

Copilot for M365 Expeditionary Package



1 Copilot for M365 Expedition Essentials

Stage 1: What is Copilot?

- Engage in a half-day Workshop delivered by Virteva's Copilot AI experts
- Understand the attributes and qualities of Microsoft Copilot and Copilot for Microsoft 365
- Experience demos of the core capabilities of Copilot for M365
- Learn how Copilot works and interacts with your company data
- Discuss high-level prerequisites to protect your organization in the age of generative AI

3 Beginning the Ascent

Stage 3 – A well-executed pilot and user training

- Expand Copilot persona analysis to match your organizational structure
- Conduct a skills assessment to close potential knowledge gaps
- Reassess data governance and acceptance of security risks ahead of pilot
- Copilot training through best practices to ensure user success
- Creation of your own Copilot Center of Excellence
- Set up and operationalize the Copilot Dashboard

2 Copilot for M365 Base Camp Preparations

Stage 2: Readiness Assessment & Planning

- Our Copilot Readiness Assessment thoroughly reviews your environment to ensure it is ready prior to AI exposure
- Receive detailed and informed guidance on opportunities for improvement
- Prepare for Copilot with a focus on risk around data security, permissions, and governance
- Discuss Persona development and common uses cases of the tool across business units
- Guidance on building your own internal Copilot Center of Excellence

4 Summitting the Peak

Stage 4 – Full-scale departmental deployments

- Review business case for expanded rollout
- Create effective change management and communications for a successful transition
- In-person or virtual hands-on user training
- Operationalization of the Copilot Center of Excellence
- Initial end user survey processes to intake user experience feedback in the first weeks
- Work with your team to review user stories and feedback to develop future communications