Copilot Flight Plan: Boarding

Board your flight to maximize your adoption of Copilot for Microsoft 365 and tackle Adoption and Change Management!

The Challenge
The integration of AI with Copilot for Microsoft 365 offers enhanced productivity and insights but presents challenges in adoption, security, and compliance, potentially hindering its benefits due to increased risks.

The main issues are around how to:
- Maximizing the business value of Copilot for Microsoft 365
- Handling increased data compliance and security risks
- Setting boundaries and policies for usage
- Steering innovation and integrations with copilot
- Monitoring data access and exfiltration

The Solution
Spyglass's Copilot for Microsoft 365 Adoption and Change Management (Boarding) is focused on achieving three things: defining use cases for deployment, training, and change Management.
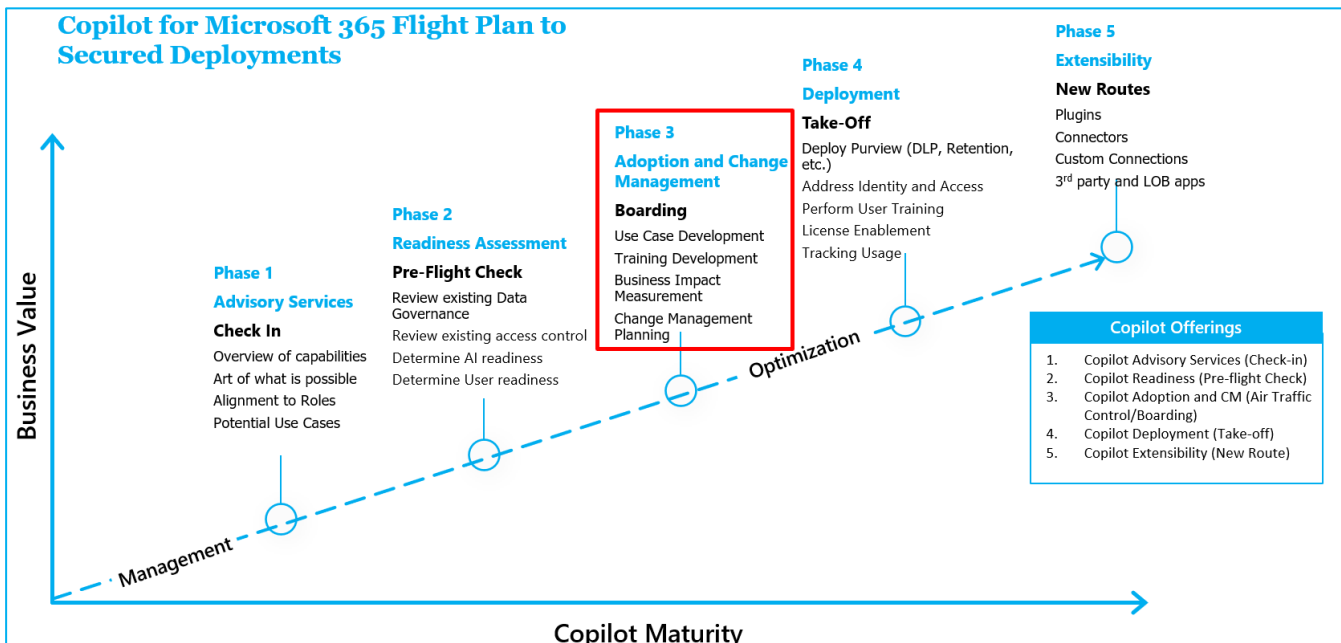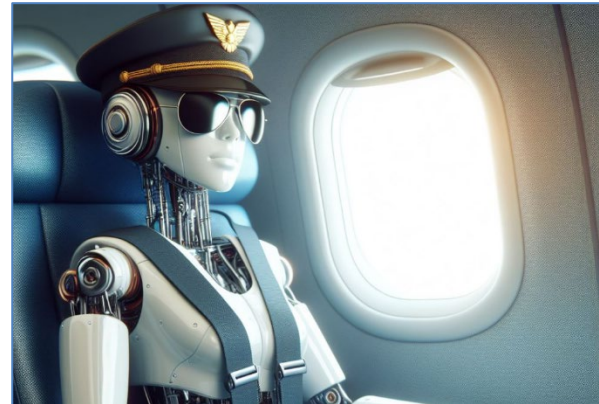- Use Case Creation - Identify personas and their associated use cases.
- Training - Develop training to cover users, administrators, and support staff.
- Change Management
  - Decide how to best determine business impact and returns on investments
  - Look at tracking and reporting
  - Develop roadmaps for deployment

Deliverables
- Roadmaps
- Use Cases
- Training Plans
- User Communication

Timeline
- 5 Days

Copilot for Microsoft 365 Flight Plan to Secured Deployments

Phase 1
Advisory Services
Check In
Overview of capabilities
Art of what is possible
Alignment to Roles
Potential Use Cases

Phase 2
Readiness Assessment
Pre-Flight Check
Review existing Data Governance
Review existing access control
Determine AI readiness
Determine User readiness

Phase 3
Adoption and Change Management
Boarding
Use Case Development
Training Development
Business Impact Measurement
Change Management Planning

Phase 4
Deployment
Take-Off
Deploy Purview (DLP, Retention, etc.)
Address Identity and Access
Perform User Training
License Enablement
Tracking Usage

Phase 5
Extensibility
New Routes
Plugins
Connectors
Custom Connections
3rd party and LOB apps

Copilot Offerings
1. Copilot Advisory Services (Check-in)
2. Copilot Readiness (Pre-flight Check)
3. Copilot Adoption and CM (Air Traffic Control/Boarding)
4. Copilot Deployment (Take-off)
5. Copilot Extensibility (New Route)

Business Value

Management

Optimization

Copilot Maturity

Spyglass MTG Copilot Flight Plan

Copilot for Microsoft 365 is a whole new way to work thanks to the integration of AI into our normal business tasks that allow us to be more productive and bring forth new insights from the documents we interact with. These new capabilities also bring challenges to adoption, security, and compliance within our environments.

Spyglass's Copilot for Microsoft 365 Flight Plan provides a systematic way to tackle introducing AI capabilities into an environment at any point in the AI journey including:

- Check-In – The initial step to determine how Copilot for Microsoft 365 can benefit users and processes that includes:
    - Overview of Copilot for Microsoft 365 capabilities
    - Whiteboarding of what is possible
    - How it could align with existing roles
    - Discussing potential use cases and personas
- Pre-Flight Check – Now that capabilities align with potential use cases and personas, it is time to start looking at how ready the environment is by looking at:
    - Existing Identity and Data Governance requirements and capabilities
    - Readiness for AI
    - Readiness for users to adopt
- Boarding – This stage of the journey is taking all of the validation from phase 1 and 2 and putting it into action by:
    - Creating Use Cases
    - Developing Training
    - Understanding Business Impacts
    - Planning for Support
    - Defining Controls
- Take-off – At this point, Copilot if ready to lift off and be consumed by users and controls put in place:
    - Data Governance using Purview
    - Identity controls using Entra ID
    - Delivering User and Admin training
    - Tracking and reporting on Copilot for Microsoft 365
    - Enablement of Users
- New Routes – helps to establish customize experiences for users and processes while leveraging the power of AI focused on productivity. This can leverage plugins, connectors, and even tie in with existing Line of Business applications. This is the phase of the Flight Plan that really personalizes the experience for user groups and business units.

Spyglass MTG Can Help!

We can help you maximize your adoption of Copilot for Microsoft 365. Contact us today!

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