Adoptive Technologies

COPILOT GUIDE FOR MANUFACTURING

Microsoft 365 Copilot in manufacturing

Practical ways to cut paperwork and chasing on the shop floor and in the office, and what to sort out before you start.



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WELCOME

Before you start

Manufacturers are not short of things to do, and a lot of those things are paperwork.

Shift reports, work instructions, near-miss forms, supplier emails, customer updates, quality logs. Most of it is written by skilled people who would rather be doing something else. That is where Copilot can help, because it is good at drafting, summarising and finding things in the documents you already have.

It is not a tool for controlling machines or making safety decisions, and this guide is deliberately clear about that. It is written for owners, operations directors and production managers at small and medium manufacturers, and it covers what Copilot is, what to prepare, the everyday jobs where it helps, and the sensible rules to agree.

If anything here raises a question, pick up the phone. I would rather talk it through.



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How to use this guide

Read it end to end, or jump to what you need. Thinking about starting? Go to the readiness checklist on page 4. Want ideas? Pages 5 to 8 cover shop-floor and office use. Worried about safety and document control? Start on page 9.

CHAPTER 1

Copilot in two minutes

Copilot is not one product. There are three things people mean by the name, and it helps to know which is which.

1 Copilot Chat

An AI chat assistant included with many work Microsoft 365 accounts. It is good for drafting, explaining and brainstorming, and it works with what you type, paste or attach. Signed in with a work account, it carries enterprise data protection.

2 Microsoft 365 Copilot

A paid add-on licence that works inside Word, Excel, PowerPoint, Outlook and Teams, and can use your own emails, meetings and files, for example procedures and manuals stored in SharePoint. It only shows a person what they already have permission to see.

3 Agents

Optional extras built for a single repetitive job, such as answering questions from your quality manual. They come later, after the basics have settled.

The point to remember

Copilot works with your office documents and data. It does not run or control machinery, and it does not replace your safety systems or quality procedures. Its answers are only as good as the documents behind them, so out-of-date procedures and untidy permissions are the first things to fix.

IF THIS SOUNDS LIKE YOU	START WITH
Not sure it is worth it yet	Copilot Chat with a few volunteers. It is included with many accounts, and it shows you what people actually use.
Writing, planning and reporting all day	Microsoft 365 Copilot for that small group, once the readiness steps in the next chapter are done.
One repetitive task that eats time	Talk to us about an agent, after the basics are in place.

Licensing, names and features change often. We confirm the current position for you before you buy anything.

CHAPTER 2

Get ready before you switch it on

Manufacturers have extra things to get right, because documents often carry safety, quality and commercial weight.

- [ ] **Get your documents in order.** Copilot can only find a procedure if it is stored somewhere sensible. Tidy the SharePoint or file share that holds work instructions, manuals and certificates.
- [ ] **Retire old versions.** If three revisions of a work instruction are all in the same folder, Copilot may quote any of them. Make sure the current approved one is clear, and archive the rest.
- [ ] **Check who can see what.** Drawings, pricing, supplier terms and HR files should be restricted to the people who need them. Copilot will not respect a rule that is not in place.
- [ ] **Protect your accounts.** Turn on multi-factor authentication for everyone, including shared or shop-floor accounts where practical.
- [ ] **Think about shop-floor access.** Many operators do not have a desk, a PC or a licence. Decide whether Copilot is for the office, the line or both, and how people will reach it, for example on a shared device.
- [ ] **Protect your intellectual property.** Agree what designs, formulations and customer specifications must never be pasted into a tool outside your organisation.
- [ ] **Keep humans in charge of safety.** State clearly that Copilot output is never the final word on safety, quality or compliance.

What we check first

We review your Microsoft 365 permissions, how your documents are organised, sign-in protection and device security, and give you a short list of fixes in priority order. Nothing is switched on until the list is dealt with.

CHAPTER 3

Where it helps: on the shop floor

Where staff have access to it, the quickest wins are the small, daily writing and searching jobs that take time away from the work.

WORD, COPILOT CHAT

Shift handover reports

Turns a few rough points into a clear, consistent end-of-shift report, so the next shift knows exactly where things stand.

TRY ASKING

Turn these notes into a shift handover report with sections for output, issues and actions.

WORD, COPILOT CHAT

Clearer work instructions

Rewrites a confusing procedure as short, numbered steps, and suggests where a warning or a photo is needed. A person still approves it.

TRY ASKING

Rewrite this procedure as simple numbered steps for a new starter. Keep the warnings.

COPILOT CHAT

Finding the right manual

Searches approved documents for the maintenance procedure or the likely causes of an alarm, with a reference back to the source.

TRY ASKING

What does the maintenance manual say about error code 41 on the press brake?

WORD

Incident and near-miss reports

Helps turn notes into a complete, well-structured report that includes the details your process needs.

TRY ASKING

Write up this near miss using our report headings and flag anything missing.

OUTLOOK

Telling people about a delay

Drafts a short, clear note to a supervisor or customer when production is held up, with the right tone.

TRY ASKING

Draft a polite email to the customer explaining a two-day delay and the new date.

EXCEL

Reading the numbers

Helps spot patterns in scrap, downtime or output figures and explains them in everyday language.

TRY ASKING

Which machines had the most downtime this month and what are the common reasons?

CHAPTER 4

Where it helps: in the office

Purchasing, planning, quality and sales spend a lot of time reading, comparing and writing. This is where Copilot tends to save the most hours.

EXCEL, WORD

Comparing suppliers

Sets out quotes side by side against your criteria and drafts clear requests for quotation, ready for you to check.

TRY ASKING

Compare these three quotes on price, lead time and terms, and recommend a shortlist.

WORD

Reading contracts and terms

Summarises a long supplier contract and highlights the clauses you should look at, but it is not a substitute for legal advice.

TRY ASKING

Summarise the payment, liability and termination terms in this contract in plain language.

EXCEL

Quality log analysis

Looks through non-conformance and inspection logs to find recurring issues, suppliers or parts.

TRY ASKING

Group these non-conformances by cause and tell me the top three recurring issues.

OUTLOOK, WORD

Customer communication

Drafts order updates, complaint responses and quotes in a consistent, professional tone.

TRY ASKING

Draft a reply to this complaint that acknowledges the issue and sets out next steps.

TEAMS

Meeting recaps and actions

Records decisions and who owns what from production, planning or customer meetings.

TRY ASKING

List the decisions and actions from today's production meeting, grouped by owner.

COPILOT CHAT

Ideas and customer insight

Summarises customer feedback and market information and helps brainstorm improvements, with the facts checked by you.

TRY ASKING

Summarise the common themes in this customer feedback and suggest three improvements.

CHAPTER 5

A day with Copilot

A short, illustrative day for a production supervisor. Your own tools and routines will differ, but the pattern is familiar.

D

Dan, production supervisor
An illustrative example, not a real person, at a 60-person fabrication business.

6:45

Shift handover

Dan types a few bullet points from the overnight shift. Copilot turns them into a clear report that follows the usual headings.

WORD

8:30

Where is that procedure?

A changeover is due on a machine. He asks Copilot to find the approved set-up procedure and checks it against the controlled copy.

COPILOT CHAT

10:00

A clearer instruction

A new work instruction is hard to follow. Copilot rewrites it as short steps, and the quality manager reviews and approves the final version.

WORD

12:00

Near-miss report

Dan writes up a near miss from rough notes. Copilot flags two details the form needs that he had missed.

WORD

14:00

Telling the customer

A material delay is looming. He drafts a short update to the customer, checks the dates and sends it.

OUTLOOK

15:30

Looking at scrap

He asks which jobs had the highest scrap rate this week, and takes the answer to the afternoon meeting.

EXCEL

What to take from it

Dan still makes every decision. Copilot saves him typing, searching and chasing, so more of his day is spent on the floor.

CHAPTER 6

Ten things to try first

Start with low-risk tasks that involve your own writing, not safety-critical decisions. These prompts work in Copilot Chat or inside the apps.

THE TASK	A PROMPT TO START FROM
Recap a meeting	*Summarise the decisions and actions from this meeting, grouped by owner.*
Handover report	*Turn these notes into a shift handover report with output, issues and actions.*
Simplify a document	*Rewrite this procedure as short numbered steps. Keep every warning.*
Find a procedure	*What does our maintenance manual say about [fault or alarm code]? Quote the section.*
Draft a delay email	*Draft a short, polite email telling [customer] that order [number] will be [x] days late.*
Compare quotes	*Compare these quotes on price, lead time and payment terms. Show it as a table.*
Summarise a contract	*Summarise this supplier contract in one page and list the clauses to query.*
Find patterns in a log	*What are the three most common causes in this quality log? Show counts.*
Summarise customer feedback	*Group this feedback into themes and tell me the three most common complaints.*
Improve my writing	*Make this clearer and shorter without changing the meaning.*

Make your prompts better

Be specific about the document, the format and the audience. Ask Copilot to quote the source so you can check it, and tell it what to leave out. A prompt with a goal, some context and a format gets far better results than a vague request.

CHAPTER 7

Using it responsibly

Manufacturing carries extra responsibilities. These are the rules we suggest agreeing before anyone starts.

1 Safety decisions stay with people

Copilot never decides whether something is safe. Risk assessments, lockouts and safety sign-offs stay with trained, accountable people.

2 Respect document control

Only treat a procedure as current if it comes from your controlled library. Check the revision number, and do not let a copy become a new master.

3 Check everything

AI can sound confident and be wrong. Check facts, figures, part numbers and dates before anything is used or sent.

4 Protect designs and customer data

Keep drawings, formulations, customer specifications and pricing out of tools your organisation has not approved.

5 Keep it away from the machines

Copilot works with documents and data in Microsoft 365. It should not be connected to, or used to control, production equipment.

6 Tell customers where it matters

Some customers have rules on AI in their supply chain. Check your contracts and quality agreements.

A word on quality systems

If you work to ISO 9001 or a customer's quality standard, record how AI is used in your processes, who checks the output and how you handle mistakes. It is easier to agree this at the start than to explain it at an audit.

CHAPTER 8

Your first 30 days

You do not need a big programme. A small, well-run pilot teaches you more than a launch.

Week 1

Tidy and protect

Review permissions and document libraries, switch on multi-factor authentication and agree what must not be pasted into AI tools.

Week 2

Start a small pilot

Choose five to ten people across the floor and office, such as supervisors, planners, buyers and quality, and give them a few starter tasks.

Week 3

Train and share

Run a short session using your own documents. Collect the prompts that worked and share them.

Week 4

Review and decide

Ask what saved time, what did not and what worried people. Decide who is next, or whether to stop.

How to tell whether it is working

- [ ] **Time saved** on the tasks you chose, as reported by the pilot group
- [ ] **Still in use** after four weeks, rather than tried once and forgotten
- [ ] **No incidents** involving data, accuracy or inappropriate content
- [ ] **Confidence** among the people using it, and honest feedback on what was not useful

Where we can help

We can run the readiness review, set up licences safely and run a hands-on session built around your own procedures, reports and emails. You get a clear view of whether it is worth buying more, before you commit.

TALK TO US

Let's work out where Copilot fits in your manufacturing business

If this guide has raised questions, we would be glad to talk. A complimentary call takes around 15 to 20 minutes, and you will speak to a real, named person, usually me.

- ✓ We ask how your team works and where the time goes
- ✓ We give you an honest view on whether Copilot is worth it yet
- ✓ No pressure and no obligation

BOOK A CALL

adoptivetechnologies.co.uk/contact

Choose a time that suits you

CALL US

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Straight through to a real person





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