

Finance | Kenya

# Empowering employees to work smarter

CrossBoundary Group

Diversified investment firm CrossBoundary Group helps employees work smarter and faster with AI-powered productivity and collaboration with Copilot for Microsoft 365, purchased through the Lenovo Cloud Solutions Provider program.



# 1

## Customer background

# Who is CrossBoundary Group?

CrossBoundary Group is a mission-driven diversified investment firm that unlocks the power of capital for sustainable growth and strong returns in underserved markets. The group provides investment advisory services across all sectors, with a strong focus on energy and real estate. Its advisory clients include government, development finance institutions, private equity firms, Fortune 100 companies, and research institutions.

CrossBoundary Group has more than 250 team members across 25 offices worldwide, with its largest presence in Nairobi, Kenya. More than 80% of employees are based in the markets that CrossBoundary Group serves.



## 2 The challenge

CrossBoundary Group believes that well-structured capital can be a catalyst for systemic change in markets that are typically overlooked. The group's 250-strong team provides contextual, tailored capital solutions, innovative project structuring, and expert advice to ambitious entrepreneurs, investors, corporates, governments, and foundations. To do this, employees rely on Microsoft 365 apps such as Word, Excel, Outlook, and Teams.

Recognizing the value of AI-powered productivity and collaboration tools, CrossBoundary saw an opportunity to help its employees work smarter and faster. Peter Ogolla, the group's IT Manager, confirms: "At CrossBoundary, we pride ourselves on innovation. Since OpenAI launched ChatGPT, we've been exploring how to harness the power of generative AI in our business. Given the nature of our work, security and privacy are key concerns. So, when we learned that Microsoft was building a solution based on OpenAI technology, we couldn't wait to get started."

“

“When we started our AI journey, Copilot for Microsoft 365 was still in the early stages of development. We were eager to become an **early adopter** and explore the potential of this **exciting new technology** for our business.”

Peter Ogolla

IT Manager, CrossBoundary Group



# Testing the waters

Starting small, CrossBoundary Group purchased six Copilot for Microsoft 365 licenses through the Lenovo Cloud Solutions Provider program.

Powered by Copilot for Microsoft 365's native large language model (LLM) technology, the solution intelligently creates and summarizes content, provides contextual prompts and suggestions, and streamlines task automation. The tool integrates seamlessly with the Microsoft 365 apps that employees use daily, including Outlook, Teams, Word, PowerPoint, and Excel.

## Software

Copilot for Microsoft 365

## Services

Lenovo Cloud Solutions  
Provider program  
Lenovo Copilot for  
Microsoft 365 Services



Crucially, Copilot for Microsoft 365 comes complete with enterprise-grade security, privacy, and compliance to ensure that all data processing happens securely within CrossBoundary Group's Microsoft 365 tenant.

The Lenovo Copilot for Microsoft 365 Services include:

- **Advise** – Customized guidance to help customers successfully implement and utilize Copilot for Microsoft 365
- **Assess** – Understanding an organizations capability to integrate Copilot for Microsoft 365 services in order to streamline the deployment journey
- **Deploy** – Facilitating a streamlined deployment and ensuring seamless integration of users
- **Adopt** – Enabling users to seamlessly adopt and utilize Copilot for Microsoft 365 in their daily tasks to enhance performance and satisfaction
- **Extend** – Grasping the tech environment and identifying opportunities to maximize ROI and boost efficiency

## Enterprise- wide rollout

Supported by Lenovo, CrossBoundary Group worked closely with the initial pilot participants to understand when and how they used the Copilot for Microsoft 365 tool, and to ensure that confidential information was protected. “Lenovo provided valuable advice and technical expertise to help us optimize the deployment,” says Peter Ogolla. “For example, Lenovo advised that Copilot for Microsoft 365 follows the access permissions set up on the Microsoft 365 environment, so we configured robust access controls to keep confidential information protected.”

Jenny Wrench, Lead Data Engineer at CrossBoundary Group, comments: “The Copilot Academy training provided by Microsoft was short and practical. We supplemented this by recruiting team members from several departments to present live demonstrations of how to use Copilot for Microsoft 365 functions in CrossBoundary’s environment.”

### 3 The solution

Based on the success of the initial pilot, CrossBoundary Group decided to roll out Copilot for Microsoft 365 across the firm. Today, the group has more than 250 Copilot for Microsoft 365 licenses and a daily active user rate of 89% after just six months.

“The response from employees has been extremely positive,” says Peter Ogolla. “We’re working to get the adoption rate up by running training and enablement sessions to ensure that all employees are comfortable using Copilot for Microsoft 365 and understand how the tool can help them work more productively.”



“

**“Copilot for Microsoft 365 is very much embedded where our people are working, so employees can interact with it without leaving their Microsoft 365 apps. It puts **the power of AI at their fingertips.**”**

Peter Ogolla

**IT Manager, CrossBoundary Group**

## 4 The results

Copilot for Microsoft 365 provides AI-powered assistance, guidance, and support to CrossBoundary Group employees, helping them to work at their best.

Users can effortlessly summarize the key discussion points and action items from Teams calls, draft emails in Outlook, generate formula suggestions in Excel, and more—adding productivity to workflows and giving employees more time to focus on what matters.



89% daily active user rate



95% of users very likely or likely to continue using Copilot for Microsoft 365



Intelligent recap of meetings and chats in Microsoft Teams is the most popular application of Copilot for Microsoft 365 at CrossBoundary



“

**“The integration of Copilot for Microsoft 365 into the Microsoft Office Suite, especially Outlook and Teams, has transformed my daily work. I can now efficiently create sales reports, automate prospect follow-ups, and inform the team in a clear and efficient manner about progress. This is all done securely and quickly, improving my work life.”**

Franck Alloghe

**Business Development Director,  
CrossBoundary Group**

## 4 The results

Nichola Ciera, Energy Policy Officer at CrossBoundary Group, notes: “Copilot for Microsoft 365 has been a valuable tool for our initial regulatory analysis function—helping us navigate complex and lengthy regulations with speed and clarity. It has also accelerated our review of legal documents by delivering well-structured summaries and clear takeaways that save time and sharpen our focus.”

Peter Ogolla adds: “The rollout has been such a success that we’re looking at introducing Copilot+ PCs from Lenovo in the near future to further enhance employee productivity.”

“

“I’m frequently **overbooked with limited critical thinking time**, as an executive. Just yesterday Copilot for Microsoft 365 helped me review the notes of a meeting I missed, interrogate conclusions by comparing to existing internal company documents, and summarize strategic conclusions to share back to my team. Copilot for Microsoft 365 offers an **always-there incredible extension of my limited time and brain power.**”

Kathleen Jean-Pierre

COO, CrossBoundary Group

# Why Lenovo?

For CrossBoundary, purchasing Copilot for Microsoft 365 licenses through the Lenovo Cloud Solutions Provider program made sense both from a commercial and support point of view. CrossBoundary benefits from Lenovo advisory, license optimization, deployment, and training services.

“We’ve worked with Lenovo for many years, and they have come to be a trusted, valued partner,” says Peter Ogolla. “The ongoing support and service we get from Lenovo is excellent. I have people that I can reach out to when I need advice and clarification, and I know that they will respond in a timely manner. Having dedicated people makes life so much easier and gives me peace of mind.”



# How can AI help employees work at their best?

With Copilot for Microsoft 365, purchased through the Lenovo Cloud Solutions Provider program, CrossBoundary Group enables employees to harness AI-powered automation, saving time and effort.

**Explore Copilot for Microsoft 365**