

Microsoft 365: Copilot Enablement



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Executive Summary

STATS/HIGHLIGHTS

Engagement

\$60K-75K

Workstreams

3

Timeline

2-3 Months

**Pending Customer Availability*



CORE OBJECTIVES

Discovery

Gather requirements, plan for AI integration, identify goals and outcomes through discovery sessions with stakeholders, and activate Bing Chat Enterprise.

Assessment/Implementation

Conduct a comprehensive analysis of data usage and health status within Microsoft 365, and prepare organization data and people for the use of AI

Pilot

Evaluate AI priority personas, rollout Copilot to test groups, establish early adoption framework and education, and understand gaps from initial experience.

Deployment

Implement production persona scenarios for AI, deploy Copilot to the organization, and provide a clear path forward, and solidify tool adoption.



Summary

Microsoft Copilot is a powerful tool that requires strong governance. The quality and success of its experience is directly impacted by a well-reviewed Microsoft 365 environment and a strong understanding of relationship of people and data. We are committed to helping customers secure their Microsoft ecosystem, preventing unintended access to sensitive content. SHI aims to maximize value with a quick return on investment.



DELIVERABLES



AI Readiness Report

Pre-filled documentation as the result of workshops and configuration, and recommendations.



Training and Adoption Resources

Custom Tailored AI Curriculum based off planning sessions paired with one pager guides for identified persona roles.

Phase I – Discovery

OBJECTIVES GOALS

- Understand culture and people
- Establish goals and targets
- Administer role-based assessments to end users
- Discuss primary data sources and tools
- Plan for potential use cases
- Document key problems and barriers
- Review Guidelines for human-AI interaction
- Enable and configure Bing Chat Enterprise

Objective

Phase I lays the groundwork for AI integration. It includes understanding the organizational culture and people, setting clear goals, identifying data sources and tools, planning potential use cases, documenting challenges, and reviewing guidelines for ethical human-AI interaction. Additionally, it involves enabling and configuring Bing Chat Enterprise, providing recommendations for data quality and monitoring, defining security measures and roles, and establishing an AI data governance plan of action.

PHASE ARTIFACTS



Session Planning Documentation

Session outcomes and findings will be documented within a comprehensive engagement report.



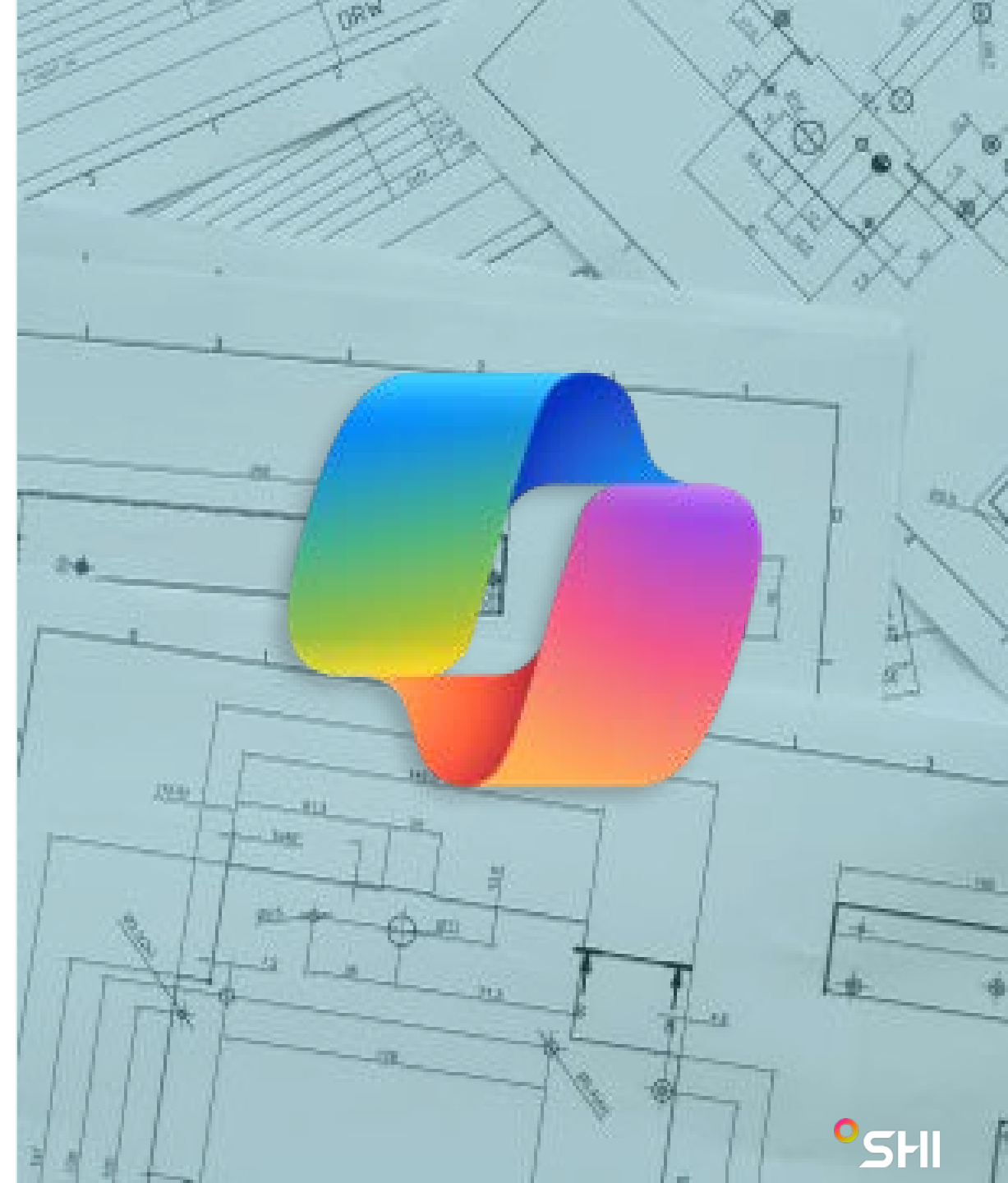
Bing Chat Enterprise Training

Communication template and one pager guide to using Bing Chat Enterprise to support the launch across the organization.



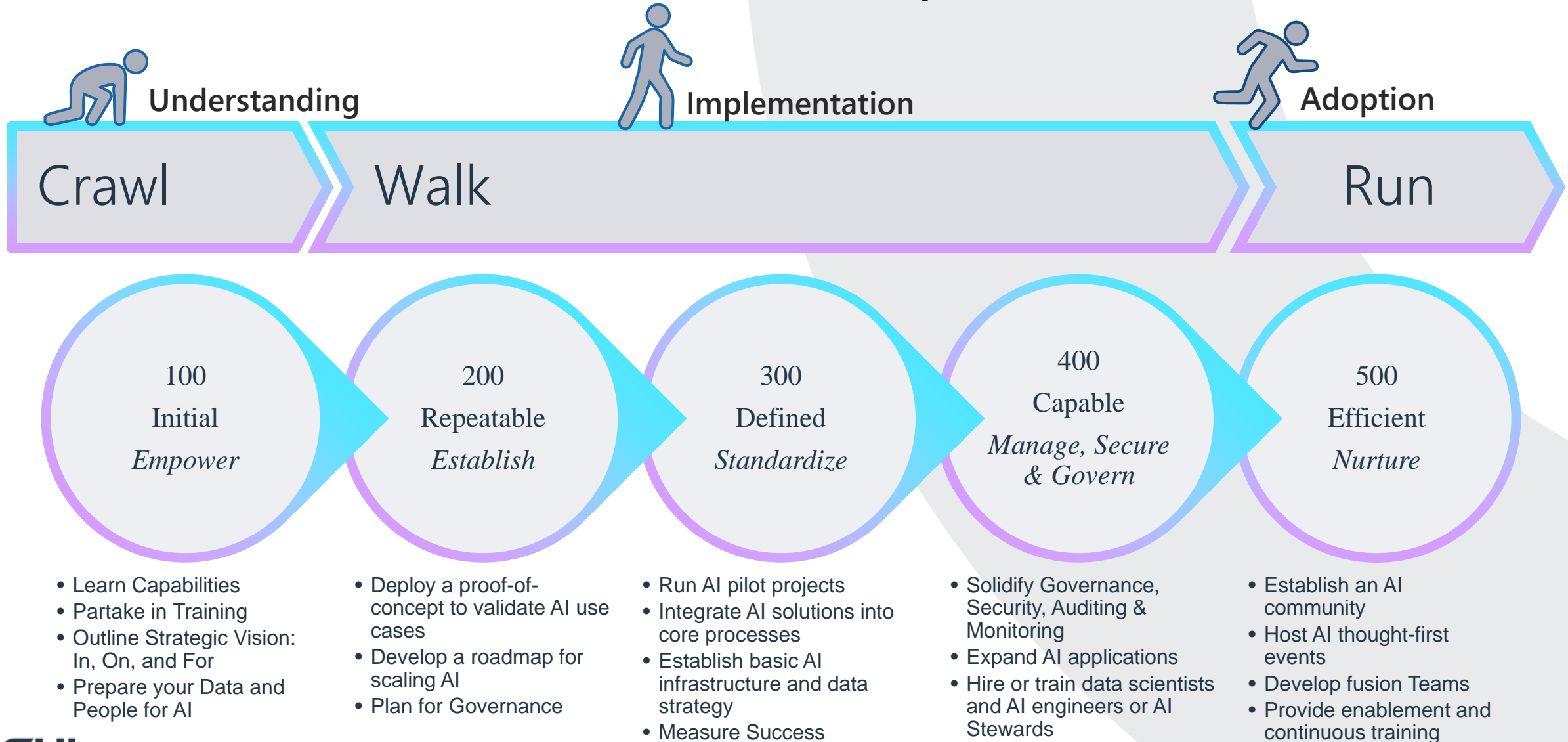
Bing Chat Enterprise

Deployed and Configured so the organization can safely start using AI today.

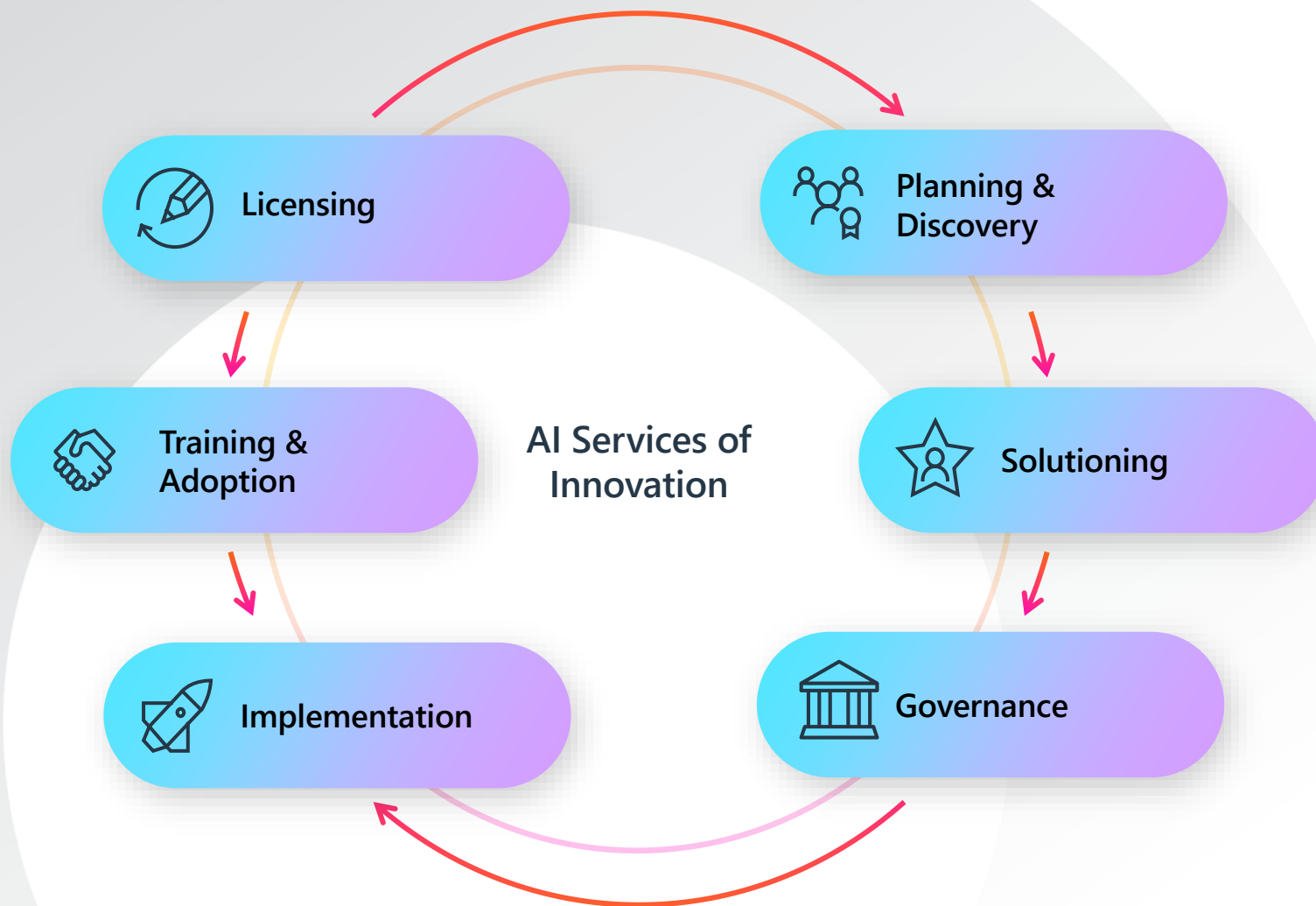


the Artificial Intelligence Center of Success

Incremental Maturity



Unlocking AI: Support for Every Part of the Journey



Immersion Experience

Discover what's possible

- 2 Days Private, Live, Virtual Instructor-Led Immersion Experience in a sandbox environment
- Discover what's possible with the M365 Suite and prepare the IT team to govern and improve the health of their tenant
- Typical Day:
 - Up to 3-Hour Virtual Session
 - Morning or afternoon
 - Up to 12 students



Phase II – Assessment/Implementation

OBJECTIVES GOALS

- 365 Adoption Analysis
- SharePoint and Teams health analysis
- Power Platform Analysis
- Use Case Analysis
- Adoption and change management
- Data Quality and monitoring recommendations
- Security and Roles Defined
- AI Data Governance Plan of action

Objective

The key objectives for Phase II include conducting a comprehensive analysis of AI 365 adoption, assessing the Power Platform, evaluating the health of SharePoint and Teams, analyzing potential use cases, and developing an adoption and change management strategy. SHI reviews potential gaps and challenges that might hinder a quality deployment of Copilot and works with the customer to resolve them before heading to the Pilot phase. While this remediation will not resolve everything, it will help ensure a successful pilot within the organization.

PHASE ARTIFACTS



AI Practice Analysis Report

As a part of the Data Governance Document, all implementations will be recorded and described.



Technical Training

Equip the Admin Team

- Public, Live Instructor-Led, Virtual Delivery
- Includes 2 seats in a three-to-five-day course
- Suggested Courses for supporting an M365 tenant:
 - [Microsoft 365 Administrators Essentials](#)
 - [SharePoint Online for Administrators](#)
 - [Managing Microsoft Teams](#)
- See our [full catalog](#) for all available courses
- Private courses also available for larger groups



Technical Training

Whether simplifying operations or generating new business, our courses are designed to ensure your IT staff and end users evolve with emerging technologies.

[Search course catalog](#)

Phase III – Pilot

OBJECTIVES GOALS

- AI priority persona review for Pilot Phase
- Copilot rollout with pilot personas
- Pilot persona training resources
- Identify additional gaps and issues
- Training review for Deployment Phase

Objective

Phase III focuses on evaluating and prioritizing specific AI use cases for a pilot group. We partner with the customer to identify the right roles and audiences to perform a successful assessment of the platform and ensure readiness is there. Next, we deploy Copilot to our pilot group and collect feedback on where improvements can be made. During this phase, it is critical that the pilot group shares all feedback to any gaps and issues can be remediated before a broader deployment.

PHASE ARTIFACTS



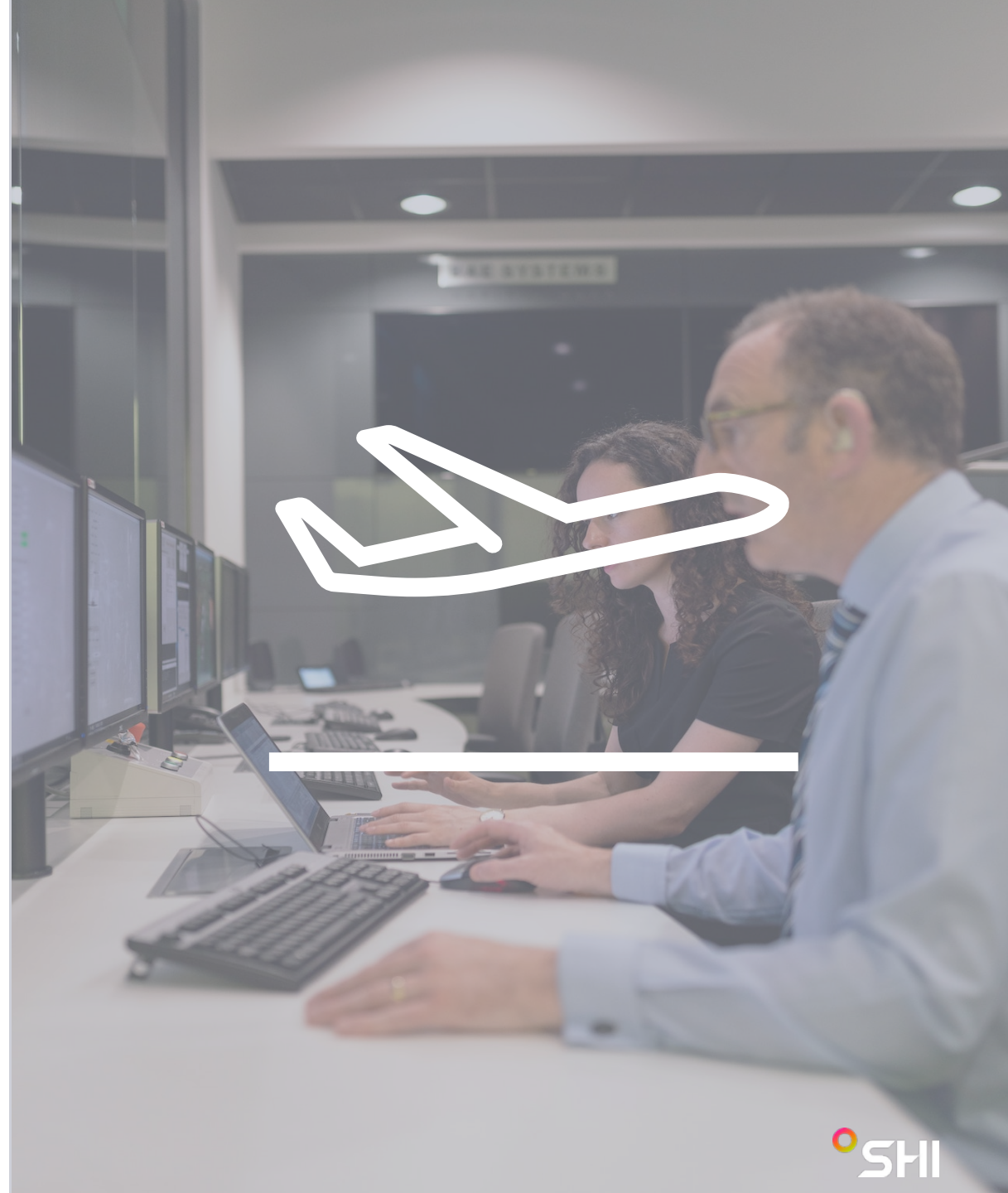
AI Readiness Report

Pre-filled documentation as the result of workshops and configuration, and recommendations.



Training Resources

Tailored one pager guides for personas to help end users to start using Copilot with prompts to meet some of their use cases.



End-User Training

Equip your End Users

- 5 Days Private, Live Instructor-Led, Virtual Delivery
- 60-minute or 90-minute Demo with Q&A
- Enable end users to contribute to a healthy M365 tenant with OneDrive, SharePoint and Teams training
- Establish positive Copilot habits with guidance around data management and document versioning
- Help end users get the most out of Copilot



M365 Copilot

End User Training / Session Outline

In this session, we will cover an overview of Microsoft copilot that will give participants an understanding of why and when to use it. Participants will learn the basics of interacting with copilot in Outlook, Meetings, and Documents, then we will wrap things up by showing the evolution of information as they are guided from meeting notes to a business proposal, to a polished PowerPoint presentation. They will learn various key scenarios for when they might use copilot and how to make the most of their new virtual assistant.

Part 1: Copilot Overview

- What is copilot?
- Security Features ("just enough access")
- Benefits of Copilot
- General Rules of How and When to Use It

Part 2: Copilot and Outlook

- Catch up with Copilot
- Catch up on Your Mobile Device

Part 3: Copilot and Meetings

- Skip the Meeting and "Follow" a Meeting
- Join Late and get a "Recap"

Part 4: Copilot and Word

- Draft a Proposal From Your Notes
- Match Format to Other Documents
- Add Other Features (Images, Summary, etc.)
- Ask For Suggestions From Copilot

Part 5: Wrap Up

- Full Evolution of Information (Meeting Notes, to Word, to PowerPoint)

Phase IV – Deployment

OBJECTIVES GOALS

- AI priority persona review for Deployment Phase
- Adoption and readiness review
- Copilot rollout to broader audience
- Next steps and roadmap for further success
- Training for Copilot adoption

Objective

Phase IV focuses on evaluating and prioritizing additional AI use cases based upon roles and audiences. Leveraging our Adoption and Readiness Review to assess the organization's preparedness for AI integration, we prepare the organization for a successful deployment of Copilot. Following this, the Next Steps and Roadmap are developed to outline the path forward, including necessary training to ensure the workforce is equipped with the skills needed for successful AI implementation.

PHASE ARTIFACTS



AI Readiness Report

Pre-filled documentation as the result of workshops and configuration, and recommendations.



Training

Custom Tailored AI Curriculum based off planning sessions.



Copilot Enablement General Timeline

Microsoft Copilot Enablement is executed in phases. The result is ensuring a secure deployment while achieving incremental success and business value along the way.

1-2 Weeks

Discover

Actions

- Gather requirements
- Plan for AI integration
- Identify goals and outcomes
- Activate Bing Chat Enterprise

2-3 Weeks

Assessment/Implementation

Actions

- Conduct a comprehensive analysis of data usage and health status within 365
- Prepare the organization data and people for the use of AI

1 Month

Pilot

Actions

- Evaluate AI priority personas use cases
- Rollout Copilot to test groups
- Establish early adoption framework and education
- Understand gaps from initial experience

1 Month

Deployment

Actions

- Stand up production use case personas for AI
- Deploy Copilot to the organization,
- Provide a clear path forward, and solidify tool adoption