

Driving Practical AI Adoption with Microsoft 365 Copilot

How Netsurit helped Boyer & Ritter turn Microsoft 365 Copilot into daily impact, reducing low-value admin work, improving practitioner efficiency, and building firm-wide AI confidence.



Overview

Boyer & Ritter LLC is a regional public accounting firm delivering tax, assurance, and advisory services across Pennsylvania.

As the firm deepened its Microsoft 365 investment, leadership identified AI as a strategic lever to improve practitioner efficiency, reduce low-value admin work, and support talent retention in a competitive market. Boyer & Ritter partnered with Netsurit to turn that opportunity into measurable, daily impact.

The Challenge



Email overload and response pressure pulled practitioners into a constant triage cycle, away from higher-value client work.



Teams were repeating the same time-intensive steps — cleaning, drafting, and reporting — with no consistency.



A lack of clear AI guidance left adoption uneven, with most staff unsure how to apply AI safely in real, billable work.

The Solution

Netsurit designed the engagement around one consistent principle: AI adoption must map directly to role-specific workflows to drive real impact.



Workflow-Centric Enablement

Mapped high-frequency tasks across Tax, Assurance, and Operations directly to Copilot capabilities, making adoption practical and relevant from day one.



Live Training with Sustained Reinforcement

Structured sessions across Outlook, Teams, Word, and Excel using real firm-style scenarios, with CPE-enabled office hours and LMS learning paths.



Training Champion Model

Empowered internal "go-to" users to drive peer adoption, share wins, and maintain an ongoing feedback loop between staff, leadership, and Netsurit.

Results That Matter



Reduced time spent on email triage, meeting summaries, and document drafting within weeks of rollout.



Improved consistency and faster turnaround on client-facing outputs across engagements.



Broader staff confidence in daily AI use, extending adoption well beyond early users.



A scalable, CPE-aligned enablement model providing a **foundation for firm-wide AI adoption**.

