Copilot for Microsoft 365 – Pre-Flight Check
A readiness workshop to launch you into success

The Challenge
Copilot for Microsoft 365 (Copilot) is a whole new way to work thanks to the integration of AI into our normal business tasks that allow us to be more productive and bring forth new insights from the documents we interact with. However, there are challenges that come along with these new capabilities including:

- Adoption
- Security
- Compliance
- Maintaining consistent controls and policies

The Solution
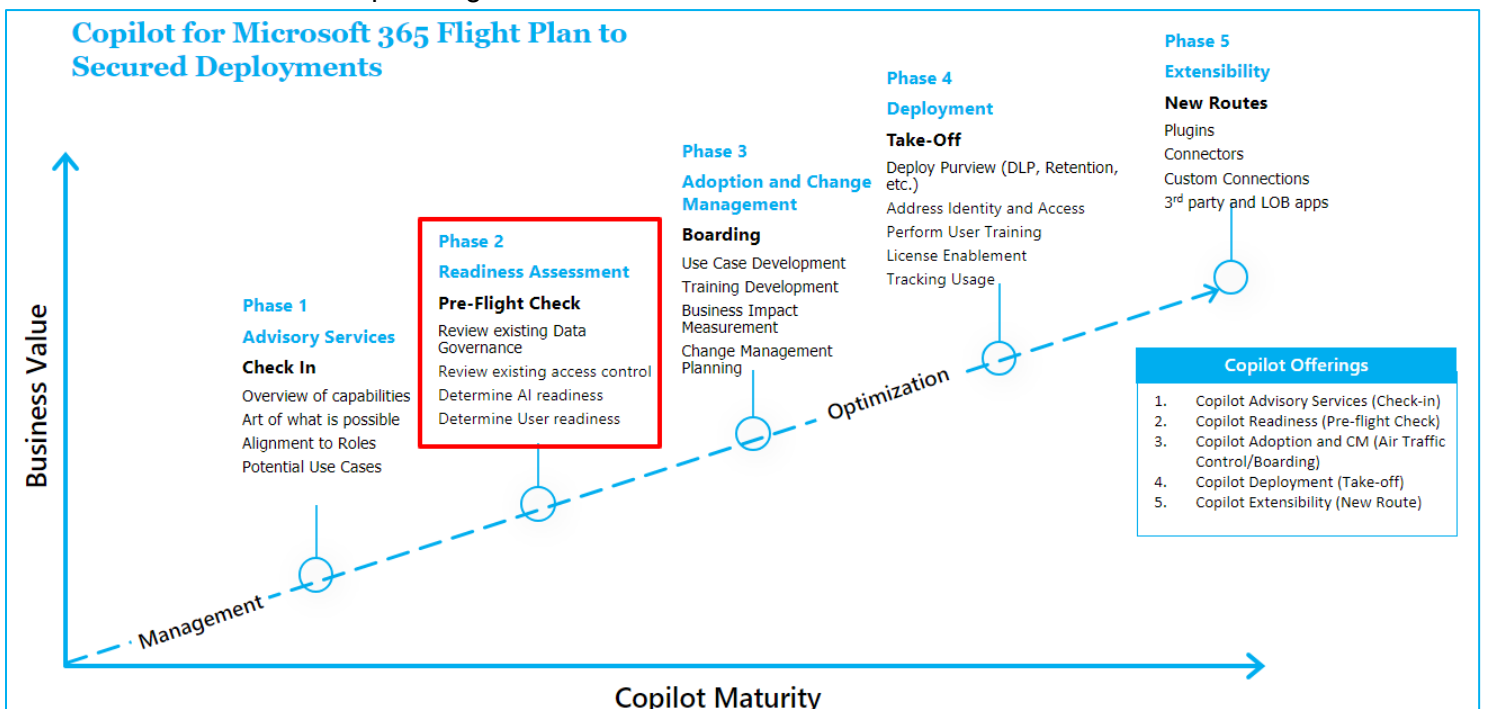Spyglass's Copilot for Microsoft 365 Pre-flight Check (Readiness) Workshop is designed to accelerate the ability to integrate and consume Copilot across your enterprise and increase the power of M365 productivity while starting to secure data and identities in the environment. Readiness can focus on planning, strategy to implement, and/or the change management required to actually perform implementation of controls and solutions.

- Identity and Access Management (IAM) - The Readiness workshop covers IAM controls and processes to protect, monitor, and control access and information in Copilot.
- Data and Information Protection/Governance - The Readiness engagement establishes controls and requirements for data protection and governance in Copilot and its sources.
- Readiness – Deals with tackling:
    o Cultural Readiness
    o User Readiness
    o Use Case review and ROI calculations
    o Readiness planning

The Details
- 1 weeks*

Deliverables
- Recommendations and Next Steps

Copilot for Microsoft 365 Flight Plan to Secured Deployments

Business Value / Copilot Maturity

Phase 1
Advisory Services
Check In
Overview of capabilities
Art of what is possible
Alignment to Roles
Potential Use Cases

Phase 2
Readiness Assessment
Pre-Flight Check
Review existing Data Governance
Review existing access control
Determine AI readiness
Determine User readiness

Phase 3
Adoption and Change Management
Boarding
Use Case Development
Training Development
Business Impact Measurement
Change Management Planning

Phase 4
Deployment
Take-Off
Deploy Purview (DLP, Retention, etc.)
Address Identity and Access
Perform User Training
License Enablement
Tracking Usage

Phase 5
Extensibility
New Routes
Plugins
Connectors
Custom Connections
3rd party and LOB apps

Management / Optimization

Copilot Offerings
1. Copilot Advisory Services (Check-in)
2. Copilot Readiness (Pre-flight Check)
3. Copilot Adoption and CM (Air Traffic Control/Boarding)
4. Copilot Deployment (Take-off)
5. Copilot Extensibility (New Route)

Spyglass MTG Copilot Flight Plan

Copilot for Microsoft 365 is a whole new way to work thanks to the integration of AI into our normal business tasks that allow us to be more productive and bring forth new insights from the documents we interact with. These new capabilities also bring challenges to adoption, security, and compliance within our environments.

Spyglass's Copilot for Microsoft 365 Flight Plan provides a systematic way to tackle introducing AI capabilities into an environment at any point in the AI journey including:

- Check-In – The initial step to determine how Copilot for Microsoft 365 can benefit users and processes that includes:
  - Overview of Copilot for Microsoft 365 capabilities
  - Whiteboarding of what is possible
  - How it could align with existing roles
  - Discussing potential use cases and personas
- Pre-Flight Check – Now that capabilities align with potential use cases and personas, it is time to start looking at how ready the environment is by looking at:
  - Existing Identity and Data Governance requirements and capabilities
  - Readiness for AI
  - Readiness for users to adopt
- Boarding – This stage of the journey is taking all of the validation from phase 1 and 2 and putting it into action by:
  - Creating Use Cases
  - Developing Training
  - Understanding Business Impacts
  - Planning for Support
  - Defining Controls
- Take-off – At this point, Copilot if ready to lift off and be consumed by users and controls put in place:
  - Data Governance using Purview
  - Identity controls using Entra ID
  - Delivering User and Admin training
  - Tracking and reporting on Copilot for Microsoft 365
  - Enablement of Users
- New Routes – helps to establish customize experiences for users and processes while leveraging the power of AI focused on productivity. This can leverage plugins, connectors, and even tie in with existing Line of Business applications. This is the phase of the Flight Plan that really personalizes the experience for user groups and business units.

Spyglass MTG Can Help!

We can help you get ready for Microsoft Copilot. Contact us today!

SPYGLASS MTG

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