



# Copilot helps Softcat chart course to improved procurement

Published

Established in 1993 and headquartered in Marlow, UK, Softcat plc is an award-winning provider of IT solutions and services to a wide range of commercial and public sector organisations.

Over the last 25 years it has established an enviable reputation for customer service. It provides more than 10,000 longstanding customers with access to leading-edge technologies and real-world, industry-focussed advice to overcome the most pressing business challenges.

With offices across the UK and Ireland and trusted, productive relationships with leading technology providers, Softcat's 250+ dedicated service professionals, including service developers, highly-experienced consultants and support analysts, work closely with customers to deliver a truly unique service experience.

## Key facts

- 1** Award-winning IT solutions and services provider
- 2** 10,000+ longstanding customers
- 3** Productive relationships with leading technology providers

## The challenge

We live in a world of ubiquitous data, where every interaction creates a legacy of information that can be used to gain significant insight into any given business process. One of the challenges we face when attempting to leverage this information, is our capacity to see through the noise and focus our analysis precisely on where those insights may lie.

For a large organisation like Softcat, where multiple businesses activities inevitably generate masses of information, seeing through the noise is absolutely vital to help simplify and improve our company-wide decision-

making processes. And when it comes to bringing on board new service providers, this is especially true.

We recently distributed a request for information (RFI) for a brand-new travel management system. As expected, the eleven formal responses we received created a complex tapestry of information contained within individual vendor responses and subsequent internal discussions. Our challenge was to simplify that data, minimise the required resources to enable us to complete the analysis and collate that information in a format that would help the business quickly make the right decision.

## Critical success factors

- Harness multiple information streams to deliver data-driven insights**
- Simplify analysis to facilitate effective decision making**
- Reduce the time and resource needed to assess suitability of third-party providers**

## The Solution

**"We received multiple responses to the RFI and request for quote (RFQ) calls from prospective vendors,"** - Sarah-Jane Sydenham, Softcat Head of Internal Procurement.

"When issuing the RFI and conducting initial online calls with all recipients, we ensured transcripts were recorded. These transcripts, along with the responses, were saved to OneDrive. Using Copilot in Teams, we analysed the data to help determine which suppliers should progress to the RFP stage."

"We followed a structured set of questions and found that Copilot's analysis aligned remarkably well with our manual evaluation. To validate its effectiveness—since this was our first time using it—we ran both manual and AI-assisted reviews in parallel. We repeated the same approach for the RFP stage, again using Copilot to analyse responses and meeting transcripts. The consistency between Copilot's insights and our manual conclusions was striking, demonstrating its potential to streamline and enhance procurement decision-making."

Sarah-Jane had drafted in her colleague, Bradley Howe, Softcat Copilot Architect. He's a subject matter expert and would bring extensive knowledge gained from multiple successful external Copilot projects to help with the task.

Working collaboratively, they examined the outcomes generated from the first batch of analysis and used those findings to further refine the prompts inputted into Copilot. "We'd never done this before," said Bradley, "so everything was brand new. We continually tested our prompts to understand what was most effective at delivering the outcomes we desired. Of course, we had no desire for Copilot to actually make the decision for us, but it was an extremely useful exercise to help understand what it can bring to the table, what prompts are most effective and when it's best to use it."

"We gained a lot of knowledge from the experience," said Sarah-Jane, "and we've been able to apply that intelligence to other projects, including preparation for an upcoming cleaning contract. We've discovered how the automatic transcription functionality embedded in Microsoft Teams helps provide actionable data that can add value to the Copilot interpretations. It's also provided an opportunity to disseminate essential knowledge and training across the wider Softcat team. We see Copilot playing a much more prominent and productive role in future procurement activities."

## Solution highlights

- AI-generated analysis provided by Microsoft Copilot**
- Insights gained through Copilot data analysis**
- Process of refining AI prompts to produce desired outcomes**

## The benefits

**"First and foremost, Copilot has helped accelerate the decision-making process. Its capacity to analyse, make recommendations and create presentable findings from a wealth of diverse data, including formal RFI and RFQ responses, meeting notes, emails and a range of other documents, has saved around 45 hours of work on this project alone! It's a significant return on investment (ROI), improves job satisfaction and has freed up valuable time and resources that can now be focussed on other important projects."**

Sarah-Jane Sydenham  
Softcat Head of Internal Procurement.

"It's been an incredibly useful learning experience," said Bradley. "The outputs created by Copilot are easy to understand, save time and incorporate justifications for the decision reached. We've made great strides in understanding how best to interrogate post-decision and prompt responses to ensure we avoid vanilla/generic results and actually drill down to achieve the most accurate and useful outputs. It sounds simple, but getting to ask the right questions is absolutely critical to getting the best out of the application and stands as valuable knowledge that can be applied to similar projects in the future."

"Copilot is helping us simplify document management," said Sarah-Jane, "Manually analysing large amounts of data can be confusing and make it difficult to focus on what's important. Although we spent many hours

refining the prompts needed to deliver valuable outputs, the intelligence we've gathered during the project can, and will be, used across the business to improve business processes and facilitate speedier, more effective decision making.

"We've rolled out Copilot to more than 2,000 colleagues across the business on the back of this project and have built our own agentic AI to increase the number of tasks that can be performed autonomously going forward. The lessons learned will be applied to an upcoming cleaning contract project and we expect to gain similar time and resource saving benefits from the foundation work we've already completed. We're convinced that the work we're doing now will have a huge impact on how the wider business approaches such projects in the future"

## Benefits at a glance

- Accelerated decision making**
- Significant ROI through time and resource savings**
- Valuable lessons learned applicable to wider business activities**

## Why Softcat

Through years of working closely with leading technology providers and some of the UK's biggest commercial and public sector organisations, Softcat has established an enviable reputation for expertise within the industry. Its team of in-house consultants and specialists has amassed an extensive portfolio of skills and knowledge capable of adding value to business processes, eliminating unnecessary workload and enhancing how businesses respond to today's challenges.