

# Engagement Overview

Velrada's **Microsoft 365 Copilot Proof of Value** engagement is designed to help your organization unlock the business benefits of AI by seamlessly integrating Copilot into your workflows. Through a structured approach, we will guide your team in exploring Copilot's capabilities while aligning to the key business objectives.

During this engagement, you'll see how Copilot streamlines processes, enhances efficiency, and improves outcomes. We'll empower key users to become AI champions, aligning AI with your needs and developing tailored use cases for measurable impact.

We'll also help you create a scalable AI adoption strategy, ensuring long-term success. With Velrada's support, your organization will achieve immediate improvements and build a strong foundation for AI-driven innovation.

## The key objective for this project are:

- ✓ Identify and train Champions on impactful Microsoft 365 Copilot use cases.
- ✓ Support Champions in guiding user groups through key Copilot scenarios.
- ✓ Promote adoption through interactive training and Lunch & Learn sessions.
- ✓ Provide ongoing support and resources for Champions.
- ✓ Gather feedback to refine and enhance Copilot usage.
- ✓ Explore opportunities to scale Copilot adoption across the organization.



### Get Ready

Begin your Copilot journey by identifying key scenarios, creating a user enablement strategy, and empowering early adopters and champions. Set success metrics to track progress and ensure a structured path for successful adoption.



### Onboard & engage

Assess technical, security, and privacy concerns while training champions and early adopters. Establish a Centre of Excellence to ensure Copilot's success and facilitate a seamless onboarding experience for your teams.



### Deliver impact

Empower users through champion-led training sessions, gather feedback and success stories, validate the business case, and create reports with recommendations for the next steps.

# Copilot Proof of Value Framework



## Stage 1. Get Ready (1 week)

### Preparing the project for **Success and mobilization**.

Ensures users are ready to adopt Microsoft 365 Copilot by reviewing prerequisites and setting expectations for the engagement. It formally kicks off the project with the core team, provides an overview of activities, confirms Champion roles, and assigns Microsoft 365 Copilot to champions and pilot users.

- Pre-Engagement Questionnaire
- Pre-Engagement Kick-off
- Core Team Kickoff
- License assignment



## Stage 2. Onboard & Engage (4 weeks)

### Inspire, engage and **continue rapid adoption**.

Ensures a successful adoption of M365 Copilot across the organization by establishing a Center of Excellence, providing champion training, and supporting them in leading end-user sessions like lunch-and-learns. Champions will be empowered to drive adoption, with continuous engagement through regular feedback sessions and usage report tracking to monitor progress.

- Establish a M365 Copilot Center of Excellence
- Champions Onboarding and Training
- End User Enablement Training
- Sent out hints & tips emails/post to engage with end users
- End user follows up training
- Microsoft Copilot Dashboard and Usage Reports Overview
- Regular Champions Check-in sessions




## Stage 3. Deliver Impact (3 weeks)

### Decide what **needs to be done next to succeed**.


Explore Copilot agents and identify tailored scenarios that align with business-specific needs. Executives will be provided with an immersive experience to engage with Copilot, enable them to realise the potential of adopting Copilot to drive efficiency and innovation. The phase concludes with a close-out report summarizing findings and providing strategic recommendations for the continued adoption and optimization of Copilot across the organization.

- Extend Microsoft 365 with Copilot agents
- Executive immersion experience session
- Sent out employee survey
- Report and recommendations presentation
- Business case builder – input user feedback into the business case

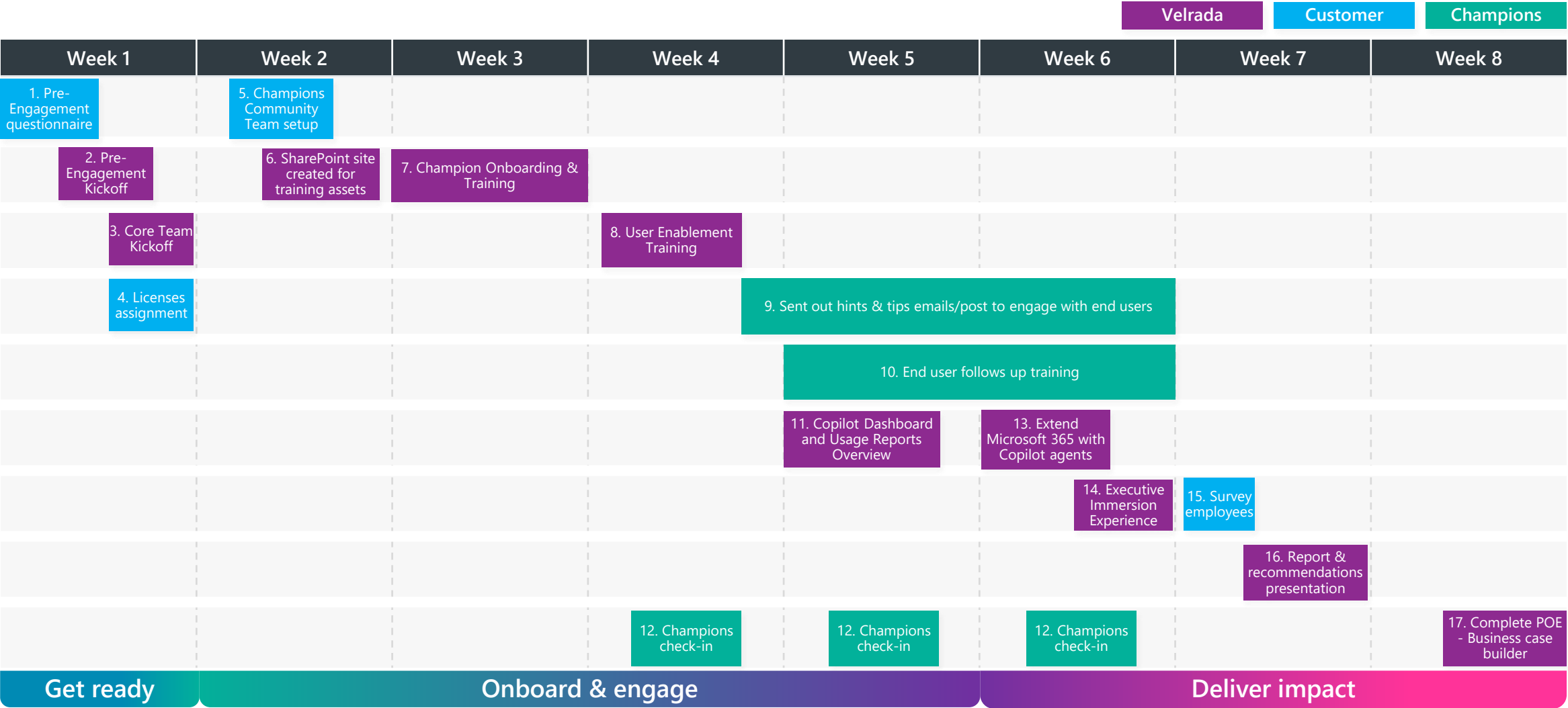
# Example of Engagement Activities

 Get Read Activities	Owner
<b>Pre-Engagement Questionnaire</b> Checklist of prerequisites for adopting Microsoft 365 Copilot.	Customer
<b>Pre-Engagement Kick-off</b> Defines engagement scope, delivery expectations, and outcomes.	Velrada
<b>Core Team Kickoff Meeting</b> Project kickoff with core team, activity overview, and role alignment.	Velrada
<b>License assignment</b> Assign Microsoft 365 Copilots to champions and pilot users	Customer

 Onboard & Engage Activities	Owner
<b>Champion Community Team Set up</b> Create a Teams channel for the M365 Copilot Champion community.	Customer
<b>SharePoint site creation for training assets</b> Creating a SharePoint-based M365 Copilot Center of Excellence guided by Velrada consultants	Customer
<b>Champions Onboarding and Training</b> Welcomes Champions, defines their role, explores Copilot scenarios, and introduces M365 Copilot capabilities.	Velrada
<b>End User Enablement Training</b> Velrada will lead end-user training with Champions, covering core M365 Copilot scenarios, best practice in prompting, and apply top 10 functional skills.	Velrada
<b>Sent out hints &amp; tips to engage with end users</b> Continue engage with users by sending out follow up emails/post after the training	Champions
<b>End user follows up training</b> Champion led short sessions aim to help end users and reinforce best practices	Champions
<b>M365 Copilot Dashboard &amp; Usage Reports Overview</b> Review the Microsoft 365 Admin Center Usage report for Copilot and the Microsoft Copilot Dashboard.	Velrada
<b>Champions Check-in</b> Recurring meetings offer champions a forum to share feedback, discuss challenges, and gain insights to effectively implement M365 Copilot within their teams.	Champions

 Onboard & Engage Activities	Owner
<b>Extend Microsoft 365 with Copilot agents</b> Present the value of Copilot Studio and identify scenario specific to your business need.	Velrada
<b>Executive immersion experience session</b> Ensure executives experience Microsoft 365 Copilot firsthand and understand its personal and organizational benefits. Discuss the vision and role of AI in the organization.	Velrada
<b>Sent out employee survey</b> The survey collects end user feedback to measure the ROI of M365 Copilot within your organisation	Customer
<b>Report and recommendations presentation</b> Deliver the close out session with Core project team; Identify the next steps for the AI transformation roadmap.	Velrada
<b>Business case builder – input user feedback into the business case</b> Input user feedback into the business case builder, complete and submit POE	Velrada

# Example of Timeline For Engagement



# Engagement Summary



## Engagement Length

This engagement is delivered across 8 weeks.

- Stage 1: Get Ready – 1 week
- Stage 2: Onboard & Engage – 4 weeks
- Stage 3: Deliver Impact – 3 weeks



## Pre-Requisites

- Copilot licenses ready for assignment
- Identify at least three (3) functions/business units for this engagement
- Prepared for participating in workshops and utilizing Copilot
- Ability to provide input into AI and Copilot scenarios



## Session Delivery

Engagement can be delivered either:

- In person (your office or Velrada's)
- Remotely using Microsoft Teams



## Client Participants

The engagement is collaborative & benefits from your input by:

- Executive Project Sponsor
- Change Lead / Program Manager
- Training Lead\*
- Communication Lead\*
- Community Manager\*
- HR Lead
- Department Leads
- IT Lead
- Microsoft 365 Architect (to assign licenses and gain insights into the usage reports)

*\*In some organizations, all three roles are performed by one person.*