

# Copilot Mentoring Program Description



mobile mentor

# The Copilot Mentoring Program

The Copilot Mentoring was purposefully designed to achieve these 3 business outcomes:

1. Identify the high value opportunities for Copilot to generate strong ROI for the business
2. Ensure your data, and business applications are ready for safe use of Copilot
3. Empower your leaders and staff to learn and fully leverage the benefits of Copilot

## Why do we need this?

Copilot and Gen AI is amazing technology, but extracting business value is not guaranteed. Our experience as a company was frustrating for the first year and left us disillusioned and questioning the decision we made to deploy M365 Copilot service to 35% of our team.

Here is a summary of the pain points we were experiencing:

- We didn't know which employees would make good use of the M365 Copilot service
- We were worried about data oversharing and not having data governance controls
- We struggled to get value from Copilot in Word, Excel, PowerPoint and Outlook
- We didn't know where to start with agents, and extensions into our business applications
- We were running blind with zero visibility of adoption, utility value and productivity gains

We had to solve these issues internally at Mobile Mentor to prove the business value of Copilot. Through the process and in our discussions with industry peers and customers, we found that most businesses are doing this work for the first time and facing the same challenges we faced.

## The Copilot Mentoring Program was designed for you!

The **Copilot Mentoring Program** is a multi-year program where we work together to define your vision, implement a shared roadmap, deploy the tools and transfer knowledge to your IT team.

We start with an assessment to understand today's reality, constraints, and aspirations. Then we jointly develop a vision and 3-phase roadmap (crawl, walk, run) to turn that vision into reality. This becomes our shared roadmap, with shared accountability and regular progress reviews.

Each month our Program Manager creates the work plan for the month ahead, and schedules workshops, meetings and deliverables so our team is working alongside your team to deploy the free and paid versions Microsoft Copilot in a way that creates value for your business.

Along the way, we provide technical support and knowledge transfer and documentation. Our goal is to empower your team to go further and faster than they could working alone.

## Five Discrete Workstreams for Copilot Success

Your team will be supported by our Copilot Mentoring team with 5 discrete skill that are required for success with Gen AI: Business Analyst, data architect, trainer, developer and an AI Officer. Each person owns a workstream and is responsible for specific deliverables and outcomes.

At times the workstreams may run in parallel and at times they may be sequential. In the first year we expect the focus to be on the business analysis, data controls and training. The focus will gradually shift to agents and extending functionality into business applications. Throughout there will be a consistent monthly cadence to quantify the value to the business and plan ahead.

	WORKSTREAM	DELIVERABLE
1	Business Analysis	Deploy free and paid M365 Copilot to the right people
2	Data readiness	Protect data from over-sharing
3	User empowerment	Build skills and confidence to drive productivity
4	Build agents and APIs	Extend Copilot with autonomous agents and APIs
5	Leadership & governance	Measure and report on the ROI for the business

## Learn from the best and share with the rest

Every business needs to embrace Gen AI but clearly this is a multi-year journey with a steep learning curve. This journey can be accelerated by engaging a Microsoft certified partner to advise, assist, and transfer knowledge. This is the basis of the Copilot Mentoring program.

Mobile Mentor works with hundreds of clients who are at different stages of deploying Copilot. Every company is unique, and we learn something from every engagement. The Copilot Mentoring program was designed to harness and share the best ideas and best practices.

Microsoft awarded Mobile Mentor partner of the year in 2021, and finalist in 2022, 2023 and 2024. Mobile Mentor is also an ELITE partner with direct access to two of Microsoft product groups.

Our company mission is “empower people to achieve more”. We have built a team that genuinely enjoys sharing knowledge and advising and guiding clients to learn and succeed. This ethos of being a mentor is deep in our DNA and has been core to our way of working since 2004.

# Scope of Work

## BUSINESS ANALYSIS

### Analysis

- Vision and scenario mapping
- Day-in-the-life observation
- Business case development

### Deployment

- M365 Copilot Biz Chat (free)
- M365 Copilot (paid)
- Agents and integrations

### Verification

- Usage and activity dashboards
- Stakeholder interviews
- ROI modelling

## DATA READINESS

### Data Gravity Assessment

- Discover all data storage repositories
- Review data security policies & controls
- Identify over-sharing of sensitive data

### Data Governance Policies

- Classify data and sensitivity labels
- Update data lifecycle policies
- Refine permissions and DLP controls

### Data Remediation Actions

- Consolidate data in SPO / OneDrive
- Implement Purview DLP controls
- Automate data labelling

## USER EMPOWERMENT

### Develop learning content

- General training materials
- Process business specific prompts
- Library of prompts, tips and tricks

### Empowerment sessions

- 1:1 sessions for paid Copilot user
- Group sessions for free Copilot users
- Empower champions & evangelists

### Learn from the best

- Feedback channel for all users
- Distill and share best practices
- Newsletter / Teams with tips & tricks

## AGENTS & EXTENSIONS

### Define Requirements`

- Identify priorities for agents & extensions
- Segment by complexity e.g. coding
- Build roadmap and project plan

### Develop Agents and APIs

- Set-up Copilot Studio & Power Platform
- Leverage API development tools
- Leverage AI tools e.g. Github Copilot

### Integrate

- Deploy autonomous agents
- Integrate with business applications
- Orchestrate and automate processes

**QUANTIFICATION  
& GOVERNANCE****Collect data**

- Copilot usage and adoption data
- Review data footprint and prompt history
- Qualitative feedback and user requests

**Review and learn**

- Monthly AI governance report with ROI
- Monthly review meeting with exec sponsor
- Strategic guidance from virtual AI Officer

**Iterate and evolve**

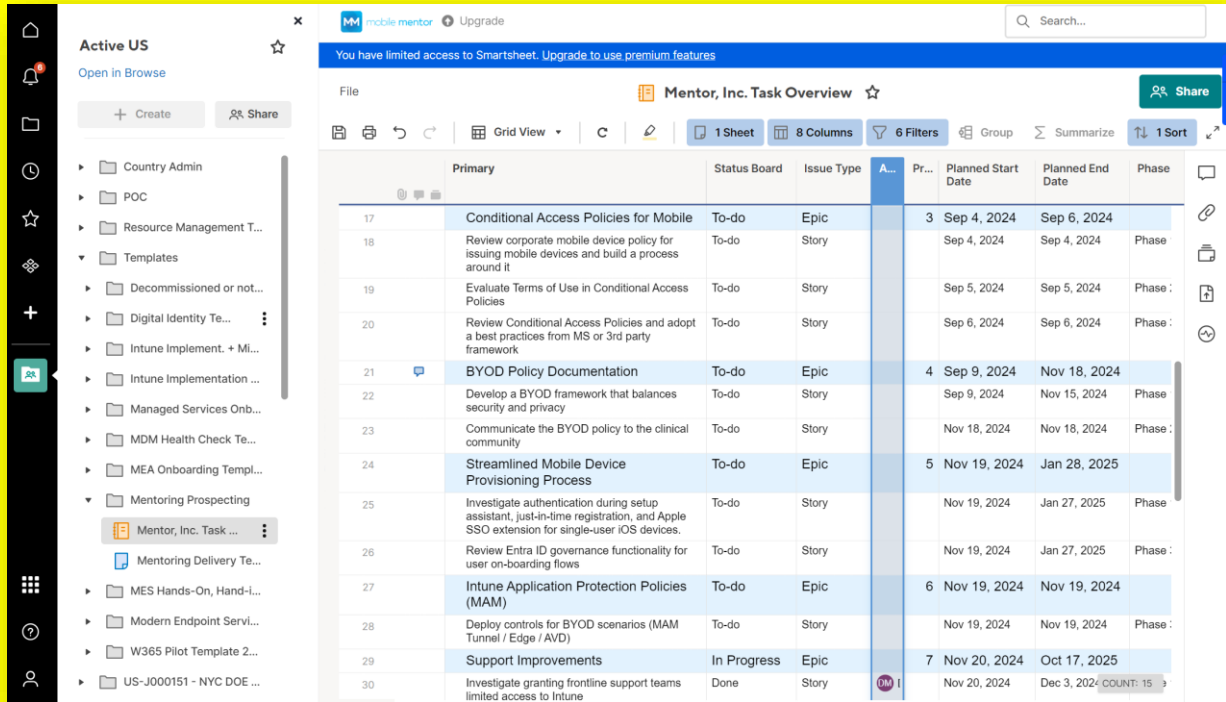
- Update roadmap quarterly
- Review priorities monthly
- Align activities weekly

## Outcomes of the Copilot Mentoring

1. Use-cases identified for M365 Copilot, paid and free versions
2. Policies and controls protect data and prevent over-sharing
3. Users trained and empowered to increase their productivity
4. Autonomous agents deployed for core business applications
5. Leaders have visibility of the ROI and impact on business metrics

# Agile Way of Working

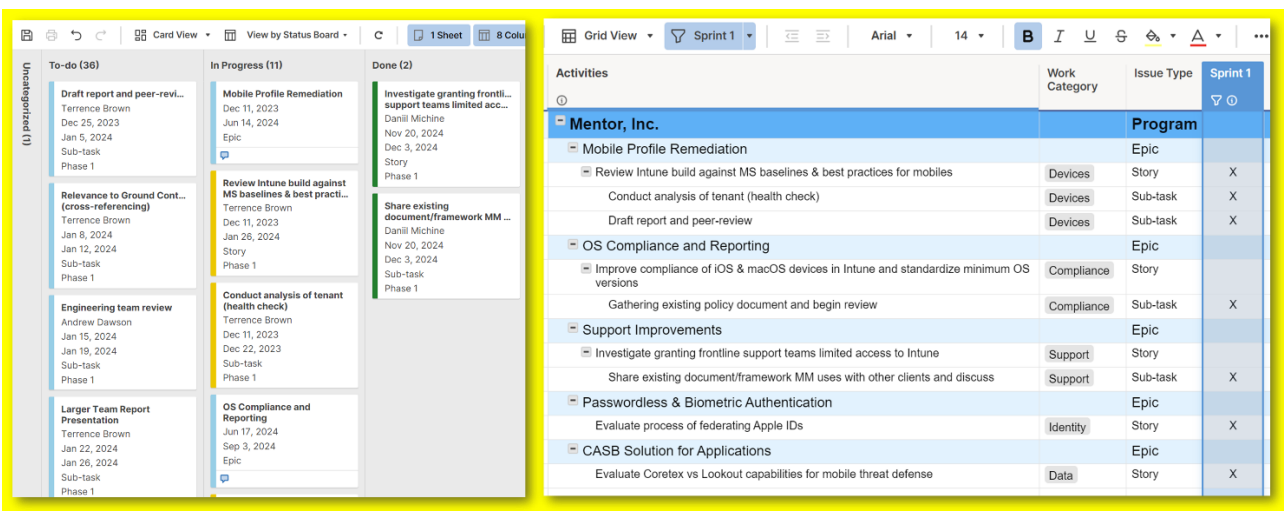
The 3-year roadmap will outline a vision and strategy with priorities for each quarter and tasks for each month. We generally use an agile framework to add value early and often by tackling the highest value items first.



**Mentor, Inc. Task Overview**

Primary	Status Board	Issue Type	Pr...	Planned Start Date	Planned End Date	Phase
17 Conditional Access Policies for Mobile	To-do	Epic	3	Sep 4, 2024	Sep 6, 2024	
18 Review corporate mobile device policy for issuing mobile devices and build a process around it	To-do	Story		Sep 4, 2024	Sep 4, 2024	Phase
19 Evaluate Terms of Use in Conditional Access Policies	To-do	Story		Sep 5, 2024	Sep 5, 2024	Phase
20 Review Conditional Access Policies and adopt a best practices from MS or 3rd party framework	To-do	Story		Sep 6, 2024	Sep 6, 2024	Phase
21 BYOD Policy Documentation	To-do	Epic	4	Sep 9, 2024	Nov 18, 2024	
22 Develop a BYOD framework that balances security and privacy	To-do	Story		Sep 9, 2024	Nov 15, 2024	Phase
23 Communicate the BYOD policy to the clinical community	To-do	Story		Nov 18, 2024	Nov 18, 2024	Phase
24 Streamlined Mobile Device Provisioning Process	To-do	Epic	5	Nov 19, 2024	Jan 28, 2025	
25 Investigate authentication during setup assistant, just-in-time registration, and Apple SSO extension for single-user iOS devices.	To-do	Story		Nov 19, 2024	Jan 27, 2025	Phase
26 Review Entra ID governance functionality for user on-boarding flows	To-do	Story		Nov 19, 2024	Jan 27, 2025	Phase
27 Intune Application Protection Policies (MAM)	To-do	Epic	6	Nov 19, 2024	Nov 19, 2024	
28 Deploy controls for BYOD scenarios (MAM Tunnel / Edge / AVD)	To-do	Story		Nov 19, 2024	Nov 19, 2024	Phase
29 Support Improvements	In Progress	Epic	7	Nov 20, 2024	Oct 17, 2025	
30 Investigate granting frontline support teams limited access to Intune	Done	Story		Nov 20, 2024	Dec 3, 2024	COUNT: 15

Smartsheet is the platform we use to collaborate across our respective teams. This platform helps to define the program of work, sprints, epics, stories, tasks and sub-tasks. We also use Smartsheet to track our progress against the roadmap regularly.



**Activities**

Work Category	Issue Type	Sprint 1
<b>Mentor, Inc.</b>	<b>Program</b>	
<b>Mobile Profile Remediation</b>	<b>Epic</b>	
Review Intune build against MS baselines & best practices for mobiles	Devices	Story
Conduct analysis of tenant (health check)	Devices	Sub-task
Draft report and peer-review	Devices	Sub-task
<b>OS Compliance and Reporting</b>	<b>Epic</b>	
Improve compliance of iOS & macOS devices in Intune and standardize minimum OS versions	Compliance	Story
Gathering existing policy document and begin review	Compliance	Sub-task
<b>Support Improvements</b>	<b>Epic</b>	
Investigate granting frontline support teams limited access to Intune	Support	Story
Share existing document/framework MM uses with other clients and discuss	Support	Sub-task
<b>Passwordless &amp; Biometric Authentication</b>	<b>Epic</b>	
Evaluate process of federating Apple IDs	Identity	Story
<b>CASB Solution for Applications</b>	<b>Epic</b>	
Evaluate Coretek vs Lookout capabilities for mobile threat defense	Data	Story

## Mobile Mentor - Microsoft Partnership Credentials



2021 Partner of the Year Winner  
Modern Endpoint Management Award



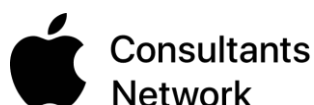
2022 Partner of the Year Finalist  
Education Award



2023 Partner of the Year Finalist  
Modern Endpoint Management Award



## Other Technical Certifications



## More Information

[Founded in 2004](#), operations in the USA, Australia and New Zealand

[Customer Case Studies](#)

[Videos](#), [Podcasts](#), [Blog](#)