

Flight ready pilot For Copilot for Microsoft 365



Ref: DRAFT24



“Pre-Pilot” Copilot Pilot

Kickstarting your Copilot Journey.

Introduction

Since Microsoft lowered the purchase limit, organisations are buying small numbers of Copilot licenses before deciding whether to expand the pilot or look at organisation wide roll out.

As a transformational technology, it is important not to treat Copilot as '*just another feature*' in Microsoft 365. As with any other technology project, it is essential to spend some time on preparation, learning and testing the capabilities, potential and limitations of Copilot.

With any technology change (and AI is a big one), Adoption and Change Management (ACM) is crucial for the success of any deployment, whether it is a *Pre-Pilot* Pilot or a wider deployment. It is important to understand that while employees will have some immediate “WOW!” moments, organisations will not see a huge productivity gain by simply giving people a license.

This is important no matter what stage you are in your evaluation of Copilot, since getting the best experience is critical for evaluation, business case development and employee success.

If you can, we suggest you start with at least twenty-five (25) licenses. This is the license count necessary to '*light up*' the Copilot usage analytics dashboard in Microsoft 365.

The “Pre-Pilot” Copilot Pilot

Through our experience of working with different organisations through the *Microsoft Copilot Jump Start Programme*, we have put together a streamlined, pre-adoption programme. This is to help ensure maximum success, for tyre kicking and testing of the core capabilities of Copilot within your organisation and is aligned specifically to a smaller, confided group of people.

We call this the “Pre-Pilot Copilot Pilot”.

This engagement focusses on helping you achieve the following:

- Pre-onboarding “*what to expect*” communications for employees.
- Base-level (essential) training and “*art of the possible*” examples.
- Weekly training drop-in sessions, delivered as lunch and learns.
- Technical check-in to support your technical IT teams (as needed).
- Reporting, using feedback from employees and data collected from Microsoft 365¹
- Assistance measuring potential ROI and business case for Copilot.

¹ Minimum of twenty-five (25) licenses required for this.



Scope of the Pilot

This initial pilot does not need to be super complex, but it is essential to still leverage the same adoption and change management principals to ensure that you can fully evaluate across their initial pilot group from a value, capability, and suitability perspective and to help you build a business case that supports the future direction of travel with Copilot for Microsoft 365.

Based on our initial discussions with **Customer name**, and experience working with other organisations in running initial, department and organisational wide deployment, we are pleased to position this fixed price adoption, training, and business outcome programme. We have set this to run over a duration of **eight weeks (8)** with a view to onboard an Initial group of up to **fifty (50)** employees across the business.

This programme is inclusive of the following key activities and outcomes.

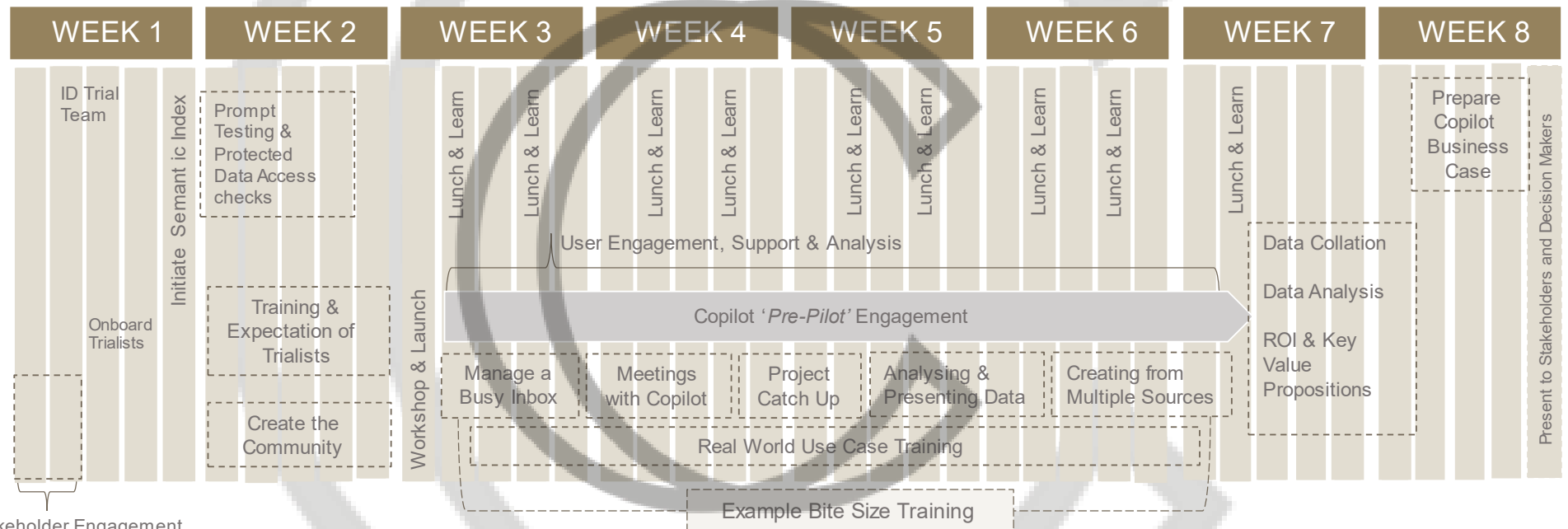
Activity	Outcome
Pre-onboarding communications for employees	Create awareness for employees "recruited" or volunteers to take part in the pilot programme.
Data Privacy and Security Review	Initial pre-testing of the Copilot experience with a view to re-assure you on your organisation's data protection and readiness for AI.
Initial training and weekly follow up lunch & learns	Regular, short, training sessions to introduce key features and examples to users. These would demonstrate key 'hero' features, 'art of the possible' scenarios and 'how to' activities.
Monitoring and feedback	A continuous process of collecting and analysing data on the pilot users' engagement, satisfaction, and performance with Copilot and Microsoft 365.
Usage and user feedback analysis	Work with / provide feedback analysis and usage insights from Microsoft 365.
Business case development	Working with your management team to summarise the results, focus on highlights and show the value of Copilot, providing recommendations for scaling out across other areas and the business value returned.

Note: The scope of this programme is based on Copilot for Microsoft 365 features and does not include any third-party app or data integration/migration into your Microsoft 365 tenant.



Your Copilot Pilot - 'Flight Plan'

The follow shows a "typical" Copilot pilot for up to **fifty (50)** people running over a typical period of **eight (8)** weeks. It Includes proven and combined activities designed to drive adoption, determine, and test use cases and measure business impact and productivity gains to the pilot group of employees across the organisation.



Stakeholder Engagement
 ID Success Measures (Purpose)
 Agree Trial Approach
 Create Comms Plan



Week 01: Boarding Passes

To begin, you need to **find your passengers!** This initial group of users will be your set of employees that have volunteered or been selected by you as the pilot group – they will be the first people in your organisation to have access to the power and potential of Copilot in Microsoft 365.

The selection process will be your responsibility, though we are happy to provide our suggestions and guidance on the persona types most likely to not only embrace the technology but have the endurance to make it to the end.

An invite should be sent to these individuals inviting them to register / accept being part of this Pilot and include the expectations and involvement you expect from them. We can provide templates for this as required.

Further communications detailing the onboarding and start of the pilot, will be sent, together with invitations to the initial training, weekly lunch & learns and the valuable feedback sessions. These can be customised as needed and will be agreed as part of the project kick-off.

Week 02: The Pre-Flight Checklist and Safety Briefing

Test Pilot(s)

Before starting the pilot with your team, we suggest allocating one (or a couple) of Copilot licenses to a new 'Test' account. This phase enables a couple of things.

1. Initiates the Semantic Indexing process which runs in the background and takes a few days. Semantic index is a new search index feature which uses Microsoft Graph to better interact with your employees personal and organisational data. This process needs a few days to run while it creates a new index which enables Search and Copilot to understand the existing data and their inter-relationships, thus enabling an improved experience.
2. It kicks off (for initial testing) the user-local semantic index process. This is similar to the above but is more of a localised cached index associated with the user for fast retrieval of most recent used/accessed data a such as files, emails and meetings.
3. Enables us to work with you to familiarise with the environment, controls and settings in the Admin Centre (for example, rules around when Copilot can be used in meetings) and that we have the right Office versions and updates enabled).
4. Provides a safety net / test bed to check standard permissions and access rights and explore expected behaviours on search, working with protected files and content etc.
5. Based on the above, we/you may need to tweak configuration settings or explore additional areas of “concern” and build a plan to enable the pilot to move forward.

Note: Copilot for Microsoft 365 in app experiences is only supported on Microsoft 365 Apps for Enterprise (ideally Current Channel). Microsoft Office 2019 or 2022 is not supported.

Note: We have included time to assist with this, but project work associated with required



remediation work is not included in this scope.

Readying the Pilot Group

There are also several other things which will be happening during this week.

- Give your Copilot “pilot” team members will have their last opportunity to 'opt-out' through a series of 'are-you-ready' emails and reminders of the upcoming training and onboarding.
- Copilot licenses will be assigned to the Team according to your chosen users and defined schedule.
- Begin the initial base training on key Microsoft Office products with **focus on Outlook and Teams**, followed by shorter intros to Copilot in Word, Excel, PowerPoint, and Loop. We also introduce team members to the Microsoft Copilot “prompt library” and provide some sample prompts for them to try.
- Schedule **weekly lunch & learn** sessions and set the tone and structure for the sessions.
- Define and organise the **formal feedback methodology**, together with the Pre-Pilot Team environment for information distribution, informal feedback, 'chat' etc...
- **Communicate** out to the team the format of the open communications with the customers' Project Lead and the Cisilion Adoption Specialist.

Note: The training sessions would be delivered by Cisilion and take place over **two (2)** days and consist of up to **four (4)**, **sixty (60)** minute sessions to allow maximum participation.

Week 03: Rotate and lift-off.

Assuming no delays from the previous stage, this is the first week of full 'hands on' Copilot experience for the Team will require a certain amount of interaction as people get used to the technology, and how it integrates into their day-to-day activities.

We host a 'Lunch & Learn' session on the Tuesday and Thursday of this week and then each week for the duration of the pilot. These sessions are 'drop-in' based for individuals or groups to share their experiences and providing general feedback on how they are finding it.

We use this time to remind and encourage feedback, as well as to provide a chance for employees to share their “A-Ha!” moments and/or 'Hero stories' from using Copilot. This is important to keep engagement with Copilot high and bolster any flagging enthusiasm now they are engaged in the exercise.

Any additional feedback or information gathering would be captured and logged via the designated 'Champions' as well as by your Project Lead.



Week 03 to 07: In flight and cruising at 35,000 Feet

This is about sitting back and enjoying the flight and of course “fly the plane” with us as your mentor!

With your pilot users onboarded, training being delivered and weekly checkpoints in-place, your pilot team should be in settling in, sitting back, and enjoying their flight. With plenty of inflight movies (training) and the cabin crew (our adoptions specialists) on hand to help. This stage of the pilot is all about enjoying the journey with Copilot in Microsoft 365.

The Lunch & Learn sessions will continue each week through to the end of the flight and deeper or 'focus' sessions will be run as needed. The deeper dive drop-in session will be run for core products such as Excel, PowerPoint, and Copilot 'Chat'. These would be 'sign-up', sessions for those individuals who more heavily use these products.

Feedback from the Team will be encouraged throughout this time with stories of their experiences as well as any perceived time saving.

All information will be fed into your Pilot Microsoft Team and appropriate communication channels with everyone being encouraged to contribute at least once per day.

Week 07: Preparing for landing.

We bring the official pilot to a close, analyse the feedback and look at the data insights.

Working with your project team, we review key data points from the users' feedback, as well as insights and telemetry data collected from the Copilot for Microsoft 365 insights dashboard.

We have included time to help your team collate this data, make sense from it, and look at trends, issues, actions needed and frequent questions. Based on your internal next steps framework, we will help you to pull together a post pilot review, together with ROI and personal, and business impact measures. This would include a measure on the time saved by your team in their working and highlight any areas which were reported as 'requiring improvement'. All these, taken together will aid in the redefinition of working practices and help establish new best practices.

Finally, from the feedback given, several key quotes (experience stories and testimonials) from users will be gathered to be included with the analysed results.

Week 08: Connecting Flight or Journey Home



At this point, we conclude the pilot phase and hand back control to yourselves. It is the point-in-time where you need to decide whether to end/conclude the pilot, or whether you are going to move the licenses to another set of users or increase the pilot to more people.

In the background, we will work with you to help create data to present your wider business case for the next part of the Copilot Journey. This may include a wider pilot or moving to an organisational phased roll-out. We have included time to assist with this, but we can also offer an extended service to write you a full draft business case.



Project Duration Table

This programme sample is inclusive of the kick-off workshops, adoption and change consultancy, initial training, lunch & learn sessions, and feedback analysis, plus guidance and assistance with preparing your outcome and business value report.

The estimated typical cost to deliver this programme is £18,995 (+VAT)

Week #	Description
01	Project Kick Off and assistance with pre-launch communications
01	Communications Planning, Feedback Planning, and drafting for project team
01	Initial baseline security and expectation testing with pilot/sample user. Go/No Go for the start of the pre-pilot pilot.
02	User communications and initial training preparation - building demos from internal environment.
02	Delivery of initial user training sessions.
02 / 03	Technical onboarding and testing, training preparation and grouping, technical and security prompt testing, and protected data access review.
03 to 7	Weekly 'Lunch & Learn' sessions, individual support tips and "homework" as required to help support pilot based on early engagement and feedback
7	Collation and review of user feedback with sentiment analysis, data trends (over time) and review of data collected by Microsoft 365 insights.
8	Assist with preparation of Business Case and ROI data for presentation to Stakeholders and Decision makers
Ongoing	Access to our solution architect team for any technical, operational or security related questions or concerns.
ALL	Cisillon project coordination services aligned to the customer's Project Management / Project Lead

Note: Resourcing based on remote delivery over Teams. Schedule is a sample based on typical pilot durations and scope. Can be delivered with full project management.



Restrictions on Pilot Scope

As a pre-pilot engagement, this Project is designed to ensure the initial group of users gain the best possible Copilot experience. As such, extensibility features detailed below are out-of-scope for this pre-pilot pilot. Moving forward, Cisillon would welcome the opportunity to discuss and investigate these further.

Therefore, as discussed, Copilot for Microsoft 365 responses are crafted based on the data a user 'feeds' it with, together with the all the telemetry and organisational data which is accessible to that user via the user's context. This is Tenant-wide and will include any configured and '**allowed**' Microsoft Graph connected services.

It has also been highlighted that **Copilot is extensible**, which means that third party applications and other data sources can be "connected" to what Copilot has access to. This can be through existing Microsoft Graph connectors which ingests information into the Microsoft Graph and are indexed or via Copilot "plug-ins" which are Microsoft Teams message extension applications which offer dynamic, non-indexed content which can be shared or accessed outside of the defined compliance boundaries.

Finally, it is also possible to build your own "Copilot". This could be designed for certain applications to be accessible by employees or be used to provide customer facing client services via a natural language interface.

These extensible features together with remediation or the design and deployment of data compliance and security workloads is not Included within this pilot programme.

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