



MICROSOFT 365 COPILOT

DISCOVERY WORKSHOP



INTRODUCTION

- Introduce the team members and their expected responsibilities.
- Review and agree on the engagement:
 1. Engagement overview
 2. Goals, scope, and deliverables
 3. Stakeholder availability and schedule
 4. Customer requirements and tools necessary for conducting the engagement
 5. Expectations and next steps



4SIGHT'S COPILOT VALUE DISCOVERY WORKSHOP

As a trusted Microsoft partner, 4Sight's Copilot Value Discovery Workshop empowers businesses to harness the full potential of Microsoft Copilot. Through a tailored three-phase approach, we help you explore AI reinvention, identify high-value scenarios, build a business case, and create a strategic roadmap for AI transformation.





INSPIRE

2-4 Hours

Showcase the Microsoft Copilot vision and value by driving “Art of the Possible” style conversations and demos. Discuss AI re-invention and value of Microsoft Copilot, touching on the importance of data security and adoption and change management.

ASSESS

1 Day

Assess customer’s needs and AI readiness by driving technical and business/organisational readiness assessments. Facilitate C-level interviews, data analysis and workshopping to identify high-value functional scenarios across priority departments.

DESIGN

2 Days

Develop the business case and plan for implementation based on prioritised scenarios. Define next steps and timeline to develop and implement the solution.

Activities

- Microsoft Copilot Business Value & Overview.
- Discuss data security, governance, and data access questions.
- Adoption and change management acceleration with Microsoft Viva.
- Optimisation readiness assessment review.
- High value scenario analysis and prioritisation for AI transformation.
- Build business case.
- Build implementation roadmap.
- Deliver executive summary (Report & Recommendations).

Outcomes

- Showcase the Microsoft Copilot vision and value.
- Security, governance and data questions answered before assessment activities.
- Understand user enablement best practices to accelerate adoption of Copilot for Microsoft 365.
- Assess customer’s business and technical needs; Complete workshops to identify priority scenarios.
- Summary of the customer’s current state and challenges based on workshop.
- Envision and prioritise high value scenarios across your customer’s organisation, specific to their business unit groups / departments.
- Early view of next steps needed for implementation roadmap to successfully deploy and adopt Microsoft Copilot.
- The business case (ROI) and high-level implementation roadmap for AI transformation defined, incorporating Viva acceleration if applicable.
- Next steps for customer/partner/ Microsoft to move forward and implement Copilot for Microsoft 365.



Copilot

Value Discovery Example Timeline

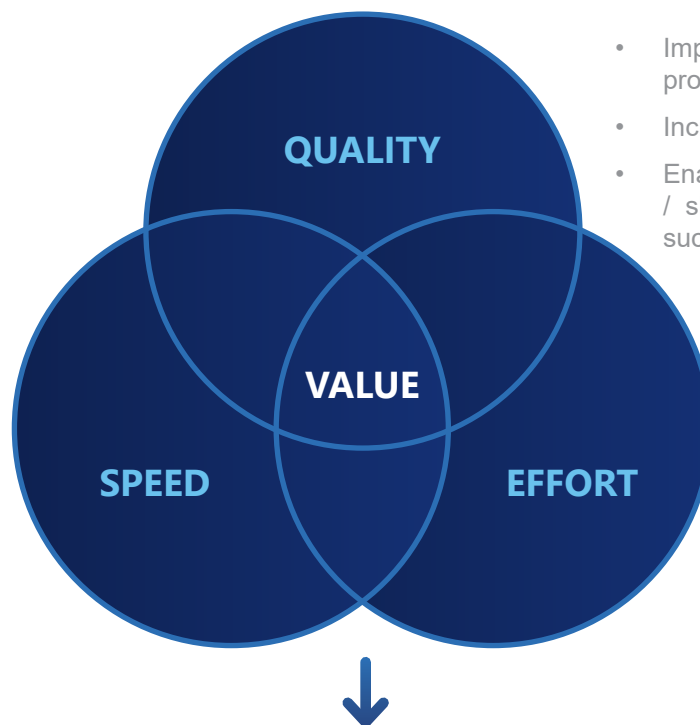
Legend
End User Enablement Team
Technical Readiness Team
Joint Teams
Customer Driven

Engagement Activities



DEFINING COPILOT FOR MICROSOFT 365 VALUE

- Complete tasks faster
- Engage in higher value activities
- Increase output
- Optimise processes.



- Improve quality of content produced
- Increase creativity
- Enable less experienced / skilled workers to achieve success

- Reduce mundane tasks
- Improve wellbeing and engagement
- Increase job satisfaction through improved results



Return on Investment / Return on Experience

- Accelerate Growth
- Cost Savings
- Cost Avoidance
- Employee Retention

CUSTOMER RESPONSIBILITIES

Inspire phase checklist

Showcase the Microsoft Copilot vision and value to your customers. Using a combination of presentations, scenarios, and demos – demonstrate the “Art of the Possible” to your customer around how AI can help increase revenue, manage costs and develop thriving employees.

1. Deliver Core Team Kickoff.
2. Deliver AI Reinvention and Microsoft Copilot value prop + business value.
3. Showcase product capabilities, including but not limited to:
 - Copilot for Microsoft 365
 - Copilot Extensibility
 - Copilot Studio in Copilot for Microsoft 365
 - Copilot for Sales
 - Copilot for Service
 - Copilot for Finance
4. Deliver immersive experiences and demos .
5. Address data security, governance, and data access questions.
6. Discuss adoption and change management guidance and how to accelerate with Viva.

Assess phase checklist

The Assess phase helps to identify your customer’s business and technical needs in preparation for AI Transformation and building a business case. Through a review of assessment and outcome of prioritised scenarios we will collaboratively determine your AI readiness, and which high-value scenarios are most important across priority departments.

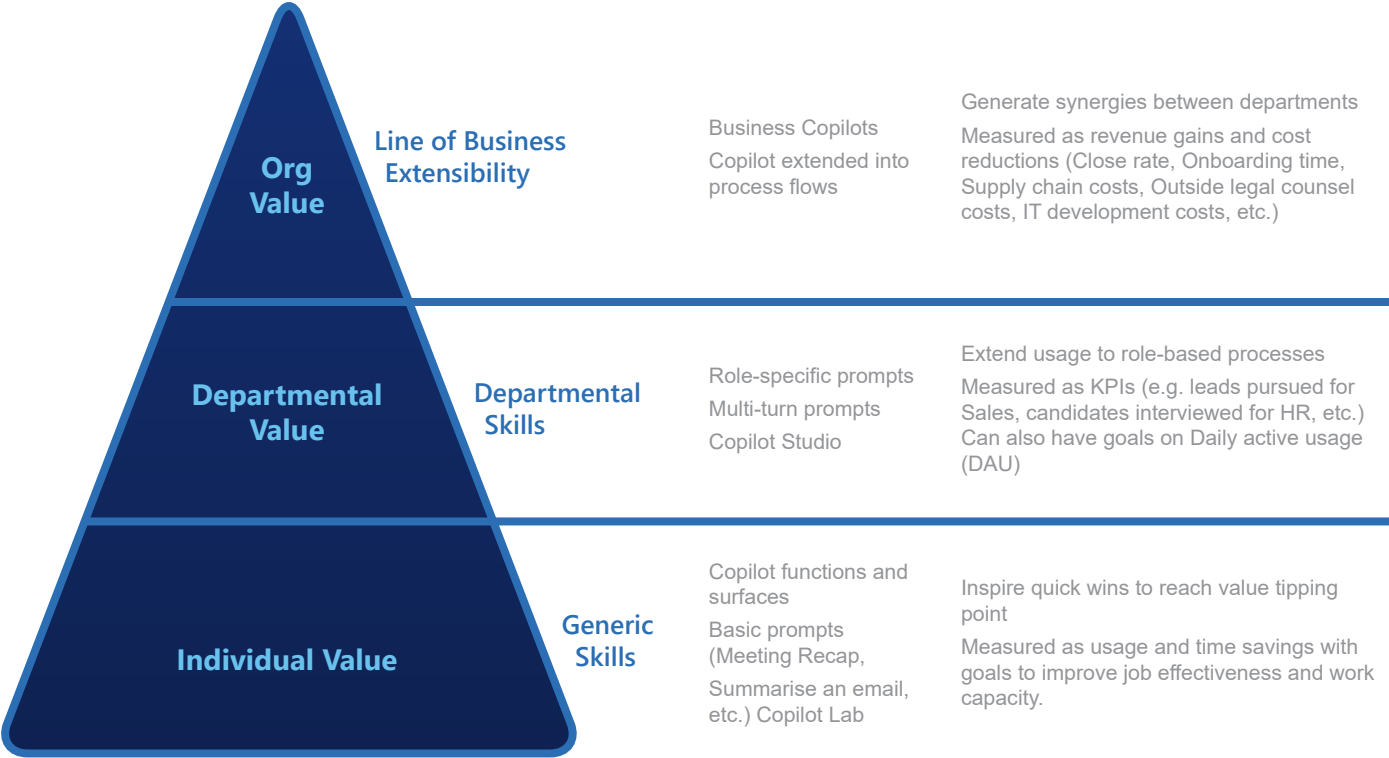
1. Complete review of the Copilot for Microsoft 365 Optimisation Assessment.
2. Identify and prioritise high value functional scenarios across 1 or more priority departments or focus groups comprised of multiple departments.
3. Review results of assessments and prioritisation and align with customer before building business case and next steps.

Design phase checklist

Build the business case and implementation plan for your customer’s AI Transformation.

1. Leverage Microsoft’s Business Case Builder to calculate ROI leveraging default values or values obtained from focus groups.
2. Discuss and align on a roadmap to implement your customer’s high-value scenarios with Microsoft Copilot.
3. Document recommendations that include next steps, identified risks, owners, and estimated completion dates.
4. Fill in Report and Recommendations template to submit as Proof of Execution (POE) and present to the customer.

MOVING BEYOND TIME SAVINGS



MOVING BEYOND TIME SAVINGS

1-4%

Increase Revenue

Revenue lift from existing and new business*

0.7%

Optimise Costs

Reduction in total operational expenditures*

51.9%

Employee Experience

Of companies surveyed cite employee wellbeing as a top outcome*

AT THE END OF THE ENGAGEMENT

We will:

- 1 Review results of technical and organisational analysis to help you understand your AI readiness level and any pre-requisites needed before purchasing and deploying Copilot for M365 licenses.
- 2 Agree on prioritised, high-value scenarios across your organisation to help build a plan for rapid adoption and value.
- 3 Build a business case summary including expected ROI and impact based on your high-value scenario prioritisation.
- 4 Together with you, create an AI transformation roadmap.



CUSTOMER RESPONSIBILITIES

Access to teams during the engagement

Participation from stakeholders, BDMs, executives, Enterprise Architects, IT Leads, and knowledge workers is required for different sessions.

Assign an executive sponsor to support the engagement

A stakeholder/sponsor is required to oversee and own the engagement process from the customer side.

CORE TEAM MODEL

WW Executive Sponsor



Core Team



Core IT services and support



- Change Lead / Program Manager
- Training Lead
- Communication Lead
- HR Lead
- Community Manager

Department Leads (Stakeholders)

- Send key local communications.
- Appoint Copilot Champions.



Local Copilot Champions

- Represent sponsor with Core Team.
- Monitor enablement.
- Work with Executive Sponsor for Communications and Cascade.
- Provide local support.
- Provide local training as needed.

1. Provide scenario-based guidance on Copilot for Microsoft 365.
2. Provide global package of assets to leverage (comms, training, readiness, etc.).
3. Provide onboarding, enablement, and issue reporting.
4. Consolidate feedback and share via Service Health Reviews.
5. Provide operations, service, and support experiences for new scenarios and features.

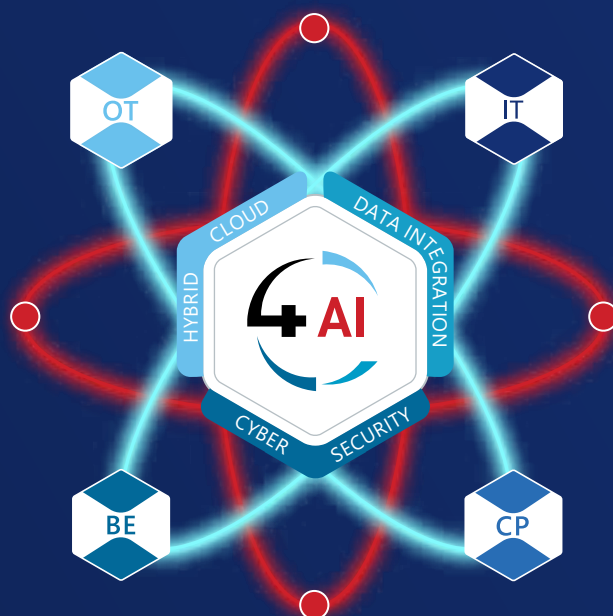


4Sight Holdings Limited (4Sight) is a public company listed on the JSE AltX (ticker: 4SI) in accordance with the laws of the Republic of South Africa. Our purpose is to leverage our extensive product and services portfolio, focused on **AI** technologies, people and data-focused solutions to design,

develop, deploy and grow solutions for our partners (customers and vendors).

The company's mission is to empower our partners to future proof their businesses through Digital **AI** Transformation to make better and more informed decisions in the modern digital economy.

4Sight's business model enables its partners to take advantage of products and solutions within its group of companies, which will allow them to enjoy turnkey Digital **AI** Transformation solutions across industry verticals.



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