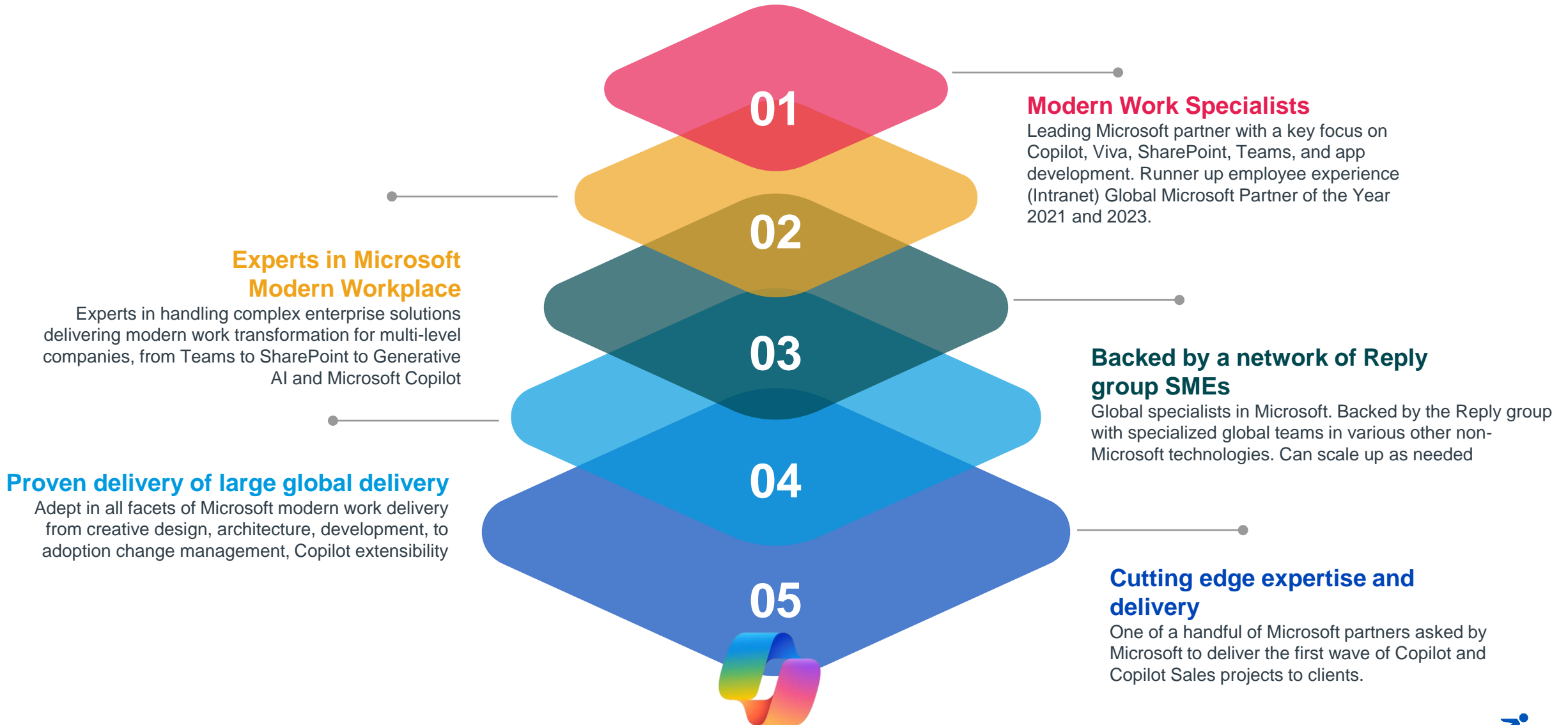


Valorem Reply

MICROSOFT COPILOT FOR M365 OFFERINGS

WHY REPLY



WHAT MAKES REPLY UNIQUE?



SETTING THE STAGE



OUR COPILOT AREAS OF SPECIALTY



Leadership Enablement & Art of the Possible

Leadership and **organizational readiness** to understand the value of Copilot. Define **use cases**, personas, and strategy.

Technical Readiness & Enablement

Technical readiness and **enablement**, with end-to-end AI strategy and governance.

Pilots

Varying levels of **hands-on assistance**, **support**, and **training**. Use case and enablement.


Full Rollout & Adoption

Organization-wide enablement with Adoption Change Management (ACM) Plan, strategy, and rollout. Champions enablement. White-glove training and hands-on user support. **Reinforcement for lasting success.**

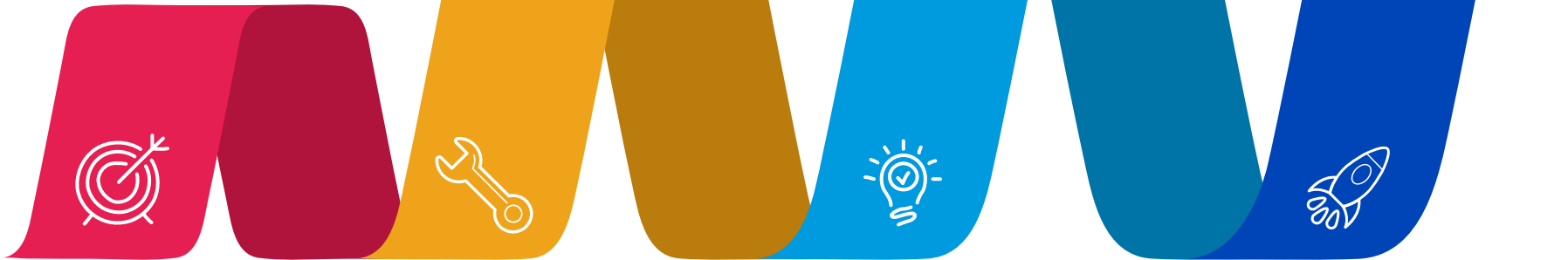
 Art of the Possible

 Technical Readiness

 Pilots

 Rollout & Adoption Change Management

 Extending Copilot



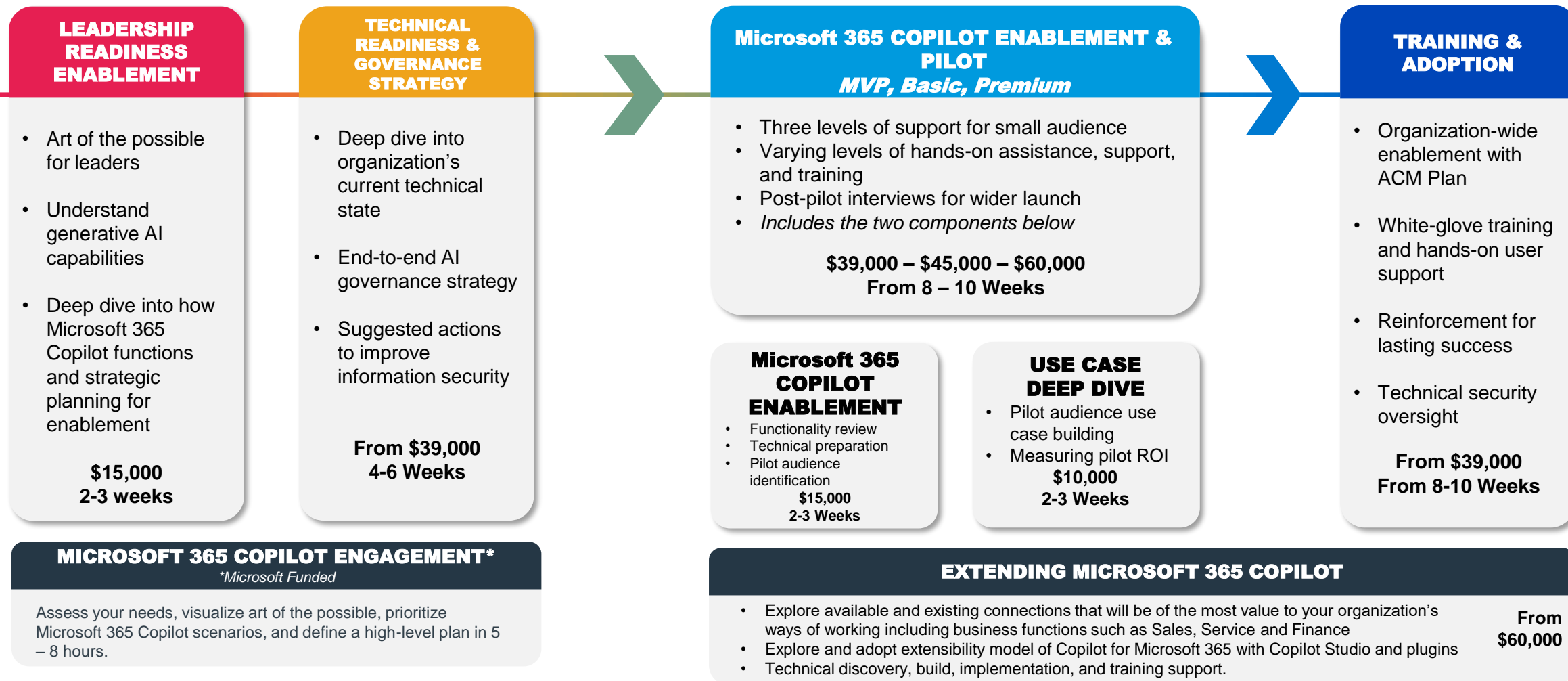
Foundational understanding of the organization and identification and enablement of **extending Copilot**



OUR MICROSOFT 365 COPILOT OFFERINGS

From Readiness to Implementation

Our Microsoft 365 Copilot offerings aim to prepare organizations for the successful use of Microsoft 365 Copilot, from essential technical readiness to long-term adoption and reinforcement. As there is no one-size-fits-all AI solution, these offerings are designed to meet clients where they are on their AI and Microsoft 365 Copilot journey. Rather than simply switching on licenses for users, it is imperative to understand the use case for Microsoft 365 Copilot, how it leverages and accesses information, and how to develop successful prompt engineering – all of which is covered in these core packages:

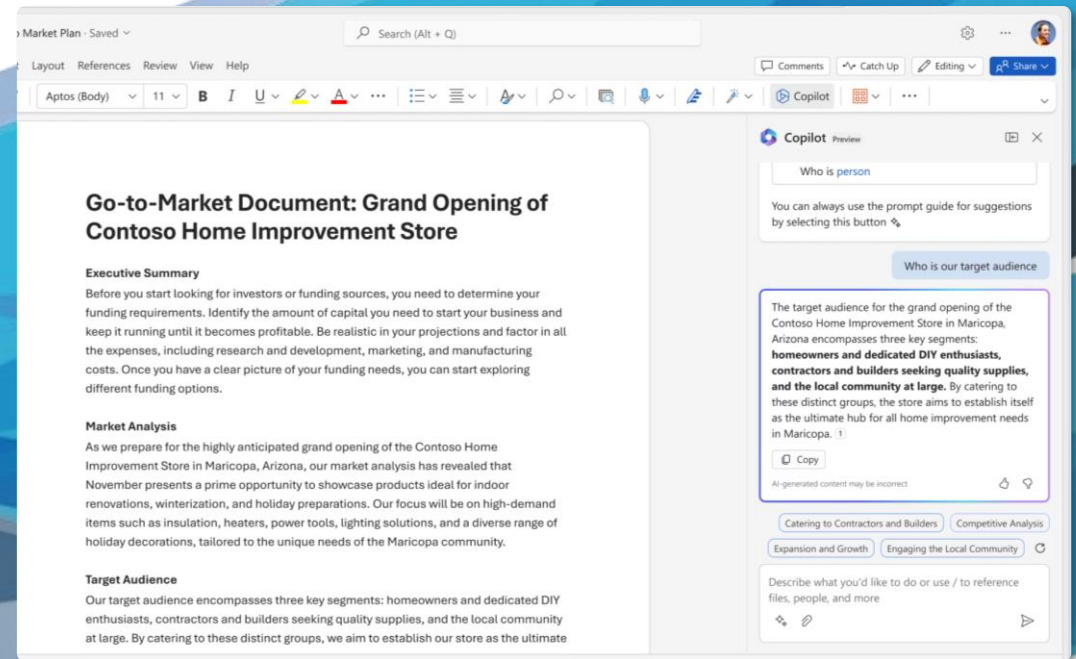
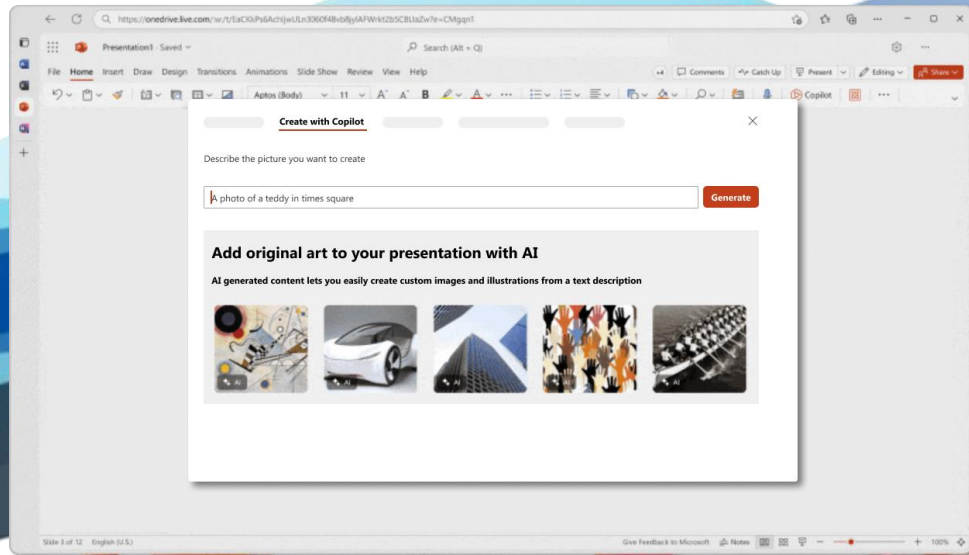


WHAT IS MICROSOFT 365 COPILOT?

AI meets daily work

Microsoft 365 Copilot is your AI-powered assistant to **unlock productivity, unleash creativity, and uplevel work.**

By integrating directly with your digital work applications, including Microsoft Teams, Word, Excel, PowerPoint, Outlook, and more, you can reduce manual efforts and complete tasks with just a few words.



LEVERAGING THE POWER OF MICROSOFT 365 COPILOT

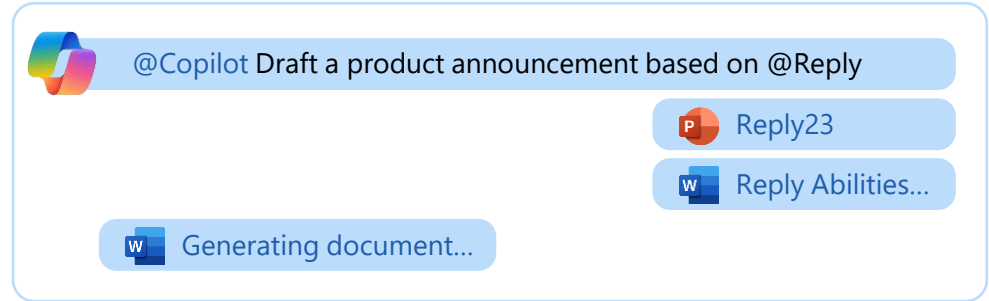
Transform your day

By combining the power of **large language models** with data in the Microsoft Graph and Microsoft 365 apps, users can **turn words into powerful prompts**.

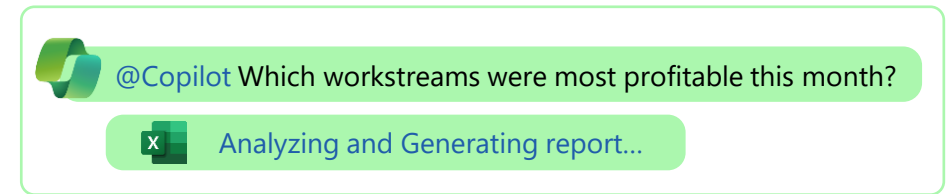
Bringing AI home

Preparing for Copilot is **more than just flipping a switch**. To ensure that your organization drives the most value, it's necessary to:

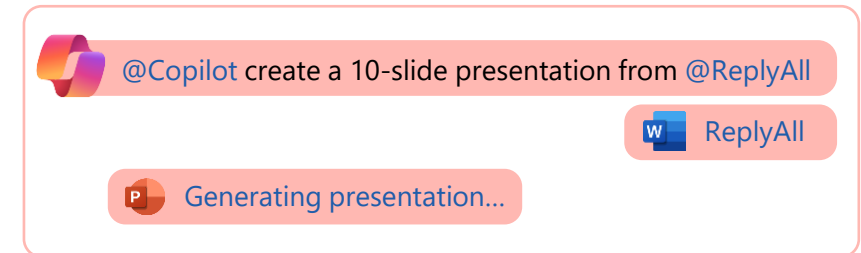
- Prepare your environment
- Review data security & compliance
- Match outcomes to investment
- Identify high-value Copilot use cases and users
- Invest in employee launch communications & training



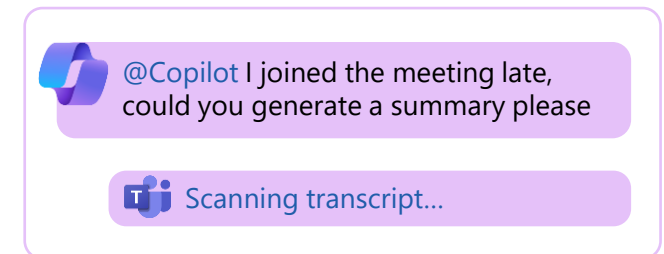
A screenshot of a chat interface showing a prompt from @Copilot: "Draft a product announcement based on @Reply". The prompt is in a blue bar. Below it are two response options: "Reply23" (with a red 'P' icon) and "Reply Abilities..." (with a blue 'W' icon). A status bar at the bottom shows "Generating document..." with a blue 'W' icon.



A screenshot of a chat interface showing a prompt from @Copilot: "Which workstreams were most profitable this month?". The prompt is in a green bar. Below it is a response option: "Analyzing and Generating report..." (with a green 'X' icon).



A screenshot of a chat interface showing a prompt from @Copilot: "create a 10-slide presentation from @ReplyAll". The prompt is in a red bar. Below it are two response options: "ReplyAll" (with a blue 'W' icon) and "Generating presentation..." (with a red 'P' icon).



A screenshot of a chat interface showing a prompt from @Copilot: "I joined the meeting late, could you generate a summary please". The prompt is in a purple bar. Below it is a response option: "Scanning transcript..." (with a purple 'T' icon).



MICROSOFT 365 COPILOT READINESS PHASES



Technical & Organizational Readiness

- **What:** End-to-end permissions and data governance assessment of the environment; Leadership engagement
- **Outcome:** Go / No-Go decision on Copilot enablement



Copilot Enablement & Pilot

- **What:** Deep dives and use case building; Technical assistance and support during Copilot enablement
- **Outcome:** Copilot is enabled for a test group



Training & Adoption

- **What:** Adoption Change Management strategy and execution; Governance execution; Microsoft 365 extensibility
- **Outcome:** Copilot is enabled for and adopted by a wider group



TECHNICAL & ORGANIZATIONAL READINESS



HOW WE CAN HELP – READINESS

If your organization has larger security concerns or a steeper hill to climb to AI engagement, Valorem Reply has two core offerings to prepare your environment for AI: **Leadership Readiness Enablement** and **Technical Readiness & Governance Strategy**. Both offerings are focused on generative AI as a new tool for hybrid work.

LEADERSHIP READINESS ENABLEMENT

Dedicated workstream for leaders and executives to understand the impacts and capabilities of AI on their organization with a roadmap of recommended actions.

\$15,000

TECHNICAL READINESS & GOVERNANCE STRATEGY

Designed for organizations whose technical settings, permissions, and data governance require further review and assistance before deploying AI.

From \$39,000



LEADERSHIP ENGAGEMENT



Activities



Discovery

Interviews and 1:1 sessions with leaders and executive assistants to understand their current state of work.



Art of the Possible

Demonstration of both generative AI and Copilot; identification of currently available functionality as well as future integrations as identified by Microsoft.



Use Case Identification

A guided session to identify “north star” goals and align use of Copilot with strategic business goals and objectives.



Strategic Roadmap

Roadmap and recommendations based on outputs of enablement sessions, interviews, and sessions to help leaders understand the business impacts and cost implications to their organization.

OUTPUTS

- ✓ Understanding of generative AI and Microsoft 365 Copilot in an organization
- ✓ High-level Microsoft 365 Copilot use case inventory
- ✓ Strategic roadmap of Microsoft 365 Copilot implementation
- ✓ Cost analysis for leveraging Microsoft 365 Copilot



DURATION: 2-3 weeks



TECHNICAL READINESS & GOVERNANCE STRATEGY



Activities



Environment Configuration

Configuration review to ensure your Microsoft 365 environment is ready for Microsoft 365 Copilot.



Data & Permissions Analysis

Deployment of proprietary tool to assess current permissions and estimate the risk and severity of potential data leaks



Data & Compliance Security Session

Stakeholder enablement to develop strategies and tools for information protection and governance.



Strategy & Recommendations

Evaluation of information protection and controls and monitoring tools. Development of recommendations to mitigate against data leakage and ensure protected content.



Pre-Pilot Actions

Handover of documentation and recommendations to enable pilot launch. Presentation assistance to executive leadership.

OUTPUTS

- ✓ Technical readiness recommendations
- ✓ Assessment of current data leak and compliance risks
- ✓ Guided and assistance to improve governance and security
- ✓ Comprehensive strategy and recommendations for ongoing security analysis
- ✓ Set of pre-pilot actions to enable successful pilot group



DURATION: 4-6 weeks



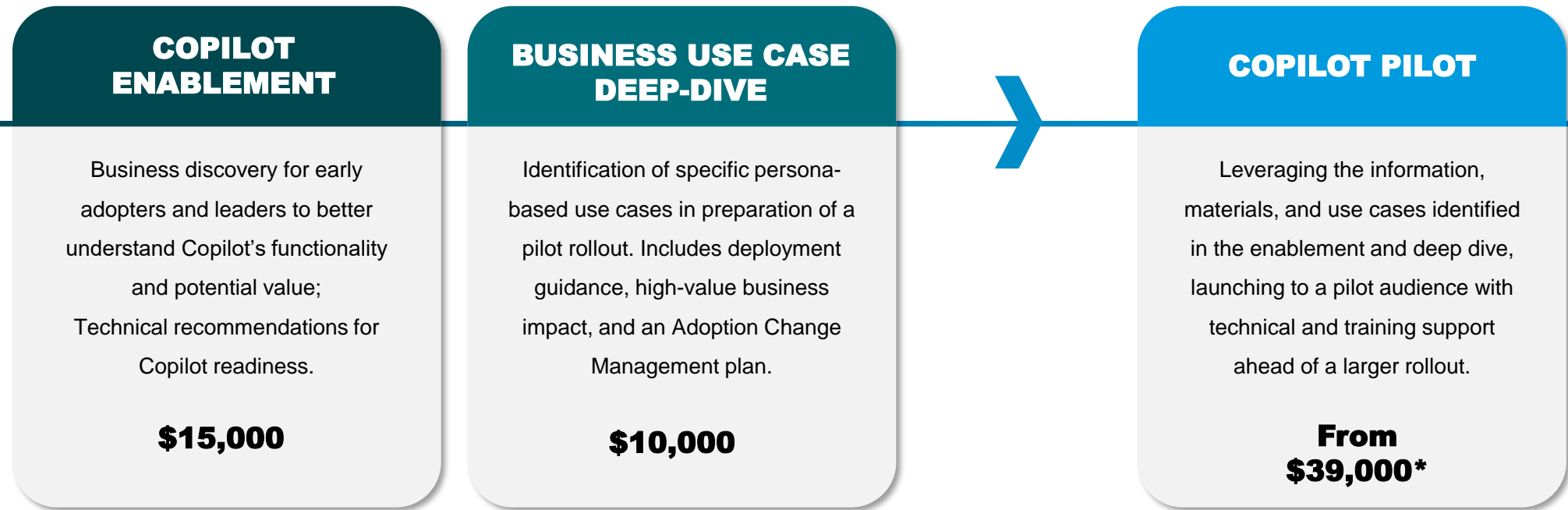
COPILOT ENABLEMENT & PILOT



HOW WE CAN HELP – ENABLEMENT & PILOT

Valorem Reply has three core offerings to run a pilot: **Copilot Enablement**, **Business Use Deep Dive**, and **Copilot Pilot**. Each organization has unique technical configurations and business needs before fully leveraging Copilot’s functionality. Therefore, there is no one-size-fits-all approach to preparing your organization for Copilot.

Following an initial conversation, we will work with your organization and Microsoft to determine the best path forward to enabling successful adoption.



MICROSOFT 365 COPILOT READINESS PILOT



Activities



Enablement Sessions

Understanding your current state and how to configure your environment for Microsoft 365 Copilot and where your organization can drive value.



Business Use Case Deep Dive

Interviews and meetings with key business stakeholders to identify high-impact use cases for your organization and identify a pilot audience.



Pilot

A guided pilot of Microsoft 365 Copilot, launched to a target audience. Designed to test, validate, and explore high-value use cases and tool adoption risk.



Training & Adoption

Training materials and activities designed to upskill pilot users on Microsoft 365 Copilot. Includes a training webinar, quick reference guides, and office hours.



Post-Pilot Analysis

Surveys and interviews with pilot users to assess how Microsoft 365 copilot improved performance and their experience with training and adoption.

OUTPUTS

- ✓ Technical readiness recommendations
- ✓ Microsoft 365 Copilot use case inventory
- ✓ Guided pilot
- ✓ Microsoft 365 Copilot training materials
- ✓ Pilot report
- ✓ Enterprise launch roadmap, recommendations, and presentation assistance for executive leadership



DURATION: 8 weeks



DRIVING VALUE FROM YOUR PILOT

What does a successful pilot look like?

Our Readiness Pilot aims to ensure readiness by tackling technical configuration, improving end-user perception, and driving overall business value.

Key outputs of the pilot include:

- Users understand how Copilot For Microsoft 365 and AI leverage data available to users to effectively automate otherwise manual processes
- Pilot users understand the business implications and impacts, further developing use case scenarios and breaking down AI barriers
- Key measurements to comprehensively communicate the effects of Copilot on current business practices
- Key stakeholders feel equipped to present a larger business use case to executives, outlining the next steps for AI in the workplace

1 

Identified key processes where Copilot for M365 could have an impact

2 

Comprehensive measurement of the impact and ROI

3 

Manage the perception of Copilot for M365 and AI in the workplace

4 

Empower users with appropriate prompt engineering

5 

Create a business case to move forward with licensing

6 

Pilot users become advocates for Copilot and its use cases



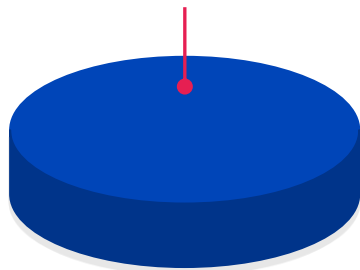
Meeting you where you are with Microsoft 365 Copilot

Our Copilot pilot offerings leverage the foundations built in the enablement sessions and use case deep-dives to support your pilot from the ground up.

From this foundation, our MVP, Basic, and Premium pilot options offer varying levels of technical assistance, hands-on pilot user support, and leadership engagement – all based on your organization’s needs.

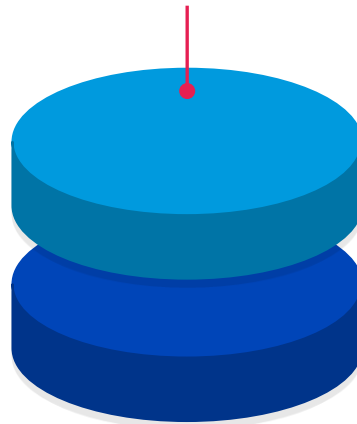
TIERS OF PILOT SUPPORT

WORKSHOP AND USE CASE DEEP-DIVE



MVP PILOT

- Technical assistance
- Pilot group assistance
- Post-pilot survey



BASIC PILOT

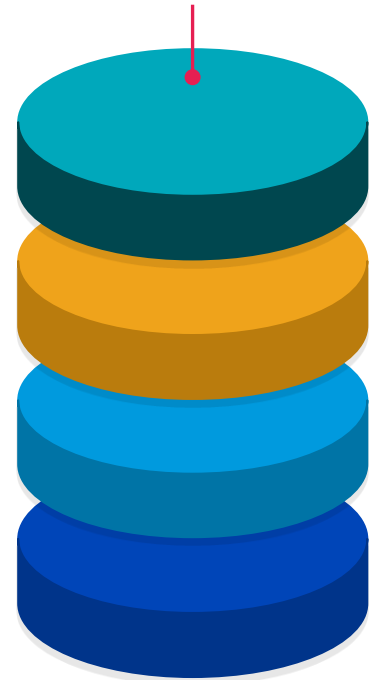
- Everything in MVP Pilot plus:
- Additional Technical assistance
- Hands-on pilot group support and training
- Next step planning



PREMIUM PILOT

Everything in the Basic Pilot plus:

- Additional technical and pilot group assistance
- Leadership engagement and coaching
- Support and plan for organization-wide rollout



MEASURING THE ROI OF YOUR PILOT

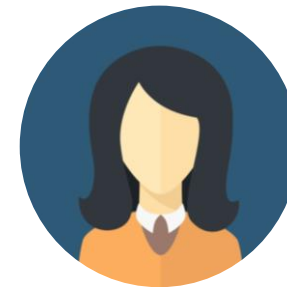
Copilot makes it possible to **turn time-consuming processes into streamlined tasks** that can be started at the click of a button. Free up time to do more challenging and value-generating work.

Our previous experience running Citizen Developer programs, where employees learn the necessary skills to automate manual systems through the Power Platform, shows the monetary value of identifying efficiencies:



We ran a Citizen Development program for **132 employees**, and the automations they created in 10 weeks **saved more hours than the entire company* combined across 2020.**

*FTSE-100 COMPANY



Created an onboarding application to drive a smoother, effective, and positive new joiner experience across Ops.

Invested 20 days and got 900 days back for the team.

*FTSE-100 COMPANY



SAMPLE COPILOT PILOT BREAKDOWN - BASIC

TASK	TIME FRAME
Technical Readiness & Discovery (part of Enablement Sessions) <ul style="list-style-type: none"> - Kick-Off and Client Knowledge Share - Technical Readiness assessment - Adoption Change Management workshop - Scenario and Use Case brainstorm with key stakeholders 	Week 1
Business Discovery & AI Use Case Inventory (part of Business Use Case Deep-Dive) <ul style="list-style-type: none"> - Scenario and use case building with key stakeholders - Identification of Pilot group - Baseline survey to Pilot group to assess current processes and attitudes towards AI 	Weeks 1-2
Pilot <ul style="list-style-type: none"> - Pilot launch communications - Stakeholder briefing sessions - Weekly Pilot participants meetings - Testing of Copilot use cases - Technical reassessments of use cases and Copilot realignment 	Weeks 3-7
Training & Adoption <ul style="list-style-type: none"> - Pilot training webinar - Pilot office hours (drop-in sessions) - Quick reference and user guides (based on outlined scenarios) - “Sponsor package” of key messages for stakeholders to cascade to pilot participants 	Weeks 3-7
Post-Pilot Analysis <ul style="list-style-type: none"> - Post-Pilot survey to participants to gather feedback on use cases and generative AI in the workplace - Pilot participants interviews - Creation of Copilot business case and next steps for key stakeholders to present to leaders and executives 	Week 8



TRAINING & ADOPTION



HOW WE CAN HELP – TRAINING & ADOPTION

After ensuring information protection and security and running a pilot on a smaller group of users, your organization will be primed for wider enablement. Our **Training & Adoption** offering leverages the discovery, configurations, and use case identification from previous engagements to encourage successful adoption across your organization.

Our package includes **Technical Assistance**, **End User Support**, and **Post-Launch Reinforcement** from **\$39,000**.

TECHNICAL ASSISTANCE

Our organization-wide rollout includes time-boxed technical assistance and support for any troubleshooting or guidance your team requires.

END USER SUPPORT

A comprehensive Adoption Change Management plan, including fully drafted communications to support your organization's key messaging and use cases, will be supported by hands-on training and support.

POST-LAUNCH REINFORCEMENT

Intentional and sustainable use of Copilot requires more than just launching the tool – critical reinforcement strategies and future Microsoft 365 integrations will help further the impact of Copilot on your organization.



WHAT IS ACM AND WHY DO WE NEED IT?



Adoption Change Management (ACM) is vital to any digital transformation. **It is the “people” side of the change.**

ACM **bridges the gap** between employees’ current way of working and their new use of helpful digital tools.

We **prepare, equip,** and **support** individuals in adopting digital change and pursuing organizational objectives.

Projects with fair ACM are 3x more likely to meet business objectives than those with poor ACM.

Projects with excellent ACM are 6x more likely to meet business objective!



ADOPTION & CHANGE MANAGEMENT

Awareness



I hear a change is coming
Our User Experience team announced that we have new tools as a new communications channel.

01

02

03

Knowledge



I know how to use it ...
I attended a quick training webinar on how to use the new tools.

04

Desire

I'm excited to use it!
A video highlighted how the new tools work and why I should use them.



05

Reinforcement

I keep learning new features!

As I continue using the new tools, I put new skills into play and take advantage of more of the app's features.

Ability



It helps me do my job ...
The new tools helps me reach the right people at the right time more effectively!



BRINGING THE CHANGE JOURNEY TO LIFE



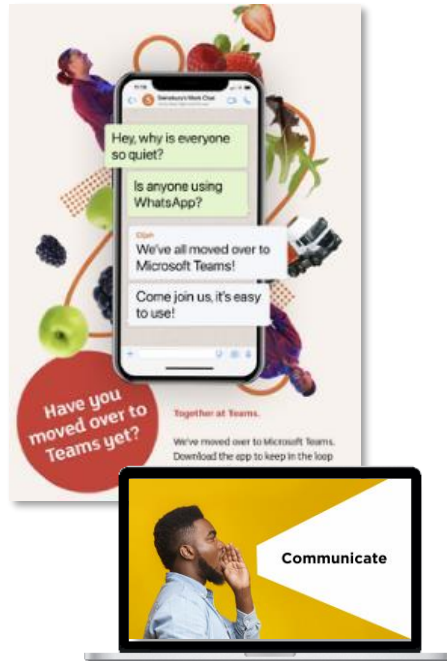
AWARENESS



Unified Campaigns



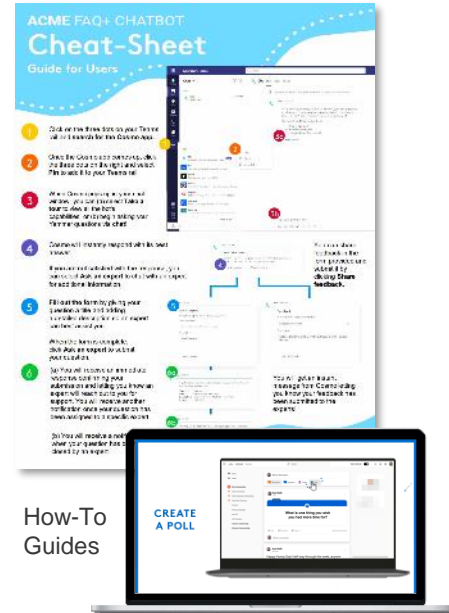
DESIRE



Posters, Banners & Buzz Videos



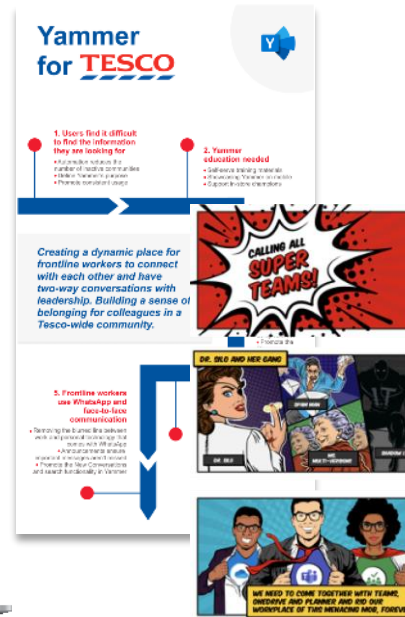
KNOWLEDGE



How-To Guides and Videos



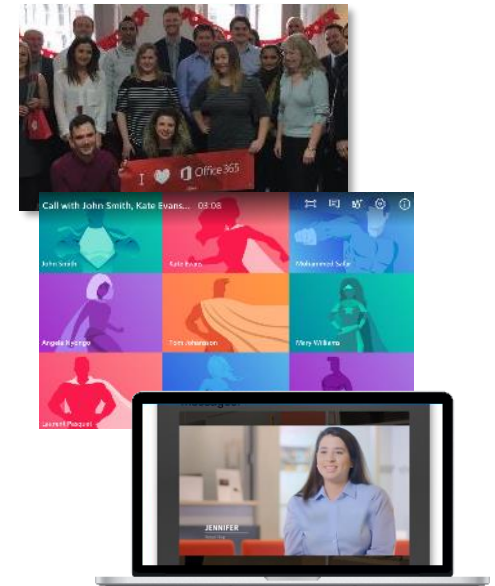
ABILITY



Infographics & Champions



REINFORCEMENT



Ongoing Activities & Employee Spotlight



TRAINING & ADOPTION



Activities



Technical Assistance

Taking all information from pilot and workshops to assess remaining security or permissions risks.



Champion Engagement

Sessions to further upskill Champions network (previous Pilot users) to act as advocates and subject matter experts.



Communications & Creative Assets

Creative design campaign to communicate Microsoft 365 Copilot launch information, engage personas as identified from previous workshops, and prepare end users for upcoming Microsoft 365 Copilot trainings.



Training & Office Hours

Training materials and activities designed to upskill pilot users on Microsoft 365 Copilot. Includes a training webinar, quick reference guides, and office hours.



Post-Launch Reinforcement

Surveys, interviews, and reinforcement tips on continuing adoption and usage of Microsoft 365 Copilot. Includes extensibility to additional applications and Microsoft 365 functionality.

OUTPUTS

- ✓ Additional technical assistance for any remaining security risks
- ✓ Full campaign and Adoption Change Management plan for launch
- ✓ Copilot training sessions and materials
- ✓ Champion and stakeholder engagement
- ✓ Reinforcement for sustainment and extensibility across Microsoft 365



DURATION: 8-10 weeks



SAMPLE TRAINING & ADOPTION BREAKDOWN

TASK	TIME FRAME
Alignment & Kick-Off <ul style="list-style-type: none"> - Kick-Off and Client Knowledge Share - Pilot success review and additional use case brainstorming - Adoption Change Management (ACM) workshop to determine key messages and creative strategy 	Weeks 1-2
Campaign Design and Asset Creation <ul style="list-style-type: none"> - Set of deliverables and assets based upon creative discovery output from ACM workshop. - Includes Communications T-Minus plan, fully drafted communications, email banners, infographic designs, Teams backgrounds, and more as to be determined with the organization. 	Weeks 2-3
Stakeholder & Champion Engagement <ul style="list-style-type: none"> - Pilot user communications to welcome them to Champion network - “Sponsor package” of key messages for stakeholders to cascade - Stakeholder briefing sessions - Bi-weekly Champion sessions 	Weeks 3-10
Training & End User Support <ul style="list-style-type: none"> - End User training webinars on the following topics: How Does it Work, It’s All in the Prompt, and Governance/Responsibility. Includes development of training materials, which will be uploaded to organization’s tenant for sustainable use - Quick reference and user guides (based on outlined scenarios) 	Weeks 3-10
Reinforcement <ul style="list-style-type: none"> - Post-launch survey and interviews with departments to align on continued Copilot use - Creation of Copilot resource hub on SharePoint with training materials - Success stories and reinforcement tips to be used on intranet & other communications - Outline of future use cases and Microsoft 365 Copilot future integrations 	Week 10
Technical Support <ul style="list-style-type: none"> - Timeboxed effort to provide bespoke support and governance guidance to organization’s IT team 	Weeks 1-10





**EXTENDING
MICROSOFT 365
COPILOT**

COPILOT EXTENSIBILITY WORKSHOP (2-3 HOURS)



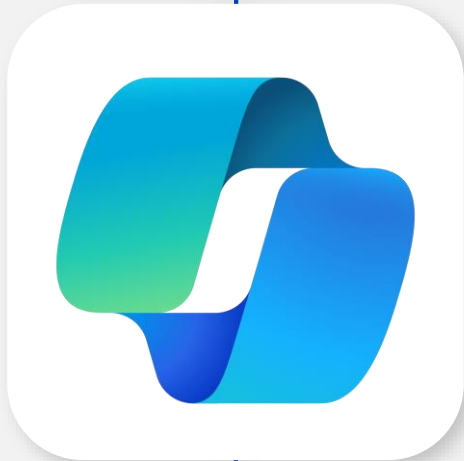
The following topics will be covered in the Copilot extensibility workshop:

- What is Copilot Extensibility
- What are the options for building extensibility
 - How to determine what tool to use when
- Sample copilots built with different tools
 - Demo Copilot Studio
 - Demo Graph Connectors
 - Demo Teams Message Extensions
 - Demo Power Platform Connectors
 - Demo OpenAI plugin
- Use Case Discussion
- Q&A



COPILLOT STUDIO IN HALF-A-DAY (4 HOURS)

This is a four (4) hour session led by a Valorem Reply Senior Consultant. Please see the table below for a high-level overview of topics that will be covered.



Task	Details
Introductions and overview	Introductions; Copilot Extensibility Overview
Introduction to Copilot Studio	Walk-through of Copilot Studio and discussion of what tool to use when
Set up your development environment	Includes steps to set up your environment and get started with Copilot Studio
Build your first Copilot	Includes presentation and lab to build the first copilot
Wrap up	Use case discussion; Call to action



HOW WE CAN HELP – MICROSOFT 365 COPILOT EXTENSIBILITY

With the extensibility model of Copilot for Microsoft 365 with Copilot Studio and plugins, Reply will collaborate with you to integrate your apps and services to extend the reach of Copilot in your organization to value-added employee experiences. We will evaluate which of the three types of plugins to enable: ChatGPT plugins, Teams message extensions, and Microsoft Power Platform connectors. Once determined, we will support you in extending Copilot to the apps you already use and have invested in, to bring the power of AI where you are already working.

Our extensibility offer includes technical discovery, implementation, and training support for **\$60,000**.

MICROSOFT 365 PLUGINS

Extend your Microsoft 365 Copilot capability by customizing and connecting your applications with plugins. Explore available and existing connections that will be of the most value to your organization's ways of working.

MICROSOFT GRAPH CONNECTORS

Ground Microsoft 365 Copilot in more of your organizations' content and data to create deeper insights and connections. Improve the semantic index to increase ranking and relevancy of content while preserving trust.



MICROSOFT 365 EXTENSIBILITY



Activities



Technical Discovery

Understanding the current external or 3rd-party tools your organization uses as well as to identify connection points.



Technical Recommendations

Sessions to ensure necessary technical settings are enabled to successfully leverage a developed Copilot extension.



Development

Dedicated time to developing the plugin in an organization's test environment. Includes end-to-end testing.



Training & Materials

Training materials to share with Microsoft 365 Copilot users to help them better understand how Microsoft 365 Copilot pulls information from the plugin or connector.



Post-Launch Support

A pot of time dedicated to support after the launch of the extension to troubleshoot any bugs. Includes technical knowledge handover to organization's IT team.

OUTPUTS

- ✓ Additional technical review and recommendations
- ✓ Extended Microsoft 365 Copilot through plugins and graph connectors
- ✓ Training materials for end users
- ✓ Technical knowledge handover.



DURATION: 10 weeks



SAMPLE EXTENSIBILITY BREAKDOWN

TASK	TIME FRAME
Alignment & Kick-Off <ul style="list-style-type: none"> - Kick-Off and Client Knowledge Share - Outline scope of work and development timeline - Realign on Microsoft 365 usage across the organization - Identify business function scenarios, specifically, Sales, Service and Finance 	Weeks 1-2
Technical Discovery <ul style="list-style-type: none"> - Sessions dedicated to understanding current 3rd-party tools, CRM, ERP and technology used across the organization - Identification of high-value plugins and connectors - Recommendations and high-level documentation of necessary configurations to enable plugins and connections 	Weeks 2-3
Development <ul style="list-style-type: none"> - Development of identified high-value plugin in a test environment - End-to-end testing of connection - Screenshare sessions and troubleshooting - Implementation of plugin or connection into organization's working environment - Deploy Copilot for identified business functions built for specific roles and skills integrated with the first- and third-party applications sales, service, and finance professionals use daily including Dynamics 365, Salesforce, Zendesk, ServiceNow, and SAP. 	Weeks 3-10
Training & End User Support <ul style="list-style-type: none"> - Creation of training materials to support end users with new functionality - Help users understand security and data protection with the plugin - Help sales, service and finance users unlock new levels of productivity with Copilot-assisted automated business processes. 	Weeks 8-9
Technical Handover & Support <ul style="list-style-type: none"> - Knowledge share sessions for organization's IT department - Documentation of all materials for future sustainment - Support and troubleshooting for any bugs that arise within 30 days 	Week 10
Project Management <ul style="list-style-type: none"> - Dedicated Reply Project Manager to ensure support and monitor timelines 	Weeks 1-10



THANK YOU

