



Copilot Workshop for Microsoft 365 Overview

LOOK

Microsoft 365 Copilot Engagement

Designed as a three-phase engagement, the Microsoft 365 Copilot Engagement helps assess your team's needs, prioritize Copilot scenarios, and define an actionable roadmap.



Attendees

Senior BDMs, Managers, End Users, LOB Leaders, and ITDMs

Subject Matter Experts (SME's)

Architects, User Experience Leads



Assess

Define scope, identify business stakeholders, and gather information on key business scenarios. Complete and review optimization assessment and guidance.



Art of the Possible

Showcase the intelligence added to employee experiences by unleashing creativity, unlocking productivity, and leveling up skills (included in the demos).



Build the Plan

Develop a plan to implement recommendations based on prioritized scenarios. Define next steps and timeline to develop and implement the solution.

Microsoft 365 Copilot Engagement

 Assess 240 mins

Microsoft 365 Copilot Engagement Kick-Off	30 mins
Optimization Assessment Review and Guidance	90 min
Address data security, governance, and data access questions	120 min

 Art of the Possible 300 mins

Art of the Possible Kick-Off	15 mins
AI-powered Organization	30 mins
Responsible AI	15 mins
Microsoft 365 Copilot overview	30 mins
Copilot at Work	45 mins
Unlocking Your Potential with AI	90 mins
Optimizing Teamwork with AI	30 mins
Microsoft 365 Copilot Champions	45 mins

 Build the Plan 285 mins

Build the Plan Kick-Off	15 mins
Scenario Analysis & Prioritization	180 mins
Report & Recommendations	90 mins



Assess

Scope

Goals: The Assess phase introduces you to the technical requirements for Microsoft 365 Copilot, the steps to take to become AI ready, and builds the Art of the Possible phase.

Scope: Complete the optimization assessment and deliver the assessment review and guidance.

We will achieve this in the following sessions:

- Identify key stakeholders
- Describe and discuss upcoming activities
- Microsoft 365 Copilot Overview
- Research team challenges and opportunities
- Deliver Microsoft 365 pre-engagement kickoff
- Review assessment and deliver guidance
- Prepare for the Art of the Possible Engagement





Scope

Goal: Deliver Microsoft 365 Copilot to leverage organizational data to add intelligence to the workforce.

Scope: The Art of the Possible for Microsoft 365 Copilot is a combination of presentations and demos that will educate and excite your organization on how to transform the employee experience with artificial intelligence integrated into Microsoft 365.

We will achieve this in the following sessions:

- AI-powered organization
- Responsible AI
- Microsoft 365 Copilot Overview
- Unleash creativity
- Unlock productivity
- Uplevel skills
- Better together with Teams Premium and Copilot in Teams
- Identify Microsoft 365 Copilot Champions



Build the Plan

Scope

Goal: Build a plan to design and implement Microsoft 365 Copilot experiences for your organization. You will summarize current customer challenges surfaced by Business Decision Makers and map them to personas.

Scope: Following the Art of the Possible, we want to define and prioritize top scenarios to focus on and work on developing a solution plan.

We will achieve this in the following sessions:

- Identify scenarios based on the customer's business decisions pain points.
- Discover personas and map them to the customer's business challenges.
- Provide a summary of prioritized scenarios.
- Deliver an overall plan to pilot Microsoft 365 Copilot, next steps, and identified risks.



Identify and engage appropriate roles

It's important to identify and engage appropriate roles for the Microsoft 365 Copilot Engagement to understand your business priorities and focus on scenarios that target the right Microsoft 365 Copilot scenarios with the right team members with the right Microsoft 365 Copilot capabilities.

We recommend the following roles to attend this Engagement:

1. **Project Executive Sponsor** – Business Decision Makers (CFO, CMO, COO) who can sign off on proposed scenarios and personas
2. **Change Management, business liaisons, representatives for knowledge workers** – integral to a successful adoption, content providers, end user, feedback is critical
3. **CIO, ITSM, Enterprise Architects** – to provide architecture guidance and insights; to provide technical guidance and insights into currently deployed technologies
4. **Project Manager/Coordinator** – to provide overall engagement project management tasks, end-to-end project management





Microsoft 365 Workshop

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