



Credit Union Establishes Confident, Governed Microsoft 365 Copilot Adoption

A regional credit union recognized the productivity potential of Microsoft 365 Copilot but also understood the risks of introducing generative AI in a highly regulated, risksensitive environment.

Rather than rushing into deployment or relying on informal experimentation, the organization partnered with ProArch to take a structured, peoplefirst approach to Copilot adoption.

Through ProArch's Microsoft 365 Copilot Smart Start engagement, the credit union established a shared understanding of Copilot, aligned adoption to real business workflows, and created a scalable foundation for governed, repeatable AI use across the organization.

Challenge

Like many financial institutions, the organization faced a familiar situation: strong interest in AI paired with valid concerns around risk, governance, and unintended use.

Before moving forward, leadership needed clarity on:

- What is Microsoft 365 Copilot and just as importantly, what is it not.
- How to ensure adoption is intentional, rolerelevant, and compliant.
- How to move past what's possible and into owned, business driven use cases.

Without a structured approach, there was a real risk of confusion, resistance, or shadow usage that could undermine trust and security in their highly regulated environment.

Industry: Federal Credit Union

Services:

→ Microsoft 365 Copilot Smart Start



The ProArch Solution

ProArch delivered our Microsoft 365 Copilot Smart Start engagement with a clear principle: adoption starts with people and behavior, not just licenses or features.

Structured Enablement

ProArch conducted readiness and ideation workshops designed around real roles and workflows. Copilot was introduced through guided, practical use cases that aligned to how teams already worked.

This approach helped establish a shared language across departments for prompting, value and success, ensuring Copilot was understood as a practical productivity tool.

Change Management by Design

Rather than positioning Copilot as an IT-led initiative, ProArch helped shift ownership to the business. Facilitated sessions brought stakeholders together to identify pain points and map them directly to Copilot assisted workflows.

Copilot was consistently framed as a trusted assistant, supporting human decisionmaking rather than replacing it—an important distinction in a regulated environment.

The Results

By pairing Microsoft 365 Copilot Smart Start with intentional change management, ProArch helped the organization:



Build confidence instead of resistance around AI adoption .



Enable users without overwhelming them.



Establish a repeatable, scalable, and governed foundation for Copilot use.

Rather than experimenting in silos, the organization now has a clear framework for expanding Copilot adoption responsibly and at the same time accelerating productivity while protecting trust.

With ProArch's approach, the organization's Copilot adoption is driven by clarity, alignment, and ownership setting the stage for longterm value in a highly regulated financial environment.



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