

# Case Study



## OTG: PoC for Microsoft 365 Copilot

### Company Profile

Ostfriesische Tee Gesellschaft (OTG) is a fourth-generation family-owned company and a subsidiary of Laurens Spethmann Holding AG & Co. KG. With more than 115 years of experience, OTG has developed a deep understanding of customer needs and established itself as a quality leader. With brands such as Meßmer, MILFORD, OnnO Behrends, and Yasashi, OTG holds a leading position in the German and European markets.

<https://www.otg.de/>

### Technologies

**#Copilot**

### Challenges

- Balancing IT security and data protection settings with optimal usability
- Understanding where AI delivers real value in everyday work

### Solution

- Proof of concept for Microsoft 365 Copilot with 25 participants
- Compact eight-week testing approach including kick-off, use case services, and deep dives
- Interactive workshops, office hours, practical "homework" for participants, and surveys for targeted feedback

### Benefit

- Employees learn in a hands-on way and can apply Copilot functionalities directly
- Deeper insights into technical, organizational, and permission-related requirements and challenges
- Reusable methods and formats established for future AI initiatives
- PoC results form a solid basis for informed decisions on AI assistants

Ostfriesische Tee Gesellschaft (OTG) wanted to gain early insights into the tangible value AI can deliver in everyday work – without compromising security, data protection, or governance. As a traditional company with high standards for information security and employee involvement, it was clear that an unstructured rollout of Microsoft 365 Copilot was not an option. Instead, OTG chose a compact, hands-on proof of concept together with novaCapta.

One particular challenge was the deliberately short testing period. Within just eight weeks, Copilot had to be tested under realistic conditions, relevant use cases identified, and the technical foundation configured to ensure secure usage.

In parallel, novaCapta supported OTG in evaluating and optimizing the technical framework. It quickly became apparent which functionalities were limited by existing security and data protection settings and where organizational or legal coordination was required. Topics such as data protection configurations and IT security demanded a careful balance between maximum protection and meaningful functionality.

#### **A Compact Copilot PoC with a Strong Practical Focus**

Together with novaCapta, OTG launched a proof of concept involving around 25 participants from all relevant business units. The approach was deliberately compact, with a clearly structured testing concept and a maximum time commitment of two hours per week for participants.

The PoC started with a kick-off and an envisioning workshop to position Copilot and collect potential use cases. This was followed by targeted deep dives, complemented by use case services, consultation hours, and concrete “homework.” Participants were encouraged to actively use Copilot in their daily work, contribute their own scenarios, and share their experiences. Surveys after each format and structured feedback enabled rapid adjustments and continuous refinement of the approach.

#### **Recognizing what AI needs to succeed**

The value of the proof of concept went far beyond simply “getting to know” Copilot. OTG gained a clear understanding of how AI can be applied effectively and which prerequisites must be in place. The PoC revealed which use cases are realistic, where missing permissions or data sources limit value, and how strongly motivation and guidance influence success. One key insight stood out: AI does not deliver value on its own. Training, recurring formats, and active enablement are essential for employees to truly unlock its potential.

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**The collaboration with novaCapta was characterized by a high level of professionalism, reliability, and true team spirit. During the Copilot M365 proof of concept and the implementation of our new Microsoft 365–based intranet, novaCapta impressed us not only with its expertise, but also made a decisive contribution to driving our digital transformation forward.**



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Based on the results, OTG was able to make well-informed decisions regarding the further development of its AI strategy and establish a solid foundation for the future use of AI assistants across the organization. At the same time, OTG and novaCapta jointly developed proven methods, formats, and approaches during the PoC that can now be reused in future projects. The proof of concept was therefore not an endpoint, but a structured starting point for OTG's sustainable use of AI.

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**The pilot showed that employees are motivated to use AI. We were able to test the possibilities and develop ideas for future applications.**



**Jule Pabst**

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