

# Aegon advances an AI-powered working model to improve productivity, efficiency and innovation



## Client profile

Aegon is a leading company in Spain's insurance sector, with an extensive network of agents and intermediaries and a strong commitment to delivering high-quality health and life insurance services. Firmly committed to evolving toward responsible, collaborative, and sustainable digitalization models, Aegon continues to advance its transformation journey by integrating emerging technologies to strengthen operational efficiency and improve the experience of its professionals and clients.

**NTT DATA is leading Aegon's digital workplace modernization program, driving the adoption of M365 Copilot and the development of intelligent agents as key enablers for integrating generative AI into corporate processes, increasing productivity, operational efficiency, and innovation.**

Workplace modernization has become a fundamental pillar for transforming the employee experience, improving response times, and strengthening analytical capabilities. Through this initiative, Aegon is optimizing processes, standardizing workflows, and accessing corporate information in a more agile, secure, and consistent way.

Aegon had reached a turning point in its evolution toward a more agile operating model, focused on value and oriented toward automation, standardization, and the safe and responsible use of generative AI. Aegon relied on NTT DATA to design and implement a comprehensive program combining consulting, specialized training, and change management, embedding generative AI into daily operations and supporting multidisciplinary teams through a progressive transition to new AI-enabled ways of working.



“The adoption of Copilot has been a success, driven by the organization's clear commitment to generative AI. But the most relevant outcome has been seeing how a progressive approach has enabled us to scale its impact. We started by improving individual productivity, and today we already see teams designing and using agents that fit naturally into their day-to-day work.”

**Leticia Mohedano**, Talent & Organizational Transformation Manager,  
NTT DATA

91%

of Aegon professionals would miss their M365 Copilot license

98

use cases identified in key areas

60%

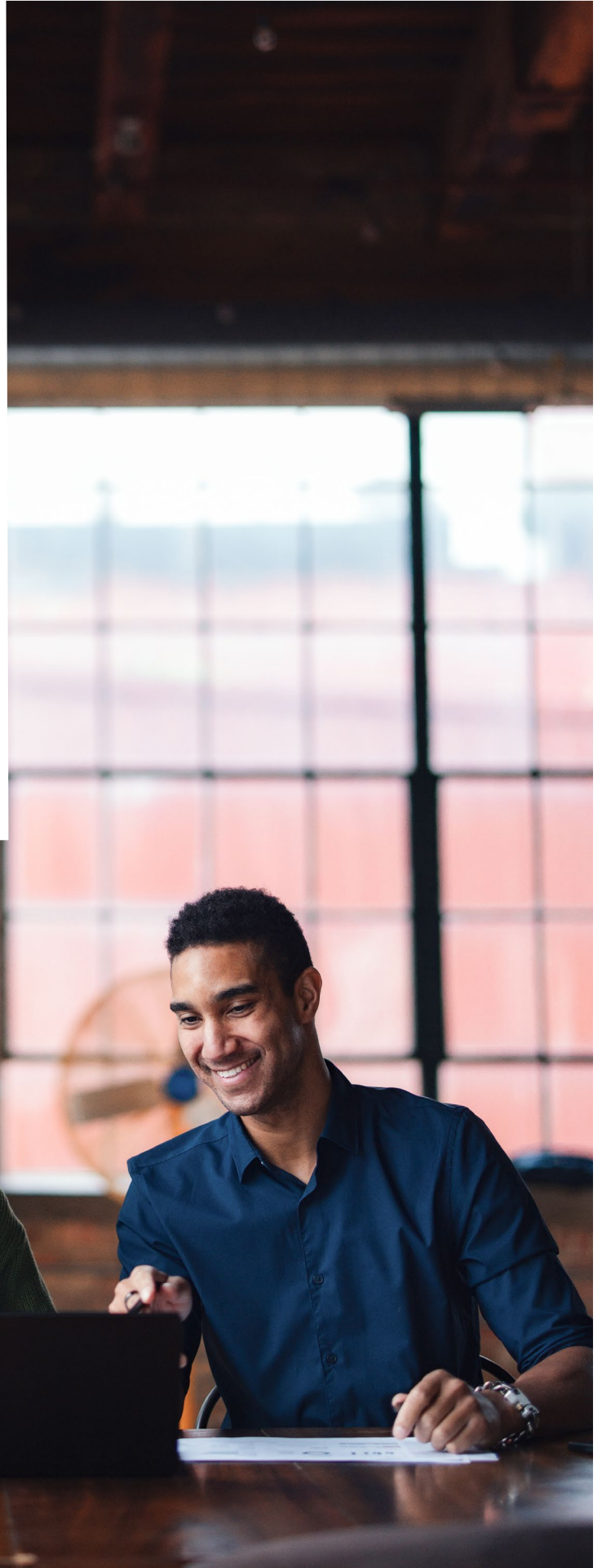
NPS in M365 Copilot agent training sessions

## Business need

Aegon started its digitalization journey with an M365 Copilot adoption program, enabling professionals to incorporate new AI-based ways of working into their daily activities. Following the initial M365 Copilot pilot, the company identified the need to scale adoption and extend it to a larger number of professionals, ensuring consistent, secure, and standardized use of the technology.

The challenge went beyond introducing a new technology. It required driving a cultural shift that would integrate generative AI into daily operations, supported by practical training, expert guidance, and clear criteria for responsible use.

Aegon also sought to evolve toward more advanced solutions based on intelligent agents capable of automating tasks, connecting corporate information, and supporting recurring activities. This next step required a technology partner that could guide adoption, help identify real use opportunities, and support teams in building internal capabilities, consolidating new ways of working with AI.



## Solution

NTT DATA combined consulting, specialized training, continuous support, and change management to ensure robust, measurable, and business-oriented adoption.

The initiative was structured as a progressive journey, enabling professionals to incorporate new AI-powered work dynamics.

Key solution capabilities:

### 1. Expanding M365 Copilot adoption

NTT DATA supported the integration of generative AI into professionals' daily work through:

- Practical training focused on applying generative AI to real day-to-day tasks.
- Specialized workshops on productivity, analysis, content generation, and information search.
- Awareness-building and guidance on the responsible and secure use of the technology.
- Identification of use cases aligned with business needs and quantification of their impact.
- Creation of an active community of "Copilot users" to encourage continuous learning and establish a strong foundation for more advanced uses of the technology.

### 2. Advanced training in Copilot agents

Aegon consolidated Copilot adoption and moved toward a more strategic use of AI through intelligent agents designed to automate tasks, connect corporate information, and accelerate processes. The approach included:

- Training in the design, creation, and evaluation of generative AI-based agents.
- Use of tools such as *Copilot Studio Full* and *Copilot Studio Lite* to build specific solutions supported by corporate content.
- A collaborative methodology enabling teams to identify, prioritize, and scale their own use cases.
- Identification of 98 use cases in key areas such as Operations, IT, Legal, and Strategy & Digitalization.
- Support in developing the first corporate agents integrated into the company's processes.

### 3. Cultural change and sustainable adoption

NTT DATA implemented a structured adoption framework to ensure the program's impact:

- A structured program with consistent learning models for the entire organization.
- Adoption criteria based on security, responsibility, and efficiency.
- Continuous impact assessment through metrics such as NPS in sessions and workshops.
- Strategic guidance to help transform generative AI into a corporate asset, not just a tool, fully aligned with business objectives.



**NTT DATA designed and implemented a generative AI-powered workplace ecosystem for Aegon, based on M365 Copilot and M365 Copilot Agents. This ecosystem enables new productivity and automation dynamics, helping teams work more efficiently and with greater agility, while maintaining a strong focus on value.**



## Outcomes

The progressive adoption of M365 Copilot and the evolution toward intelligent agents enabled Aegon to achieve measurable and significant benefits in productivity and efficiency.

With NTT DATA's support, the organization has embedded generative AI into its operating model, creating a direct impact on daily operations:

- **High satisfaction with Copilot adoption**, with more than 60% NPS in theoretical sessions and practical workshops, demonstrating the real value of generative AI in daily productivity.
- **91% of professionals said they would miss their M365 Copilot license**, confirming strong adoption and a transformative user experience.
- **98 use cases identified in key areas** such as Operations, IT, Legal, and Strategy & Digitalization, aimed at reducing operational workloads and optimizing processes.
- **87% NPS in use case identification workshops**, reflecting the relevance and applicability of AI-based initiatives.
- **Development of the first corporate agents**, connected to internal content and designed to address specific productivity and automation needs.
- **Creation of an active community of users and solution designers**, driving new work dynamics and encouraging continuous experimentation.
- **Consolidation of a more agile work model**, with greater focus on value-added tasks and AI-supported processes.
- **Progress toward strategic and responsible use of generative AI**, reinforcing a more agile, value-oriented work model through new AI-enabled capabilities.

The program's success was made possible by the development of new digital capabilities identified by NTT DATA and by the close collaboration between NTT DATA and Aegon teams, who worked together on the design, adoption, and deployment of innovative generative AI-based solutions.

Following these results, Aegon is positioned not only as an organization that adopts technology, but as one shaping the future of work in insurance by anticipating trends and committing to a strategic, responsible, and human-centered use of generative AI.

## Next Steps

Aegon will continue advancing toward an organizational model in which generative AI acts as a catalyst for innovation, efficiency, and new collaboration dynamics. With NTT DATA's support, Aegon will continue exploring new use cases, expanding the scope of M365 Copilot, and strengthening its intelligent agent ecosystem to maximize return across the organization.



Thanks to the Copilot adoption program, in which we invested a total of 51 hours of training, with an average of 150 participants per session and 10 people per workshop, we have been able to guide the organization in implementing it for daily use in specific situations. Copilot has become a strategic ally, enabling us to access more structured data for decision-making, anticipate needs, and free up time for what truly matters: people and meaningful conversations.

The adoption of M365 Copilot has boosted our productivity and responsiveness, turning technology into a real competitive advantage, managed as a cultural change program that we must continue to build on.”

**Smara Conde**, Director of HR and CSR, Aegon

