

Complete overview

# Explore what's possible with Microsoft 365 Copilot and Copilot agents

Engage Squared



# We are Engage Squared

Specialists in <people> friendly technology.

## Our mission is to make work better.

We help organisations unlock the full potential of technology - so your people can do their best work, every day. From frontline teams to the executive suite, we work with large organisations to modernise the workplace, elevate culture, and drive lasting change.

Our expertise spans **advisory and adoption services, end-to-end solution delivery, and ongoing managed support** - tailored to help our clients thrive in a fast-changing digital world.

We specialise in:

- **Building intelligent modern workplaces** that improve collaboration, connection, and employee experience;
- **Modernising apps and workflows** with automation, low-code solutions, and AI-powered agents;
- **Securing data and systems** with enterprise-grade compliance and governance frameworks;
- **Designing seamless digital and customer experiences** that align to business goals and user needs.

With a team of strategists, technologists, designers, and change leaders, we bring a human-centred approach to every engagement - balancing innovation with practicality to create impact that lasts.

**We take partnerships seriously**, and we're proud to have been named Microsoft's 2022 Global Partner of the Year for Employee Experience.



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## Microsoft Partner of the Year

Global Employee Experience – 2022 Winner

## Microsoft Partner of the Year

Australian Partner of the Year - 2021 Winner

## Microsoft Partner of the Year

Global Modern Workplace for Frontline Workers - 2021 Finalist



### Advanced Specialisations:

#### Modern Work

- Adoption and Change Management
- Calling for Microsoft Teams
- Custom Solutions for Microsoft Teams
- Meetings and Meeting Rooms for Microsoft Teams
- Teamwork Deployment

#### Business Applications

- Low Code Application Development
- Intelligent Automation

### JumpStart Partners

- Copilot
- Frontline Worker
- Employee Engagement



Microsoft Teams  
Collaboration Specialist



Viva Engage  
Adoption Specialist



Microsoft 365 Copilot  
Launch Partner



## Proud winners of:



### Victorian Premier's Design Awards

2022 Category Winner – Service Design Victorian  
Department of Premier and Cabinet's Automated Briefing  
and Correspondence System



### 2023 Digital Workplace Awards

Most Impactful Digital Transformation  
Peter MacCallum Cancer Centre's Intranet



### Step Two Digital Workplace Awards

2023 – Silver – Cerebral Palsy Alliance's Intranet  
2021 – Silver – Origin Energy's Intranet



### CRN Impact Awards

2024 – Workforce Empowerments Award  
2019 – Working Together



# We are Engage Squared

Below is a snapshot of current **Microsoft 365 Copilot** engagements across Australia

## Evaluation, Pilot and Executive engagement



## Optimise your environment



## Adoption, change and transformation



## Business case for org-wide scale-out



# We are Engage Squared

Below is a snapshot of current **Microsoft 365 Copilot Studio** engagements across Australia





# Microsoft 365 Copilot your AI assistant at work

**Microsoft 365 Copilot** combines the power of large language models (LLMs) with data in the Microsoft Graph (your calendar, emails, chats, documents, meetings, etc.) to turn your words into the most powerful productivity tool on the planet. And it does so within the existing commitments to data security and privacy in the enterprise.

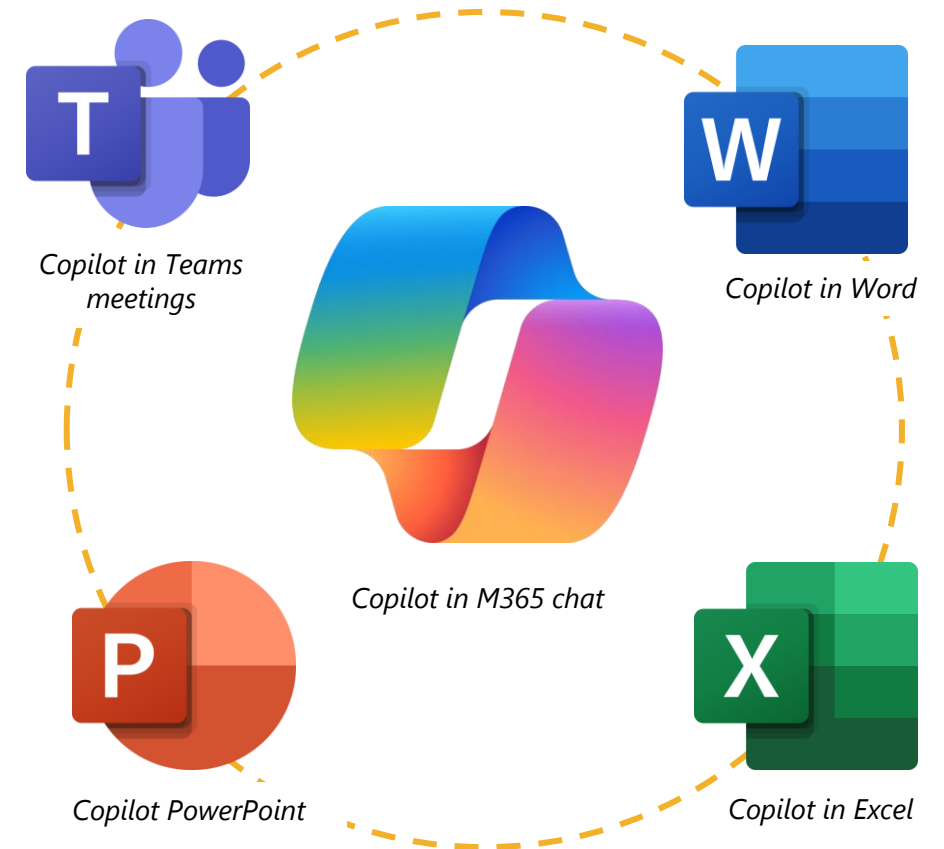
Microsoft 365 Copilot is integrated into the apps you already use every day, freeing you to focus on the most important work and less on the busy work.

## How can Engage Squared help you?

We specialise in helping businesses of all sizes to build a foundation of secure productivity.

We can help you deploy Microsoft 365 Copilot safely, ensuring your information and data is appropriately governed and doesn't expose your business to risk. This includes implementing the right data protection policies and empower your employees with AI-powered tools like Microsoft 365 Copilot and Microsoft 365 Copilot Studio.

Our change management experts can help your people learn new skills and adopt AI-powered ways of working, helping your business become more efficient and profitable.



# Microsoft 365 Copilot journey

Ahead of developing a business case for Microsoft 365 Copilot, we recommend exploring your organisations technical readiness, gain an understanding of Microsoft 365 Copilot functionality and pilot the technology across various function areas.

## Readiness assessment ☒

Validate that you are ready to deploy Microsoft 365 Copilot from a technical, business and security perspective.

## Value discovery ☒

See Microsoft 365 Copilot in action, build an understanding of how core Microsoft 365 Copilot functionality can be used in your organisation and develop a roadmap of adoption activities tailored to your teams.

## Microsoft 365 Copilot pilot ☒

Enable 100 - 300 Microsoft 365 Copilot users through a managed pilot; high-touch engagement to build knowledge and capability, using business scenarios relevant for your organisation.

## Build your business case ☐

Establish a business case to gain executive buy-in to expand Microsoft 365 Copilot to areas of your business where it makes commercial sense, with a clear summary of value, and a plan to realise ROI in your organisation.

## Scaled implementation ☐

Build on your pilot success by building knowledge and capability. Realise return on your scale investment by driving adoption using the high value scenarios identified in earlier stages, celebrating success and expand scenarios relevant for your organisation.

**InfoSec remediation**

**Information security maturity**

**Microsoft 365 Copilot extensibility and integration**

# Launch Microsoft 365 Copilot

## Step 1a:

### Design the business case

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#### Microsoft 365 Copilot 3-part workshop

Discover how Microsoft 365 Copilot can harness your organisational data and intelligence and augment the skills of your employees to enhance business operations. In this 3-part workshop we'll introduce you to the key features and capability of Microsoft 365 Copilot. This includes:

- A readiness assessment to understand your organisational profile, productivity readiness, and data security readiness
- Identifying and prioritising **initial use cases and personas**
- Educating key decision makers and stakeholders on Microsoft 365 Copilot through an art of the possible showcase
- **Developing a roadmap** and key next steps to help you on your journey to becoming an AI-powered organisation
- **Note:** Steps 1a and 1b can be completed in parallel or as individual engagements.

## Step 1b:

### Optimise your environment

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If required, our team can help prepare your Microsoft 365 tenant before your Microsoft 365 Copilot launch. Choose from one or more modules:

1. **Security uplift:** review your information security settings and sensitive data controls
2. **Content governance:** we'll review existing content & governance controls (including archive and backup)
3. **Plan your migration of data to the cloud:** Microsoft 365 Copilot will only work with data that is in the cloud, our migration experts can help prepare you
4. **3rd party integration:** explore making data in 3<sup>rd</sup> party systems (e.g., ServiceNow, Confluence etc.) visible to Microsoft 365 Copilot by integrating using M365 Graph Connectors

## Step 2:

### Test capability

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#### Pilot and roadmap

Microsoft 365 Copilot can bring significant productivity benefits, if you identify the right business scenarios. Engage Squared can help you identify how, when and where to launch Microsoft 365 Copilot to maximise productivity through an in-depth and structured pilot program.

Starting with a rapid pilot program, we will work with you to identify high-impact business scenarios, identify any organisational risks or impacts, and plan next steps for org-wide enablement of Microsoft 365 Copilot.

We will support key decision makers and a small number of employees to take full advantage of Microsoft 365 Copilot through a structured change management approach which includes product training and 'ways of working' coaching on how to leverage AI to optimise processes and increase productivity.

## Step 4:

### Scale-out

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Accelerate the benefits by turning on Microsoft 365 Copilot with technical and change support from Engage Squared.

#### Outcomes:

- ✓ Raise awareness and create excitement through inspired change communication and training materials
- ✓ Coach staff in your priority business units to work smarter (inc. training assets development, training delivery and self-guided learning for pilot)
- ✓ Define systems and processes to deal with exceptions (including clear, automated reporting processes for data that has been overshared) – highly recommended if you haven't optimised your environment before launch



# Launch Microsoft 365 Copilot agents

## Discover Copilot Studio

### Vision & Value

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#### Copilot 3-part workshop

Discover how Microsoft Copilot Studio can help your organisation unlock AI-driven efficiencies, streamline processes, and solve business challenges.

In this three-part workshop, we'll introduce you to the key features and capabilities of Microsoft Copilot Studio. This includes:

- An AI readiness assessment
- Identifying and prioritising key business challenges and high-impact use cases
- Educating key stakeholders on Microsoft Copilot Studio through an 'Art of the Possible' showcase
- Building a Microsoft Copilot Agent in real time to demonstrate practical applications
- Developing a strategic roadmap with clear next steps to maximise Microsoft Copilot Studio's value for your org

## Copilot Studio Lift Off

### Proof of Concept (PoC)

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Quickly prove the value of Microsoft Copilot Studio in a controlled environment without full operational deployment. Timeframe: 3–4 weeks

#### Activities include:

- Define requirements through discovery workshops, design the user experience
- Agile build to deliver a solution prioritising business value
- Deploy a test agent to your Microsoft 365 tenant for stakeholder feedback.
- Discuss feedback and refine for potential future investment.
- Microsoft Copilot Studio in a Day Training Session

#### Deliverables:

- Solution Design and Architecture
- Solution deployed in a test environment
- Microsoft Copilot Studio training session

## Copilot Studio Lift Off

### Test capability

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Implement Microsoft Copilot Studio in a production setting with real users to gain feedback and refine support processes. Timeframe: 5–7 weeks

#### Activities include:

- Discovery and design - ensure readiness for production use, create a solution blueprint.
- Agile build to deliver a solution prioritising business value
- A round of User Acceptance Testing
- Provide admin handover guide for maintenance and future enhancements.
- Microsoft Copilot Studio 'In a Day' training session

#### Deliverables:

- Solution design and architecture
- Solution launched in production
- Admin guide for configurations

## Get ready for the future

### AI Strategy & Governance

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Our mission is simple: **help you take advantage of AI safely and responsibly.**

We help you navigate the world of AI by closely with you to create an AI strategy and governance approach that fits your organisation perfectly.

We'll guide you through planning your next steps, managing potential risks, and putting good practices in place, so your teams and stakeholders feel confident about using AI in a way that's ethical, effective, and aligned with your goals.

# We've entered the era of AI extensibility Copilot agents

**Microsoft's Work Trend Index 2025 puts it simply: this is the year AI moves from being something teams are trying out, to something they're building into how they work<sup>1</sup>. It's no longer about just doing work faster; it's about changing how that work gets done.**

Many organisations have already seen the productivity benefits of Microsoft 365 Copilot, summarising meetings, drafting content and lightening the load – and now they're ready for more. Employees are seeing the benefits. Leaders are seeing the impact. And the technology is here to take things further. As a Microsoft partner helping organisations launch Microsoft 365 Copilot, we have seen this shift first-hand. More and more teams are asking, "what else can it do?". In our own engagements, there's growing demand for solutions that move beyond individual productivity, and into solutions that connect systems, support real processes and make work simpler across entire teams.

**For leaders looking to extend the value of AI and stay ahead in 2025, Microsoft 365 Copilot agents aren't a nice-to-have, they are the next step forward.**

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## Close the capacity gap

82% of leaders are confident they'll use digital labour, like Microsoft 365 Copilot agents, to expand workforce capacity over the next 12–18 months. With business demands rising and teams already stretched, agents offer a smarter way to scale without burning out your people.

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## Keep pace with change

The speed of business is outpacing how work gets done. 48% of employees and 52% of leaders say their work feels chaotic and fragmented. Microsoft 365 Copilot agents bring order to complexity by streamlining tasks and cutting through the noise.

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## Leaders are already moving

81% of business leaders expect AI agents to be integrated into their company's AI strategy by this time next year. The shift from exploration to execution is well underway, and the organisations moving now to stay ahead.

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## Shift focus to meaningful work

AI is already freeing people up to focus on higher-value work. Agents help by taking care of repetitive admin, so employees can spend more time solving problems, collaborating, and making decisions.

# Optimise your processes with agents



## Transform complex and dynamic processes

Microsoft 365 Copilot Agents can handle **highly variable situations** in **real time**, using judgment to plan their steps and perform specialised tasks required to complete the job.



## Reimagine possibilities with multi-agent collaboration

Microsoft 365 Copilot Agents can collaborate with multiple users and other agents to accomplish tasks that span **disconnected systems**, **long time horizons**, and **organisational boundaries**.



## Enable every employee to augment their jobs with agents

Using natural language, any employee can be **empowered** to design and operate **custom tailored Microsoft 365 Copilot agents** for their workflows.

# Our build methodology

We'll take your prioritised backlog of use cases and start to move you through each stage of our build process, from AI Design > to build > testing > and implementation. Our team includes a blend of technical experts and change management experts to ensure you're set up for success. We'll repeat this methodology for each AI use case on the backlog.

## Phase 1:



### Design & prototype

We'll start with design sessions, collaborating closely to tailor the requirements for a solution that'll truly wow your team. We'll bring together your key stakeholders in several workshops to ensure every important requirement is gathered and a clear scope for the solution is established.

We'll also create wireframes of the proposed chatbots UX that can be circulated to stakeholders

#### Key deliverable:

- Solution prototype / PoC

## Phase 2:



### Solution build & UAT

With the proof-of-concept complete, we'll move into testing and refining requirements based on the PoC. Once complete, we'll move into a full build of your Microsoft 365 Copilot copilot solution.

We'll share work-in-progress updates during build and invite your stakeholders back for a demonstration.

#### Key deliverable:

- AI solution deployed to your Microsoft 365 tenant

## Phase 3:



### Scaled implementation

Once the build is complete, our team of Change Managers can support you with a targeted change campaign. This includes everything from developing a change strategy (including impact assessments), stakeholder engagement, communications support, end user training (both live and on-demand), and success measurement to quantify the impact of the change.

#### Key deliverable:

- Change management launch support to deliver a targeted launch campaign (scope TBD with client)

## Phase 4:



### Handover & BAU ops

Once launch activities are complete, we'll support you to transition the new solution into BAU.

This includes setting up the appropriate channels for continuous improvement, value tracking and reporting against agreed benchmarks, and ongoing managed support (if required).

#### Key deliverables:

- Final handover reports
- Ongoing managed support

# ENGAGE

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