



NETSURIT



Microsoft

# Microsoft 365 Copilot Workshop

Pre-engagement kick-off



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# Agenda

- Introduction
- Workshop overview
- Stakeholder availability and schedule
- Customer requirements and tools necessary for conducting the workshop
- Expectations and next steps

# Introduction

The purpose of this meeting is to introduce the team members and their expected responsibilities.

Review and agree on engagement:

- Workshop overview
  - Goals, scope, and deliverables
- Stakeholder availability and schedule
- Customer requirements and tools necessary for conducting the workshop
- Expectations and next steps



# Microsoft 365 Copilot Workshop Goals

Grounded in business data, Microsoft 365 Copilot is designed to help organizations unleash creativity, unlock productivity, and level up skills.

01

## Assess the needs of your employees

Identify the high-value Microsoft 365 Copilot scenarios for your organization across

02

## Accelerate outcomes using Microsoft 365 Copilot

Showcase Microsoft 365 Copilot in real-world scenarios.

03

## Develop a solution plan for enhancing outcomes

Develop a plan to implement recommendations based on prioritized scenarios.



# Netsurit Microsoft 365 Copilot Workshop

Designed as a three-phase engagement, the Netsurit Microsoft 365 Copilot Workshop helps customers assess their needs, prioritize Copilot scenarios, and define an actionable roadmap.



## Customer Audience

Senior BDMs, Managers, End Users, LOB Leaders, and ITDMs

## Partner Participants

Architects, User Experience Leads



### Assess

Define scope, identify business stakeholders, and gather information on key business scenarios. Complete and review readiness assessment and guidance.



### Art of the Possible

Showcase the intelligence added to employee experiences by unleashing creativity, unlocking productivity, and leveling up skills (included in the demos).



### Build the Plan

Develop a plan to implement recommendations based on prioritized scenarios. Define next steps and timeline to develop and implement the solution.

# Outcomes

## Workshop outcomes

- Identify technical requirements for Microsoft 365 Copilot
- Identify participants for the Microsoft 365 Copilot Select Microsoft 365 Copilot scenarios
- Deliver a prioritized, actionable plan to quickly address employee needs by implementing and adopting Microsoft 365 Copilot





## Assess

# Scope

**Goals:** The Assess phase introduces you to the workshop, technical requirements for Microsoft 365 Copilot, the steps to take to become AI ready, and builds the Art of the Possible phase.

**Scope:** Complete the readiness assessment and deliver the assessment review and guidance.

We will achieve this in the following sessions:

- Identify key stakeholders
- Describe and discuss upcoming activities
- Microsoft 365 Copilot Overview
- Research customer challenges and opportunities
- Deliver Microsoft 365 pre-engagement kickoff
- Review assessment and deliver guidance
- Prepare for the Art of the Possible workshop



## Core modules

# Netsurit Microsoft 365 Copilot Workshop agenda

Phase	Session	Description	Outcome	Customer attendees
Assess	Pre-Engagement Kick-Off	This session covers what each upcoming session will entail and sets expectations with the customer for delivery and agreed-upon outcomes.	Expectation setting for the workshop and communicate the objectives.	Microsoft 365 Copilot preview Executive Sponsor, CXO, ITDM
	Readiness Assessment	This assessment verifies that the customer has met the Microsoft 365 Copilot prerequisites.	Complete the M365 Copilot assessment.	NA
	Readiness Assessment Review and Guidance	The readiness assessment calculates the customer's readiness for Microsoft 365 Copilot adoption. It provides context for the customer's score and offers recommendations for addressing technical gaps.	Educate on the technical requirements for Microsoft 365 Copilot and share knowledge on where they can go to access additional guidance. Help your customer understand what it will take to become Microsoft 365 Copilot ready and identify the next steps to fill gaps.	Microsoft 365 Copilot preview Exec Sponsor, CXO, Project Mgr, ITDM



## Art of the Possible

# Scope

**Goal:** Deliver Microsoft 365 Copilot to leverage organizational data to add intelligence to the workforce.

**Scope:** The Art of the Possible for Microsoft 365 Copilot is a combination of presentations and demos that will educate and excite your organization on how to transform the employee experience with artificial intelligence integrated into Microsoft 365.

We will achieve this in the following sessions:

- AI-powered organization
- Responsible AI
- Microsoft 365 Copilot Overview
- Unleash creativity
- Unlock productivity
- Uplevel skills
- Better together with Teams Premium and Copilot in Teams
- Microsoft 365 Copilot personas



## Core modules

# Netsurit Microsoft 365 Copilot Workshop agenda

Phase	Session	Description	Outcome	Customer attendees
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-upon optional sessions will be listed here.	Set the agenda and schedule for the Art of the Possible phase.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	AI-Powered Organization	<p>The objective is to reiterate the trends identified in Microsoft's Work Trend Index Annual Report. Key topics to cover are:</p> <ul style="list-style-type: none"> <li>• The components of an AI-powered organization</li> <li>• Why organizations need to invest in AI-driven solutions to stay competitive</li> <li>• Why workers need to develop new skills to take advantage of the opportunities AI presents</li> </ul>	Deepen your customer's understanding of the most recent work trends surrounding AI.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Responsible AI	<p>This section serves as a guide for how to approach external marketing communications based on terminology, tone, and Microsoft's approach to responsible AI. The goal of this presentation is to cover:</p> <ul style="list-style-type: none"> <li>• Why responsible AI matters and the potential AI has for today and tomorrow</li> <li>• Microsoft's approach to responsible AI</li> <li>• Examples of responsible AI in action along with applicable key learnings</li> </ul>	Deepen your customer's understanding of Microsoft's approach to responsible AI.	Exec Sponsor, LOB leaders, Project Mgr, ITDM

## Core modules

# Netsurit Microsoft 365 Copilot Workshop agenda

Phase	Session	Description	Outcome	Customer attendees
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"><li>• Natural Language</li><li>• The value of accessing business content in the business context</li><li>• Microsoft's comprehensive approach to security</li><li>• How Copilot is embedded across Microsoft 365 apps</li></ul>	Deepen your understanding of the underlying components of Microsoft 365 Copilot. Emphasize that Copilot's output is grounded in business data and context.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Unleash Creativity	<p>The objective is to demonstrate how Microsoft 365 Copilot unleashes creativity. In this section, discuss the following topics:</p> <ul style="list-style-type: none"><li>• Copilot in Word</li><li>• Copilot in PowerPoint</li><li>• Copilot in Excel</li></ul>	Demonstrate how Copilot increases employee creativity, highlighting the practical applications of Copilot in Word, PowerPoint, and Excel.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Unlock Productivity	<p>The objective is to demonstrate how Microsoft 365 Copilot unlocks productivity. In this section, discuss the following topics:</p> <ul style="list-style-type: none"><li>• Copilot in Outlook</li><li>• Copilot in Teams Meetings</li><li>• Copilot in Teams Chat &amp; Loop (optional)</li></ul>	Demonstrate how Copilot increases employee productivity, highlighting the practical applications of Copilot in Outlook, Teams Meetings, Teams Chat & Loop, Power Automate, and Viva Sales.	Exec Sponsor, LOB leaders, Project Mgr, ITDM

## Core modules

# Netsurit Microsoft 365 Copilot Workshop agenda

Phase	Session	Description	Outcome	Customer attendees
Art of the Possible	Uplevel Skills	<p>The objective is to demonstrate how Copilot uplevels skills. In this section, discuss the following topics:</p> <ul style="list-style-type: none"><li>• Copilot in Microsoft 365 Chat</li><li>• Client meeting in Microsoft 365 Chat</li><li>• Strategy in Microsoft 365 Chat</li><li>• Status update in Microsoft 365 Chat</li></ul>	Demonstrate how Copilot can be used to increase employee skills, highlighting the practical applications of Copilot in Microsoft 365 Chat.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Better Together	<p>The objective is to demonstrate the better together story for Copilot in Teams and Teams Premium. In this section, discuss the following topics:</p> <ul style="list-style-type: none"><li>• Advanced AI in Microsoft Teams</li><li>• Deciding when to use Intelligent Recap versus Copilot in Teams</li><li>• Traditional methods for completing tasks versus new approaches using advanced AI in Microsoft Teams</li><li>• Copilot in Teams and Teams Premium better together story</li></ul>	Show new ways to complete tasks. Help to understand which AI product to use in Teams and when to leverage both together.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Microsoft 365 Copilot Personas	<p>The objective is to explore a "Day in the Life" for the following Microsoft 365 Copilot Personas:</p> <ul style="list-style-type: none"><li>• HR Manager, Seller, Marketing Professional, Finance Manager, and IT Lead</li></ul>	Share the practical uses of Microsoft 365 Copilot for key personas. Plant seeds for a future scenario discovery workshop.	Exec Sponsor, LOB leaders, Project Mgr, ITDM



## Build the Plan

# Scope

**Goal:** Build a plan to design and implement Microsoft 365 Copilot experiences for your organization. You will summarize current customer challenges surfaced by Business Decision Makers and map them to personas.

**Scope:** Following the Art of the Possible, we want to define and prioritize top scenarios to focus on and work on developing a solution plan.

We will achieve this in the following sessions:

- Identify scenarios based on the customer's business decisions pain points.
- Discover personas and map them to the customer's business challenges.
- Provide a summary of prioritized scenarios.
- Deliver an overall plan to pilot Microsoft 365 Copilot, next steps, and identified risks.



## Core modules

# Netsurit Microsoft 365 Copilot Workshop agenda

Phase	Session	Description	Outcome	Customer attendees
Build the Plan	Build the Plan Kick-Off	This session covers what each upcoming session will entail and sets expectations with the customer for delivery and agreed-upon outcomes.	Begin the Build the Plan phase of the workshop.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Scenario Analysis and Prioritization	Deep dive into the discovery of use cases, BDM pain points, and scenarios.	Identify one or more scenarios based on your customer's pain points.	Exec Sponsor, LOB leaders, Project Mgr, ITDM
	Report and Recommendations	Deliver the overall plan for a Microsoft 365 Copilot implementation. Identify the required next steps such as setting up trial licenses and acquiring necessary production licenses.	Document results from the workshop.	All project teams

# Customer responsibilities

## Access to teams during the workshop

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

## Assign a stakeholder to support the engagement

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



# Next steps

**Agree to proceed with the sessions**

**Set a date for the workshop activities**

Plan the sessions and coordinate with attendees.

Confirm participation from key stakeholders to complete the workshop as planned.





THANK YOU



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one together