Services overview

Copilot Vision & Value

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.

Microsoft Partner

2022 Partner of the Year Winner
Employee Experience Award
2021 Partner of the Year Winner
Australia

Microsoft

Microsoft Solutions Partner

Microsoft Preferred
Business Applications

Microsoft Preferred
Content Services

CHANGE PRACTITIONER

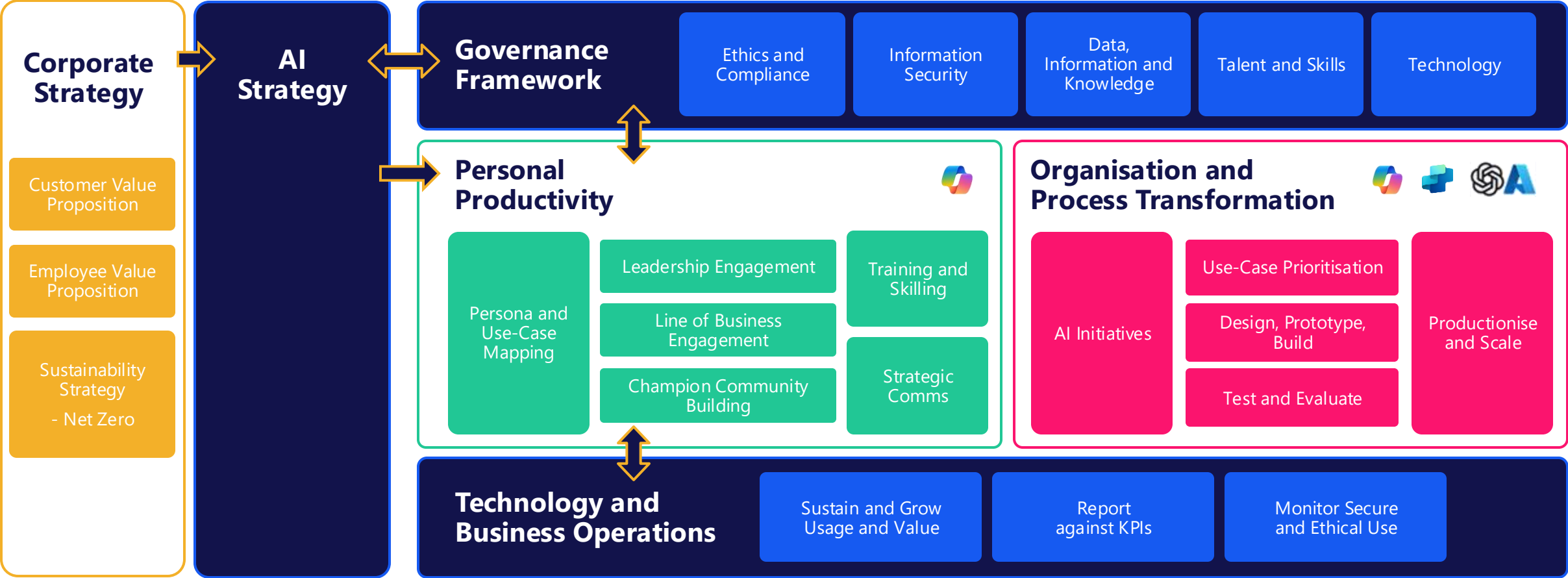PROSCI CERTIFIED

Viva Engage
Adoption Specialist

Microsoft Teams
Collaboration Specialist

Our AI Delivery Framework

Engage Squared's AI Delivery Framework is based on our experience demonstrating, planning, deploying, training, extending and securing generative AI tools across more than 100 customers in Australia, New Zealand and Japan.

Most of our generative AI work has centred around two key areas; achieving personal productivity gains using Copilot for M365 and integrating generative AI features into line of business applications (in addition to securing customer environments).

As the technology evolves, and our customers gain more confidence with these technologies, our focus has increasingly shifted to maturing customer adoption; developing good AI strategies, with clear governance, supported by mature operations to empower staff to use generative AI in a secure and ethical way.

Corporate Strategy

- Customer Value Proposition
- Employee Value Proposition
- Sustainability Strategy - Net Zero

AI Strategy

Governance Framework

- Ethics and Compliance
- Information Security
- Data, Information and Knowledge
- Talent and Skills
- Technology

Personal Productivity

- Persona and Use-Case Mapping
- Leadership Engagement
- Line of Business Engagement
- Champion Community Building
- Training and Skilling
- Strategic Comms

Organisation and Process Transformation

- AI Initiatives
- Use-Case Prioritisation
- Design, Prototype, Build
- Test and Evaluate
- Productionise and Scale

Technology and Business Operations

- Sustain and Grow Usage and Value
- Report against KPIs
- Monitor Secure and Ethical Use

Engagement overview

The most recent Work Trend Index (WTI, 2024) reveals that increasing digital debt, the overwhelming influx of data, emails, meetings, and notifications, is stifling workplace innovation. As 75% of knowledge workers now use AI, businesses need to shift from employees manually searching for information to AI-powered experiences where technology does the heavy lifting. By integrating AI tools like Microsoft Copilot, companies can personalise workflows and automate tasks, allowing employees to focus on more valuable and creative work. This transformation is critical to staying competitive in a landscape where 79% of leaders agree that AI adoption is essential, yet many struggle with a clear path to implementation.

Discover how Microsoft 365 Copilot can help you harness organisational data and intelligence and augment the skills of your employees to enhance business operations.

By the end of this workshop, you'll have:

❑ A prioritised list of business scenarios that can be addressed by deploying Microsoft 365 Copilot

❑ Recommended activities to help prepare your people and technical environment

❑ A roadmap outlining potential workstreams and dependencies with clear next steps

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

Assess and Advise

- Define scope and identify business stakeholders
- Gather information on key business scenarios
- Complete and review readiness assessment and guidance

Art of the possible

- Showcase the intelligence added to employee experiences with Microsoft 365 Copilot
- Explore how you can boost creativity, unlock productivity, and spend more time on important work
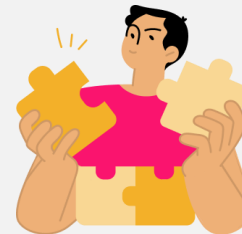
Build the plan

- Develop a plan to implement recommendations based on prioritised scenarios
- Define next steps and timeline to develop and implement Microsoft 365 Copilot

Price: $11,000 (AUD ex GST)

*Can be funded by Microsoft for eligible customers

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Copilot Vision & Value

The Copilot Vision & Value is a three-phase engagement designed to help customers understand the value of AI reinvention, identify top functional scenarios, build a business case and develop a strategic implementation roadmap for AI transformation powered by Microsoft 365 Copilot.

Inspire (2-4 hours)

Showcase the Microsoft 365 Copilot vision and value by driving "Art of the Possible" style conversations and demos. Discuss AI re-invention and value of Microsoft 365 Copilot, touching on the importance of data security and adoption and change management.

Assess (1-2 days)

Assess customer's needs and AI readiness by driving technical readiness assessments. Facilitate executive-level interviews, data analysis and workshopping to identify high-value functional scenarios across priority departments.

Design (1-2 days)

Develop the business case and plan for implementation based on prioritised scenarios. Define next steps and timeline to develop and implement the solution.

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Copilot Vision & Value Scope

Inspire (2-4 hours)

- ❑ Microsoft 365 Copilot Business Value & Overview
- ❑ Data Security for Copilot Presentation and demo
- ❑ Adoption and change management acceleration with Microsoft Viva

Assess (1 -2 days)

- ❑ Technical readiness assessment
- ❑ High value scenario analysis and prioritisation for AI transformation
- ❑ Identify data oversharing risks

Design (1 -2 days)

- ❑ Assess value potential
- ❑ Build implementation roadmap
- ❑ Deliver executive summary (Report & Recommendations)

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Copilot Vision & Value Outcomes

Inspire (2-4 hours)

- Showcase the Microsoft 365 Copilot vision and value together with Microsoft 365 Copilot Chat
- Provide an overview & demo of Data Security for Copilot
- Understand user enablement best practices to accelerate adoption of Microsoft 365 Copilot

Assess (1 -2 days)

- Assess business and technical needs
- DSPM for AI Assessment with Microsoft Purview
- Facilitate workshops to envision and prioritise scenarios across your organisation, specific to business functions or departments
- Early view of next steps needed for implementation roadmap to successfully deploy and adopt Microsoft 365 Copilot

Design (1 -2 days)

- The business case (ROI) and strategy for AI transformation defined, incorporating Viva acceleration if applicable
- Next steps to move forward and implement Microsoft 365 Copilot
- Develop a plan to implement recommendations based on prioritised scenarios
- Define next steps and timeline to develop and implement Microsoft 365 Copilot

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Example workshop agenda

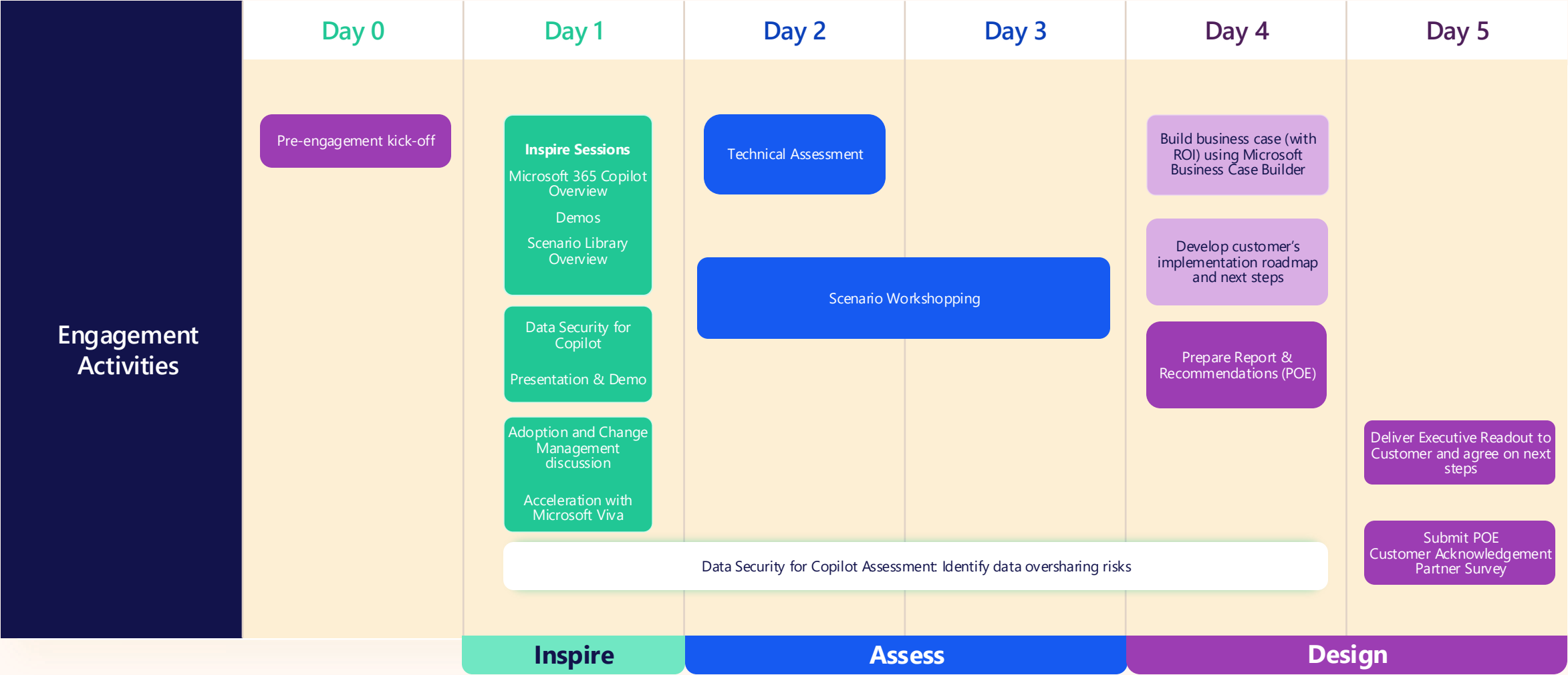| Phase	Session	Description	Outcome	Customer attendees	Time
Art of the possible	Art of the Possible Kick-Off	This session will begin the Art of the Possible portion of the workshop. Required sessions as well as the agreed optional sessions will be listed here.	Set the agenda and schedule for the Art of the Possible phase	Project Lead Project Manager	15 minutes
	AI-Powered Organisation	The objective is to reiterate the Microsoft work trend index in the following areas: • Discuss components of the AI-powered organisation. • Present key findings where organizations need to invest in AI-driven solutions to stay competitive and workers need to develop new skills to take advantage of the opportunities AI presents.	Deeper understanding of the work trends	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge Workers	10 minutes
	Responsible AI	This section serves as a guide for how to approach external marketing communications based on terminology, tone, and our approach at Microsoft to responsible AI. The goal of this presentation is to cover: • Why responsible AI matters and the potential AI has for today and tomorrow. • Our approach to responsible AI. • Examples of responsible AI in action along with sharing some of those learnings with customers and partners.	Deep understanding of Microsoft's approach to responsible AI	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge Workers	10 minutes

Example workshop agenda (cont'd)

Phase	Session	Description	Outcome	Customer attendees	Time
Art of the possible	Microsoft 365 Copilot Overview	The objective is to provide an overview of Microsoft 365 Copilot by discussing: • Natural Language • Access to business content and in the business context • Comprehensive approach to security • How Copilot is embedded across Microsoft 365 apps	Deeper understanding of the underlying of Copilot and a realization that Copilot output is grounded in business data and context.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge workers	10 minutes
	Unleash Creativity	The objective is to demonstrate how Copilot unleashes creativity. In this section, we will discuss the following topics: • Copilot in Word • Copilot in PowerPoint • Copilot in Excel	Understanding on how the customers enable workers with Copilot to increase their creativity. Deeper understanding of practical applications of Copilot in Word, PowerPoint, and Excel.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge workers	15 minutes
	Unlock Productivity	The objective is to demonstrate how Copilot unlocks productivity. In this section, we will discuss the following topics: • Copilot in Outlook • Copilot in Teams Meetings • Copilot in Teams Chat & Loop	Understanding on how Copilot enables the end user to increase their productivity. Deeper understanding of the practical applications of Copilot in Outlook, Teams Meetings, Teams Chat & Loop, Power Automate, and Viva Sales.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge workers	15 minutes

Example workshop agenda (cont'd)

Phase	Session	Description	Outcome	Customer attendees	Time
Art of the possible	Uplift Skills	The objective is to demonstrate how Copilot can uplift skills. In this section, we will discuss the following topics: • Copilot in Microsoft 365 Chat • Client meeting in Microsoft 365 Chat • Strategy in Microsoft 365 Chat • Status update in Microsoft 365 Chat	Understanding of how Copilot enables workers to increase their skills. Deeper understanding of practical applications of Copilot in Microsoft 365 Chat.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge Workers	10 minutes
	Better Together	The objective is to demonstrate the better together story for Copilot in Teams and Teams Premium. In this section, we will discuss the following topics: • The Advanced AI in Microsoft Teams and when to use Intelligent recap and when to use Copilot in Teams • Discussion of the current way to accomplish a task and the new way to accomplish the same task, which means leveraging advanced AI in Microsoft Teams • Copilot in Teams and Teams Premium better together story	A deep understanding of new ways to complete tasks. An understanding of when to use which AI in Teams and when to leverage both together.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge Workers	15 minutes
	Microsoft 365 Copilot Personas	The objective is to discuss a "Day in the Life" for Microsoft 365 Copilot Personas: • HR, Seller, Marketing, Finance, and IT	An understanding of the practical uses of Copilot for key personas. Plants seeds for future scenario discovery workshop.	Exec Sponsor, LOB Leaders, Project Mgr, ITDM, Knowledge Workers	20 minutes

Copilot Vision & Value Example **Timeline**

	Day 0	Day 1	Day 2	Day 3	Day 4	Day 5

Engagement Activities

Day 0:
Pre-engagement kick-off

Day 1:
Inspire Sessions
Microsoft 365 Copilot Overview
Demos
Scenario Library Overview

Data Security for Copilot
Presentation & Demo

Adoption and Change Management discussion
Acceleration with Microsoft Viva

Day 2:
Technical Assessment

Scenario Workshopping

Day 4:
Build business case (with ROI) using Microsoft Business Case Builder

Develop customer's implementation roadmap and next steps

Prepare Report & Recommendations (POE)

Day 5:
Deliver Executive Readout to Customer and agree on next steps

Submit POE
Customer Acknowledgement
Partner Survey

Data Security for Copilot Assessment: Identify data oversharing risks

Inspire	**Assess**	**Design**

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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