

Workshop overview

Explore what's possible with **Microsoft 365 Copilot**



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.



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



Yammer
Adoption
Specialist



Microsoft Teams
Collaboration
Specialist



Engagement overview

The most recent Work Trend Index report is clear – increasing digital debt is costing us innovation. The constant inflow of data, emails, meetings, and notifications has outpaced humans' ability to process it all (WTI, 2023). To remain competitive, it's critical that businesses transform their digital workplace from one where *employees* must do the hard work and go to the information > to an experience where *technology* does the hard work for you. Information comes to you through better integration, personalisation, and artificial intelligence.

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

- 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

Assess workshop

Scope of session 1

The assess phase introduces you to the workshop, technical requirements for Microsoft 365 Copilot and the steps you need to take to become AI-ready. Before the workshop, we'll require you to complete a readiness assessment, so we can understand your organisational profile, productivity readiness, and data security readiness.

In this first session, we'll:

- Identify key stakeholders within your business (e.g. key decision makers, and groups that may benefit the most from using Copilot)
- Provide an overview of Microsoft 365 Copilot
- Research your current challenges and opportunities for how Copilot could solve some of these
- Identify initial business scenarios that would resonate with your business stakeholders
- Prepare for the art of the possible workshop (including prioritizing the list of use cases that you'd like us to showcase)

Workshop logistics

What we need from you:

Complete the readiness assessment and share it with our team before the Assess workshop.

Who should attend this session?

We recommend a group of 4-6 people within your organisation, who can assist with initial planning and provide insights on the current state of your business (e.g. the productivity challenges you face, the vision you are looking to achieve etc.) Typically, this session will have a mix of the following role types:

- M365 Product Owner
- Executive/program sponsor
- Business SME/s
- Technical SME/s
- Knowledge Manager/s

Session length

2 hours

Art of the possible workshop

Scope of session 2

In session two, we'll deliver a combination of presentations and demos that will educate and excite your key stakeholders on how to transform in the employee experience with AI.

The demos and presentations will be scenario-based (using context from our Assess workshop).

The goal of this session will be to:

- Showcase the possibilities of an AI-powered organisation
- Educate your key stakeholders on responsible AI
- Highlight how Microsoft 365 Copilot could enhance the employee experience for key personas within your organisation

Workshop logistics

Who should attend this session?

We recommend a group of 6-10 people within your organisation, who will ultimately contribute to the decision on whether to invest in Microsoft 365 Copilot. This should include a mix of representatives from different departments in your organisation. Typically, this session will have a mix of the following role types:

- Technical representatives
- HR representatives
- Marketing
- Sales
- Finance/Operations
- Line of business representatives

Session length

2.5 hours

Build the plan workshop

Scope of session 3

In session three, we will build a plan to implement Microsoft 365 Copilot experiences for your organisation. Using insights and context from our first two sessions, we'll present back our recommended top scenarios to focus on.

Together we'll discuss the best next steps, including a pilot Microsoft 365 Copilot, any technical requirements you need to complete, and any identified risks that need to be addressed.

The goal of this session will be to provide you with a high-level plan that can be used to form a business case for investing in Microsoft 365 Copilot. This will be delivered as a final report, outlining next steps and any action items discussed during the session.

Workshop logistics

Who should attend this session?

We recommend a group of 4-6 people within your organisation, who will ultimately contribute to the decision on whether to invest in Microsoft 365 Copilot. This should include a mix of representatives from different departments in your organisation. This session should be attended by the stakeholders who will be responsible for owning the plan and implementing Copilot within your organisation. This could include:

- M365 Product Owner
- Executive/program sponsor
- Business SME/s
- Technical SME/s
- Knowledge Manager/s

Session length

1.5 hours

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 Organization	The objective is to reiterate the Microsoft work trend index in the following areas: <ul style="list-style-type: none"> • Discuss components of the AI-powered organization. • 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: <ul style="list-style-type: none"> • 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	<p>The objective is to provide an overview of Microsoft 365 Copilot by discussing:</p> <ul style="list-style-type: none"> 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	<p>The objective is to demonstrate how Copilot unleashes creativity. In this section, we will discuss the following topics:</p> <ul style="list-style-type: none"> 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	<p>The objective is to demonstrate how Copilot unlocks productivity. In this section, we will discuss the following topics:</p> <ul style="list-style-type: none"> 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	<p>The objective is to demonstrate how Copilot can uplift skills. In this section, we will discuss the following topics:</p> <ul style="list-style-type: none"> • 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	<p>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:</p> <ul style="list-style-type: none"> • 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	<p>The objective is to discuss a "Day in the Life" for Microsoft 365 Copilot Personas:</p> <ul style="list-style-type: none"> • 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

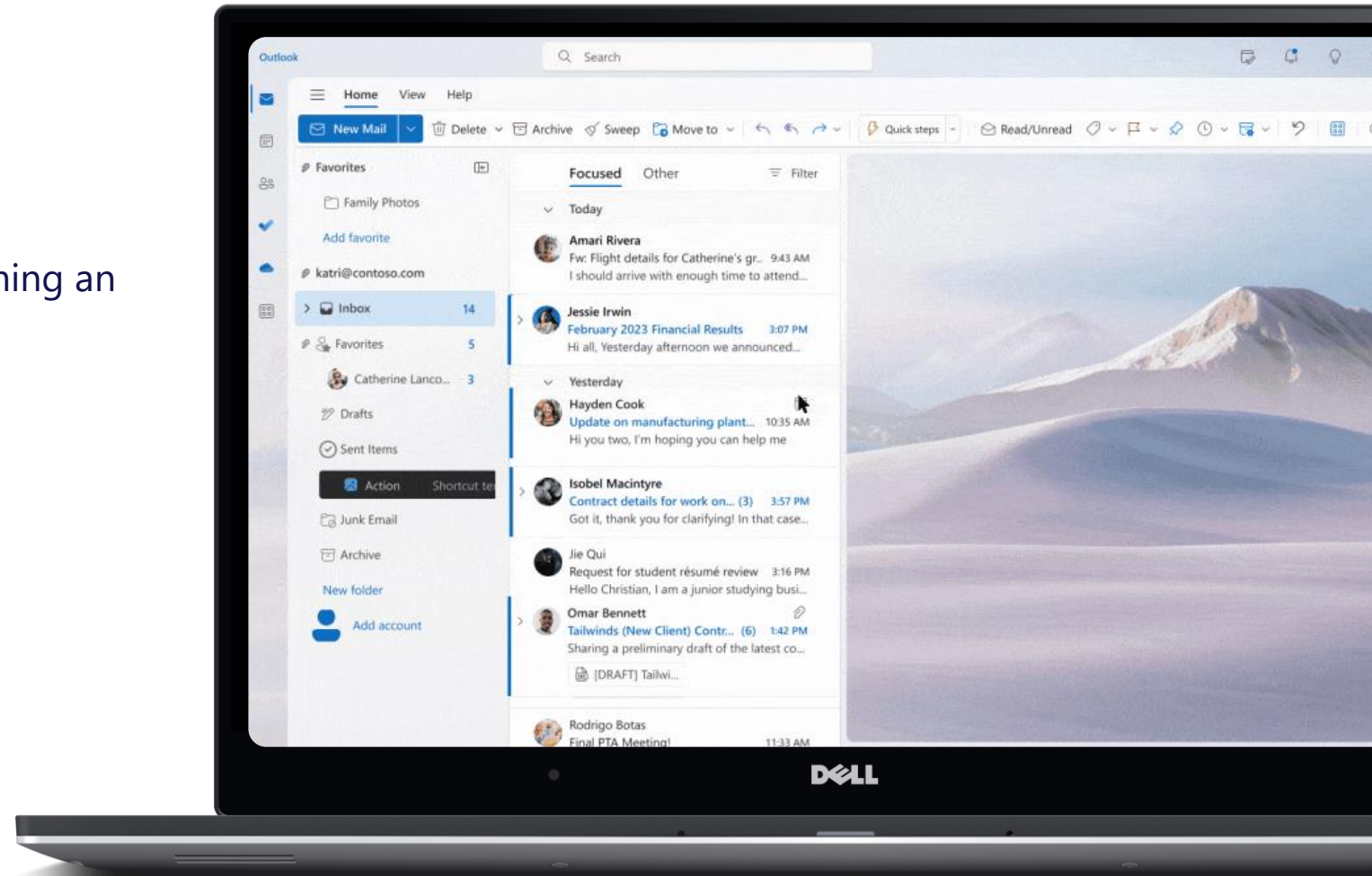
Get in touch

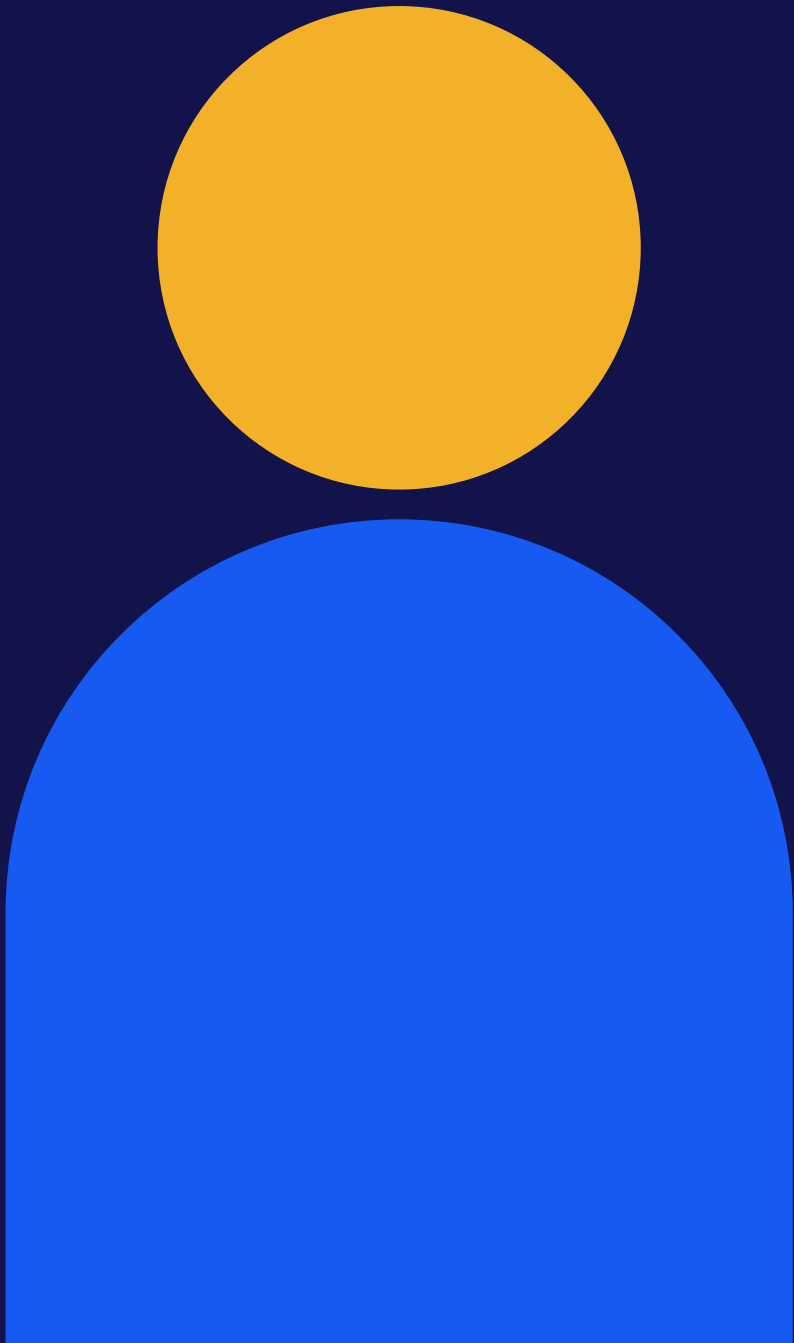
Start preparing your business today.

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

info@engagesq.com | +61 03 9111 0082

engagesq.com/copilot





<people>
friendly
technology

ENGAGE SQUARED 