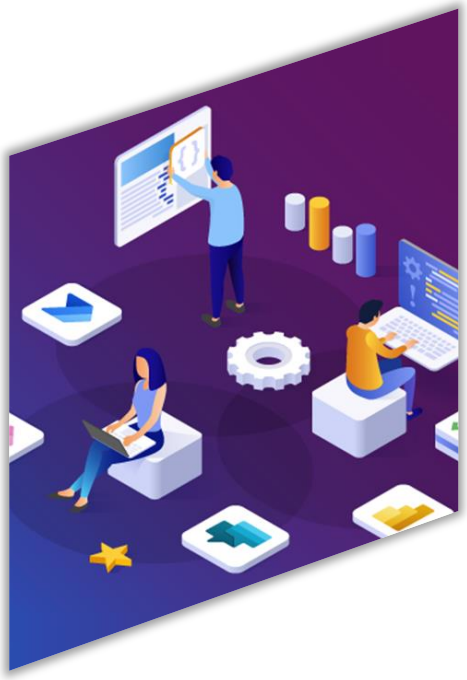
Netwoven

Microsoft Solutions Partner

Copilot for Microsoft 365



Copilot Evaluation Accelerator Overview

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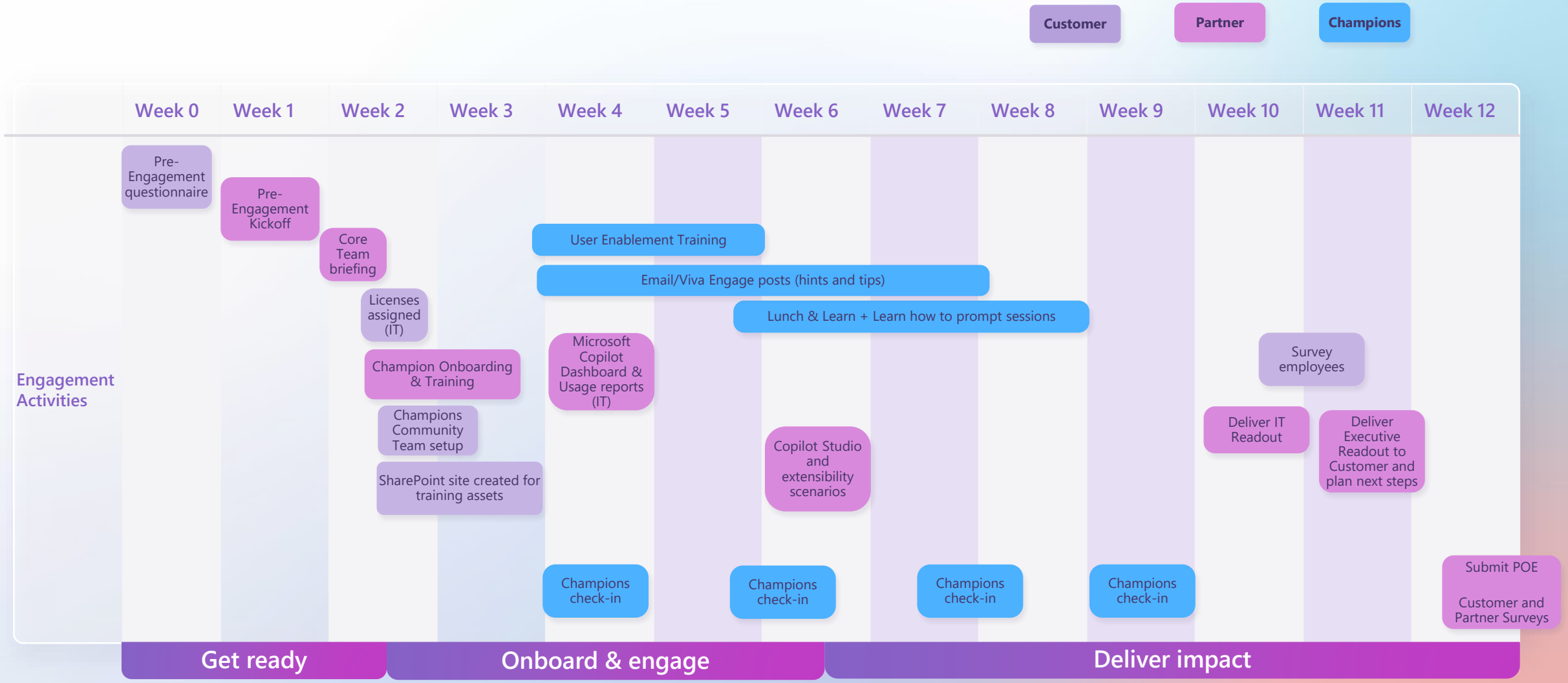
Copilot Evaluation Accelerator Timeline

Example



Copilot Evaluation Accelerator

Guidance and content to rapidly demonstrate value with a customer's first set of users

Objectives:

- Engage and train Champions on the top value Copilot for Microsoft 365 scenarios.
- With the help of Champions, activate a set of user cohorts with fundamental and functional scenarios.
- Continue rapid adoption through training sessions & Lunch & Learns
- Create next-stage business opportunities for Copilot for Microsoft 365 scenarios for the rest of your customer's organization.

Outcomes:

- Showcase business value of AI.
- Activate Champions community.
- Achieve high user adoption of the Copilot for Microsoft 365 scenarios.
- Build an AI transformation roadmap.

Get ready	Onboard & engage	Deliver impact	Extend & optimize
			Explore Scenario Library high-value scenarios. Drive cross-organizational Copilot scenarios adoption. Deliver business process transformation with Copilot Studio, plugins, and connectors.

Prescriptive set of activities to deliver value in 90 days

Copilot Evaluation Accelerator

A *guided evaluation experience* to rapidly assist customers with deploying and realizing value from an initial purchase of Copilot for Microsoft 365 licenses so they will be ready to expand their Copilot for Microsoft 365 footprint to a significant portion of their organization.

Get ready
(1 week)

Define scope, identify business stakeholders, Champions, user cohorts; Determine success criteria:

- ❑ Review Customer pre-engagement questionnaire.
- ❑ Conduct pre-engagement kickoff to identify Champions, departments, and users.
- ❑ Establish success metrics.

Onboard & engage
(2 to 4 weeks)

Facilitate onboarding of Champions and users with training assets and communications templates:

- ❑ Core team kickoff
- ❑ Assign licenses to user cohorts.
- ❑ Deliver training to Champions.
- ❑ Provide Microsoft Copilot Dashboard overview
- ❑ Deliver Champion-led training to users (**at least three departments to activate**).

Deliver impact
(2 to 4 weeks)

Implement activities to drive success, review learnings and document next steps to fully adopt Copilot for Microsoft 365:

- ❑ Deliver Champion-led Lunch & Learn.
- ❑ Customize with Microsoft Copilot Studio
- ❑ Learn how to prompt training.
- ❑ Collect and analyze feedback.
- ❑ Create business case.
- ❑ Prepare and deliver IT & executive readouts.

Detailed Activities Plan

Get ready

Get ready | Onboard & engage | Deliver impact

Activity	Get Ready – Week 1							Onboard & Engage
	(t-7)	(t-6)	(t-5)	(t-4)	(t-3)	(t-2)	(t-1)	Kickoff (t)
Pre-Engagement Questionnaire completed	◆							
Pre-Engagement Kickoff meeting	◆							
Send the Champions Program calendar invite		◆						
Create a Microsoft Team for the Champions Community for Copilot for Microsoft 365			◆					
Confirm Champions nomination					◆		◆	
Send a Core Team Kickoff calendar invite						◆		
Send a Champions Onboarding and Training session calendar invite							◆	
Core Team Kickoff meeting								◆

Detailed Activities Plan

Onboard & engage

Get Ready | **Onboard & engage** | Deliver impact

Activity	Onboard & Engage				Deliver Impact
	Week 2	Week 3	Week 4	Week 5	Week 6
Core Team Kickoff meeting	◆				
Email/Viva Engage Announcement to participating users	◆				
Email/Viva Engage from Department Leads invitation to participating users for training	◆				
Email/Viva Engage Copilot for Microsoft 365 is now available			◆		
Assign licenses to Champions	◆				
Deliver Champions Training	◆	◆			
Assign licenses to participating users		◆			
Deliver Microsoft Copilot Dashboard and usage reporting overview			◆		
Champions with partner support deliver user training to participating departments			◆	◆	
Email/Viva Engage – 5 easy ways to use Copilot			◆		
Email/Viva Engage – Copilot in Teams				◆	
Community Lead and Champions connection				◆	
Setup SharePoint page for training content				◆	
Schedule first Lunch & Learn sessions				◆	

Detailed Activities Plan

Deliver impact

Get ready | Onboard & engage | **Deliver impact**

Activity	Deliver Impact						Extend & Optimize
	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12+
Continue to schedule Lunch & Learn sessions	◆						
Email/Viva Engage Microsoft Copilot	◆						
Email/Viva Engage Copilot in Outlook		◆					
Email/Viva Engage Copilot in Word		◆					
Email/Viva Engage Copilot in PowerPoint			◆				
Lunch & Learn plus Learn how to prompt sessions	◆	◆	◆	◆			
Viva Engage – Success stories / Tips & Tricks	◆	◆	◆	◆			
Schedule IT and Executive Readouts		◆					
Prepare and send the survey to participating users			◆				
Prepare Business Case Builder in collaboration with customer				◆			
Deliver Customizing with Microsoft Copilot Studio session or Build your Own Copilot (optional)		◆					
Community Lead and Champions connection		◆	◆	◆			
Prepare Report and Recommendations for the Executive Readout presentation				◆			
IT Leads Readout			◆				
Core Team and Executive Readout meeting				◆			
Executive “thank you” message and summary of next steps					◆		
Submit Report and Recommendations (POE) for payment						◆	

Report and Recommendations

Preparation
60 minutes

Delivery
60 minutes

Summary
The Report and Recommendations encompasses the results of the engagement. The goal of this session is to present findings from the engagement to the Core team and outline next steps.

Content
Deliver Impact

Customer resources
Core Team:
- Executive Sponsor
- Department Leads (stakeholders)
- Communications Lead
- Training Lead
- IT Lead
- Community Manager
- HR Lead

Partner resources
- Microsoft 365 Consultant

Objectives
The Report and Recommendations must be completed at the end of the engagement and presented to the Core Team, including the Executive Sponsors.

Preparation
Prior to delivering the Report and Recommendations, the facilitator leading the meeting will need to:

- Complete the required customer and partner participants slide.
- Engagement Results:
  - Departments enabled with Copilot for Microsoft 365 scenarios and number of enabled users. Must enable at **least three (3) departments**.
  - Summary of quick wins during the engagement.
- A screenshot of Copilot for Microsoft 365 value summary slide from the Business Case Builder output report (***Copilot for Microsoft 365 ROI analysis/business case)***.
- Completed AI transformation roadmap slide:
  - Identify next set of steps to continue the adoption of Copilot for Microsoft 365, owner, completion date and any associated risks.

Deliverables
- The Report and Recommendations is completed and presented to the customer.