

Assessment Review and Guidance

Summary

The Assessment Review and Guidance module provides an opportunity for the customer to learn the location of Microsoft 365 Copilot guidance, to ask questions to get their environment ready for AI, and to review and gain clarity on the optimization assessment and results.

Customer Resources
ITSM
CISO

Partner Resources
Microsoft 365
Architect
Microsoft 365
Consultants

Objectives

The aim is to communicate requirements and review the assessment, identifying gaps for optimization. This is a starting point for to determine if a more in-depth Partner delivered assessment is required. This module includes the following elements:

- Review of optimization assessment results that is contained at the top of the assessment worksheet
- Identify the blockers for Microsoft 365 Copilot and resolution
- Provide guidance to your customer on steps to take to get the most out of Microsoft 365 Copilot.

Preparation

Prior to delivering the Assessment Review and Guidance, the facilitator will familiarize themselves with:

- The overall engagement format of the Microsoft 365 Copilot Engagement
- Leverage the assessments to show areas to address

Deliverables

The deliverables of the Assessment Review and Guidance module are defined as:

- Deeper understanding of the technical requirements
- Sharing of knowledge on where to go for added technical guidance
- Review of the optimization assessment results to increase understanding on fits and gaps
- Identification of next steps to fill gaps