

# Implementation of CloudShift Compass with Microsoft 365 Copilot

**Governed AI. Real Adoption. Measurable ROI.**



End-to-end Microsoft 365 Copilot transformation for regulated industries

EMEA • Africa • North America

Prepared by CloudShift — 2026

# Executive summary

Four reasons CloudShift Copilot Compass delivers safe and scalable Microsoft 365 Copilot adoption.

## Governance-first scorecard

12-point readiness scorecard with a GDPR heatmap to launch Microsoft 365 Copilot safely and reduce oversharing risk on Microsoft SharePoint and Microsoft OneDrive.

## Fabric IQ in Microsoft Fabric + Microsoft 365 Copilot fusion

A semantic business layer that grounds Microsoft 365 Copilot and Microsoft Copilot Studio agents in trusted enterprise data.

## Agent Factory with Microsoft Copilot Studio

Custom agents delivered as repeatable, governed assets — one per business function, with full lifecycle management.

## Industry packs for regulated sectors

Pre-built Microsoft 365 Copilot use cases for banking, government and industry, with built-in compliance considerations.

# The Microsoft 365 Copilot opportunity

Why customers are accelerating Microsoft 365 Copilot programs now.

## Productivity gains

Microsoft 365 Copilot saves hours per week for knowledge workers across Microsoft Word, Excel, PowerPoint, Outlook and Teams.

## The agentic AI era

Microsoft Copilot Studio enables custom agents that extend Microsoft 365 Copilot into business-specific workflows.

## Regulatory pressure

GDPR and sector regulations require governed, auditable and explainable AI adoption from day one.

## Data foundation

Microsoft Fabric and Fabric IQ in Microsoft Fabric unify the data needed for trustworthy Microsoft 365 Copilot answers.

# Microsoft Copilot product portfolio we activate

## Microsoft 365 Copilot

Embedded AI across Microsoft Word, Excel, PowerPoint, Outlook and Teams.

## Microsoft Copilot Chat

Secure AI chat with enterprise data protection for every employee.

## Microsoft Copilot Studio

Build, manage and govern custom agents across business processes.

## Microsoft 365 Copilot for Sales

AI for sellers connected to CRM data and seller workflows.

## Agents on Microsoft Azure AI Foundry

Advanced enterprise agents, orchestration and grounding at scale.

## Microsoft Copilot in Microsoft Fabric

AI assistance for data engineers, analysts and Power BI authors.

# Microsoft 365 Copilot value across the enterprise

Example use cases by function with Microsoft 365 Copilot.

## Sales

- Meeting prep in Microsoft Teams
- CRM updates and follow-ups
- Proposal drafting in Microsoft Word

## Marketing

- Campaign briefs and creative angles
- Content drafting across channels
- Audience insights from data

## HR

- Job descriptions and policy Q&A
- Onboarding plans for new hires
- Internal comms in multiple languages

## Finance

- Variance analysis in Microsoft Excel
- Board and committee summaries
- Forecast narratives and commentary

## Operations

- SOP authoring and updates
- Automation with Microsoft Power Automate
- Supplier briefings and reviews

## IT & Customer Service

- Ticket triage and routing
- Knowledge base answers
- Agent assist in live conversations

# Our 5 differentiators

## 1. Governance-first scorecard

Quantified risk before any rollout, with a GDPR heatmap.

## 2. Fabric IQ + Microsoft 365 Copilot fusion

Grounded answers powered by a semantic business layer in Microsoft Fabric.

## 3. Agent Factory with Microsoft Copilot Studio

Repeatable agents per function, governed end-to-end.

## 4. Industry packs

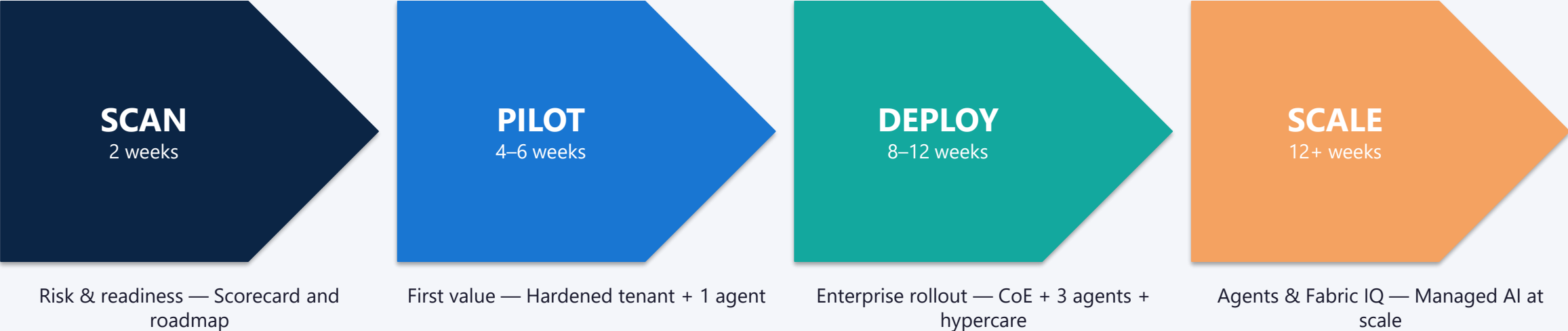
Banking, government and industry use cases ready to deploy.

## 5. Local + multilingual delivery

Native delivery in French, English and Arabic across EMEA and Africa.

# Compass — a modular 4-tier journey

A clear path from risk assessment to scaled, agent-driven Microsoft 365 Copilot adoption.



# Tier 1 — Compass Scan

## At a glance

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### Duration

2 weeks

### Audience

All sizes

### Investment

\$9,500

## Key activities

- Tenant audit on Microsoft Entra ID
- Oversharing scan on Microsoft SharePoint and Microsoft OneDrive
- Sensitivity labels and DLP gap analysis with Microsoft Purview
- 12-point readiness scorecard (Red / Yellow / Green)
- GDPR compliance heatmap

## Deliverables

- Readiness report
- Prioritized remediation backlog
- Executive business case for Microsoft 365 Copilot

# Tier 2 — Compass Pilot

## At a glance

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### Duration

**4 to 6 weeks**

### Audience

**100 to 500 users**

### Investment

**From \$15,000 to \$30,000**

## Key activities

- Tenant hardening (Microsoft Entra ID, Microsoft Purview)
- End-user enablement program (4 modules)
- Executive coaching (2 sessions)
- 1 custom agent built in Microsoft Copilot Studio
- ROI baseline configured
- Prosci / ADKAR change plan and Champions program

## Deliverables

- Live pilot for 100 to 500 users
- 1 production agent
- ROI dashboard
- Adoption and change management plan

# Tier 3 — Compass Deploy

## At a glance

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### Duration

8 to 12 weeks

### Audience

500 to 5,000 users

### Investment

From \$40,000 to \$75,000

## Key activities

- Phased rollout across business units
- Copilot Center of Excellence (CoE) setup
- Role-based training tracks
- Shadow AI guardrails with Microsoft Purview
- 3 production agents in Microsoft Copilot Studio
- Microsoft Power Automate workflow integration
- ROI dashboards and quarterly business reviews
- 90-day hypercare

## Deliverables

- Full enterprise rollout
- Center of Excellence
- 3 production agents
- KPI dashboards
- Hypercare support

# Tier 4 — Compass Scale

UNIQUE

## At a glance

### Duration

12+ weeks

### Audience

5,000+ users

### Investment

From \$85,000 + monthly retainer

## Key activities

- Fabric IQ in Microsoft Fabric semantic layer
- Multi-agent orchestration with Microsoft Copilot Studio and Microsoft Azure AI Foundry
- Responsible AI governance with Microsoft Purview
- FinOps for AI
- Compliance pack (GDPR, ISO 27001, PCI-DSS)
- Managed AI Service with monthly tuning

## Deliverables

- Fabric IQ foundation
- Agent factory
- Managed AI operations

# Industry packs

Pre-built Microsoft 365 Copilot use cases and Microsoft Copilot Studio agents per industry.

## Banking

- Risk agent
- KYC accelerator
- Branch advisor copilot

## Government

- Citizen services agent
- Policy drafting
- GDPR-by-design

## Industry

- Maintenance agent
- SOP copilot
- Supply chain insights

## Retail

- Sales copilot
- Marketing agent
- Customer 360

## Healthcare

- Patient briefing
- Compliance agent
- Care team assistant

# Fabric IQ in Microsoft Fabric + Microsoft 365 Copilot fusion

How CloudShift grounds Microsoft 365 Copilot and Microsoft Copilot Studio agents in your governed business data.



**Fabric IQ in Microsoft Fabric grounds Microsoft 365 Copilot and Microsoft Copilot Studio agents in your governed business data.**

# Pricing & packaging

Transparent fixed-price tiers and add-ons.

Component	Model	Indicative range
Compass Scan	Fixed	\$9,500
Compass Pilot	Fixed	\$15,000 – \$30,000
Compass Deploy	Fixed + per user	\$40,000 – \$75,000
Compass Scale	Fixed + retainer	\$85,000+ and \$5,000–\$25,000 / month
Industry Pack add-on	Fixed	\$15,000 – \$40,000
Custom agent in Microsoft Copilot Studio	Fixed per agent	\$8,000 – \$25,000
Managed AI Service	Monthly retainer	\$5,000 – \$25,000 / month

# Adoption & change management

A proven framework to turn Microsoft 365 Copilot licenses into daily habits.

## Prosci / ADKAR methodology

Awareness, Desire, Knowledge, Ability, Reinforcement.

## Executive coaching

Dedicated 1:1 sessions with senior leaders.

## Champions program

Community of practice across business units.

## Role-based training tracks

Tailored learning for Sales, HR, Finance, Operations, IT.

## Communications plan

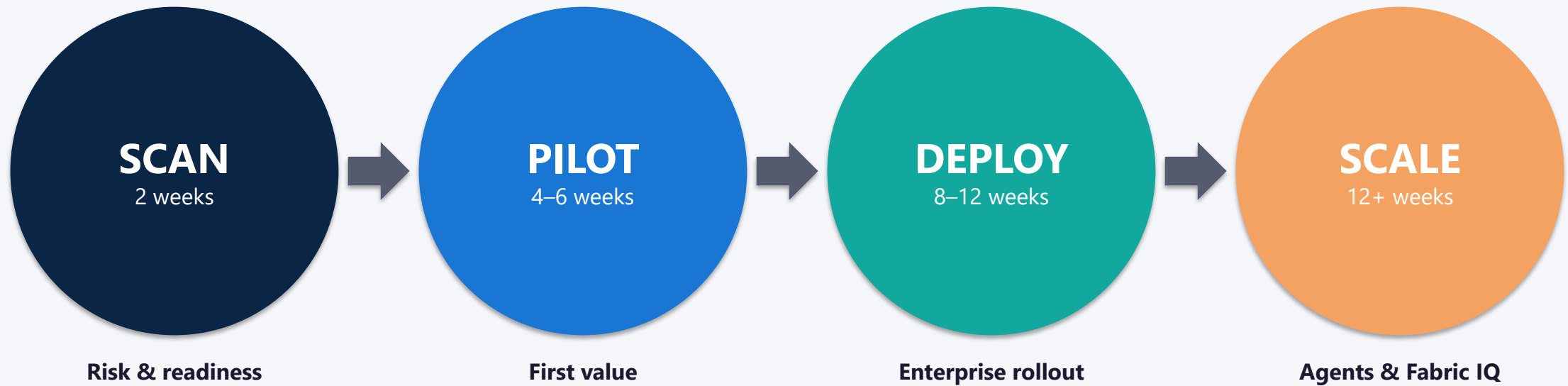
Multilingual rollout in French, English and Arabic.

## Success measurement

Tracking adoption via the Microsoft 365 Copilot Dashboard.

# Your Compass journey

Four stages, one continuous journey toward governed AI at scale.



# Why CloudShift

## Microsoft Solutions Partner

Designations across Modern Work, Data & AI and Security.

## FastTrack Ready Partner

Guided onboarding with engineering-aligned support.

## 25+ certified consultants

Deep expertise across the Microsoft Cloud.

## EMEA / Africa / North America

Regional presence with global delivery.

## Banking, Government, Industry

Sector-focused practices and references.

## Multilingual delivery

Native delivery in French, English and Arabic.

# Marketplace listing snapshot

Field	Value
Offer name	CloudShift Copilot Compass
Type	Consulting service
Duration	2 – 16 weeks
Starting price	\$9,500
Tagline	Governed AI. Real Adoption. Measurable ROI.
Categories	AI + Machine Learning, Productivity, Security, Industry
Industries	Banking, Government, Industry, Retail, Healthcare
Geographies	EMEA, Africa, North America
Solutions	Microsoft 365 Copilot, Microsoft Copilot Studio, Microsoft Power Platform, Microsoft Fabric, Microsoft Purview

**Free 30-minute discovery call**

**Talk to our team**

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**CloudShift — your partner for governed AI with Microsoft 365 Copilot.**