



COPILOT READINESS ASSESSMENT

“With great power comes great responsibility”

Microsoft Copilots offer the potential to genuinely revolutionise the way we work to inspire us to be more productive and focus on meaningful work. Whether you want to create a proposal based on a rough outline or automatically build a presentation on a specific topic, there is a lot of promise.

However, proceeding without due diligence poses a substantial business risk. With well over 100 copilots within the Microsoft ecosystem, ready to read, analyse, and advise based on “your data” the risk of unexpected consequences is high...

Critical Risks

Beware of these consequences if you neglect proper planning:

Data that hasn't been optimised for Copilot	→	Data Exposure: Confidential information leaks
	→	Ineffective Insights: Inaccurate and costly advice
	→	Productivity Drain: Decreased team efficiency
	→	Compliance: Legal and regulatory consequences



With our Copilot Readiness Assessment, you will maximise the organisational benefits of the solution while ensuring data protection best practice is upheld.



COPILOT READINESS ASSESSMENT

Fusion5 Service Offering

BENEFITS

- Early identification of challenges, roadblocks, and potential issues mapped to recommendations for resolution to drive implementation success.
- Mitigating security and compliance risks relating to your unique circumstances
- Engaging in collaborative teamwork to comprehensively grasp and quantify both your business and technical requirements.
- A well-documented implementation roadmap that aligns skills, stages, and adoption strategies with your business goals. This roadmap serves as a guide to define the success of integrating Copilots into your business.

DURATION

- 3 weeks elapsed time

Embrace the Copilot revolution in a safe and secure way

To embrace Copilot without risk, it becomes imperative that organisations proactively create adoption plans and establish the necessary safeguards. Just as a flight without a comprehensive flight plan would be unwise, navigating the Copilot journey requires careful preparation.

Work with us to assess how ready you are for Copilot and form an adoption roadmap. In our 360 review we will focus on six key areas:

Data Security – Reviewing security policies, security models, and controls for sensitive data to maintain a robust and resilient data environment.

Regulatory Compliance – Assessing compliance to regulatory standards such as GDPR, PII, Data Sovereignty, and Data retention to ensure adherence to legal and industry-specific requirements.

Data Quality – Evaluation of data cleanliness, accuracy, timeliness, and overall content to ensure optimal usability and reliability.

Data Governance – Establishing safeguards to ensure positive early experiences and prevent the compromise of sensitive information.

Organisational Change Management – Recommendations around the change process to ensure that objectives are fulfilled, identify enablement opportunities that will drive adoption and reduce resistance to change.

Business Strategy – Defining the desired and measured outcomes you aim to achieve using Copilots, thereby ensuring organisational alignment through education, the setting of achievement milestones and budgets.

Based on our standard offering and deliverables, the fee for this engagement is **\$18,000** (exclusive of GST). This is a fixed fee service.

ABOUT FUSION5

When we work with you, we don't recommend technology for technology's sake. What drives us is delivering outcomes that genuinely improve your business. Our unique experience and advanced understanding of the solutions we offer, together with innovative technology that can be wrapped around them, means we can offer 'fit for you' solutions that amplify solution benefits for your business.

We realise adopting new technology is not just a one-off activity — it requires change management, support, and continuous improvement to ensure your digital journey evolves with your business. We're here to partner with you through all aspects of the journey.

ABOUT US (Microsoft Data and AI Specialists)

We have the highest possible level of certification from Microsoft in this area as a Specialised Microsoft Solutions Partner in Data and AI

We advocate using industry best practice with management of your data to fuel growth and the reduction of risk

Key Activities

This is a collaborative engagement, where, prior to the workshops we will ask you to complete a survey to assess your initial preparedness for Copilot. We will then hold focused workshops with your knowledge owners and our Copilot experts to perform the following activities.

Workshop 1 – Business Alignment (4hrs)

The goal of this workshop is to understand your business goals, data maturity and where you are at in your journey. We will look at:

- Current Business Strategy and Goals for Copilot (if known, if not, we will assist you with establishing them)
- Current Governance Structure and Intended audience for Copilot
- Assessing your readiness around organisational change management and ability to consume this change

Workshop 2 – Technical Alignment (4hrs)

The goal of this workshop is to understand what technology you have access to, and what processes and controls have been put in place around your data. We will look at:

- Current state data quality
- Intended content to be shared with Copilot
- Relevant data security policies and procedures
- Identifying sensitive data

Workshop 3 – Deep Dive (4hrs)

This session will cover any areas of concern or focus areas that have led to further consideration and challenges.

Playback Session (2hrs)

A playback session on findings, recommendations, considerations, and the proposed roadmap

Deliverables

- Recordings and transcripts of the Workshops facilitated by Fusion5.
- Documented findings, recommendations, and considerations
- Roadmap for Copilot success

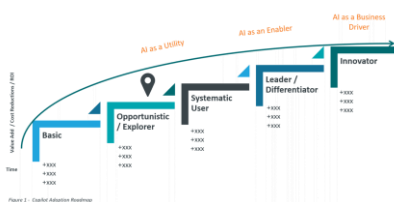


Figure 1 - Copilot Adoption Roadmap



Figure 2 - Copilot Adaptive Roadmap

Assumptions

We anticipate that:

- Workshops will be based in Wellington or Auckland or can be delivered remotely. If, however you are located outside these regions and would prefer an in-person engagement, we are able to travel to you. Please note, travel costs are additional to this fixed fee quoted.
- Key stakeholders identified by you will have the appropriate experience, knowledge of systems/data, and availability. This includes meeting all necessary time commitments such as working sessions.
- The proposal is based on our standard framework. Any changes to the scope of the requirements may result in additional effort which will be handled through a change control process.