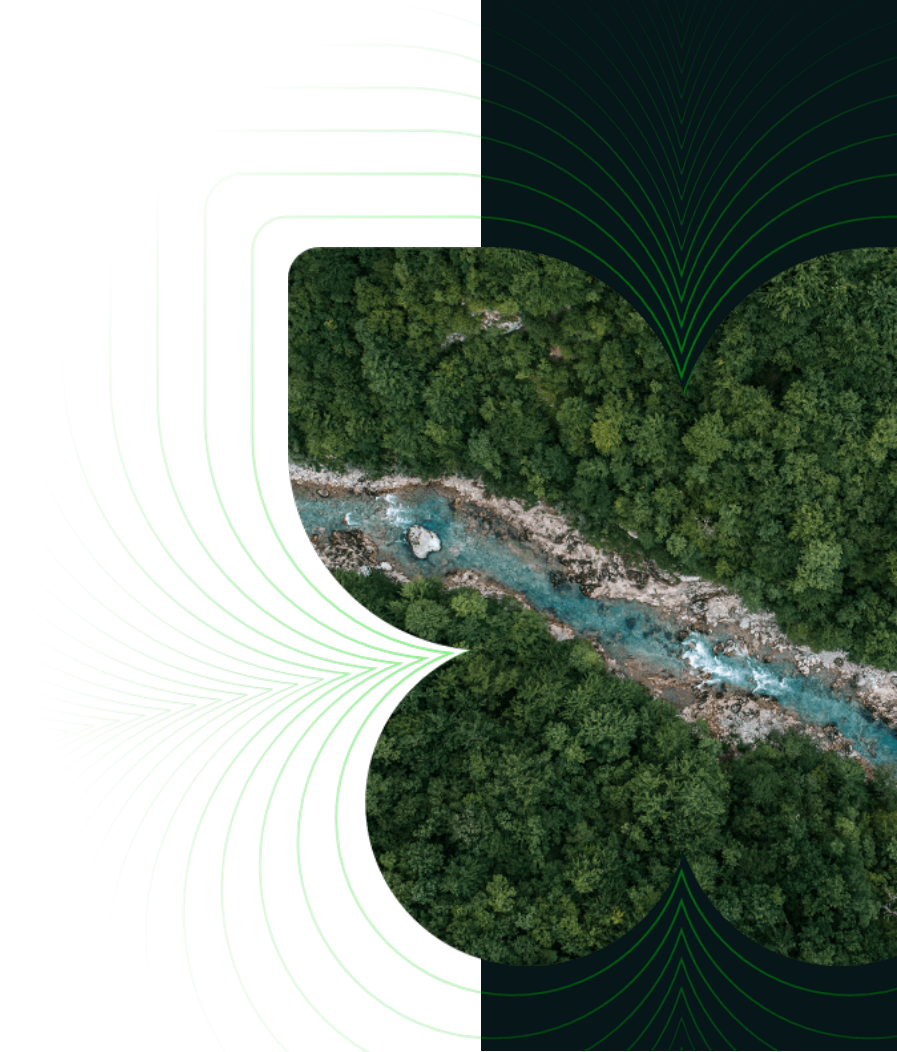


The project



Key project elements included:

- Identity migration
- Security uplift
- Cloud infrastructure overhaul
- Low code / no code
- Device and application management



The outcome



Cost savings

Consolidated infrastructure reduced costs, delivering an estimated **£11 million** in savings.



Enhanced security

Implemented a holistic security approach using **Azure Security** and **Microsoft Defender for Cloud**, ensuring end-to-end protection across a complex multi-cloud environment.



Simplified device management

Streamlined device and app management through **Microsoft Intune** and **Defender for Endpoint**, reducing complexity, cutting costs, and enhancing security.



Long-term IT and security support

Established a **three-year Managed IT Service agreement**, providing proactive support across all levels of Halo's cloud infrastructure, underpinned by Microsoft technology.

“I’ve done a few digital transformation projects in my time, and the speed at which Kocho and the Hallo team were able to achieve this was truly exceptional.”

Robin Dargue

CIO | Hallo Healthcare
Group



Seamless user experience authentication

DebeKa

- One of the largest insurers in Europe.
- They had no online account management.
- Customers needed the ability to activate their online accounts by entering an account ID and other info.



The new process

Debeka

Accept our T&Cs

Prove who you are

Set up a password

Set up MFA

Access your documents

Debeka **Versichern und Bausparen**

Zugangsdaten eingeben

Aktivierungscode:

?

Servicenummer:

Geburtsdatum:

Abbrechen Weiter



The outcome

Debeka

- Kocho built account activation, sign in, password reset and other authentication journeys.
- Knowledge transfer.
- Rapid website pilot.
- Then into mobile app integration.
- Competitive edge regained!



Ready to take the next step?

Book a Cloud Discovery Call

1-hour pre-sales call with an experienced Kocho consultant.

- Get expert advice and recommendations tailored to your requirements.
- Find out about Microsoft-funded workshops you may be eligible for.
- Speak to us about your wider secure cloud transformation strategy.
- Sign up for a free Scout health check



hello@kocho.co.uk



0800 044 5009

