TriLumen Systems

CASE STUDY

Enterprise Workforce · Microsoft Copilot Deployment

Rolling Out Copilot Without Exposing What It Shouldn't

THE CHALLENGE

Turning on Copilot for a large, multi-department workforce without first locking down file permissions is how employees end up accidentally seeing executive salaries and confidential data on day one. At enterprise scale, "just-in-time" permissions are almost always messy.

OUR APPROACH

Before a single license got assigned, we ran a full data governance and permission audit, deploying automated scanners to identify over-shared sites, sensitive executive folders, and outdated financial data, then re-scoping permissions so the system only ever surfaced what a given user was authorized to see.

Sales and service needed different builds. For sales, Copilot bridged email, chat, and the CRM, so reps stopped manually updating pipeline stages. For customer care, we anchored the assistant strictly to verified internal procedures and ticket history, not the open web, so a complex dispute surfaces the exact resolution script in seconds. We staged the rollout in cohorts with a champion network training power users in every department.

THE RESULT

Sales reps stopped manually maintaining CRM records mid-conversation, resolution time on complex disputes dropped to seconds, and leadership had a real, measurable view of adoption, not just a license count.

Have a Problem That Looks Like This?

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