A CASE STUDY

FOR FINANCE TEAMS EVALUATING AI

The Copilot Pilot, Scaled

A single-workflow finance team Copilot pilot that recovered 1.5 FTE-equivalent capacity in 90 days at $2,160 annual total cost.

Bolted on. **Built in.**

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CASE 10 · COPILOT PILOT

A 75-person Canadian E&P operator deployed Microsoft 365 Copilot in JIB reconciliation, captured measurable time savings within 90 days, and scaled across the full finance team by month six. **Total annual license cost: $2,160. Recovered capacity: 1.5 FTE-equivalent.**

OPERATOR PROFILE — Canadian E&P operator, mid-cycle stable

75 people across one office and three field locations. Six-person finance team. Standard mid-market operator posture: Microsoft 365 already deployed, IT governance in place, appetite for AI but no clear ROI path.

STARTING POSTURE — Eighteen months of AI pitches, zero deployments

The CFO had been hearing AI pitches for eighteen months. Most landed as strategy engagements priced at $75-150K with document deliverables, not capability. **“I want to know what’s actually working, in operations, that we could deploy in 90 days.”**

ENGAGEMENT — Co-Managed + AI

Three weeks of joint scoping between Vencer’s strategic advisor and the CFO produced a bounded pilot. **Not “AI for finance.” Not “deploy Copilot organization-wide.”** One workflow, one team, ninety days, kill-or-scale commitment on day 90.

COMPOSITE CASE STUDY

Drawn from multiple actual Vencer engagements with Canadian operators of similar profile. Names, specific identifying details, and precise metrics have been anonymized. **The deployment pattern is the point.**

CASE 10 · THE FRAMING

The pilot succeeded because of what the CFO refused to do, not what she agreed to. **She refused a strategy engagement, a broad rollout, an IT-owned initiative, and an open-ended timeline.**

The four framings that made this work.

- **Workflow scoped to JIB reconciliation specifically.** Not “AI for finance.” Month-end JIB reconciliation, joint venture partner statements, exception routing. One measurable workflow.
- **The CFO owned the pilot, not IT.** Not IT. Not operations. The CFO ran weekly check-ins, made adjustment decisions, and held the day-90 scale-or-kill commitment.
- **Measurable baseline before touching Copilot.** Two weeks of pre-pilot measurement: average JIB cycle time, error rate, exception count. **You cannot claim improvement without a baseline.**
- **Kill discipline at day 90.** If the pilot did not clear a defined target (25% cycle-time reduction), it would be discontinued. No sunk-cost extension. No wait-and-see.

THE PATTERN BEHIND THE PATTERN

This framing is consistent across operators we’ve watched succeed with AI. CFO ownership. Bounded scope. Measured baseline. Honest kill criterion. The technology (Copilot) matters far less than the structure around it.

CASE 10 · THE NINETY DAYS

Copilot licenses added for three pilot users on Day 1. Weekly check-ins with the CFO across the full ninety days. **Refinement happened every seven days, not at the end of a six-month waterfall.**

DAYS 1-14 Setup and baseline

Three Copilot licenses provisioned. Two-hour kickoff walked through workflow scenarios, suggested prompt patterns, and set expectations honestly: **AI produces useful first drafts that a human must review, not finished work you can ship blind.**

DAYS 15-45 Prompt library development

Users kept a shared prompt library. What worked, what didn't, what needed refinement. Weekly review of the library. **By day 45, twelve reusable prompts covered 80% of the JIB reconciliation workflow.**

DAYS 46-75 Workflow integration

Prompt library integrated into the standard month-end procedure. Exception routing that used to require a senior AR analyst got handled by Copilot with junior review. **The senior analyst's time moved up the value chain to strategic work.**

DAYS 76-90 Measurement and decision

Final measurement vs. baseline. Report to CFO on day 88. **Scale-or-kill decision made on day 90, with data.** Target: 25% cycle-time reduction. Actual: 38%.

CASE 10 · THE RESULTS

Ninety days from license activation to a documented scale decision. **The finance team cleared its target by a wide margin. Rollout to the full finance team began in month four.**

CYCLE TIME **4 days → 2.5 days per JIB cycle**

38% faster. Target was 25%; achieved was 38%. Month-end close moved earlier in the calendar, which had knock-on effects on cash flow visibility and management reporting.

CAPACITY **~1.5 FTE-equivalent recovered**

Across the six-person finance team. **Equivalent value ~$195K vs. an annual Copilot license cost of $2,160 (three users × ~$720/year).** ROI in the first month, not the first year.

SCALE **Full finance team by month six**

With the pilot proven, licenses extended to all six finance users. Two additional workflows added (AP invoice coding, board-package drafting). **The prompt library from the JIB pilot accelerated both.**

THE MOMENT IT MATTERED

The pilot's success had less to do with the AI than with the structure around it. **CFO ownership. Specific workflow. Measurable baseline. Honest kill criterion at day 90.** The same Copilot licensing deployed without those disciplines would have produced a very different outcome.

CASE 10 · GENERALIZATIONS

Microsoft 365 Copilot in mid-market finance workflows is producing measurable ROI. **The upside compounds as the prompt library matures, workflows expand, and the next capability layer arrives.** But not every workflow is a fit.

Where the pattern applies.

- **Finance and back-office workflows** with repetitive-but-varied processing (reconciliations, coding, drafting) benefit the most from AI assist.
- **Workflows with clear input-output pairs** and defined exception patterns are the highest-leverage starting points.
- **Teams where the reviewer has domain expertise** can safely accept AI-drafted outputs. Teams without that expertise cannot; AI can amplify errors as easily as it amplifies productivity.

Where the pattern does not apply.

- **Not every workflow.** The wrong pilot on the wrong workflow gets you a different case study.
- **Not without CFO/CEO ownership.** IT-owned AI pilots without executive accountability drift into strategy exercises.
- **Not without a measurable baseline.** Without pre-pilot measurement, there is no defensible ROI claim at day 90.

> **THE TAKEAWAY**
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> Bounded scope, measured baseline, CFO ownership, honest kill discipline. **Those four make AI pilots produce measurable outcomes.** The Copilot technology is table stakes. The structure around it is the intervention.

ABOUT VENCER GROUP

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Vencer was built from decades of experience across mergers, divestitures, technology transitions, and daily operations. Every scaling moment, every M&A close, every inflection point, encoded into how we build and how we show up.

19	11	4	24/7
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NOTES, METHODOLOGY & LEGAL

How this case study was compiled.

COMPOSITE METHODOLOGY

This case study is a composite drawn from multiple actual Vencer Group engagements with Canadian energy operators of similar profile (80-150 people, active-acquirer stage, IT-and-the-Cycle Review engagement). Names, precise identifying details, and specific financial figures have been anonymized. The pattern of findings and the sequencing of the ninety-day work are drawn faithfully from Vencer's field experience.

FINANCIAL FIGURES AND RANGES

Where the case study cites specific dollar amounts (annual spend before and after, recovered spend, license counts), those reflect representative ranges across the composite engagements. Individual client outcomes have varied within roughly ±25% of the numbers stated here, depending on starting posture, acquisition history, and operational scale.

THE IT-AND-THE-CYCLE REVIEW

The IT-and-the-Cycle Review is a 3-to-5 day structured assessment by a Vencer engineer, covering four dimensions: current spend and whether it's rightsized; vendor stack and integration state; cyber posture and insurance-defensibility; and operational cadence around governance and renewal. It is a scoped engagement, priced per operator size, and delivered under a written statement of work.

ATTRIBUTIONS AND UPDATES

Content reflects Vencer's engagements with Canadian operators through 2026. Insurance renewal outcomes reflect market conditions in Q2 2026 for Canadian mid-market energy operators. Where market conditions change materially, this case study may be updated; consult vencergroup.com/insights for the most current version.

WHERE OUR LAWYERS SMILE

This case study is drawn from a real engagement, anonymized. Company identifiers are changed, financial figures are rounded, and timelines are approximated. Outcomes are specific to the operator described and are not projections for any other engagement. Similar patterns often repeat, but every situation carries its own inputs. Consult your own advisors before drawing operational or investment conclusions from this material.

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