Responsible Copilot Adoption for Wealth Advisory

Netsurit helped Chartered Wealth turn Microsoft 365 Copilot into a practical, governed capability for day-to-day advisory work.

Overview

Chartered Wealth is a South African wealth-management and financial-advisory organisation. Netsurit delivered a standalone, role-aligned Microsoft 365 Copilot enablement programme for 29 learners across 10 live sessions, with a strong focus on practical workflows, client confidentiality, governance and human validation.

The Challenge

Turning AI interest into practical advisory workflows that save time without compromising client service.

Protecting sensitive client information and using Copilot appropriately in a regulated financial-services environment.

Improving recurring work such as meeting prep, follow-up, communication, document creation and presentations.

Building user confidence while reinforcing that AI outputs still require human review and professional judgement.

The Solution

Ten live, one-hour enablement sessions for 29 learners across Teams, Outlook, Word, Excel and PowerPoint.

Training built around real wealth-advisory workflows: client reviews, recaps, follow-up, market updates and drafting.

Prompt engineering and reusable frameworks for consistent, repeatable use over one-off experimentation.

Governance guidance covering permissions, Conditional Access, Purview, DLP and human validation.

Results That Matter

A repeatable model for using Copilot within M365 workflows, moving toward practical use.

33 active Copilot Chat users and **1,725 prompts,** showing growing confidence in using AI at work.

25 users enabled for Copilot and **24 active,** with **828 prompts** recorded over 30 days.

A stronger foundation for **responsible AI adoption,** combining enablement with governance.