Copilot for Microsoft 365
ICT Delivery Model

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AGENDA

- ❑ **Introduction**
- ❑ **ICT Framework for Copilot Adoption**
- ❑ **Implementation Plan**
- ❑ **User Enablement with the right Skillset**
- ❑ **Technical Enablement**
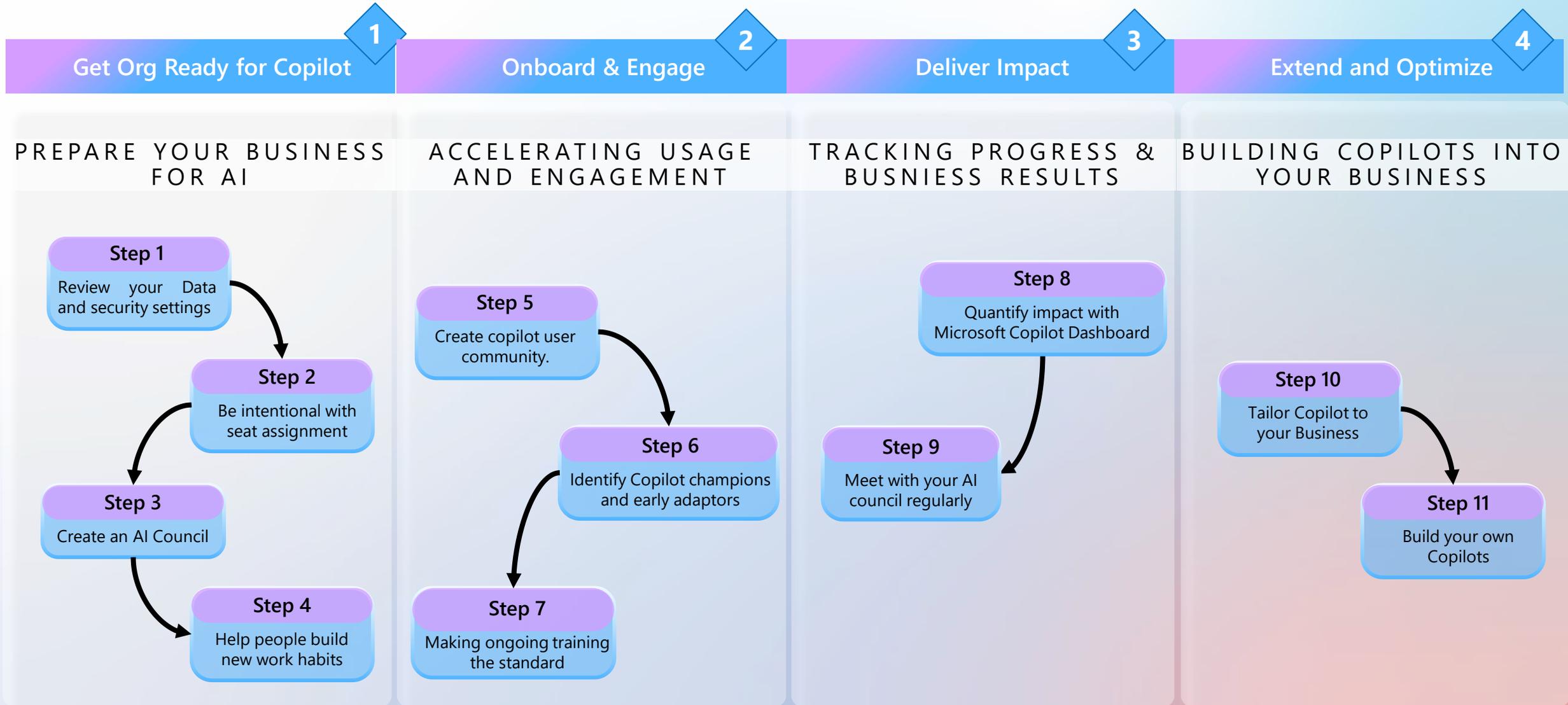
Copilot for Microsoft 365 Implementation

Copilot implementation

Copilot essentials checklist

- ✓ Sponsor
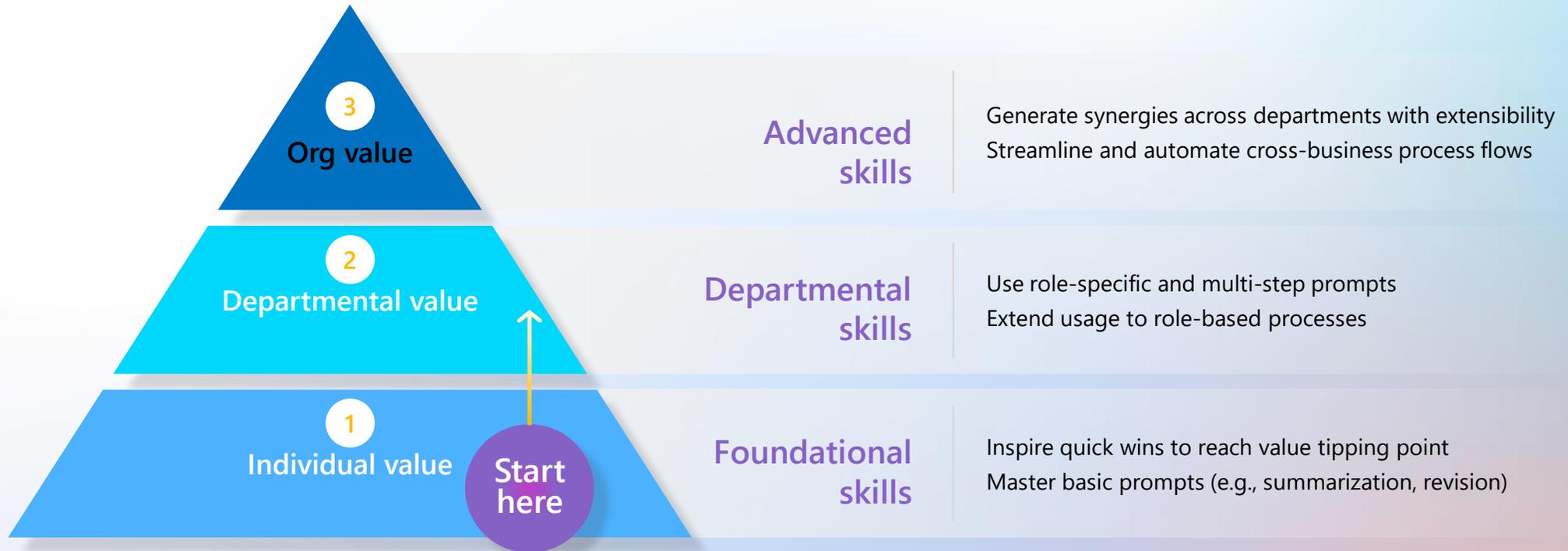- ✓ Scenarios
- ✓ Security

User Enablement

Prepare organization and employees for the AI transformation journey

Technical Readiness

Address technical deployment and optimization, including governance, security, compliance, and management

User Enablement

Set the Foundational Skillset for Copilot

Pyramid Level	Skill	Description
3 Org value	**Advanced skills**	Generate synergies across departments with extensibility Streamline and automate cross-business process flows
2 Departmental value	**Departmental skills**	Use role-specific and multi-step prompts Extend usage to role-based processes
1 Individual value — Start here	**Foundational skills**	Inspire quick wins to reach value tipping point Master basic prompts (e.g., summarization, revision)

1 Start with top 10 generic skills from **Copilot Lab** that deliver immediate success (e.g., summarize a meeting, email thread).

2 Use the **Copilot Scenario Library** to train users on new departmental use cases and process improvement to impact departmental KPIs.

3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Foundational Skills for every employee

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1 Recap a meeting
– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from meeting

2 Summarize an email thread
– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon

3 Draft email
– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.

4 Summarize a document
– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from file

5 Tell me about a topic/project
– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about topic organized by emails, chats, and files?

6 Give me some ideas for …
– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on file

7 Help me write …
– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]

8 What did they say …
– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic

9 Revise this content
– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot

10 Translate a message
– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

Departmental Skills

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HUMAN RESOURCES

CREATE MORE EFFICIENT HIRING PROCESS

Create a job description by asking, copilot in word to suggest skills, qualifications and responsibilities.

Conduct a group interview in Microsoft teams and ask copilot to summarize the contributions of each candidate.

Discover, the best candidates for a position by having copilot extract, skills, experience, and qualifications from a set of resumes.

MARKETING

CREATE A MARKETING PITCH IN RECORD TIME

Discover trends, and outliers in the latest market research with copilot in Excel to identify which markets to target with promotions.

Draft targeted promotion plan with suggested taglines using copilot in word.

Transform, the engineering teams' design documentation from a word document into a pitch deck in PowerPoint with copilot

SALES

DRIVE BETTER SALES PRESENTATIONS WITH AN AI ASSISTANT

Create a bulleted list of notes using recent email threads before the meeting with Customer to understand the asks that need to be addressed.

Give the customer your full attention in a meeting by relying on copilot to handle the meeting notes.

Draft the final proposal using the copilot to take content from your emails, meeting notes and presentations.

IT

DEPLOY A CRITICAL UPDATE WITH THE HELP OF COPILOT

Create a project plan for the upcoming rollout based on a previous project, plan and product documentation.

Meet on teams to discuss the plan and use copilot to keep track of unanswered questions.

Create a presentation on the rollout by using copilot to create slides based on the project plan word document.

FINANCE

FOCUS ON THE HIGH-VALUE TASK TO COMPLETE AN ACQUISITION

Summarize the due-diligence information from the operations and legal team.

Use Copilot to add a section to offer sheet discussing some conditions for the deal based on previous meeting transcript.

Use copilot in excel to refine the deal analysis based on the negotiations and changes in the economic environment

Advanced Skills

1
Identify new high value scenarios

- Gather data from service health reviews
- Skill/acquire talent for extensibility opportunities

2
Expand on Copilot Studio capabilities

- Build, automate, and administer copilots
- Select extensibility scenarios

3
Scale Copilot users and skills

- Extend throughout organization
- Identify high value user cohorts for advanced skill building
- Optimize usage patterns

Our Continuous learning Program

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On-demand Training

- ✔ On demand, story-based courses that covers everything a business user needs to be proficient using Microsoft 365 and how to get started with Copilot
- ✔ Continuously updated to keep up to date with changes and capability of the Copilot
- ✔ Easily accessible from customers own Microsoft 365 environment

Live Instructor-led Coaching

- ✔ Two instructor-led group coaching sessions on copilot per week
- ✔ Weekly tips on using copilot
- ✔ Two Webinars for all employees (on copilot or introduction to AI)
- ✔ Training communication and reporting

Copilot Implementation-Technical

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1 — Get Org Ready for Copilot

User Enablement Workstream

- Secure exec sponsorship, create AI Council, and define RAI principles
- Identify success owners, Champions, and early adopter cohorts
- Detail high value scenarios and personas
- Be intentional with assignment and concentrate seats
- Define success criteria, KPIs, and success measurement plan

2 — Onboard & Engage

- Complete User Enablement Strategy training
- Define user experience and feedback strategy
- Design and deploy training and engagement community (Center of Excellence/Champion Platform)
- Launch employee communications and Champion program
- Onboard executives and user cohorts
- Deliver user Champions and support staff training

3 — Deliver Impact

- Review success measures and user survey results
- Conduct feedback and reporting analysis
- Deliver extended training and adoption support
- Identify additional optimization scenarios
- Iterate user experience strategy
- Gather and amplify success stories

4 — Extend and Optimize

- Extend to new high value scenarios
- Deliver business process transformation with Copilot Studio, plugins, and connectors
- Drive group and cross-organizational productivity and innovation
- Understand custom line of business opportunities

USER ENABLEMENT

TECHNICAL READINESS

Technical Readiness Workstream

- **Perform the Copilot for Microsoft 365 Optimization Assessment**
- **Address data security, governance, and data access questions**
- **Build shared Copilot for Microsoft 365 implementation plan with User Enablement team**

- **Ensure appropriate Data Security controls are in place**
- **Prepare your organization for Copilot for Microsoft 365 with setup guide: deploy Microsoft 365 apps, if needed; assign licenses**
- **Assign permissions by role to provide access to the Copilot for Microsoft 365 usage report**

- **Establish service management plan**
- **Analyze Copilot for Microsoft 365 usage reports and the Microsoft Copilot Dashboard to observe user adoption, retention, and engagement**

- **Design, build, and publish plugins to deliver unique experiences**
- **Build your own copilots**

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