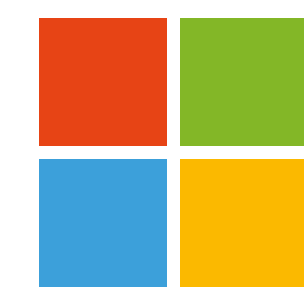




Case study

Scaling human excellence with AI

How Softcat is using Microsoft Copilot to simplify work, enhance customer service and build AI expertise



Microsoft

Executive summary

Strong relationships, practical advice and a genuine commitment to helping customers are still at the centre of the business, and that hasn't changed as AI has become a more visible part of working life.

Softcat is using Microsoft technologies to help its people do more of what they already do well, by taking friction out of day-to-day work, making trusted information easier to find, speeding up analysis and cutting back the time spent on repetitive manual tasks. Softcat is now a more capable organisation, where employees are gaining more time, more confidence and mental space to focus on the customer conversations and decisions that matter most.

Across the business, Microsoft 365 Copilot, Copilot Studio, SharePoint, Microsoft Fabric, Power BI and Microsoft Dynamics 365 are being used to improve productivity, knowledge access, commercial visibility and collaboration. In one procurement project alone, Copilot saved around 45 hours of work. Elsewhere, a Copilot-powered knowledge experience is helping employees find the right

sales and vendor collateral faster, while broader data and analytics work is improving access to governed insight across the organisation. At the same time, Softcat is modernising its own commercial operating model through Dynamics 365, creating a more connected environment for account teams, specialists and support functions.

What makes this especially valuable is that Softcat isn't only using these tools internally.

As a Microsoft-focused organisation and a Customer Zero, it is using its own business as a real-world test bed to understand what actually drives value, what helps adoption and what needs to happen behind the scenes to make AI genuinely useful in practice. That means the lessons learned internally can also help customers navigate a fast-moving AI landscape with more confidence.

About Softcat

Softcat is an award-winning IT solutions provider serving commercial and public sector organisations across the UK and Ireland.

With more than 25 years of experience, more than 10,000 longstanding customers and over 250 dedicated service professionals, it has built a strong reputation for helping organisations adopt leading technology in practical, high-impact ways.

At the heart of that reputation is a simple belief: great people deliver great service. That's why Softcat's AI strategy is centred on helping employees work more effectively, spend less time on admin and low-value effort, and create more room for the conversations and decisions that matter most to customers. The aim is to continue supporting that human judgement, improving consistency, making information easier to access and scaling the service standards Softcat is already known for.

The opportunity

As Softcat has grown, so has the amount of information, content and process complexity behind the customer experience.

The business saw a clear opportunity to make trusted information easier for employees to access, help people work through complex data more efficiently and cut down the time spent on repetitive manual tasks. The aim was to evolve processes that were already working well in a way that would protect and scale the service standards the business is known for.

In Softcat's Bid team and supporting sales, employees needed a better way to work with large volumes of content spread across multiple systems. Different versions of documents needed manual governance, and it wasn't always obvious which source was the most recent or up to date. Over time, that made it slower and harder to maintain a clear single version of the truth.

Softcat also wanted to move away from the cost and complexity of a legacy third-party platform and build a more modern, scalable way for colleagues to access the material they needed. At the same time, some internal processes involved large volumes of data and documentation.

Procurement was a clear example. Teams needed

to review detailed RFI and RFP responses, compare submissions, work through follow-up discussions and analyse meeting transcripts, all while making careful, well-informed decisions. As Sarah-Jane Sydenham, Head of Internal Procurement at Softcat, explained, "Manually analysing large amounts of data can be confusing and make it difficult to focus on what's important."

Softcat also recognised a broader opportunity around data itself.

If AI was going to deliver consistently useful outcomes, the data first had to be more accessible, better governed and easier to work with. As James Wingham Head of Data at Softcat explained, older reporting models often meant a request had to be raised, added to a backlog and then left for a specialist team to pick up. The direction now is very different. In his words,

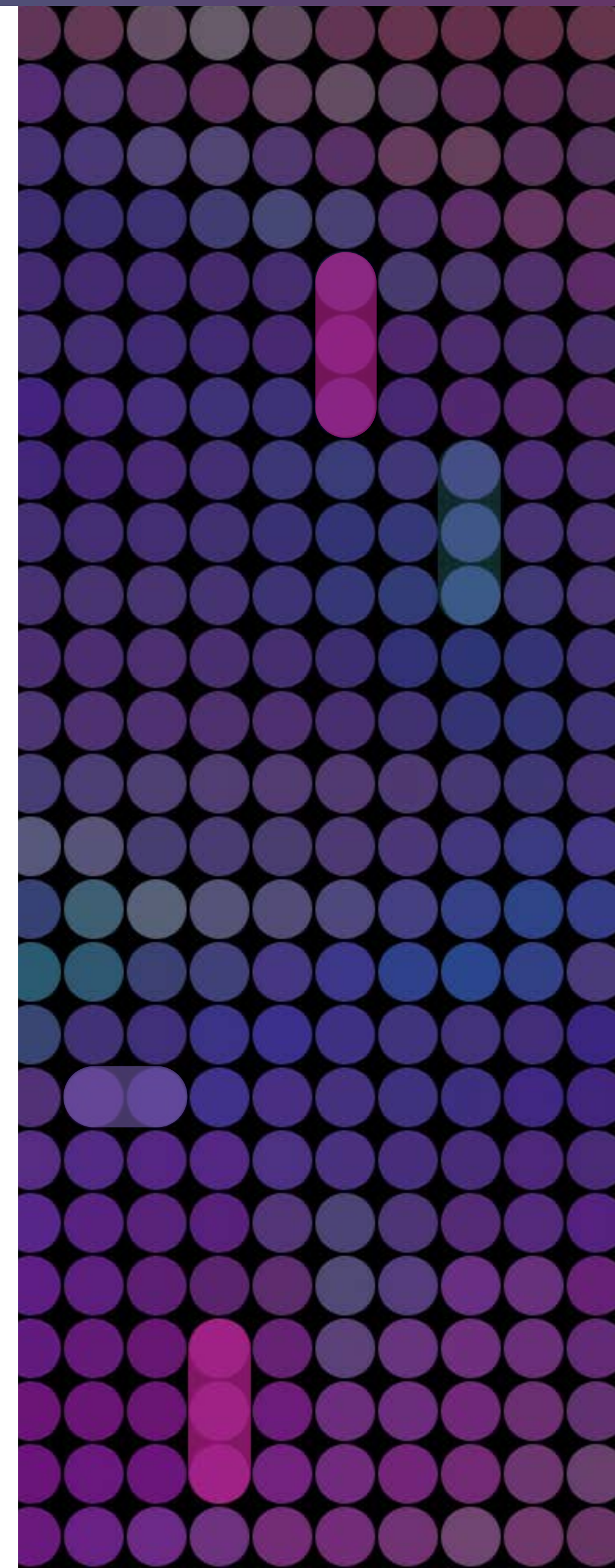
“ We can do things quicker. We can move data around easier and just become more efficient by enabling teams to access the data they need at the point of use. ”

That shift is helping the business move away from traditional reporting cycles and towards more governed, self-service access to insight, so colleagues can get answers faster and make better use of live information.

A further opportunity presented itself within Softcat commercial platform. As the business continued to grow, the need for a more connected, intelligent and AI-ready environment became increasingly clear. The existing quoting and ordering environment had supported the business for many years, but it no longer reflected the pace, scale and expectations of a modern technology organisation.

As Keith Monk, Chief Information Officer, put it, "We're going from a CRM and process that we have slowly iterated on for the past 25 years, to the bleeding edge tech with all the automation and data capabilities an organisation of our size could ask for."

For Softcat, this was an opportunity to rethink how sales teams, specialists and supporting functions work together, and how that collaboration ultimately improves customer experience. As Alastair Wynn, Business Transformation Director, explained, "This is more than just a CRM replacement. This is ultimately a new way of working for us, a new operating model for us."



The approach

The approach

Softcat's approach has been guided by one simple question: how do we use AI to do more of what we're already great at?

That concept runs through the whole strategy, and AI tools are now being used to help people find information faster, cut through complexity, interrogate data more easily and spend more time on high-value work.

That's why Softcat's AI journey has focused on practical use cases where Microsoft technologies can make a clear and measurable difference. Microsoft 365 Copilot, Copilot Studio, SharePoint, Microsoft Fabric and Power BI and D365 all play a part in improving productivity, knowledge access and decision-making. Just as importantly, using these tools internally gives Softcat first-hand experience of prompt design, governance, adoption and value realisation, which leaves it better placed to support customers trying to do the same.

A key part of that approach has been building stronger foundations for controlled self-service.

Softcat's data teams are working to create shared, governed models that can be used more widely across the business, changing the operating model around who does reporting and how people get access to insight. Richard White, Head of Data Services, described the benefit of this shift in practical terms. "Rather than having to go back to another team and ask, "can you send me an export?" or "can you create me a report?", users can increasingly go and interact with this data independently of requests through our team. This is enabling much more data discoverability across the business"

White explained that one of the goals is to prevent inefficient data use across the business and further reduce silos, simplifying the structure of data people have access to. Richard explains, "as more people want to create agents and work across different data sources, that simplification matters more and more. It means Softcat can think

more carefully about how to leave data where it is, connect to it in smarter ways and make the overall architecture easier to manage."

The view Softcat takes is that governance can be a tool to enable people.

With good guardrails in place, it means more people can have access to data and make use of it in the way that most benefits them. James made that point directly when he said,

“ Once we've got the guard rails in place as well around data governance, and defined who can access what, it'll be even easier for people to pull value from it. ”

White made the same point from the IT side, describing his team's role as maintaining "the guardrails and the patterns that allow people to do it so that the governance becomes easy." Together, those views capture the wider philosophy behind the programme: clear standards should make innovation easier, not harder.

Applying the strategy

Automating business functions

One of the clearest examples of this approach in practice is Softcat's Copilot-powered knowledge platform.

Using SharePoint with Microsoft Copilot as a search capability, Softcat created a more centralised and trusted home for sales and vendor collateral.

It gives employees a single destination for relevant, up-to-date content and makes it much easier to find the right information without searching across disconnected systems. Because the platform surfaces content from approved internal sources rather than personal files or separate document libraries, it also increases trust in what is being returned.

Employees can ask natural language questions and quickly get relevant results, whether they are looking for a case study linked to a particular technology or content relevant to a specific sector. For bid teams and other customer-facing groups, that means less time spent searching and more confidence that the material they are using is current, relevant and aligned to Softcat's portfolio. As Lauren Tiller, Senior Communications Manager, explained,

“Deploying Copilot in this way meant we could improve document control, gain increased value from our significant Copilot investment, and develop valuable insight and skills around an AI application used by many existing and prospective clients.”

To make the experience more useful and consistent, Softcat also used Copilot Studio to build a bespoke agent shaped around its own

business priorities and content standards. That work wasn't just about the technology. It involved substantial effort around prompt design, content auditing, metadata and governance so the system could return accurate, useful and up-to-date results. As Lauren said, “Working as a team, we designed a bespoke Agent within Copilot Studio and trained it to respond to certain prompts and specified parameters to deliver accurate results.” She also highlighted the scale of the groundwork involved, saying, “Huge amounts of work went into auditing existing collateral and creating relevant meta tags to define what ‘good’ content was.”

Alongside knowledge access, Softcat has put significant focus on strengthening its data and analytics foundations with Microsoft Fabric and Power BI.

The emphasis here is on making trusted insight easier to reach and easier to use. That shift has a direct employee benefit, but it also has a customer-facing one. As James explained, Softcat is trying to provide its sales teams with “better stories

around what the customer is and what we need to sell to them”. He said the real value of self-service capability is that teams can work with dashboards directly, “manipulate it however they need to manipulate it to get the value out of the data” and then have “that meaningful conversation” with customers.

Richard also gave a useful example of how this strategy is improving efficiency inside the data function itself. “We've used Fabric's MCP capability to connect to Power BI reports and allow AI to generate descriptions of measures automatically in real time, rather than requiring our teams to spend two hours on every measure writing description. This kind of AI-assisted support is what we're looking for and it's consistently improving efficiency within the team.”

Softcat has also applied Copilot to a complex procurement project for a new travel management system. The business needed to review responses from eleven vendors, along with internal discussions, meeting transcripts and other

supporting material. Using Copilot in Teams, the procurement team analysed that information alongside a manual review so it could test the quality of the outputs and validate the approach.

The alignment between the AI-assisted analysis and the manual evaluation gave the team confidence in the role Copilot could play. Sarah-Jane explained, “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.”

Bradley Howe Solutions Professional at Softcat, worked closely with the team to refine prompts and improve the usefulness of the outputs. He said, “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.” That reflects Softcat’s wider view of AI. It’s there to support judgement, not replace it. Softcat is also using Microsoft technologies to build

capability more responsibly across the business. James said, “We’re now starting to use things like Power Apps and Power Automate to automate a lot of our processes within Softcat.

Alongside this we’re also building out a centre of excellence, so we have a central team who own the strategic direction for Power BI”. While there are also pockets of people in the business who can build their own Power BI dashboards and build their own Power Apps. He added that greater visibility helps the central team “guide them, ensure they’re doing best practice, so that we’re all working towards the same goal at the end.” That balance between local innovation and shared oversight is a key part of how Softcat is scaling responsibly.

Enhancing sales with Microsoft

A further and especially important strand of Softcat’s transformation is the modernisation of its own commercial operating model through Microsoft Dynamics 365. Rather than positioning CRM as a separate system that users have to step into, Softcat is building a connected model that brings together Dynamics 365, Copilot, Teams, Outlook, LinkedIn Sales Navigator and broader Microsoft data capabilities. Alastair Wynn’s

Business Transformation Director at Softcat, explained the appeal of Microsoft lay in the wider ecosystem and the ability to combine “data, productivity tools, collaboration tools” with a CRM environment that would “allow full interoperability, collaboration, Dataverse, and Copilot through its veins.” That vision is already taking shape through Softcat’s D365 pilot.

As Alastair said, “200 people are now in pilot. That’s about 80 account managers plus about 100 additional individuals to support those account managers and the accounts that reside in pilot.” The purpose to build new habits and workflows around a more collaborative, more visible and more AI-ready way of working.

A huge benefit of the D365 system is that it extends intelligence into the tools employees already use every day. Alastair described that consistency clearly: “Whether you are interacting with Copilot in Dynamics, in Outlook, in Teams, whatever it may be, there is a consistent experience across the deck.” That gives teams the ability to surface summaries, actions and insight in the flow of work rather than forcing them into disconnected systems.

Softcat is also exploring specific agent-led use cases inside the sales journey, including sales qualification, research, next best action and coaching-led scenarios linked to recorded and transcribed calls. As Alastair explained, “We’re exploring sales qualification agent, which is lead generation and lead scoring. We’re also looking

at sales research agent, which is serving data insights and reporting.” He also pointed to future coaching and call-support scenarios where Teams transcription and Dynamics 365 can work together as a foundation for additional layers of intelligence. For Keith Monk, Chief Information Officer, the practical value of this new environment lies in how naturally it connects to the tools salespeople already rely on. He said,

“ The platform integrates with everything that our salespeople already use, like Teams, like Outlook, like LinkedIn . ”

and highlighted the ongoing development Microsoft is making in agents and platform capabilities over time. In practice, that means customer conversations, account activity and notes can be brought together more effectively, reducing friction in the sales process and improving the visibility teams have around opportunities and next actions.

The benefits

Delivering time savings

The benefits of this work are already showing up across several parts of the business.

In procurement, Copilot saved around 45 hours of work on a single project by speeding up analysis and helping the team synthesise a large amount of information more quickly. As Sarah-Jane put it, “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.”

The new knowledge experience is also delivering clear operational value.

Thousands of users now have easier access to trusted, up-to-date collateral, which makes knowledge sharing simpler and reduces the frustration that comes with duplicated or outdated content. Moving away from the previous third-party hosted solution has also reduced cost and complexity while creating a more secure and manageable platform inside the Microsoft estate.

The data and analytics work is creating value in a different but equally important way. By reducing

reliance on central reporting teams and making it easier for colleagues to self-serve insight, Softcat is lowering bottlenecks and speeding up access to information. James captured that change clearly when he said, “we can do things quicker. We can move data around easier and just become more efficient in just generally giving data back to Softcat.” White described the same shift from another angle, saying teams can increasingly work without always needing exports or bespoke reports, giving them much greater “data discoverability”. Together, those changes are improving the day-to-day employee experience and helping people act on information while it is still useful.

There is a broader cultural benefit as well. By reducing manual workload and making information easier to access, AI is giving people more time to focus on customer conversations, solution design and strategic thinking. This isn’t about efficiency for its own sake. It’s about creating more time and headspace for the parts of the job where people make the biggest difference.

There is also clear customer value. Because Softcat is adopting, testing and refining these

technologies internally, it can give customers guidance based on real experience rather than theory. It has a clearer understanding of what drives value, what supports adoption and what needs to be in place behind the scenes to make AI genuinely useful in a real business environment. As Bradley said,

“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 results and actually drill down to achieve the most accurate and useful outputs.”

Evolving sales capabilities

Although the programme is still in its early stages, the Dynamics work adds another major layer of value.

At the customer level, Softcat expects a more cohesive and collaborative experience, with the right people able to access the right information at the right time at the most immediate level, Softcat expects a more connected and collaborative selling environment, one where the right people can see the right information at the right time and engage customers more effectively throughout the lifecycle of an opportunity.

Alastair Wynn described the expected customer impact in practical terms: “What the customer should see is a more cohesive, more collaborative, more efficient ways of working with Softcat from this point forwards.”

He went on to explain that the new model should mean “the right people have access to the account

and or the opportunity”, enabling teams to bring in the right expertise at the right moment and give customers stronger support from lead through to close.

That improved visibility is expected to benefit preparation as much as execution.

Better exposure to account activity, customer insight, contact intelligence and interaction history should help Softcat’s teams prepare better for calls and meetings, making engagements more informed and more relevant. Alastair Wynn noted that this will “light up the data world around customers far more than we’ve ever had before” and reduce the historic dependence on individuals manually keeping records up to date. In other words, the value is in access to more data, and in making that data more usable and more actionable.

For internal teams, one of the biggest gains is expected to come from reducing administrative effort and removing what Keith Monk described as the “swivel chair” between customer interactions and system updates. In the new model, those steps can increasingly be assisted or automated. Keith Monk said, “The admin effort should reduce with Copilot doing some of those administrative tasks for our salespeople.” That is a huge benefit to Softcat’s account teams, because any time recovered can be redirected into customer-facing activity, collaboration and better commercial focus. The broader sales experience is also expected to improve significantly. Keith Monk elaborated

“Our customer facing teams have been operating exceptionally well, even with a legacy system. With the latest technology and automation, they’ll be able to do even more amazing stuff for customers, and that prospect is really exciting”.

Crucially, he also emphasised that the human element remains central: “We still need really good salespeople and that human relationship with our customers. But AI is going to be a distinguisher for them in terms of their performance.” That balance, between human relationship and intelligent augmentation, sits at the heart of Softcat’s approach.

As more activity is captured in the platform, Softcat expects stronger forecasting, better account insights and greater organisational visibility. As Keith Monk puts it, “Copilot can do a forecast for us,” and over time, “you would expect that the Copilot forecast will be more accurate than the human one.” This highlights the platform’s growing value in helping teams sell more efficiently and make better-informed decisions.

Perhaps the most important benefit is that Softcat is building this capability inside its own business first.

That gives it practical experience, stronger credibility and a richer story to share with customers undertaking similar journeys. Alastair Wynn made that point directly when he said, We would confidently describe ourselves as a Customer Zero in this space.

By going first internally, Softcat is creating a model it can later speak about not only from a partner perspective, but from direct operational experience.

Insights

What Softcat’s experience has shown is that the most effective AI strategies do not begin with the technology itself.

They begin with a clear understanding of what already makes the business successful, and a determination to strengthen those qualities rather than disrupt them. In Softcat’s case, that means using AI to support the responsiveness, care and service-led thinking that have long set the business apart. The technology works best when it amplifies those strengths - making it easier for people to find the right information, act with more confidence and spend more of their time where human judgement adds the greatest value.

That experience has also reinforced another important truth: strong AI outcomes depend on strong foundations. The value Softcat is seeing today comes from the harder work that is the foundation to the project - auditing content, improving metadata, strengthening governance, refining prompts and building a data environment that is easier to navigate and trust. Richard White’s

emphasis on “data discoverability” and James Wingham’s focus on the importance of guard rails both point to the same lesson: AI becomes genuinely useful when people can access the right information safely, confidently and at the right moment.

Just as importantly, Softcat’s journey shows that governance and enablement cannot be treated as separate things. The most sustainable model is not one where innovation is locked down by a central team, but nor is it one where people are left to experiment without structure. The real opportunity lies in creating frameworks that make innovation easier to scale - clear patterns, shared standards and the right automation in the background so more people can move quickly without losing control. That is what comes through so clearly in James’s description of the centre of excellence model and in White’s view that good governance should become easier, lighter and more repeatable through the right guard rails and supporting processes. Perhaps the most powerful insight of all is that internal experience creates external value.

By learning in its own environment first, Softcat is building AI expertise it can take to customers with real credibility. This goes beyond internal transformation, positioning Softcat as a partner that understands where AI delivers value, what successful adoption looks like and how strong foundations drive long-term success. That hands-on experience helps customers move from experimentation to measurable outcomes.

Softcat's AI journey is ultimately about enhancing what makes the company and its people great in the first place. Removing friction, opening up access to trusted knowledge and giving talented people more space to do the work that matters most.

By bringing together Microsoft 365 Copilot, Copilot Studio, SharePoint, Fabric, Power BI and Dynamics 365 with careful governance, stronger data foundations and practical enablement, Softcat is showing what responsible, scalable adoption can look like in the real world.

The result is a more informed, more connected and more capable organisation, one that is improving employee experience, strengthening customer service and building practical intelligence

it can take back to customers with confidence. From knowledge discovery and procurement analysis to governed self-service insight and a modern AI-ready sales operating model, Softcat is turning Microsoft technology into something tangible: better day-to-day work for employees, better support for customers and a stronger foundation for long-term growth.