

Softcat navigates its way to improved content management with Copilot



Published

Softcat plc has been providing award-winning IT solutions to leading UK businesses and public sector organisations for more than 25 years.

It's helped more than 10,000 longstanding clients access leading edge solutions supported by the most up-to-date technologies. Every engagement is underpinned by knowledgeable, sector-specific support services to enable clients to enhance business agility and responsiveness.

consultants, collaborate closely with leading IT providers. This helps ensure Softcat delivers high-level customer service and keeps pace with the very latest technological developments to provide unparalleled support and insight to a broad range of businesses.

Its 250+ dedicated service professionals, including support analysts, developers and highly-trained

Key Facts

1

25 years of providing leading edge technologies to commercial and public sector clients

2

Close collaboration with leading technology providers to ensure fit-for-purpose IT solutions

3

10,000+ longstanding customers

The Challenge

Softcat provides an extensive range of different technologies and solutions to thousands of businesses. Ensuring that Sales and Bid teams have access to the most up-to-date information is challenging, especially in such a rapidly developing technology landscape. Products evolve, and developments within the marketplace can make it difficult to keep track of the most relevant and accurate information hosted on its platforms. When coupled with the significant business growth Softcat has achieved in recent years, the existing systems had become complex and difficult to use effectively.

Often, critical documentation wasn't captured by the existing solution and important information was distributed across different platforms. Documents created and subsequently updated by Softcat's internal subject matter experts (SMEs) could create multiple versions, meaning users lacked a simple method of accessing an essential 'single version of the truth.' And with platform users unable to guarantee the accuracy and relevance of content, trust in the system was significantly undermined.

Softcat used a third-party provider to host its sales and solutions documents, but it was becoming increasingly costly and cumbersome to use. Every change incurred a cost and efforts to improve the platform's performance were both expensive, and ultimately, failed to remedy the underlying performance issues.

The current systems lacked any process capable of validating and updating solution information. This created a very real risk that available content could be out of date and irrelevant to the challenges our clients currently face and the solutions we provide to overcome them. Softcat needed an enhanced platform that could guarantee all documents were up to date, accurate and on brand.

Critical Success Factors

Replace legacy, third party content management solution

Reduce the complexity associated with accessing relevant, up-to-date information

Provide a platform capable of being simply and efficiently populated with relevant solutions collateral

The Solution

Softcat leveraged its own Intranet, using SharePoint with Microsoft Copilot integrated as a search function, to create a single platform where collateral could be stored, kept up to date and easily accessed. Hosting everything in one place would reduce confusion around where content is held and make it easier to access relevant, up-to-date customer and vendor related collateral.

Lauren and the wider team spent many hours refining how best to prompt the Agent to deliver the right outcomes. While it was a complex and labour-intensive exercise, it played a critical role in training the Copilot Agent. "Huge amounts of work went into auditing existing collateral and creating relevant meta tags to define what 'good' content was," said Lauren. "Different tags mean different things to different people, so we collaborated closely with colleagues from across the business to define meta tags and ensure they delivered valuable, accurate results. We knew it was also important to configure the Agent to align its responses in line with Softcat's 'Five Major IT Priorities:' Hybrid Infrastructure, Workspace, Cyber Security, Networking, Infrastructure, and Data, Automation and AI."

Embedding Microsoft Copilot within the platform would enable it to traverse its internal library and ensure content could only be taken from an approved source, rather than from a user's own OneDrive or documents other users have shared with them. Copilot can also be used to find supporting information. For instance, users can ask Copilot to "find me a Microsoft Azure case study for a retail customer," or "which ISO certifications does Softcat hold?" to add value to the sales process and enable customer questions to be easily and quickly answered.

The team also created video resources for colleagues. They covered the basics, ie, how to craft a single prompt, to more advanced questioning where a 'customer ask,' such as: "my customer wants to know how to improve security - what's the best solution to help them achieve this." With the help of video resources, the team was able to train users around the best type of language to use and how to tailor prompts to generate relevant results for specific industries.

Lauren Tiller, Senior Communications Manager, said, "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.

"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. We understood just how important being accurate and precise in our prompting would be in relation to achieving our desired goal of configuring the solution to always return relevant, up-to-date collateral."

The solution has helped create an easily searchable single library, using consistent meta tagging. It enables users to quickly find relevant content, as well as suggesting recommended sales strategies based on the parameters inputted into the system.

Solution Highlights

Leveraging Microsoft Copilot Studio to create a bespoke search function

Extensive groundwork to define 'good' content and accurate meta tagging to ensure relevant search results

Knowledge-sharing across the wider business to gain added value from Copilot investment

The Benefits

Microsoft Copilot has enabled Softcat to internally create a reliable, trusted document management system providing a user-friendly archive of relevant, up-to-date sales and vendor collateral. Its embedded AI-driven, Copilot search provides simplified access, through dedicated search filters, to collateral aligning with Softcat's Five Major IT Priorities.

Executive buy-in is strong, with acknowledgement that creating an easily accessible, secure and accurate document library delivers quantifiable operational benefits. It also represents a great return on a significant Copilot investment, as well as eliminating the costs associated with the earlier third-party hosted solution.

Its helping thousands of users, across diverse teams, save valuable time, share knowledge more effectively and trust that the information they're accessing is relevant and truly reflects Softcat's current portfolio of services and solutions. For Bid teams, the rollout of Meta Data UX, inclusive of multiple bid-process parameters, is helping them respond more effectively to increased demand.

And to ensure the solution continues to deliver a high value return on investment, a form process has been developed to implement a document relevance and lifecycle system. Six-monthly emails will be distributed to SMEs to ensure they check collateral for accuracy and relevance, ensuring that if it's on the system, it's both discoverable, and most importantly, up to date.

Benefits at a Glance

Copilot used to create a reliable, trusted document management system

Improved security and reduced cost through developing and implementing an in-house system

Facilitates more effective knowledge and information sharing across the business

Why softcat

This project is a prime example of how Softcat doesn't just talk the talk, it walks the walk! Its commitment to actively implement today's technologies, work on them to wring best value out of them and subsequently pass on that real-world knowledge to its clients, illustrates why it's become such a trusted provider. The work it's doing now has the capacity to have a profound, longstanding impact on not just its own, but its client's operational efficiency for years to come.