



ENGAGEMENT OVERVIEW

Copilot Vision & Value

Introduction

Working with Velrada to perform this **Copilot Vision & Value** engagement will facilitate business value conversations surrounding AI and how relevant Microsoft AI products & services can help to deliver value across different functions.

Whilst laying AI foundations within your organisation, value-driven conversations and implementation blueprints help to reenforce the business case for technologies such as Copilot.

A series of Microsoft-endorsed assessments to optimise your AI transformation with Copilot can be performed to help develop a roadmap of next steps and plot current-state maturity.

By identifying high-value use cases for Microsoft AI and Copilot products, key motivators such as increased revenue potential, reduced costs, improved customer experiences and employee well being can be captured.

Velrada is a preferred partner for your Microsoft AI & Copilot journey with our deep knowledge across the entire Microsoft platform. We are also an active participant in the Microsoft Copilot Jumpstart program.

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- 1) Introduction to our Microsoft AI Capability
- 2) Overview of Copilot Vision & Value
- 3) Engagement Overview

Microsoft Solutions Partner



Business Applications
Data & AI
Digital & App Innovation
Modern Work

Advanced Specialization – Low Code Application Development
Advanced Specialization – Intelligent Automation

Microsoft Partner



2024 Partner of the Year Finalist
Microsoft Dynamics 365 Services

2023 Partner of the Year Finalist
Microsoft Mixed Reality
& Microsoft Dynamics 365 Services

2023 Microsoft ANZ Business
Applications & Industry
Winner

2022 Partner of the Year Finalist
Microsoft Dynamics 365 Customer
Service & Field Service Partner of the
Year Award





Our Microsoft AI Capability

Velrada's Microsoft AI Practice

AI-Powered Transformation: Reimagining Experiences with Copilot

Core Capabilities

- Experience with value & outcome focused solutions using Copilot & AI products across entire Microsoft stack.
- Building an AI innovation capability for clients to scale solutions

Core Outcomes

Enabling responsible AI innovation, fostering a future of ethical and intelligent AI solutions.

Key Projects

- Internal & external facing agents for key business processes to allow for Q&A over structured & unstructured data.
- Leveraging Gen-AI to provide additional automation and process efficiency.
- Healthcare, education, & asset intensive industries

Solutions

- Internal & external facing agents for key business processes to allow for Q&A over structured & unstructured data.
- Leveraging Gen-AI to provide additional automation and process efficiency.
- Enabling adoption of Copilot products within M365, D365 and Power Platform.

Platform Experience

- Microsoft 365 Copilot
 - Azure AI Solutions
- AI capabilities within Dynamics 365
- Role-Based Copilots (Sales, Service, Finance)
 - Fueling AI with Microsoft Fabric





Included Activities & Deliverables

Copilot Vision & Value

Copilot Vision & Value Overview



Step 1. Inspire



Step 2. Assess



Step 3. Design

Run a tailored **Benefits Realisation Workshop**.

ACTIVITIES

- AI & Copilot Business Value Overview workshop and Art of Possible Demonstration
- Copilot Implementation Best Practices and consideration

OUTCOMES

- Showcase Microsoft 365 Copilot capabilities
- Understand security, governance and data access best practices
- Understand Copilot user enablement best practices to accelerate adoption

Run the Copilot **Pre-Flight Checklist** to prepare.

- Assess the Copilot technical prerequisites
- Copilot Optimisation Assessment
- Use-Case Identification and scenarios for different roles.

- Evaluate current Microsoft 365 environment against Copilot prerequisites and best practices
- Identify and prioritise high-value functional scenarios for Copilot across priority departments
- Early view of next steps needed for implementation roadmap

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

- High-level implementation roadmap
- Present findings, executive summary, and recommendations.

- High-level roadmap for Copilot and AI enablement
- Provide inputs to support business case
- Recommend pilot programs
- Outline pilot timelines and identify potential beneficiaries
- Plan the next steps for a successful Microsoft 365 Copilot implementation

Copilot Art of the Possible

INSPIRE

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DEMONSTRATIONS OF MICROSOFT COPILOT FOR CORE BUSINESS FUNCTIONS

Microsoft 365 Copilot



Copilot Studio



Sales Copilot



Service Copilot



Finance Copilot



Addressing Responsible AI

INSPIRE

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COPILOT IMPLEMENTATION BEST PRACTICES AND CONSIDERATION

Activities

- Deliver Microsoft 365 Copilot value prop + business value overview presentation
- Deliver immersive experiences and demos
- Showcase product capabilities for Microsoft 365 Copilot and other Copilot variants
- Discuss Adoption Best Practices for Microsoft 365 Copilot
- Explore Ethical AI Considerations

Deliverables

- Prepare an output from the workshops.
- Document Recommended Opportunities and Integrate into Roadmap



Through presentations, real-world scenarios, and live demonstrations, we will showcase the 'Art of the Possible' – demonstrating how AI can boost business performance by improving employee and organisational productivity.

Introduce Key Microsoft Copilot Guides

COPILOT BEST PRACTICES & SUCCESS KIT

INSPIRE

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Activities

- Velrada will facilitate a guided walkthrough the Microsoft 365 Copilot Technical Readiness Guide & Success Kit.
- Address technical questions related to Microsoft 365 Copilot activating the capability, licensing, security, governance and data access.
- Discuss key components of the roadmap deliverable.

Deliverables

- Access to the Microsoft 365 Copilot Technical Readiness Guide & Success Kit.
- Identify of key pre-requisites and challenges for enabling Microsoft 365 Copilot within the roadmap.
- Sharing of relevant training resources and links to support team understanding and adoption of the platform.



Copilot Optimisation Assessment

ASSESS

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Activities

- Velrada will provide a list of required information to prepare for the technical assessment.
- We will assess your Microsoft 365 environment's readiness for Copilot enablement.
- Identify recommended prerequisites and nice-to-have configurations for Copilot enablement.

Deliverables

- A list of technical prerequisites that must be addressed before enabling Copilot
- Key recommendations for measures to be implemented before broader roll out of Copilot including data classification, sensitivity labeling, data loss prevention, privacy, retention and security.
- Guidance on completing prerequisites and policies within the Microsoft 365 Admin Center, SharePoint, and Purview to support enablement.



Microsoft Copilot for Microsoft 365 Optimization Assessment Results

Thank you for taking the time to complete the Copilot for Microsoft 365 Optimization Assessment. You've taken an important step to understand how far along your organization is in adopting AI. This report highlights the foundational elements you already have to help your organization prepare for its digital transformation journey and take full advantage of Copilot for Microsoft 365.

The answers you provided in the Copilot Optimization Assessment give us your Optimization Scores, which reflects your organization's potential ability to take advantage of Copilot for Microsoft 365 to help increase employee productivity and security posture.

Blockers Identified **0**

This score reflects any primary blockers to overcome to get ready for Copilot for Microsoft 365 and the new era of AI.

Microsoft 365 Copilot-ready users **83%**
250 of 300

Customer Baseline

Organizational Profile Readiness **94%**
15/16

Productivity Tool Readiness **100%**
20/20

Copilot for Microsoft 365 Deployment Path
Core

Your organizational readiness score relates to your ability to drive adoption of Copilot for Microsoft 365 through effective organizational

Productivity and collaboration are the backbone of Copilot for Microsoft 365. A major benefit of AI is the opportunity to automate certain tasks and improve

The Copilot deployment path is part of the overall technical readiness guidance developed to help customers get started with their

Identify Opportunities for AI

ASSESS

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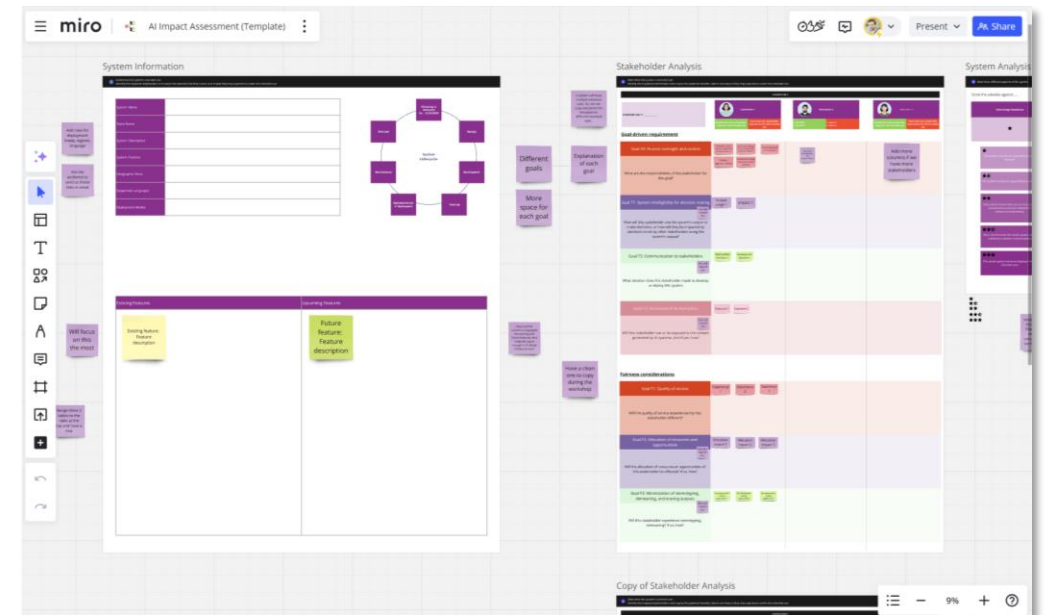
DISCOVER VIABLE USE CASES FOR BUSINESS PROCESSES & FUNCTIONS

Activities

- A collaborative workshop with key representatives of business units allowing them to volunteer problems and challenges that could be transformed with AI.
- Use a series of Miro templates to capture in an engaging manner either face-to-face or via a Teams call.
- Evaluation of these problems, challenges, and opportunities to suggest some AI (and non-AI) solutions.
- Capture potential value (tangible & non-tangible) of each opportunity captured.

Deliverables

- Prepare an output from the workshops.
- Document the AI Opportunities and the associated Microsoft AI products & services best suited to deliver them.
- Recommend opportunities for proofs of concept.



Develop AI Business Case

CAPTURE VALUE OF YOUR AI OPPORTUNITIES

DESIGN

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Activities

- Perform a Business Value & ROI calculator for Microsoft 365 Copilot & Role-Based Copilots(if applicable).
- Identify advantages to business process improvements, information access, information analysis, and meetings. List these in the net benefits and incorporate into calculation.
- Provide input to support high-level business cases for AI solutions elicited in the opportunities exercise. Calculate value of opportunities.

Deliverables

- Outputs from business value calculators.
- AI Opportunity Backlog with summary of net benefits.

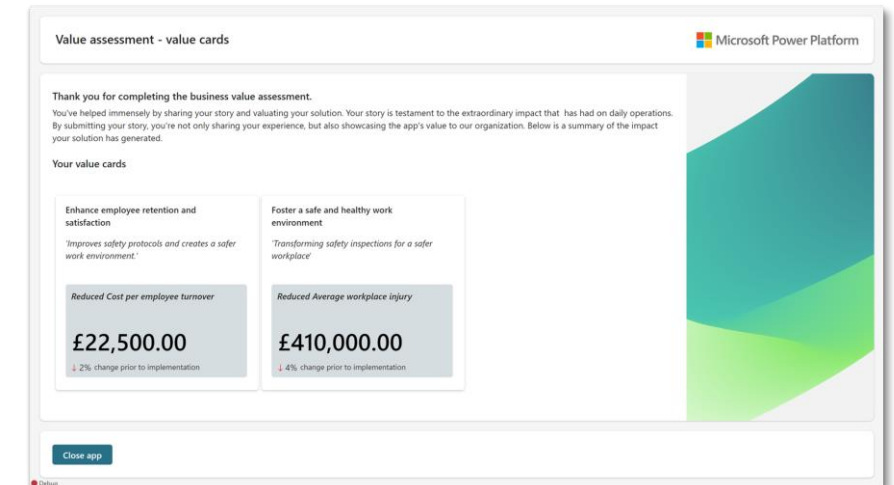
Product		Deployment Schedule			Assumed Value	
		Year 1	Year 2	Year 3	Year 1	Year 2
Teamwork						
Microsoft 365 Copilot		\$0	\$0	\$0	A\$ 44,880	2,245 / A\$ 2,245

Microsoft 365 Copilot Benefits		
Business Process Improvements		A\$ 195,000
Info Access & Analysis		A\$ 99,000
Meetings		A\$ 87,000
Microsoft 365 Copilot Costs		
Microsoft 365 Copilot cost		A\$ 236,000

This calculation has been automatically saved to your dashboard

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Although great care has been taken to ensure the accuracy and completeness of results derived from this tool, this tool should be used for informational purposes only and may not reflect actual savings. Microsoft makes no warranties, express, implied or statutory, as to the information generated by the tool or any organization's achievement of the potential benefits estimated by using Microsoft solutions or products. Use, disclosure, or reproduction of this tool is prohibited without the prior written permission of Microsoft Corporation. The costs and benefits are calculated based on values from the Forrester "TE" studies of Microsoft 365 E3, Office 365 E3 & E3, and Windows 10.



Prepare a Copilot Roadmap

PREPARE FOR AI TRANSFORMATION JOURNEY

DESIGN

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Activities

- Velrada will prepare the final findings and roadmap deliverable.
- Present to the organisation and discuss before engagement closure.
- Discuss next steps to work with Velrada for PoCs & implementations.

Deliverables

- Recommendations for implementing Microsoft AI products, including Microsoft 365 Copilot and other Copilot variants including Role-Based Copilots (Sales, Service, Finance), and Copilot Studio (if applicable).
- An action list of technical prerequisites and recommendations to prepare the organization for Copilot.
- An action list for enabling Copilot for selected users within the organization and scaling it further.
- High-level estimates for implementing discovered AI Opportunities, including recommendations for a PoC/to assess feasibility and value.





Engagement Overview

Engagement Overview

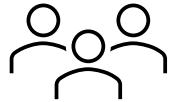
COPILOT VISION & VALUE



Engagement Length

Velrada can perform this engagement across 1 week.

- Intro to AI Fundamentals & Responsible AI
- Assessment & Guide
- Copilot Demonstrations Workshop
- AI Opportunity Discovery Workshop
- Roadmap Presentation
- Preparation of final deliverable



Client Participants

The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership.
- M365 custodians
- Proponents of AI within organisation (pilot group for Microsoft 365 Copilot)



Session Delivery

Engagement can be delivered either:

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



Pre-Requisites

- Client must be prepared for participating workshops to perform discovery & planning.
- Ability to provide input into M365 configuration

Time & Cost Investment

RESOURCE PRICING

Velrada Resource	Total
Delivery Manager	\$ 2,000
Microsoft Copilot Consultant	\$ 9,000
Total Services Cost	\$ 11,000
Less Microsoft MCI Funding	\$ TBC
Total Investment	\$ TBC

Additional details:

- Pricing is provided in **\$AUD** and excludes any federal or state taxes.
- Velrada can provide this in both fixed-price and time & materials terms.
- Rates are applicable to this engagement only.
- Any additional scope, activities, deliverables, workshops, or delays beyond the agreed statement of work may incur additional costs.
- Microsoft MCI funding can be available to cover the cost of the engagement
- Client must perform consent & survey activity to release MCI funding to Velrada otherwise we reserve the right to charge the full amounts to the Client.


PROPOSED TIMELINE


Component	M	T	W	T	F
Project Kick-off					
AI Fundamentals & Responsible AI workshop					
Assessment & Guide workshop					
Copilot demonstrations					
AI Opportunity discovery workshop					
Prepare deliverable					
Present deliverable					

Built for tomorrow

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