Data#3 Customer Story

Penrith City Council

Penrith City Council gets AI-ready with Data#3's Copilot Readiness Assessment

Data#3

PENRITH CITY COUNCIL

Data#3 | PENRITH CITY COUNCIL

Objective

Penrith City Council wanted to ensure it was ready to seize the opportunity of Microsoft 365 (M365) Copilot while avoiding unnecessary risk.

Benefits

- Confidence to proceed with M365 Copilot
- Comprehensive understanding of risk
- Roadmap for M365 Copilot rollout
- Identification of opportunities
- Guidance on change management involved

Testimonial

"Do the Readiness Assessment and look at the underlying architecture: this will help you to understand what it means to your organisation. You need to build the hype internally, balance what is in the media, too, and set a perspective for your organisation. People will be innovative when they have the tools available."

Jane Howard, Chief Information Officer, Penrith City Council.

Approach

The council wanted to plan effectively for adoption of a key emerging technology and partnered with Data#3 as a trusted partner with direct experience using M365 Copilot.

Project Highlight

"We have gathered insightful information about the potential benefits of AI, which will help us enhance the services we provide to the local community."

Jane Howard, Chief Information Officer, Penrith City Council.

Solutions & Services

- Data#3 Readiness Assessment for Microsoft 365 Copilot

Data#3 Customer Story

Penrith City Council

“We want to make use of new tools and technologies that could help us be more efficient, and focus on adding value for customers without spending that does not add value.”

Jane Howard, Chief Information Officer, Penrith City Council.

The Background

Nestled between Sydney and the Blue Mountains, Penrith City Council is responsible for an area characterised by spectacular natural beauty and a buzzing arts, culture, and entertainment scene. The council supports a diverse community, providing a range of services that makes Penrith a great place to live and visit.

The council wanted to assess the potential of Microsoft 365 (M365) Copilot as a key emerging new technology to enable greater efficiency and service delivery. It was important to understand potential value as well as any risk involved.

The Challenge

The arrival of the highly anticipated M365 Copilot technology is set to revolutionise workplaces, putting enterprise-level artificial intelligence (AI) in the hands of employees. For Penrith City Council, Chief Information Officer, Jane Howard, it was important to understand how best council could leverage the advantages while ensuring proper data governance in this evolving landscape.

“Since this is a new and evolving technology, it’s still quite immature. As local government, we need to see tangible benefits from purchasing licenses by having the software demonstrate clear advantages.”

“There has been a lot of media around generative AI, and people have questioned how will it fit from an organisational perspective? Will it replace me in my role? Where does it fit into day-to-day operations and how it fits in the organisation and adding value means we need to understand the overall business case.”

In an organisation that provides such a broad range of services, ranging from libraries and recreation to waste management and building permits, it is unsurprising that staff roles are diverse. It made sense to Howard that approaching the introduction of Copilot would require a deep dive into the different ways employees’ roles could benefit.

“There are many types of workers in local government, and not everyone sits in front of a PC all day. We have children’s services, waste management, and people hard at work maintaining our outdoor areas. We have to know where it is showing value, because it might not be useful for everyone, and we need to invest where people will make use of this and benefit.”

M365 Copilot uses the Semantic index, which indexes every file that a user has access to in M365 the results available for Copilot to query. If a user unknowingly has access to sensitive information, Copilot may return a result that leverages that information, inadvertently raising risk. If users are unaware of the implications of the sensitive nature of their results, they may inadvertently share further. It is, then, essential that organisations review their data governance situation to ensure permissions are correct and to prevent over-sharing.

“In local government, while some of our information is available publicly, we do have much data, like any organisation, that we must keep safe. We also need to keep our employees safe and not expose them to a situation where they have access to information that they shouldn’t.”

While managing risks is vital, the potential for boosted efficiency is significant. Any technology that enables staff to stretch the budget further represents the chance to enhance services and do more for the local population.

“Our other challenge is taking full advantage of the opportunity. We want to make use of new tools and technologies that could help us be more efficient, and focus on adding value for customers without spending that does not add value. We have to make sure the decision is right.”

Data#3 Customer Story

Penrith City Council

“The Project team is a collaboration between the ICT and the Information Management teams who are leading this initiative; and participated in the Data3 Readiness Assessment.”

Jane Howard, Chief Information Officer, Penrith City Council.

Business Outcome

One challenge of a very new technology is finding help from a partner with first-hand experience. Penrith City Council chose to seek guidance from Data#3, who have hands-on proficiency thanks to being one of the rare few organisations in Australia to take part in the Copilot for M365 Early Access Program (EAP).

“We were looking at our data and making sure we understood its location and accessibility, and wanted to engage with an organisation that could help. Data#3 have had experience with Copilot themselves, so they can share their own experiences with us.”

Focusing on the areas of information governance, organisational change management, and platform, Data#3’s M365 Copilot Readiness Assessment helps businesses understand their current situation and prepare their people and data to get the most from Copilot.

The Data#3 team conducted analysis of Penrith City Council’s M365 tenant, giving the council valuable insights into their data-sharing practices, and recommending best-practice steps to mitigate risk. Experts connected directly to the council’s M365 tenant to perform a technical analysis and led a series of six workshops, then created a readiness report, roadmap, and recommended next steps.

“The Project team is a collaboration between the ICT and the Information Management teams who are leading this initiative; and participated in the Data3 Readiness Assessment. They thought it was really well structured. The flow from where we started at introduction to where we ended up; with a final report – took us on a journey that gave us a good grounding and an understanding of what Copilot is, what we could do in the organisation, and how to prepare for our pilot program. We’re very happy with how the workshops were presented and we gained valuable knowledge throughout.”

“Each workshop covered different aspects, an introduction, the technology architecture, our data assessment and a key workshop ensuring we understood any potential issues around sensitive data. We looked at the results around data accessibility permissions, then the users themselves, assigning different ‘personas’ around the potential way Copilot could be used. Other workshops also covered how the tool operates, opportunities around use cases, how this technology would be implemented in our environment and the configuration we would need to do.”

While the council runs a tight ship in terms of data governance, Howard said that due diligence is especially important when introducing generative AI. While she was pleased that the workshops did not uncover any major surprises, it was good to go into the pilot program with greater certainty.

“Our Information Management team is very astute at protecting our data assets, and we are mindful of how data is stored and structured. The workshop was useful in making us even more aware of what data we should mark sensitive.”

“Because ICT are new to the technology ourselves, working with an experienced team was helpful. We have used free tools like ChatGPT but we were interested to see how Copilot would work in our organisation with our data to give the most value. We also purchased a few licences in advance of our pilot, so we the Project Team can see how it could work.”

It has been a fascinating experience for Howard and the Project Team, who have been keen to put Copilot through its paces. She said it has been “very interesting” to see how people respond when getting a glimpse of this future.

Data#3 Customer Story

Penrith City Council

“One of the suggestions of the Readiness Assessment is to set up a Centre of Excellence, with the pilot group engaged in identifying opportunities, sharing ideas, and reporting back on things that didn’t work or worked well.”

Jane Howard, Chief Information Officer, Penrith City Council.

Business Outcome (continued)

“We had a large meeting of around 30 people in a hybrid format, and there was an executive assistant in the room taking minutes. After the meeting I demonstrated to her the minutes and action items Copilot had produced. Her feedback was literally “Wow”. This new technology will definitely provide some real advantages for some of our personas!”

“Years ago, we used to take shorthand, then secretaries typed minutes, then we had dictation machines, then PCs, so roles will change, this is just another evolution of the way we work – as Microsoft calls it, a modern workplace.”

Howard said that the value of effective change management cannot be underestimated. The workshop approach helped with practical recommendations that aligned well with the council’s way of working. Howard’s group went out to ask Heads of Department to nominate team members to be involved in the pilot and said that they were “very excited” at the opportunity.

“One of the suggestions of the Readiness Assessment is to set up a Centre of Excellence, with the pilot group engaged in identifying opportunities, sharing ideas, and reporting back on things that didn’t work or worked well. They will become Copilot champions throughout the organisation if and when we decide to move this forward in the organisation.”

“Data#3 will play a part in that team, in that when we need something escalated, they can assist us with advice. We can also channel new M365 functionality around modern workplaces into that group.”

Conclusion

The introduction of Copilot represents an extraordinary opportunity to work more efficiently and, in the case of Penrith City Council, to enable employee focus on providing the exceptional services the community needs.

“Penrith is a growing council, with a population expected to grow 31% by 2036. Therefore we have to look at the ways we work and make ourselves more efficient.”

“It is not just about growth of resident numbers; we have the new Nancy Bird Airport in construction close by, and the Penrith area is a great destination to visit, we’re on the river and close to the mountains, so we will be welcoming more guests, too. We’re looking at ways to work smarter and more efficiently to give everyone the best we have to offer.”

After working through this initial phase, Howard’s advice is that organisations seek experienced help to embark on structured planning.

“Do the Readiness Assessment and look at the underlying architecture: this will help you to understand what it means to your organisation. If you just deployed the licences, it would be quite lacking. You need to build the hype internally, balance what is in the media, too, and set a perspective for your organisation. People will be innovative when they have the tools available.”

“Also to mention that we have been supported by Microsoft, and we were able to use our Technology Innovation Fund via Data#3. Between our vendor partner Data#3, Microsoft, and our own internal learnings, the Readiness Assessment has been a success.”

Data#3 Customer Story

Penrith City Council

Data#3 and Microsoft

Since 1994, Data#3 has combined forces with Microsoft to help our customers adapt and grow. Today, we are Microsoft's largest Australian business partner with the highest level of competency across the Microsoft ecosystem. Our hundreds of accredited consultants are ready to help our customers deliver the digital future; from enhancing productivity and collaboration with Microsoft 365, Microsoft Teams Rooms, and the latest Surface devices, to transforming business processes with Dynamics 365, to ensuring our customers get the most value from Azure cloud. Our scale and expertise enable our unparalleled support to customers selecting, deploying, managing and securing Microsoft applications, products and devices.

Microsoft 365 (M365) Copilot, one of Microsoft's latest innovations, will fundamentally change how your organisation creates and uses information every day through the power of Artificial Intelligence. We're also one of only 600 organisations globally to have taken part in the Early Adopter's Program, an exclusive first look at how M365 Copilot operates. We've been using and testing this new technology from the get-go, and we're here to help your team hit the ground running.

Data#3 | Microsoft