



Microsoft 365 Copilot Readiness for Financial Services

Maximize your investment in Microsoft 365 Copilot



THE BENEFITS OF COPILOT

- A generative AI-powered assistant that automates repetitive tasks, giving finance professionals back time to focus on strategic work
- Offers guided actions in apps such as Outlook, Microsoft Teams, PowerPoint, Word and Excel

WHY YOU NEED AN ASSESSMENT

- To give you full confidence in deploying Microsoft 365 Copilot with expert-led recommendations and guidance specifically tailored to financial operations

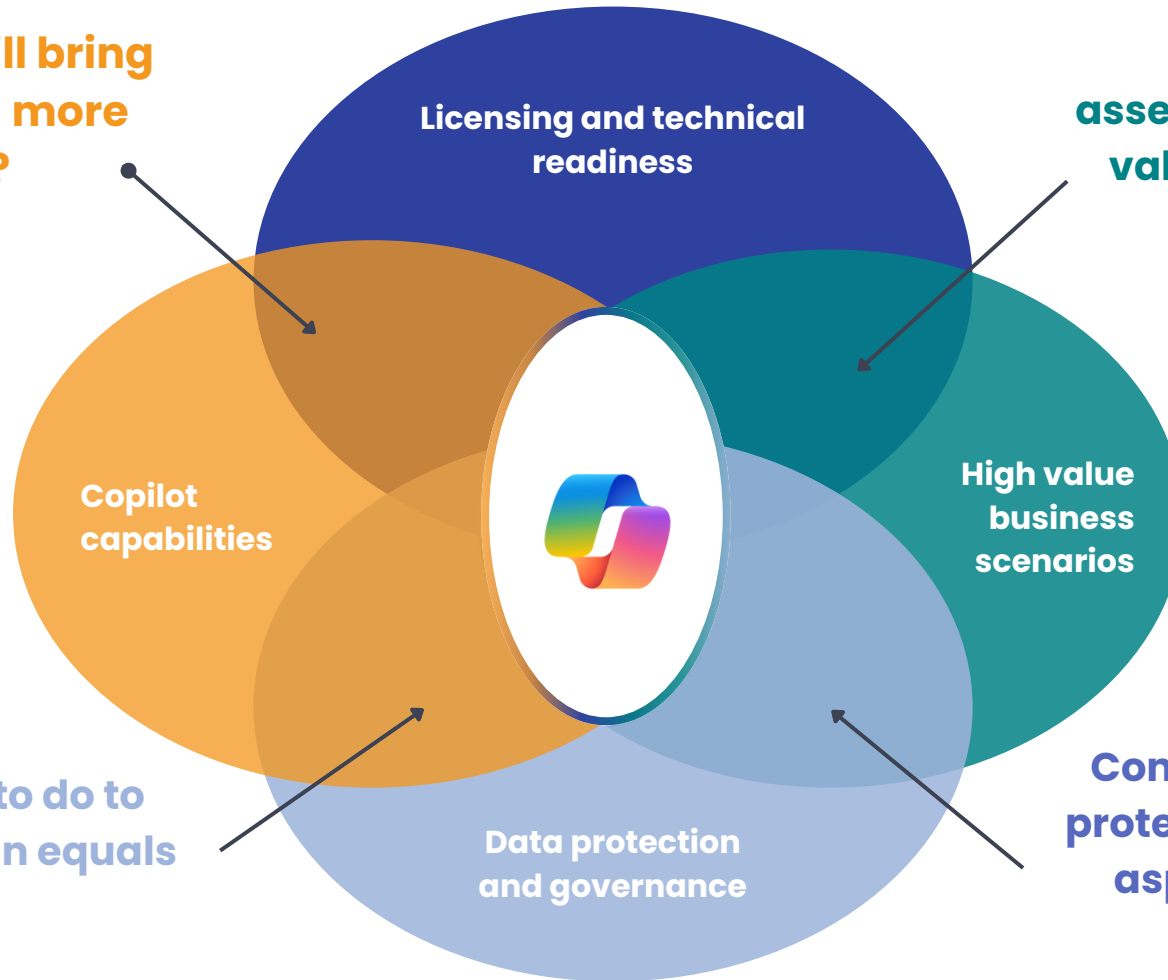
CREOSPARK'S ASSESSMENT OVERVIEW

- Fixed fee engagement
- Identify gaps in readiness
- Showcase benefits of Copilot
- Identify high-value scenarios
- Includes best practices to improve readiness
- Deliver final presentation & document

The foundations of our assessment >

The foundations of our Copilot Assessment

Which Copilots will bring your organization more immediate value?



Focus the licenses assessment using the high value business scenarios

What do you need to do to prevent "garbage in equals garbage out"?

Consider the specific data protection and governance aspects of the high value business processes

Breakdown of our services

Estimated timeline: 4 weeks | Estimated cost: \$15,000

ASSESS LICENSING AND TECHNICAL READINESS

- Assess licensing needs
- Assess technical readiness
- Identify pre-requisites
- Ensure successful deployment

ASSESS CUSTOMER DATA PROTECTION AND GOVERNANCE

- Assess data protection needs
- Assess data governance needs
- Ensure compliance with regulations
- Ensure data security

IDENTIFY HIGH-VALUE SCENARIOS AND GOOD PRACTICES

- Identify high-value scenarios for deploying Copilot
- Provide good practices for improving readiness
- Deliver final presentation and document

Why you should partner with us

As a Microsoft Solutions Partner, we have worked with some of the best financial institutions to help them **understand**, **adopt**, and **love** their technology.

Let us help you **revolutionize** your organization with the powers of generative AI in **Microsoft 365 Copilot**.

Contact us: info@creospark.com | +1 416 788 0031 | creospark.com



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