Copilot – Extensibility

WHY

Unlock advanced and customized uses of Copilot by extending its capabilities beyond the out-of-the-box features. This solution helps business unit leaders and process owners innovate by integrating Copilot with unique data sources, enterprise applications, and tailored workflows. The goal is to create bespoke AI-powered solutions for specific business processes or industry needs, thereby driving even greater value and competitive advantage. In this stage, organizations move from using Copilot as provided, to shaping Copilot to fit their business like a glove.

3 Phases

Phase 1: Opportunity Discovery

Process & Data Assessment: Work closely with process owners in various departments to identify opportunities where a custom Copilot capability could solve a problem or create efficiency. This involves reviewing line-of-business (LOB) applications and workflows. For example, in a sales department, we might find that connecting Copilot to the CRM system could help generate tailored sales insights automatically. *Ideation Workshops:* Conduct workshops to brainstorm possible Copilot extensions (plugins or connectors). Leverage the fact that Microsoft's Copilot ecosystem supports extensibility with over 1,200 available connectors for enterprise systems. We help the client envision scenarios like: "What if Copilot could access our inventory database to answer stock questions?" or "How could Copilot automate steps in our approval process?". The output of this phase is a shortlist of high-impact extension ideas and a clear definition of requirements for each (data sources involved, desired Copilot behaviors, etc.).

Phase 2: Design & Development

Technical Design: For the top prioritized extensions, our experts design the solution architecture. This includes how Copilot will connect to external systems or databases (using Microsoft Graph connectors, custom plugins, or Copilot Studio as appropriate), and how the user will interact with the new functionality. Security and compliance checks are integral – we ensure any data integration respects access permissions and data policies. *Build & Integration:* Develop the custom plugins or integrations. For instance, if one extension is to integrate a third-party CRM, we build a connector so Copilot can pull customer data from that CRM into its responses. If another extension is to enable a specific task (e.g., approving an expense), we might develop a plugin that triggers that workflow through Copilot's interface. We also connect relevant data to the Microsoft 365 Graph or Dataverse where needed, making that information available to Copilot securely. Once built, each extension is tested thoroughly in a sandbox and then in a pilot group to ensure it works as intended within the client's environment. *User Experience Tuning:* We involve sample end-users and the process owners to refine how the extended Copilot interacts. Maybe the first version provides too much raw data, so we adjust it to give a succinct summary. This iterative design ensures the new capabilities truly meet the business need and are easy to use.
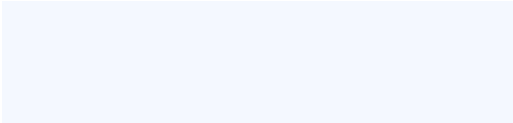
Phase 3: Deployment & Value Realization

Deployment: Roll out the new Copilot extensions to the target user groups. This often involves updating Copilot settings/permissions for users, and distributing any custom apps or connectors developed. The deployment is timed and communicated so users know new capabilities are available. Training & Documentation: Provide targeted training to the relevant teams on how to use the new Copilot features embedded in their workflow. For example, the finance team gets a quick guide on using Copilot to generate finance reports from the integrated ERP data. We also supply easy-to-follow documentation (and possibly in-app guidance) so users can quickly adopt the extended features. Ongoing Support & Optimization: The project doesn't just drop a new tool and leave; we monitor usage of the custom features and gather feedback. Our team offers continuous support post-launch to fix any issues and tune the solutions as the client's needs evolve. We might schedule a 30-day and 90-day post-implementation review to measure the impact of the extensions (e.g., "Copilot now answers 90% of IT helpdesk FAQs via the new knowledge base connector, saving the helpdesk team _N_ hours per week") and to identify any further enhancement or new extension opportunities.
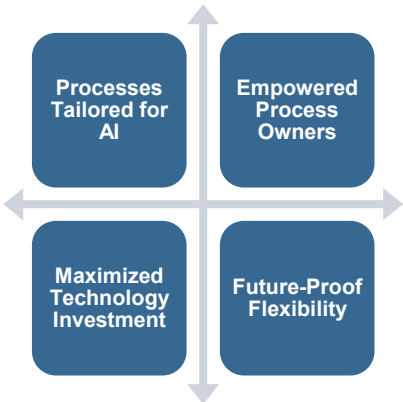
WHAT

1. Key Components & Features:

The Extensibility solution is essentially a custom software development and integration project with an AI twist. Its main components include:

- *Line-of-Business Integration:* We make Copilot more powerful by connecting it to the client's unique business systems and data. This can involve using Microsoft Graph Connectors or building new ones to surface enterprise data (from CRM, ERP, databases, intranet, etc.) directly into Copilot's working context1. By integrating these data sources, Copilot's responses and insights are based on the information that matters most to the business (not just generic or publicly available data)4.
- *Custom Copilot Plugins:* Where a specific functionality is needed, we develop custom Copilot plugins. These plugins extend Copilot's capabilities—enabling it to perform actions or retrieve specialized information on command. For example, a plugin could allow Copilot to initiate a workflow (like create a new ticket in a support system) or fetch real-time data from an IoT device feed. Each plugin is built to seamlessly embed into the Copilot experience, so users can invoke complex operations with natural language.
- *Workflow Automation:* Beyond data retrieval, extensibility often means embedding Copilot into business workflows. We design Copilot interactions that streamline multi-step processes. For instance, we might integrate Copilot into an employee onboarding workflow so that a manager can simply ask Copilot to "Set up a new hire" and the plugin will execute a series of provisioning tasks. This turns Copilot into an AI assistant that not only informs but also acts within the scope defined by the business4.
- *Tailored Training & Documentation:* Given these capabilities are unique to the organization, we provide custom training for users on how to use them. We also typically hand over technical documentation for the client's IT team detailing how the integrations are built. This empowers the client's developers or IT admins to maintain the solutions or even build upon them in the future.
- *Continuous Support & Evolution:* A hallmark of this service is that it sets up a framework for continuous innovation. Not only do we support the current solutions, but we help the client put in place the practices to manage Copilot's extended features (for example, procedures to update the knowledge base behind a Q\&A plugin as new content arises). We also ensure the solution is scalable and secure, using enterprise-grade practices so that as the usage grows or requirements change, Copilot can adapt without breaking compliance

2. Value Proposition:

Copilot Extensibility is what turns a great tool into a game-changing, competitive differentiator for the organization. The value propositions for the client include the following with the ambition to move towards continuous AI Value Creation

WHAT

Deliverables:

The Extensibility engagement yields concrete technology assets and improvements, including: (May differ based on the customer use-case or scenario's)

- *Custom Copilot Extensions*: A set of deployed plugins/connectors integrated into the client's Microsoft 365 Copilot environment. For each extension, the deliverable is a working feature available to users (e.g., "Copilot can now retrieve inventory levels from our SAP system on command" is a delivered capability). These come with all necessary access controls and security configurations in place.
- *Technical Documentation & Source Code:* Documentation for each integration (architecture design, API details, user guides) and ownership of source code where applicable. This ensures the client has full control over the custom solutions. Future developers can reference this to modify or extend the solutions.
- *User Job Aids:* For the user-facing side, quick reference guides or tooltips explaining how to invoke the new Copilot features. For instance, if users can ask Copilot for a "customer 360 report" after CRM integration, a tip might be published explaining the exact prompt and an example output.
- *Integration of Data into Microsoft Graph (if applicable):* In cases where we connected a data source to the Microsoft Graph, the data will be indexed and available in the organization's Microsoft 365 ecosystem. This is a behind-the-scenes deliverable that boosts search and Copilot knowledge capabilities (and the client's IT gets documentation on this setup too).
- *Post-Implementation Report:* A summary of the extensibility project's outcomes, including the impact observed (e.g., time saved or process steps reduced due to the new Copilot capabilities). This report often highlights how the extended features are being used and recommendations for additional areas that could be extended in the future to inspire the client's ongoing AI roadmap

Encouraging Continued Adoption:

The Extensibility solution by design encourages a cycle of continuous improvement. First, by involving business process owners from the start, it ensures that those stakeholders are invested in using and championing the new tools. They effectively become advocates for AI in their domain because they helped shape it. The ongoing support provided means the client is never alone in maintaining momentum – issues are promptly resolved, and small enhancements can be made to keep the experience smooth. Importantly, the knowledge transfer (through documentation and training of IT staff) empowers the organization to pursue further Copilot extensions on its own. We often conclude this engagement by outlining a "future innovations backlog" – a list of ideas and next-phase extensions that the client can consider implementing over time, either with ConXIoN or independently. This seeds a roadmap for continued adoption of AI innovation. As more teams see the success of initial custom integrations, they may initiate their own extension projects, creating a virtuous cycle. In summary, Copilot & AI Extensibility not only delivers immediate, process-level improvements, but also equips the organization with the capability and mindset to keep expanding AI's value in the long run

5 benefits

| Tailored to your organization | Detailed final report with analytics, user feedback/sentiment | Focus on broad adoption using a network of champions | A high-level future roadmap on generative AI for your organization | Clear scope and budgetary engagement |