

Scaling Microsoft Copilot Adoption Across a Large Financial Services Organization

Financial Government-Sponsored Enterprise (GSE)

Business Problem Statement

A large, highly regulated financial services organization needed to accelerate enterprise-wide adoption of Microsoft Copilot across its finance division. While initial awareness existed, the organization struggled to translate that awareness into real, measurable impact.

The goal was to empower both employees and leadership to confidently use Copilot within finance and risk workflows, while ensuring compliance with regulatory standards.

Key Challenges

▶ Regulatory Complexity

Ensuring responsible AI usage within a tightly governed finance and risk environment.

▶ Diverse Skill Levels

Supporting thousands of users with varying levels of AI familiarity and technical readiness.

▶ Tool Dependency

Heavy reliance on Microsoft 365 applications (Excel, Word, PowerPoint, Outlook) for critical workflows.

▶ Relevance Gap

Avoiding generic AI demos by grounding training in real finance and risk workflows.

Our Solution

Fast Lane implemented a phased, scalable enablement strategy to drive sustainable Copilot adoption:

- Phase 1: Foundation & Awareness
- Phase 2: Applied Enablement for Leaders
- Current & Next Phase: Advanced Enablement

Visualizing the Journey:



Build baseline Copilot knowledge and responsible AI understanding.



Tailor training to real finance workflows for immediate impact.



Deliver large-scale, instructor-led sessions across the organization.



Equip leaders to use Copilot for insights and decision-making.



Introduce advanced use cases, agents, and custom solutions.

Delivery Highlights

- ▶ Instructor-led sessions scaled to **+1,000 participants** per session.
- ▶ Thousands of finance users trained, including **800 senior leaders**.
- ▶ Phased approach from awareness to advanced.
- ▶ Deep customization aligned to finance and risk workflows.
- ▶ Demonstrated gains in productivity, analysis quality, and speed of decision-making.
- ▶ Achieved durable, organization-wide Copilot adoption.

Why It Matters

This engagement demonstrates how organizations can move beyond AI experimentation to **real business transformation**.

By aligning Copilot adoption with actual finance workflows and regulatory requirements, the organization unlocked measurable efficiencies and improved decision velocity.

The structured, role-based approach ensured that AI became a **trusted, embedded capability**, not just a tool, positioning the organization for ongoing innovation and competitive advantage.

Delivery Modalities:



Live, instructor-led training (ILT)



Onsite Workshops

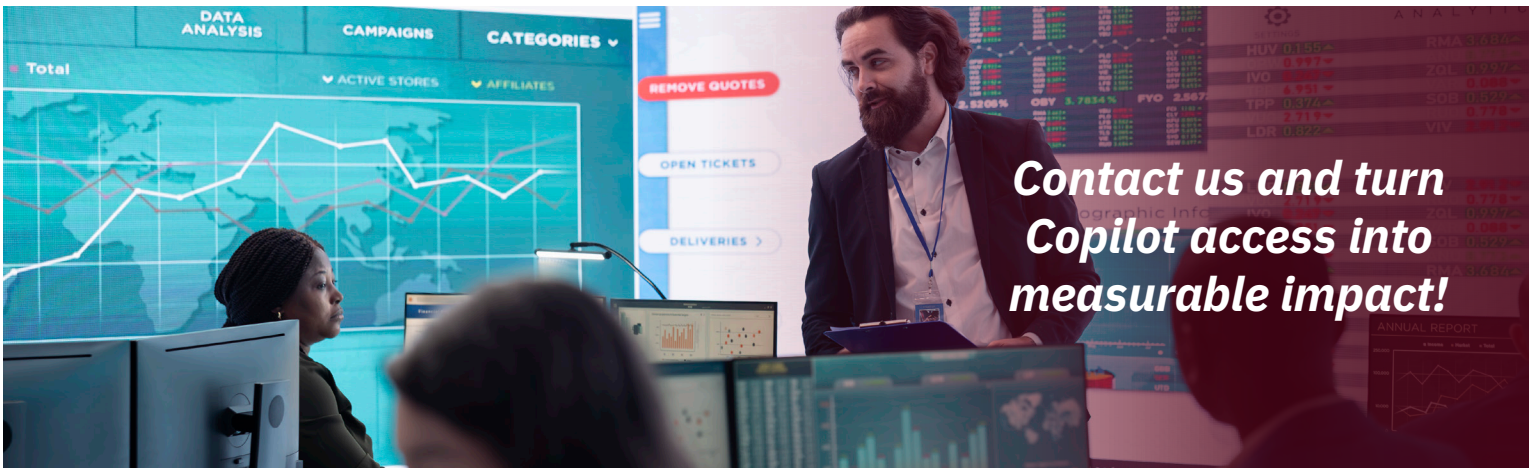


Applied Labs & Capstones



Blended Learning Paths

This case highlights Fast Lane's ability to deliver enterprise-scale AI enablement that is practical, compliant, and deeply aligned to business outcomes.



Learn more at:
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Fastlanetraining.ca

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Fast Lane