Copilot – AI Advisory

WHY

Provide executive-level guidance and planning to kickstart the AI journey with Copilot. This advisory engagement helps business leaders formulate a clear AI strategy, assess organizational readiness, and identify high-value use cases for Copilot in the business1. It ensures leadership alignment and addresses concerns around governance and ROI from the outset.

3 Phases

Phase 1: Vision & Assessment

Business Visioning: Conduct leadership workshops to clarify AI goals, transformation opportunities, and success criteria. Begin by leading strategic conversations about how AI can drive business transformation. Readiness Assessment: Evaluate the current state of the organization's data, technology, and people readiness for Copilot. This includes reviewing licensing, infrastructure, and security posture for AI deployment.

Phase 2: Strategy & Roadmap

Use Case Identification: Identify key personas and business scenarios that would yield the most value when reimagined with AI. Prioritize "quick win" Copilot use cases as well as long-term opportunities. Governance & Risk Planning: Provide guidance on responsible AI use, addressing data protection, compliance, and ethical considerations from the start. Roadmap Development: Formulate a tailored Copilot adoption roadmap aligned to business objectives. Define phased implementation plans, timeline, and resource needs for rolling out Copilot, including integration points and any prerequisites (such as data cleanup or security enhancements).

Phase 3: Executive Buy-in & Next Steps

Executive Alignment: Present the AI strategy and Copilot roadmap to stakeholders. Achieve leadership consensus on vision, priorities, and investment required. Value Proposition & Business Case: Articulate the expected ROI (e.g. productivity gains, faster decision-making) and competitive advantages of adopting Copilot, using industry data and pilot insights (for example, highlighting that early adopters saw significant efficiency gains like 73% faster task completion). Action Plan & Handover: Deliver a comprehensive strategy document outlining the roadmap, key policies (e.g. AI governance guidelines), and immediate next steps to move forward. This plan positions the organization to proceed with deployment and adoption initiatives confidently.

WHAT

1. Key Components & Features:

This Advisory solution is characterized by strategic consulting activities led by senior AI consultants. It includes:

- **AI Vision Workshops:** Facilitated sessions with business leaders to envision the role of Copilot and AI in the organization's future, aligning with overall business strategy.
- **Organizational Readiness Audit:** A thorough assessment of technical readiness (licenses, infrastructure, data architecture) and cultural readiness (change appetite, skill gaps) for Copilot1. Gaps are documented so they can be addressed (e.g. mitigating any security or compliance issues before rollout).
- **Use Case & Persona Analysis:** Identification of high-impact use cases by examining workflows across departments. The team pinpoints which business processes or roles (e.g. sales, finance, customer support) could benefit most from Copilot augmentation1. This comes with an analysis of potential productivity gains or pain points solved by AI.
- **Responsible AI Guidance:** Advisory on governance best practices, ensuring the AI plan adheres to data privacy, security and ethical standards. For example, leaders receive guidance on establishing policies to prevent sensitive data leaks and to maintain compliance while using Copilot.
- **Roadmap & Recommendations:** A tailored strategic roadmap is the primary deliverable. It details phased implementation of Copilot (pilot projects, broader deployment, and future extensions), resource planning, and risk mitigation strategies. The roadmap is accompanied by actionable recommendations — such as which departments to onboard first, how to form an internal AI Center of Excellence, and what success metrics to track.

2. Value Proposition:

The AI + Copilot Advisory gives leadership a clear, value-driven game plan for AI adoption. It ensures that Copilot deployment is aligned with business priorities and positioned to deliver ROI quickly. By engaging in this upfront planning, organizations avoid common pitfalls of unguided AI projects. For instance, without a strategic plan, companies risk missed opportunities (failing to identify impactful use cases) and cultural resistance to change. This advisory mitigates those risks by building executive buy-in and a shared vision for change. Leaders come away with confidence that their AI initiative will be structured, responsible, and effective. In essence, this phase answers the "why" and "what" of Copilot for the business, creating a strong business case to move forward.
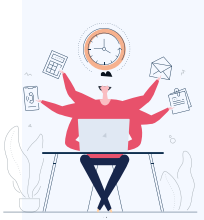
WHAT

Deliverables:

At the end of the Advisory engagement, ConXioN provides an Executive AI Strategy Pack which typically includes:

- **A Copilot Strategy & Roadmap Document** – outlining the implementation phases, timeline, and resource plan, tailored to the client's environment.
- **A Use Case Portfolio** – a curated list of high-value Copilot use cases for the organization, with expected benefits for each.
- **Readiness Assessment Report** – summary of current readiness vs. required state (covering technology stack, data, security, and user readiness), with recommendations to close any gaps before deployment1.
- **AI Governance Guidelines** – initial recommendations for policy and governance (covering data privacy, compliance, and responsible AI usage principles) to ensure safe Copilot usage from day one.
- **Executive Presentation & Buy-in** – a workshop or report-out session with leadership, securing agreement on the roadmap and next steps. This deliverable often serves as a "green light" for the next phase of the journey.

Encouraging Continued Adoption:

The conclusion of the Advisory project is not an end, but a launch pad. Because it produces a concrete action plan and executive sponsorship, the organization is primed to proceed with Copilot deployment. The creation of a vision and Center of Excellence (proposed during this phase) means there will be champions inside the company to drive the initiative forward. By clarifying success measures early, it also sets the stage for continuous value tracking – leadership will have defined KPIs to monitor as Copilot rolls out, keeping attention on adoption and outcomes. In short, the Advisory solution ensures the **momentum for change** is established at the top, so that subsequent adoption efforts are well-supported and likely to succeed.

5 benefits

Tailored to your organization (you choose departments, champions and verticals)

Focus on broad adoption using a network of champions

Clear scope and budgetary engagement

Detailed final report with analytics, user feedback/sentiment

A high-level future roadmap on generative AI for your organization