



Copilot for Microsoft 365 Adoption Accelerator

Pre-Engagement Kick-off

Feb 2024

© Copyright Microsoft Corporation. All rights reserved.

Agenda

- Introduction
- Engagement overview
- Stakeholder availability and schedule
- Customer requirements and tools necessary for conducting the engagement
- Expectations and next steps

Introduction

The purpose of this meeting is to:

Introduce the team members and their expected responsibilities

Review and agree on engagement:

Engagement overview

- Goals, scope, and deliverables

Stakeholder availability and schedule

Customer requirements and tools necessary for conducting the engagement

Expectations and next steps



Copilot for Microsoft 365 Adoption Accelerator Engagement goals

Copilot for Microsoft 365 Adoption Accelerator Engagement is designed to help organizations adopt Copilot for Microsoft 365

01 Address Copilot for Microsoft 365 optimization opportunities

Deliver scope agreed upon by Partner and Customer to prepare for copilot and to deploy copilot

02 Establish adoption strategy for employees

Develop engagement plan and training plans that meet the needs of your customers

03 Accelerate adoption of Copilot for Microsoft 365 using Rapid Learning

Create a Center of Excellence and leverage Copilot Labs in rapid learning sessions to become familiar with prompting and Copilot for Microsoft 365

04 Monitoring and Reporting of Adoption

Develop and implement plan for monitoring and reporting the successful adoption of Copilot for Microsoft 365



Copilot Implementation

The Adoption Accelerator Engagement is designed to help ensure successful adoption of Copilot for Microsoft 365.

The high-value scenarios will be the focus for the Adoption Accelerator Engagement. Include **Adoption Managers, Business Decision Makers, End-User Support, Champions, and relevant customer and partner resources to support the Prepare and Deploy** in the Copilot Implementation. Responsibility should be handed off for sustained success.



Assess and Plan

- Perform optimization assessment
- Address Security, Governance, and Data Access questions
- Showcase Copilot for Microsoft 365 capabilities
- Discover high-value scenarios and personas
- Build Copilot implementation and optimization plan



Prepare and Deploy

- Address optimization assessment opportunities:
- Manage overprivileged and risky users
 - Mitigate device risk
 - Prevent over-exposure of data
 - Discover and control the use of AI apps
 - Deploy Microsoft 365 Apps and/or configure channel
- Configure Copilot and assign licenses with Setup Guide



Drive Adoption

- Build a Copilot Center of Excellence
- Build the adoption plan:
- Plan the awareness strategy
 - Build the learning plan
 - Establish success measures and reporting
- Execute the plan to drive adoption

Copilot for Microsoft 365
Workshop

You
are
here

Copilot for Microsoft 365
Adoption Accelerator

Copilot Implementation

The Adoption Accelerator Engagement is designed to help ensure successful adoption of Copilot for Microsoft 365.

The high-value scenarios will be the focus for the Adoption Accelerator Engagement. Include **Adoption Managers, Business Decision Makers, End-User Support, Champions, and relevant customer and partner resources to support the Prepare and Deploy** in the Copilot Implementation. Responsibility should be handed off for sustained success.



Assess and Plan

- Perform optimization assessment
- Address Security, Governance, and Data Access questions
- Showcase Copilot for Microsoft 365 capabilities
- Discover high value scenarios and personas
- Build Copilot implementation & optimization plan

Copilot Workshop



Prepare and Deploy

- Address optimization assessment opportunities:
- Manage overprivileged and risky users
 - Mitigate device risk
 - Prevent over-exposure of data
 - Discover and control the use of AI apps
 - Deploy Microsoft 365 Apps and/or configure channel
- Configure Copilot and assign licenses with Setup Guide



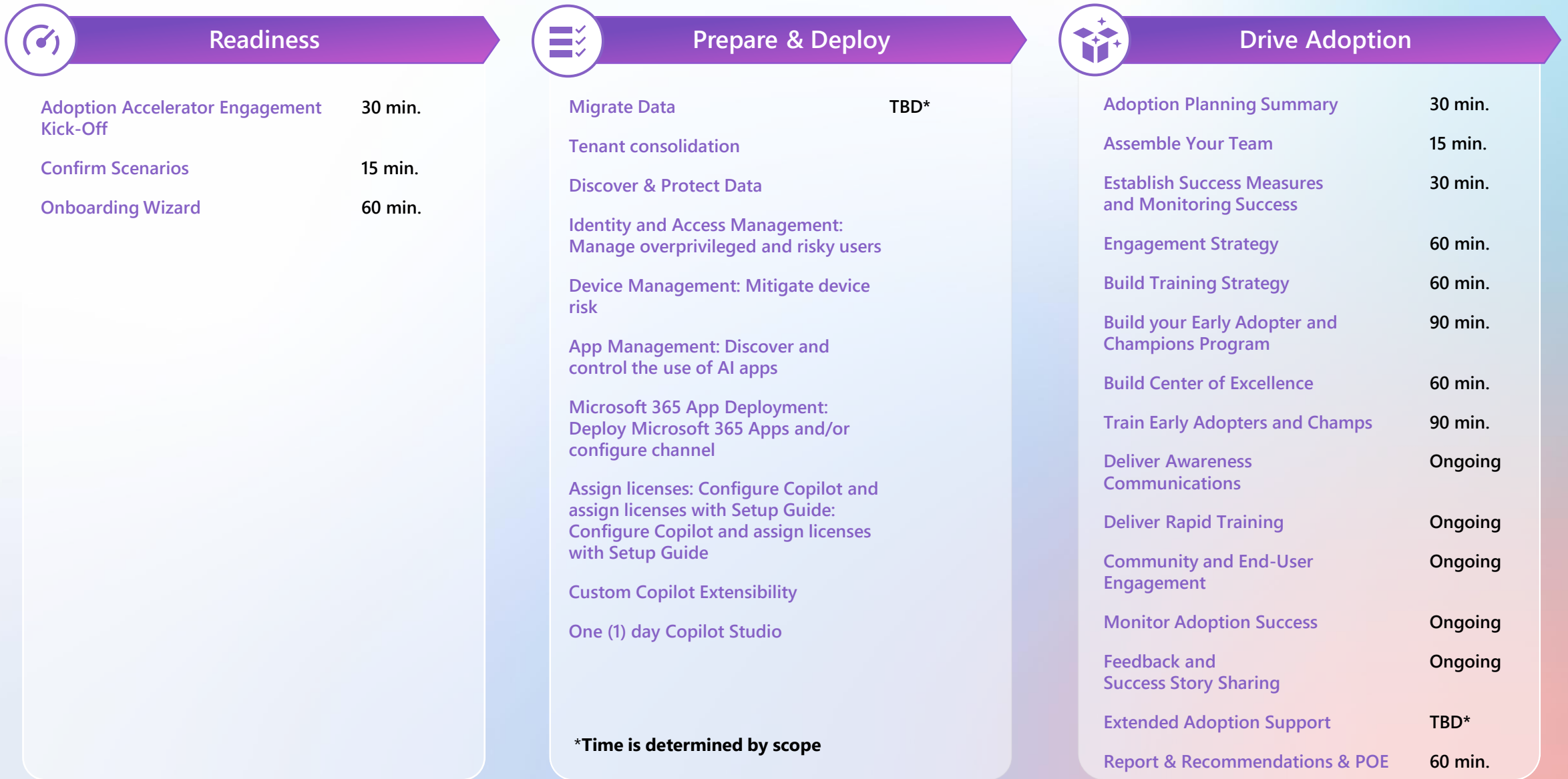
Drive Adoption

- Build a Copilot Center of Excellence
- Build the adoption plan:
- Plan the awareness strategy
 - Build the learning plan
 - Establish success measures and reporting
- Execute the plan to drive adoption

You
are
here

Adoption Accelerator

Copilot for Microsoft 365 Adoption Accelerator



Readiness

Adoption Accelerator Engagement Kick-Off	30 min.
Confirm Scenarios	15 min.
Onboarding Wizard	60 min.

Prepare & Deploy

Migrate Data	TBD*
Tenant consolidation	
Discover & Protect Data	
Identity and Access Management: Manage overprivileged and risky users	
Device Management: Mitigate device risk	
App Management: Discover and control the use of AI apps	
Microsoft 365 App Deployment: Deploy Microsoft 365 Apps and/or configure channel	
Assign licenses: Configure Copilot and assign licenses with Setup Guide	
Custom Copilot Extensibility	
One (1) day Copilot Studio	

***Time is determined by scope**

Drive Adoption

Adoption Planning Summary	30 min.
Assemble Your Team	15 min.
Establish Success Measures and Monitoring Success	30 min.
Engagement Strategy	60 min.
Build Training Strategy	60 min.
Build your Early Adopter and Champions Program	90 min.
Build Center of Excellence	60 min.
Train Early Adopters and Champs	90 min.
Deliver Awareness Communications	Ongoing
Deliver Rapid Training	Ongoing
Community and End-User Engagement	Ongoing
Monitor Adoption Success	Ongoing
Feedback and Success Story Sharing	Ongoing
Extended Adoption Support	TBD*
Report & Recommendations & POE	60 min.

Outcomes

Engagement outcomes may include:

Construction of the adoption plan

Execution of the adoption plan

Creation of a Center of Excellence

Trackable adoption success

Addressed Copilot optimization opportunities





Readiness

Scope

Goals: Provide the adoption planning summary of the overall adoption for Copilot for Microsoft 365 and discuss key components

Scope: Identify key stakeholders for participation and complete the adoption planning summary

We will achieve this in the following sessions:

- Copilot for Microsoft 365 adoption kick-off
- Confirm scenarios
- Onboarding wizard walk-through



Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Readiness	Pre-Engagement Kick-Off	This session covers what each upcoming session will entail and sets expectations with the customer for delivery and agreed-upon outcomes.	Set expectations for the engagement and clearly communicate the objectives.	<ul style="list-style-type: none"> Change Management Lead Copilot for Microsoft 365 Champions Executive Sponsor 	30 minutes
	Confirm Scenarios	Review and confirm the top scenarios from the Copilot for Microsoft 365 Engagement. This will help you set focus for the engagement and introduce them to the people who missed the engagement. Suggestion is to complete during the Copilot Adoption Kickoff call.	Confirmation of the prioritized scenarios for the focus of this engagement	<ul style="list-style-type: none"> Change Management Lead Copilot for Microsoft 365 Champions Executive Sponsor, Line of Business Leads represented by scenarios 	30 minutes
	Onboarding Wizard	Walk-thru the onboarding wizard to show readiness step, how to assign copilot licenses, and send email announcements to users	Assigned licenses to end users	<ul style="list-style-type: none"> Admin 	60 minutes



Prepare and Deploy

Scope

Goals: Execution of the opportunities identified in the Copilot implementation plan for the customer

Scope: Execution of the scope that is defined and agreed upon by the partner and the customer that addresses at least one line item in the customer's Copilot implementation plan.

Acceptable scope includes:

- | | |
|------------------------------------|-------------------------------------|
| Migration of data | Microsoft 365 App deployment |
| Tenant consolidation | Extended adoption support |
| Discovering and protection of data | Custom Copilot plug-ins |
| Identity & access management | One (1) day Copilot Studio Workshop |
| Device management | |
| Microsoft 365 App management | |



Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Prepare and Deploy	Migration of Data	This session is to perform migration of data from on-premises to Microsoft 365, another cloud to Microsoft 365, and tenant to tenant.	Migration of data into Microsoft 365.	Microsoft 365 Admin Data owner for source and target	TBD
	Tenant consolidation	Consolidate tenant data from source to target.	Necessary data and or identity is migrated from source tenant to the target.	Microsoft 365 Admin source and target	TBD
	Discovering and protect data	Discover customer data (what is sensitive, where it resides, who has access, how used, what is risk) determine risk tolerance, and implement controls (ie data lifecycle, data protection, data access, labeling, classification) to mitigate and reduce risk.	Data is discovered, risk tolerance defined, and necessary controls are implemented to mitigate and reduce the risk.	Information security and compliance SME Microsoft 365 Admin	TBD
	Identity & Access management	This session is to setup single sign-on with a single identity for logging in to Copilot for Microsoft 365, conditional access, and real-time access policies.	Set up single sign-on, multifactor authentication, end-user password reset, conditional access policies, near real-time access policy enforcement, controlled access over cloud apps, and just-enough and just-in-time approval for admin roles to manage Copilot app access in Microsoft 365.	Identity and Access management SME Microsoft 365 Admin Microsoft Entra Admin	TBD

Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Prepare and Deploy	Device management	Mitigate device risk by planning and deploying mobile device management and compliance policies.	Setup and deployment of mobile device management complete, apps update management for Microsoft 365 apps configured, and device compliance policies created.	Mobile device management Admin Microsoft 365 Admin	TBD
	Microsoft 365 App management	Discover and control the use of AI apps by planning and setting up mobile application management and app protection polices for Microsoft 365 apps.	Mobile application management setup for the Microsoft 365 apps to protect apps and company data on unmanaged devices that will be used to access Microsoft 365 for using Copilot. App protection policies configured to restrict the use of Microsoft 365 apps and Teams, as well as Copilot in these apps, on unmanaged (personal) devices or apps Setup of app protection policies to prevent saving files, including those generated by Copilot, to unprotected apps or untrusted locations.	Mobile application management Admin Microsoft 365 Admin	TBD
	Microsoft 365 App deployment	Deploy Microsoft 365 Apps and/or configure channel.	Microsoft 365 Apps deployed to end users and channel configured to current.	App manager Microsoft 365 Admin	TBD

Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Prepare and Deploy	Assign licenses	Configure Copilot and assign licenses with setup Guide or preferred tool.	Copilot licenses deployed to the end user.	Business Decision Maker (determine user lists) Microsoft 365 Admin	TBD
	Copilot extensibility	Raise adoption of Copilot for Microsoft 365 by extending copilot into Line of Business apps.	Design and development of a custom Copilot plugin for Line of Business (LOB) Apps. or Delivered a one-day Copilot Studio Workshop to design and deploy custom Copilot plugins that integrate into Line of Business Apps.	Change Management Lead BDM for LOB Copilot Champions End users	TBD



Drive Adoption: Build the plan

Scope

Goals: Develop a comprehensive adoption plan focused on the high value scenarios

Scope: The plan for adoption of Copilot for Microsoft 365

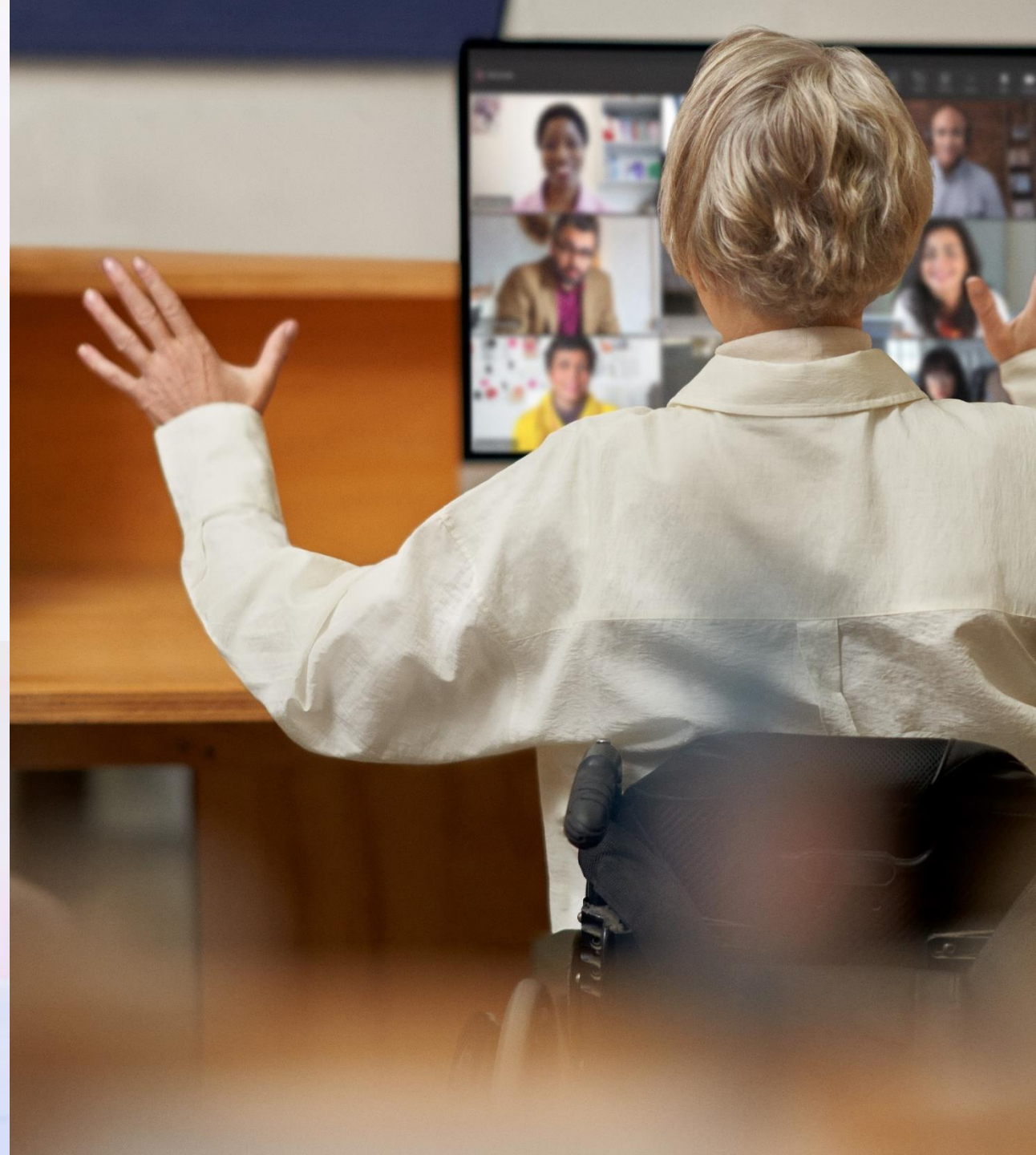
We will achieve this in the following sessions:

Provide summary of adoption planning

Establish success measures and monitoring success

Engagement strategy

Training strategy



Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Build the Plan	Adoption plan summary	Provide a summary of the adoption plan and discuss why the adoption of Copilot for Microsoft 365 is different.	Shared understanding of the Copilot for Microsoft 365 Adoption.	<ul style="list-style-type: none"> Project Lead Project Manager Change Management Leaders Champions 	15 minutes
	Establish success measures and monitoring	Determine success measures by completing the following activities: <ul style="list-style-type: none"> Define your goal clearly and specifically Identify the criteria for measuring your success Choose the methods and tools for collecting and analyzing data Set a baseline and targets for your success measures Document your approach to reporting success 	Defined scorecard and reporting cadence.	<ul style="list-style-type: none"> Project Lead Project Manager Change Management Leaders Champions 	30 minutes
	Engagement strategy	A comprehensive communication strategy is a plan that outlines the goals, objectives, audience, messages, channels, and methods of communicating effectively with your stakeholders. A communication strategy can help you achieve your desired outcomes, such as increasing awareness, engagement, or loyalty, by delivering clear and consistent messages that resonate with your audience.	Comprehensive awareness and communication plan.	<ul style="list-style-type: none"> Project Lead Project Manager Change Management Leaders Champions 	60 minutes

Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Drive Adoption: Build the Plan	Build early adopter and champions program	Plan for a cross-functional group that can provide enablement, share best practices, monitor program metrics, and continually optimize the Copilot rollout. Early adopter and champions program developed with guidance from the Build Champion Program Guide .	Comprehensive plan for deployment of the Center of Excellence.	<ul style="list-style-type: none"> Project Lead Project Manager Change Management Leaders Champions 	60 minutes
	Build training strategy	Build a comprehensive training strategy for the early adopters, champions, end users, and executives.	Comprehensive training strategy defined.	<ul style="list-style-type: none"> Project Lead Project Manager Change Management Leaders Champions 	60 minutes



Drive Adoption: Execute the plan

Scope

Goals: Execution of the adoption plan

Scope: Execution of the plan developed in the previous phase:
Build the Plan

You will drive adoption by:

Building the center of excellence

Training the Copilot flight crew

(Training the Copilot champs)

Delivering end user and exec communications

Delivering rapid learning

Community and end-user engagement

Monitoring adoption success

Obtaining feedback and success story sharing

Completion and delivery of engagement report and recommendations



Optional modules

Copilot for Microsoft 365 Adoption Accelerator Engagement agenda

Phase	Session	Description	Outcome	Customer attendees	Time
Drive Adoption: Execute the Plan	Execute Adoption Plan	The objective is to execute the adoption plan by delivering awareness communications, engaging with the community and end-users, monitoring adoption success, and sharing feedback and success stories.	Drive rapid adoption by executing a comprehensive adoption plan.	N/A	Ongoing
	Build the Center of Excellence	The objective is to Build the Center of Excellence.	Center of Excellence is created in Microsoft Teams.	N/A	60 minutes
	Train Early Adopters and Champs	Demonstrate and practice using Copilot for Microsoft 365 in a rapid learning session with early adopters and champions by practicing Copilot for Microsoft 365 in Copilot Labs.	Early adopters and champions will get hands on experience of using Copilot for Microsoft 365.	Early Adopters, Champions	90 minutes
	Deliver Rapid Training	Demonstrate and practice using Copilot for Microsoft 365 in a group based rapid learning session that is co-lead by champions and partner SME.	End users will get hands on experience of using Copilot for Microsoft 365.	Champions and End Users	90 minutes
	Extended Adoption support	Provide extended adoption support for opilot for Microsoft 365.	Delivered additional training to end users, such as additional scenario discovery, extended adoption plan timeline, rapid training sessions, and the creation of computer-based training for Copilot.	Change Management Lead BDM End uses	TBD

Customer responsibilities

Access to teams during the engagement

Participation from change management leads, stakeholders, BDMs, Executives, Enterprise Architects, IT Leads, and knowledge workers is required for different sessions.

Assign a stakeholder to support the engagement

A stakeholder/sponsor is required to oversee and own the engagement process from the customer side.



Next steps

Agree to proceed with the sessions

Set a date for the engagement activities

Plan the sessions and coordinate with attendees.

Confirm participation from key stakeholders to complete the engagement as planned.



Thank you.

