



Copilot for  
Microsoft 365



# Copilot Value Discovery

Overview



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# Copilot Value Discovery

The Copilot Value Discovery 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 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 Copilot vision and value by driving “Art of the Possible” style conversations and demos. Discuss AI reinvention and value of Microsoft Copilot, touching on the importance of data security and adoption and change management.

### Assess ( 1 day)



Assess customer’s needs and AI readiness by driving technical and business/organizational readiness assessments. Facilitate C-level interviews, data analysis and workshoping to identify high-value functional scenarios across priority departments.

### Design (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 Value Discovery Overview

ACTIVITIES



## Inspire (2-4 hours)

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

OUTCOMES

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



## Assess (1 day)

- Optimization readiness assessment review
- High value scenario analysis and prioritization for AI transformation

- Assess customer's business and technical needs; Complete workshops to identify priority scenarios
- Summary of the customer's current state and challenges based on workshop
- Envision and prioritize high value scenarios across your customer's organization, specific to their business unit groups / departments
- Early view of next steps needed for implementation roadmap to successfully deploy and adopt Microsoft Copilot



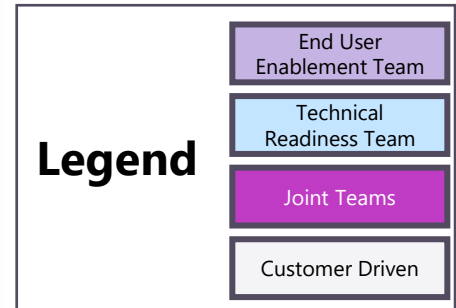
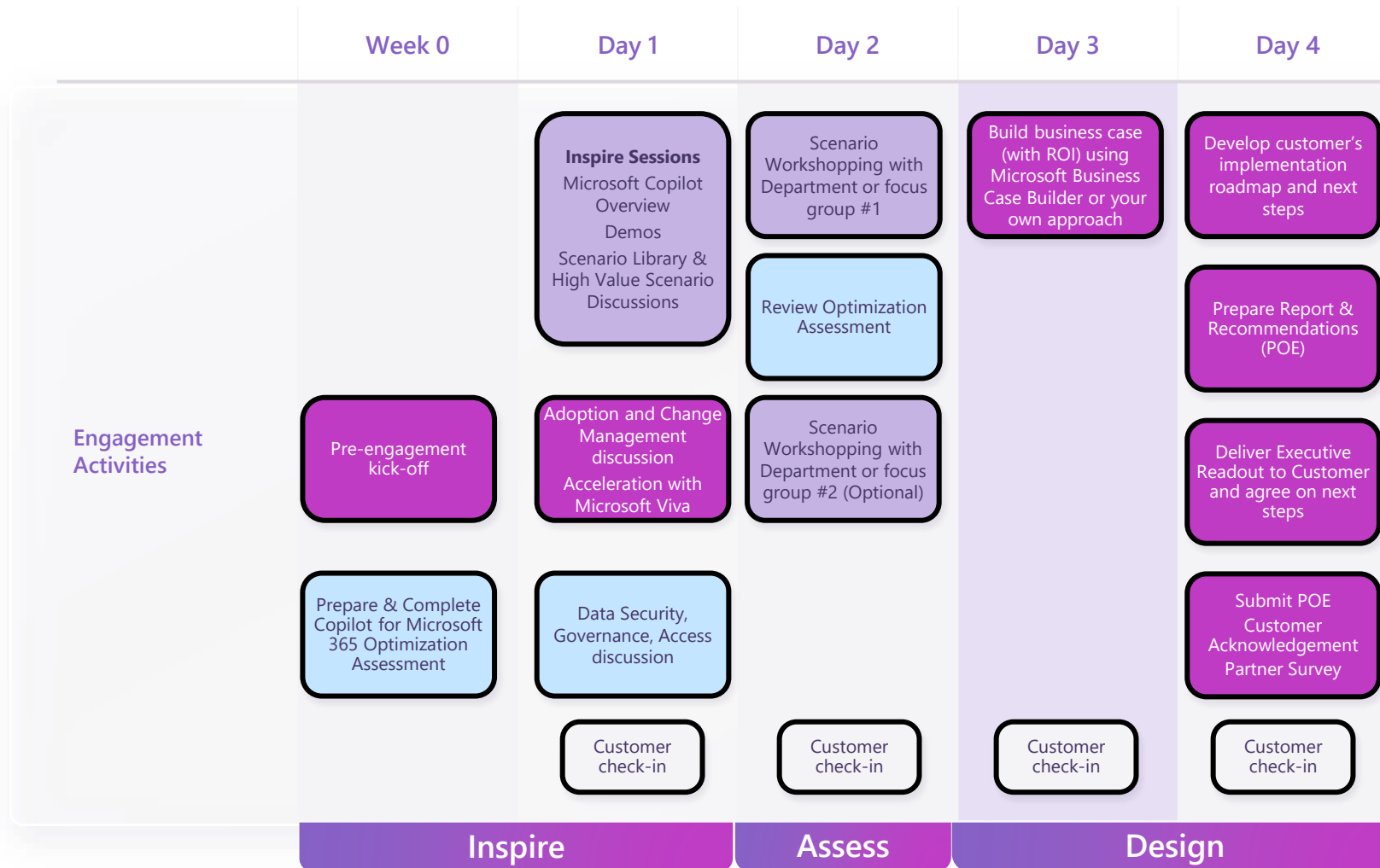
## Design (2 days)

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

- The business case (ROI) and high-level implementation roadmap for AI transformation defined, incorporating Viva acceleration if applicable
- Next steps for customer/partner/Microsoft to move forward and implement Copilot for Microsoft 365

# Copilot Value Discovery Example Timeline

Example



# Report and Recommendations

## Preparation

120 minutes

## Delivery

120 minutes

## Summary

The Report and Recommendations encompasses the results of the engagement. This is an executive summary to present the final engagement findings and expected next steps.

## Content

### Copilot Value Discovery Report and Recommendations

#### Customer resources

- Sr. BDMs
- ITDMs
- Change Management / Corporate Comms

#### Partner resources

- Microsoft 365 Architect
- Microsoft 365 Consultants
- Change Management or Advisory resources

## Objectives

The Copilot Value Discovery Report and Recommendations presentation is the primary deliverable that records the results from the engagement. This report is the executive summary for the final engagement readout with the customer/

## Preparation

1. Complete list of customer stakeholders / decision makers who you workshopped with or interviewed throughout the engagement.
2. Build a view of the customer's prioritized high-value scenarios across departments identified during the engagement.
3. Create the customer's business case summary slide or Business Case Builder output for Copilot for Microsoft 365
4. Construct the customer's AI transformation roadmap including a list of agreed upon next steps, owners, expected completion dates and risks

## Outcomes

- The Report and Recommendations deck has been shared with the customer, showcasing the business case and implementation plan developed based on their priority scenarios
- Recommendations are provided to the customer on next steps for continued engagement, piloting, deployment, or ongoing change management for Copilot for Microsoft 365 and/or Microsoft Viva leveraging your advisory service offerings.
- Agreement and alignment is made on recommendations and next steps