

Services overview

Copilot Studio Vision & Value

About us

We are Engage Squared.

Specialists in <people> friendly technology.

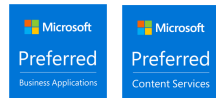
Our mission is to make work better. We empower employees to enjoy work more - using Microsoft tools to make work more productive, collaborative and connected.

We work with large organisations to:

- **enable teams and individuals** to adopt new ways of working through our organisational change and transformation campaigns;
- help leaders, communications, and HR teams to **uplift culture and engage staff** by building integrated digital workplaces that use the latest features in SharePoint Online and the Microsoft Viva suite;
- create a more **secure and compliant environment** to better manage, retain and protect their information landscape; and
- **boost productivity** with automation, digitization, and app modernisation (using all of the Microsoft 365 suite, including Teams, PowerApps and Power Automate on M365 and D365).

From design, to technical build, our team of experts use their broad range of skills across project delivery, cloud strategy, user experience design, governance, agile development, change management, and security to help our clients get the most of technology.

We take partnerships seriously and were proud to be named Microsoft's 2022 global Partner of the Year for Employee Experience.



Viva Engage
Adoption
Specialist



Microsoft Teams
Collaboration
Specialist

Engagement overview

Today's workforce is increasingly overwhelmed in a fast-paced and demanding digital landscape. Many employees are already turning to personal AI tools for help, which puts company data at risk. And with adoption of digital customer experience channels at an all-time high, customers are now expecting personalised, timely resolution for more complex needs. But businesses are facing talent shortages.

A three-phase engagement that provides an overview of the **Art of the Possible**, an overview of key concepts, and building **next-Generation AI capabilities** using Microsoft Copilot Studio.

By the end of this engagement you will:

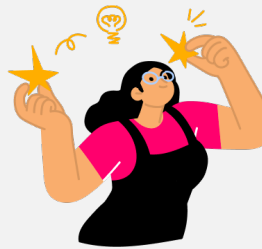
- **Solve business challenges** with intelligent AI assistants that can dynamically query business knowledge and complete workflows
- **Drive productivity** by reducing manual processes, allowing employees more time to focus on high-value initiatives
- **Reduce overhead costs, risks and time to value** by empowering makers to quickly develop scalable, secure solutions

Let our team of experts give you an in-depth look into how AI capabilities can transform your business.



Inspire

The Inspire phase introduces the transformative potential of Microsoft Copilot Studio, aligning with customer goals and showcasing how AI can enhance business processes and drive innovation.



Assess

- We will evaluate your AI readiness
- Identify key business challenges
- Explore high-impact use cases, establish how Copilot Studio can address your organisational needs.



Design

- Build a strong business case and developing a strategic roadmap for AI adoption
- Develop clear recommendations for leveraging Copilot Studio to achieve measurable outcomes.

Price: \$11,000 (AUD ex GST)

*Get in touch to check your eligibility for Microsoft funding

Conversational AI is in demand

Employees

Today's workforce is increasingly overwhelmed in a fast-paced and demanding digital landscape.

Many employees are already turning to **personal AI tools for help**, which can put your company data at risk.

86% want AI to assist with finding the right information and answers they need ¹

70% would delegate as much work as possible to AI to lessen their workloads ¹

75% of knowledge workers use AI at work today ²

Customers

With adoption of digital CX channels at an all time high, **customers are now expecting personalised, timely resolution for more complex needs**. But businesses are facing talent shortages.

75% of all customers expect a consistent cross-channel service experience ³

57% of leaders expect call volumes to increase by as much as 20% over the next 1-2 years ⁴

66% of millennials expect real-time customer service ³

But organisations may encounter challenges when building conversational AI at scale



Budget and time constraints



Infrastructure and resource hosting



Integration with business systems



Technical expertise



Security and compliance risks



Maintaining content

Enrich customer and employee experience



Solve business challenges with intelligent AI assistants that can dynamically query business knowledge and complete workflows



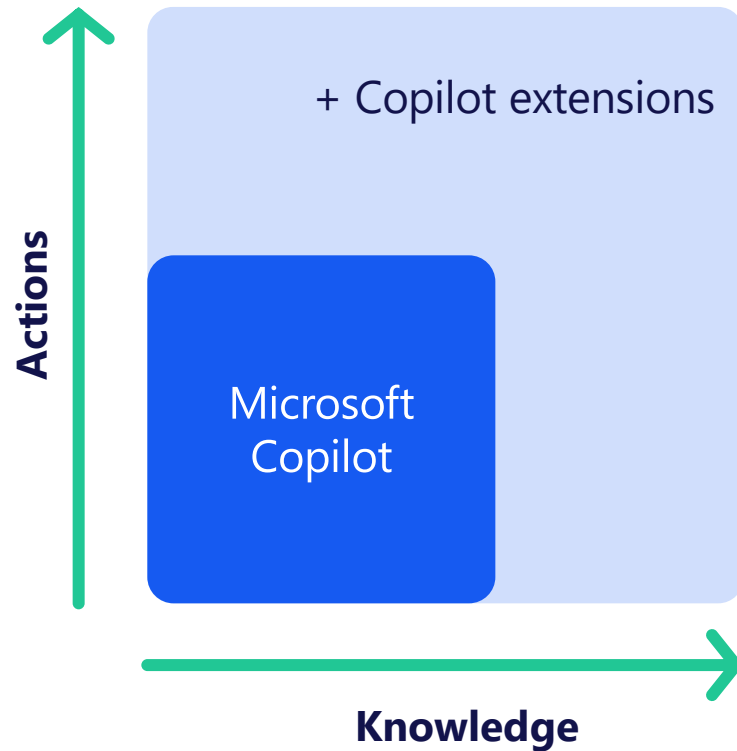
Drive productivity by reducing manual processes, allowing employees more time to focus on high-value initiatives



Reduce overhead costs, risks and time to value by empowering makers to quickly develop scalable, secure solutions

By 2026, Enterprises that directly tie GenAI to intelligent document processing will see a 20% increase in new use cases leading to increased productivity and scale and improved customer experiences

Copilot extensions



Extend & customise with

- ✓ Your business data
- ✓ Your apps
- ✓ Your workflows
- ✓ Your automation

+ Hand-off to your copilot

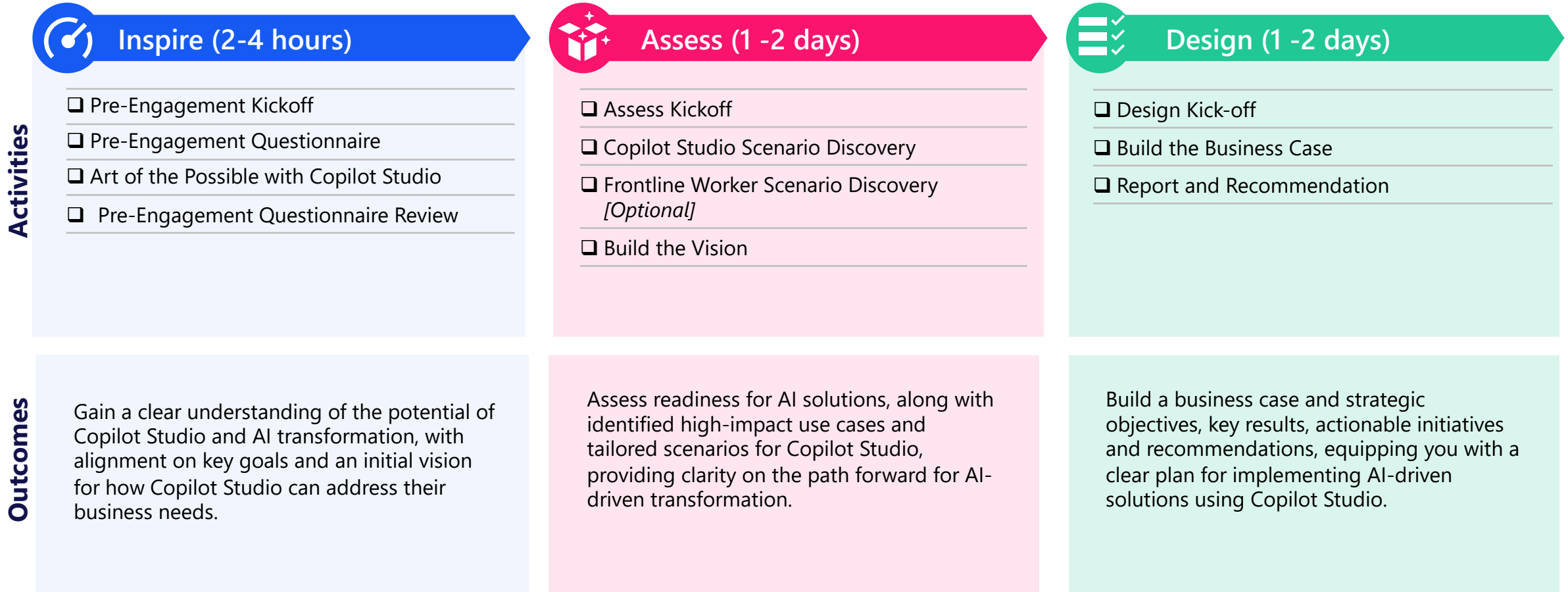
Copilot Studio Discovery Goals

- 01 Envision the possibilities for realising business value with Microsoft Copilot Studio.
- 02 Explore the scenarios and use case that align to solve your business challenges and growth opportunity
- 03 Align on priority solutions for transforming the business with conversational AI capabilities.
- 04 Define measurement and target results for value realisation to build a business case.




Copilot Studio Vision & Value Framework

The Copilot Studio Vision & Value Workshop is a three-phase engagement that provides an overview of the Art of the Possible, an overview of key concepts, and building next-Generation AI capabilities using Microsoft Copilot Studio.



Example workshop agenda

Phase	Session	Description	Outcome	Customer attendees	Time
 Art of the possible	Pre-Engagement Kick-Off	This session covers what each upcoming session will entail and sets expectations with the customer for delivery and agreed upon outcomes.	To level set expectations for the workshop and set clear objectives.	Project Executives & BDM(s) IT Apps / Innovation Leads Other IT Leaders Line of Business leads	60 minutes
	Pre-Engagement Questionnaire	This pre-engagement questionnaire is geared to understand customer's current state regarding strategy, vision, and perceived business value.	Customer has completed the pre-engagement questionnaire and replied with answers from one or more stakeholders.	IT Leaders, Business Leaders	60 minutes
	Art of the Possible with Copilot Studio	Establish a common understanding of how Copilot Studio can accelerate time to value for AI-enabled experiences.	Participants understand the AI capabilities enabled with Copilot Studio, the need for Copilot Studio's authoring capabilities, how and why a company would utilise it.	Project Executives & BDM(s), Line of Business leads	90 minutes
	Questionnaire Review	The pre-engagement questionnaire is reviewed by your team to identify opportunities and preliminary recommendations.	The pre-engagement questionnaire has been reviewed by your team, and initial opportunities and insights have been identified for communication to the customer when appropriate.	Project Executives & BDM(s) IT Apps / Innovation Leads Other IT Leaders Line of Business leads	60 minutes

Example workshop agenda (cont'd)

Phase	Session	Description	Outcome	Customer attendees	Time
Assess	Assess Kick-Off	Initiate the Assess Phase, setting objectives, discussing agenda, and establishing stakeholder roles for the discovery sessions	Clear understanding of the goals, scope, and expectations for the assessment.	Project Executives IT Leaders Line of Business Leads Key Stakeholders	60 minutes
	Build the Vision	A Deep-dive session designed to explore current business challenges and opportunities, strategies, business objectives that can be supported by agents and conversational AI, and aspirational results that can be expected through implementation. Preliminary scenarios, process improvement opportunities, and high-impact use cases for Copilot Studio and agents may also be identified as part of this module.	Challenges, opportunities, business-driven objectives and target results have been defined and documented.	Business Leaders Functional Managers Process Owners	90 minutes
	Frontline Worker Scenario Discovery [Optional]	Optional session focused on exploring scenarios where Copilot Studio can enhance frontline worker experiences and improve operational efficiency.	Clarity on the specific needs and opportunities for frontline workers, enabling targeted AI adoption in frontline operations.	Operations Managers Field Service Managers Frontline Supervisors	90 minutes

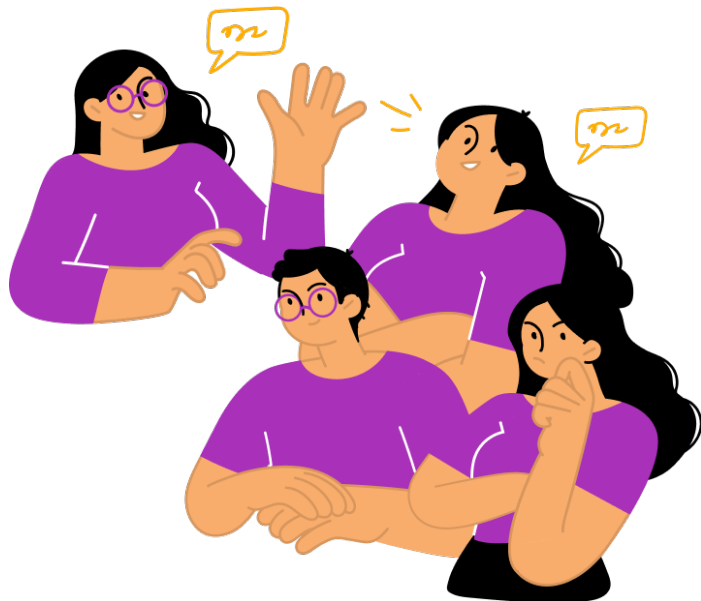
Example workshop agenda (cont'd)

Phase	Session	Description	Outcome	Customer attendees	Time
Design	Design Kick-Off	Initiate the Design Phase by confirming objectives, roles, and expectations, ensuring alignment on building the business case and roadmap.	Stakeholders are aligned on the goals, scope, and expectations for the Design Phase.	Project Executives IT Leaders Business Decision Makers	60 minutes
	Design for Value	Develop the OKR framework content and define initiatives (agents) enabled with Copilot Studio that align to business strategies and develop metrics that can be used to measure the success of those initiatives.	A Value Plan & Business Case that articulates the value of initiatives delivered using Copilot Studio, backed by quantitative and qualitative data.	Finance Leaders IT Leaders Project Executives	90 minutes
	Report and Recommendation	Present a comprehensive report summarising findings, recommendations, and a strategic roadmap for AI adoption.	A clear set of objectives, key results, initiatives and actionable next steps for implementation of agents using Copilot Studio.	Business and IT Leaders Project Executives Key Stakeholders	90 minutes

Who should attend?

For the best experience and impact, both key IT Decision Makers and key decision influencers should be in attendance.

We recommend at least three (3) individuals attend for an inclusive and thorough conversation around strategic alignment and low-code patterns of value.



Digital Transformation & Innovation Leaders

Line of Business Leaders
(HR, Ops, Finance)

IT Executives
(CIO/CTO/CSO)

Line of Business Leaders
(HR, Ops, Finance)

Applications & Automation Technologists

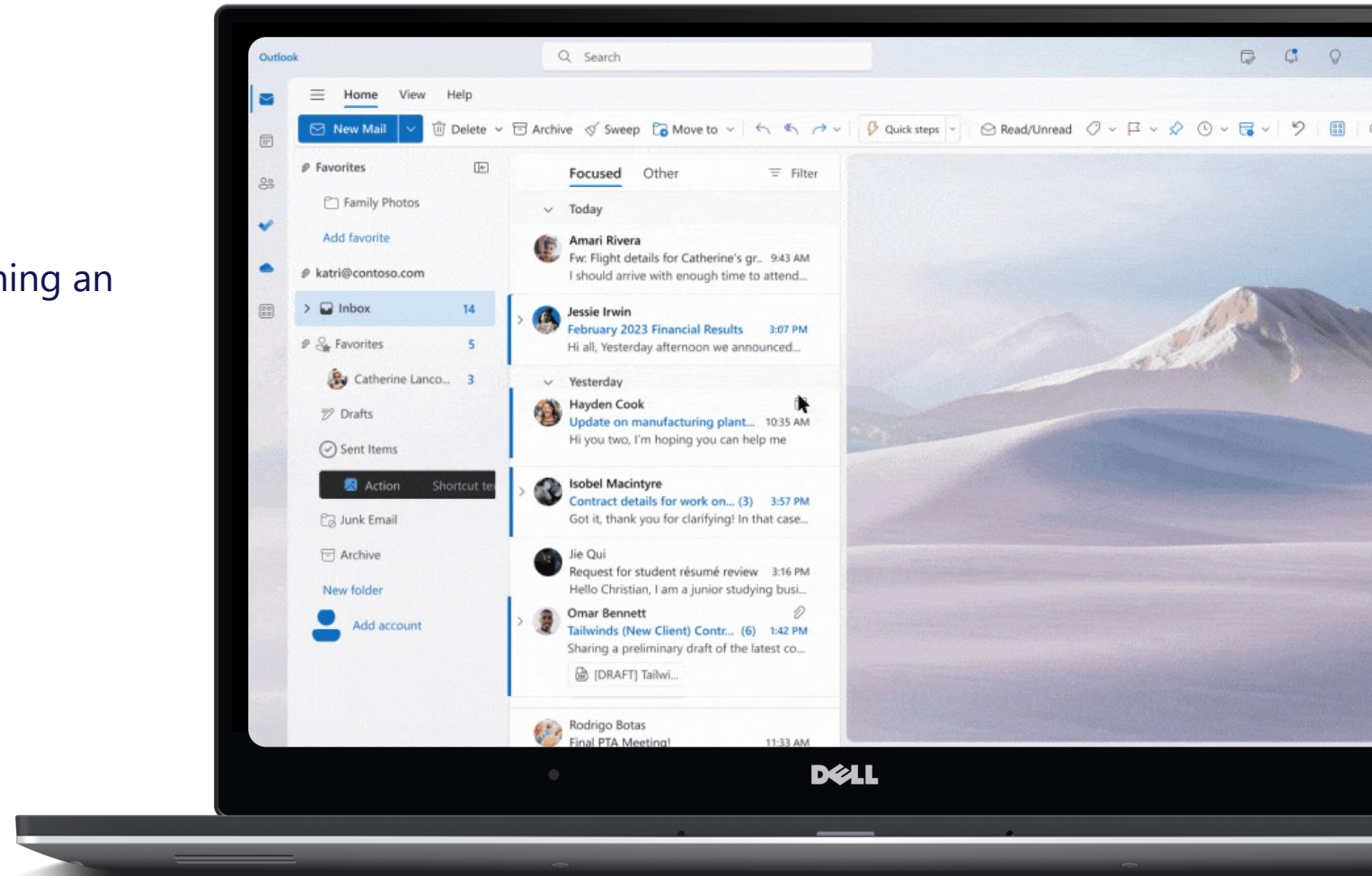
Get in touch

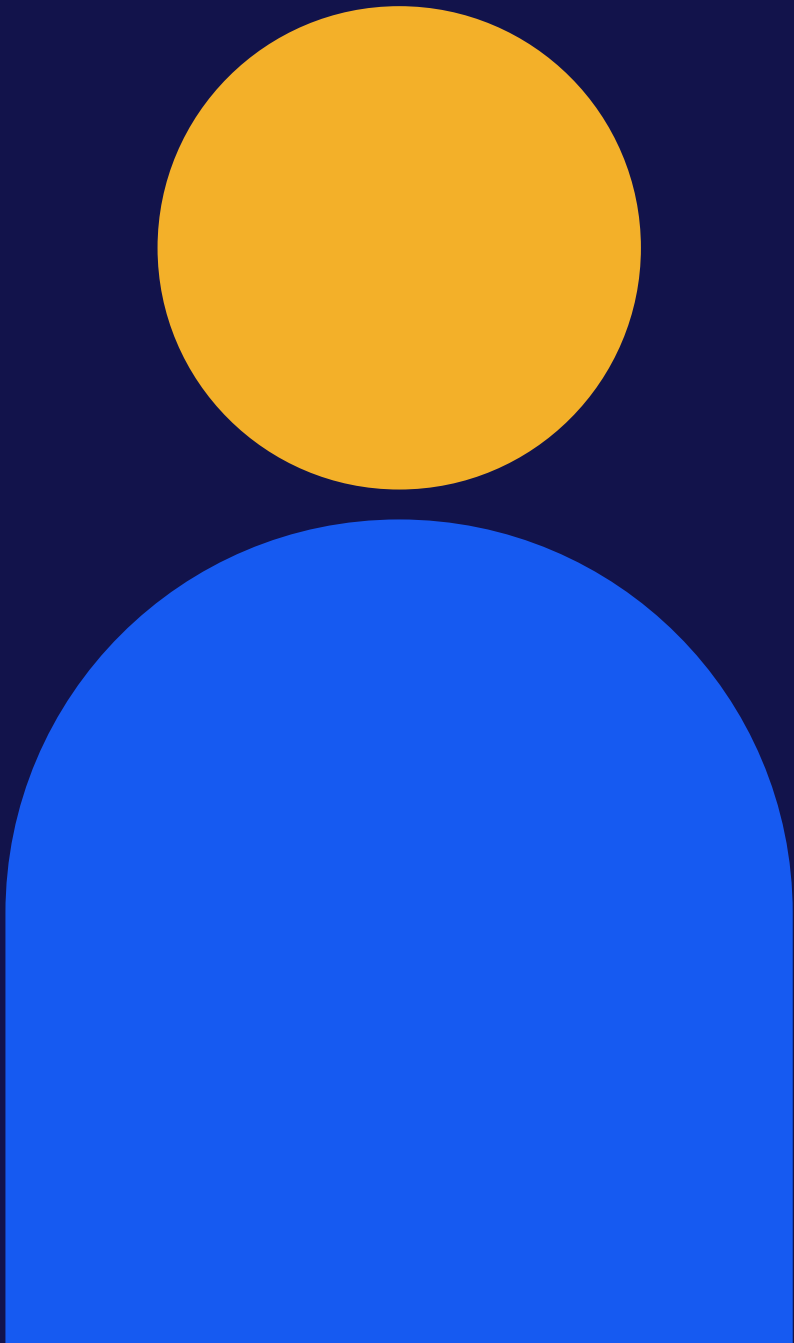
Start preparing your business today.

Contact us to kick-start your journey to becoming an AI-powered organisation.

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engagesq.com/copilot





<people>
friendly
technology

ENGAGE SQUARED 