Copilot Vision & Value

Pre-engagement kick-off

Microsoft 365 Copilot

link Development   **Microsoft**

Agenda

- Introduction
- Engagement overview
- Timeline and activities
- Customer responsibilities
- Expectations and next steps

Introduction

The purpose of this meeting is to …

Introduce the team members and their expected responsibilities.

Review and agree on the engagement:

- Engagement overview

- Goals, scope, and deliverables

- Stakeholder availability and schedule

- Customer requirements and tools necessary for conducting the engagement

- Expectations and next steps

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.

Customer Audience
Senior BDMs, Functional or Departmental Leaders, AI Champions, ITDMs

Partner Participants
Architects, User Experience Leads, Advisory and Change Management Consultants

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 prioritized scenarios. Define next steps and timeline to develop and implement the solution.

Copilot Vision & Value Overview

ACTIVITIES

Inspire (2-4 hours)

- ❑ Microsoft 365 Copilot Business Value & Overview
- ❑ Discuss data security, governance, and data access questions
- ❑ Adoption and change management acceleration with Microsoft Viva

Assess (1 -2 days)

- ❑ Technical readiness assessment
- ❑ High value scenario analysis and prioritization for AI transformation

Design (1 -2 days)

- ❑ Build business case
- ❑ Build implementation roadmap
- ❑ Deliver executive summary (Report & Recommendations)

OUTCOMES

- • Showcase the Microsoft 365 Copilot vision and value
- • Security, governance and data questions answered before assessment activities
- • Understand user enablement best practices to accelerate adoption of Microsoft 365 Copilot

- • Assess customer's business and technical needs
- • Facilitate workshops to envision and prioritize scenarios across your customer's organization, specific to their business functions or departments
- • Early view of next steps needed for implementation roadmap to successfully deploy and adopt Microsoft 365 Copilot

- • Customer's board ready business case (ROI) and strategy for AI transformation defined, incorporating Viva acceleration if applicable
- • Next steps for customer/partner/Microsoft to move forward and implement Microsoft 365 Copilot

Inspire phase checklist

Learn about the Microsoft 365 Copilot vision and value. Using a combination of presentations, scenarios, and demos –we will demonstrate the "Art of the Possible" around how AI can help increase revenue, optimize costs and develop thriving employees.

Inspire
(2-4 hours)

❑ **Deliver Microsoft 365 Copilot value prop + business value overview presentation**

❑ **Showcase product capabilities, including but not limited to:**

   ❑ Microsoft 365 Copilot

   ❑ Copilot Studio

   ❑ Copilot for Sales

   ❑ Copilot for Service

   ❑ Copilot for Finance

❑ **Deliver immersive experiences and demos**

❑ **Address data security, governance, and data access questions**

❑ **Discuss adoption and change management best practices; how to accelerate AI adoption with Microsoft Viva**
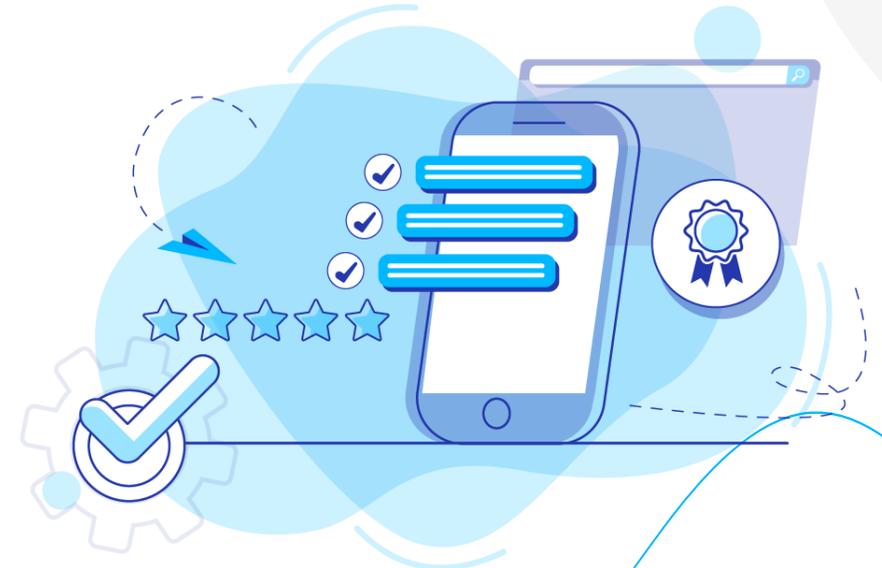
Assess phase checklist

The Assess phase helps to identify your customer's business and technical needs in preparation for AI Transformation and building a business case. Through a series of assessments (technical & business) you'll help your customer determine their AI readiness and which high-value functional scenarios are most important across priority departments.

Assess
(1–2 days)

- ❑ **Complete Microsoft 365 Copilot Optimization Assessment**
- ❑ **Identify and prioritize high value functional scenarios across priority departments**
- ❑ **Review results of assessments and align with customer before building business case and next steps**
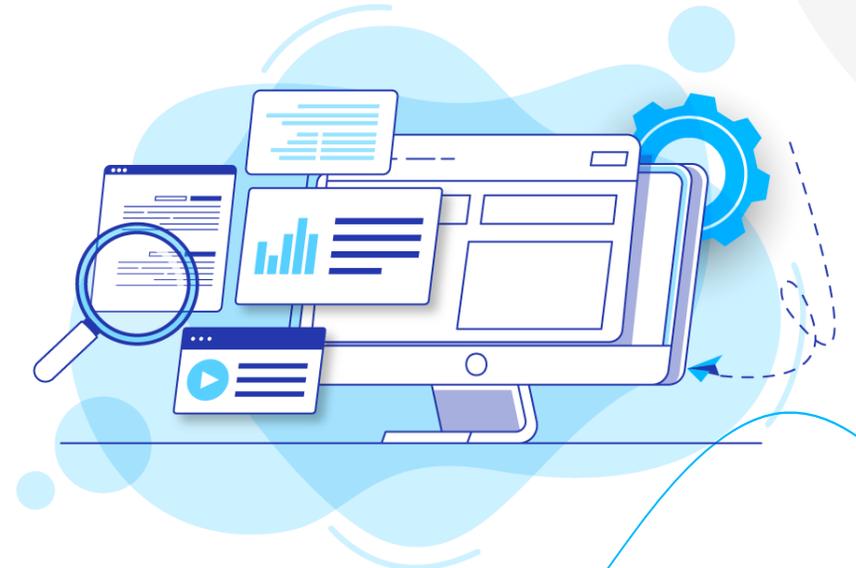
Design phase checklist

Build the business case and implementation plan for your customer's AI Transformation.

Design
(1–2 days)

- ❑ **Leverage Microsoft's Business Case Builder or your own business value calculation and approach to build the business case including ROI**

- ❑ **Discuss and align on a roadmap to implement your customer's high-value scenarios with Microsoft 365 Copilot**

- ❑ **Document recommendations that include next steps, identified risks, owners, and estimated completion dates**

- ❑ **Fill in Report and Recommendations template to submit as Proof of Execution (POE) and present to the customer as an executive summary**
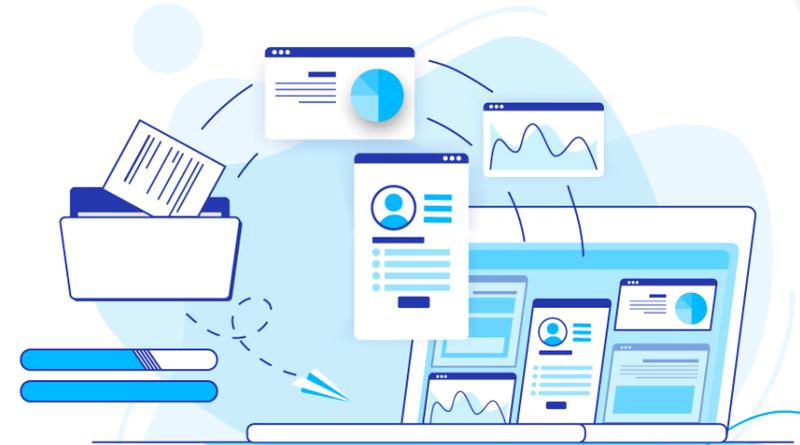
Customer responsibilities

Access to teams during the engagement

Participation from stakeholders, BDMs, executives, Enterprise Architects, IT Leads, and knowledge workers is required for different sessions.

Assign an executive sponsor to support the engagement

A stakeholder/sponsor is required to oversee and own the engagement process from the customer side.

Identify your team members

Key roles	Responsibilities	Person / People Assigned
Executive Sponsor	Help the project team identify and prioritize their top business needs. Encourage active participation across Sr. BDMs, IT Admins and ITDMs, Corporate Communications and leaders from your business departments or functions. Actively participate in Inspire and Assess sessions to ensure the engagement aligns to your organization's mission and priorities. Sign off on business case and agree on outcomes/next steps to move forward with Microsoft 365 Copilot for your AI Transformation.	TBC
Senior Business Decision Makers	Help align AI Transformation priorities with the top priorities of your business. Raise key challenges, pain points, and trends that you feel can be transformed with AI. Drive the direction and strategy for your AI transformation together with us.	
IT Decision Makers / Admins	Provide a view of the current state environment and Microsoft or alternate workloads in use, as well as related data access and security configuration. Participate in technical assessment discussions to understand pre-requisites to AI and what gaps may exist to deploying Microsoft 365 Copilot.	
Corporate Comms and/or Change Management (EX)	Provide a view of how your organization currently handles major transformational change including adoption and change management approaches for large deployments. Assess change impact and understand communication and training strategies necessary for a successful AI transformation with Microsoft 365 Copilot. Provide a viewpoint (if applicable) on leveraging existing or new Microsoft Viva modules to support measurement, adoption and skilling for AI.	
Function / Department #1	Identify key stakeholders from your business to help with workshopping top scenarios and "day in the life" processes that can be transformed with AI for specific departments or functions. Help the project team identify and prioritize the departments or function's top business needs. Actively participate in high-value scenario workshopping to help build a strong business case and implementation roadmap.	
Function / Department #2	Identify key stakeholders from your business to help with workshopping top scenarios and "day in the life" processes that can be transformed with AI for specific departments or functions. Help the project team identify and prioritize the departments or function's top business needs. Actively participate in high-value scenario workshopping to help build a strong business case and implementation roadmap.	

Next Steps

1. Schedule "Inspire" sessions (2-4 hours) for a Microsoft 365 Copilot overview, discussion around data security and adoption and change management.

2. Align on IT availability for technical assessment

3. Start planning departmental workshopping sessions to identify and prioritize functional scenarios

4. Agree on regular check-ins to stay aligned with engagement status and outcomes

5. Plan for business case review after assessments and workshopping

Thank You!

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