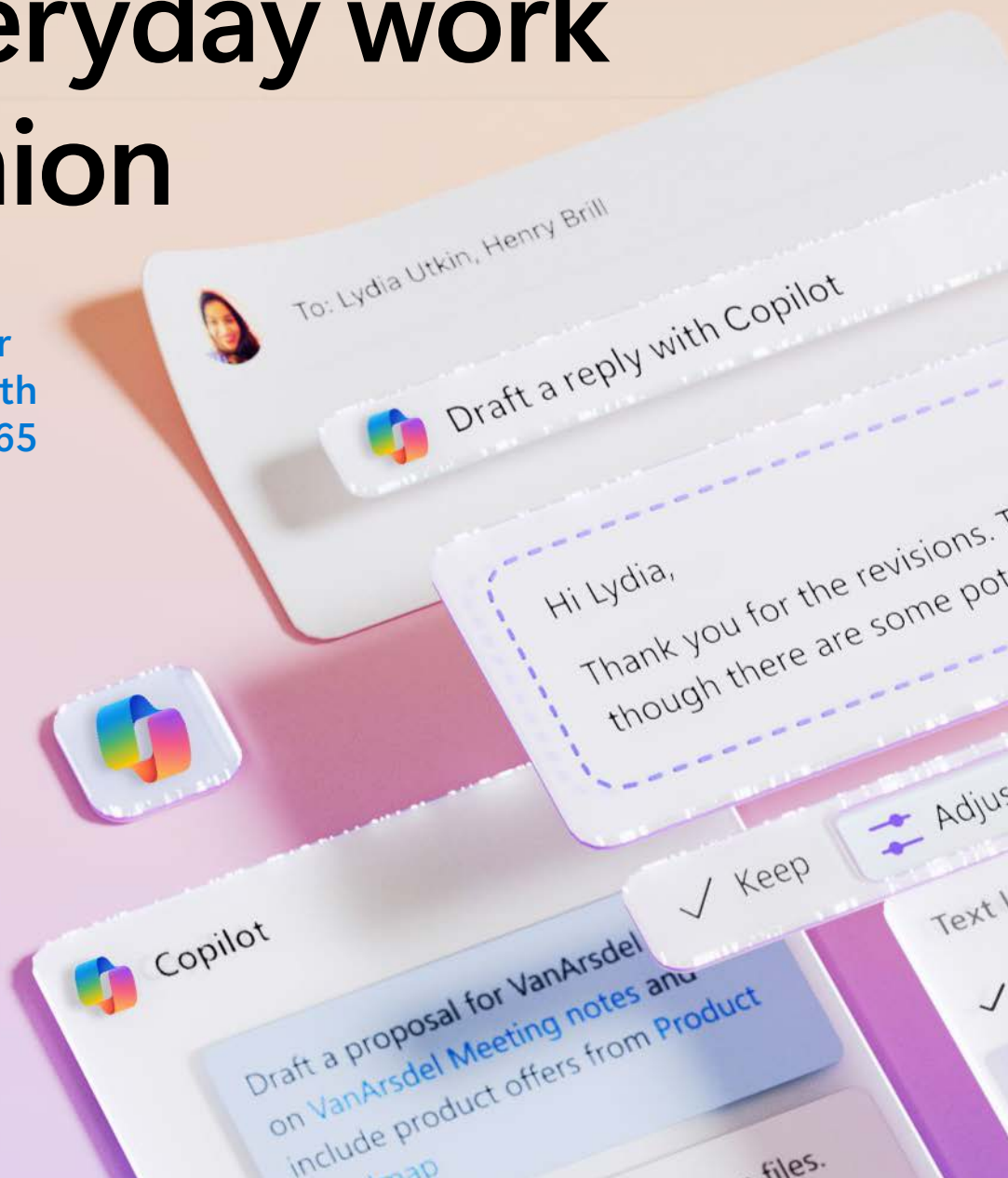


How to onboard Copilot, your everyday work companion

Ready your people and processes to reach their full potential at work with Copilot for Microsoft 365



Contents

If you can imagine it, you can achieve it	2
Every person can realize the promise of Copilot	3
The secret to adoption is in building new work habits	4
Navigate your AI journey with confidence	6
Achieve more with your everyday AI companion	8

If you can imagine it, you can achieve it

There's an art and science behind using Copilot to empower every department and role

In today's fast-paced digital world, the sheer volume of emails and messages can overwhelm even the most organized professional – the typical Microsoft 365 power user receives, on average, upward of 250 emails daily and juggles 150 chats daily.¹ Many of us are no strangers to the overwhelm that comes with the digital hustle. But imagine if you alone didn't have to bear the weight of these increasing workloads.

AI has proven to be a game-changer in productivity, augmenting human capability and accelerating everyone's innate ingenuity. It doesn't just make it easier to check off items on our to-do lists – it unlocks our creative potential, helping us overcome the drudgery of work to rediscover the joy in work. But like any new tool, it takes practice to master.

Copilot for Microsoft 365 has the potential to redefine the boundaries of what an organization can get done. Yet there is an art and science to successful adoption across an organization. To reap the benefits, you must first understand the process of integrating generative AI capabilities into your business operations and investing in the strategies, skills, and techniques needed to unlock the full value of Copilot.

Tap into the full potential of Copilot for Microsoft 365

Research findings from early Copilot users²

70%

Said they were more productive

4x

Nearly 4x faster catching up on a missed meeting

29%

Faster overall in a series of tasks (searching, writing, and summarizing)

77%

Said they didn't want to give it up

Every person can realize the promise of Copilot

The busy Executive can find the time to prepare with confidence

Executives are always pressed for time. Imagine what you could accomplish with an AI-powered assistant at your disposal. You may not have a break in your schedule, but you can achieve more between meetings than you ever thought possible.

The HR Director can make the hiring process less tedious and costly

The cost of replacing an individual employee can range from one-half to two times the employee's annual salary – and that's a conservative estimate, according to Gallup.³ Copilot for Microsoft 365 changes this paradigm by creating a more efficient hiring process that reduces costs and ensures you are selecting the most suitable candidates for the job.

The Operations Manager can quickly identify issues and find solutions

Production issues cost money. That's why solving them quickly is always a top priority. Copilot for Microsoft 365 identifies issues and finds solutions faster to reduce the cost of lost production. Everyone is trying to avoid production downtime as much as possible. Those with Copilot have a clear advantage when it comes to getting to the bottom of an issue – fast.

The Sales Manager can focus more on building pipeline and closing deals

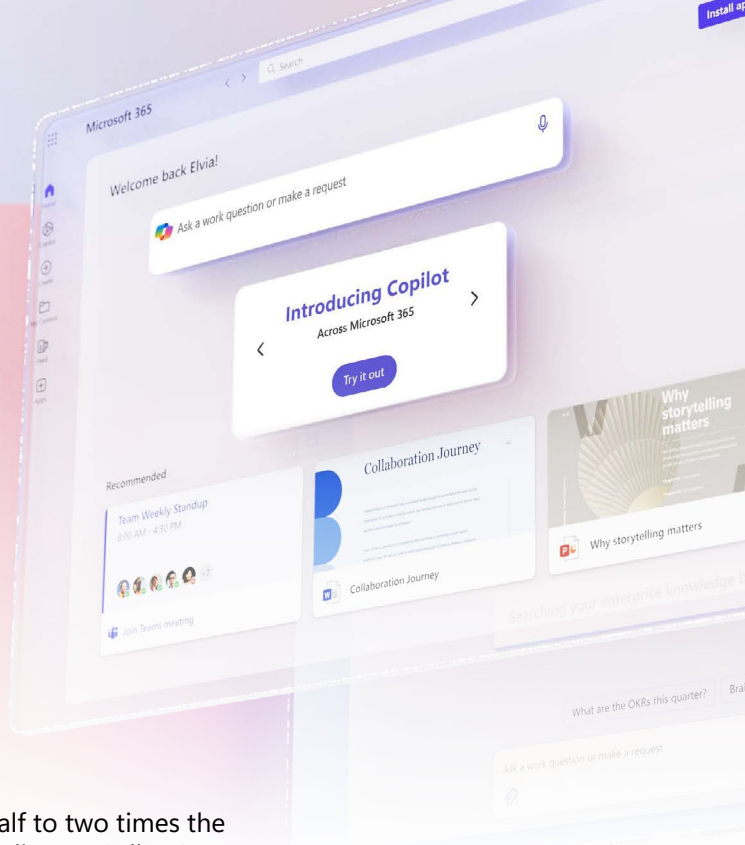
From conducting industry research to creating proposals, Copilot for Microsoft 365 works alongside sales teams, handling administrative and routine, repetitive tasks. As a result, they can save time and focus on building pipelines and closing deals. Your customer wants to feel special. Meet that expectation by personalizing content, landing the right messages, and freeing up your time to give them the attention they deserve.

The Marketing Director can create an impactful marketing pitch in record time

From developing strategic marketing plans to collaborating with other teams, composing marketing copy, and more, Copilot for Microsoft 365 works alongside marketing teams so they can focus on turning ideas into qualified revenue opportunities. We may live in a digital world saturated with content. But you can stand apart with an intelligent assistant that helps your team unleash creativity at scale like never before.

The Financial Analyst can spend more of their time on high-value tasks

In today's fast-paced financial landscape, analysts need all the help they can get to do more with the data they have and make proactive, strategic decisions amid an overflow of information and ever-tightening deadlines. Copilot for Microsoft 365 helps you organize information in more productive ways, streamlining processes like forecasting, financial reporting, and coordinating stakeholder communications. Processes like completing an acquisition can be tedious, requiring careful coordination of people, data, and insights. Efficiencies can be unlocked when you can lean on AI to support every step.



The secret to adoption is in building new work habits

It's not enough to activate Copilot – your people need guidance on how to build new skills. **We can help.**

Copilot isn't designed to replace human capabilities – it's designed to enhance them. Copilot for Microsoft 365 is an AI-powered assistant that's built to enhance your experience with Microsoft 365 applications, including Word, Excel, PowerPoint, Outlook, and Teams. People engage with Copilot just like they would any other virtual assistant, using their native language to ask questions and make requests. The difference is Copilot knows how to access and manage your content and data spread across Microsoft 365.

Copilot for Microsoft 365 knows how to access information from your inbox. It can make some highly informed recommendations based on email threads and chats. It can quickly generate content based on information and ideas you share. And it can perform complex or repetitive tasks with simple commands, among many other use cases. But Copilot isn't a person. Your work output still requires professional judgment that only you can provide. To realize the full potential of generative AI, it's important that your people understand how to use this technology to augment their own capabilities.



We help you ready your people and processes to successfully embrace Copilot



Understand the data

To use Copilot for Microsoft 365 effectively, team members must grasp the origins, integrity, and bounds of the data it leverages to draw insights and suggestions. Copilot analyzes a wealth of organizational content within an organization's Microsoft 365 tenant, including calendars, emails, chats, documents, meetings, contacts, and more – all from within the secure Microsoft 365 compliance boundary. The more data available in Microsoft 365, the richer and more personalized the Copilot suggestions.

Education and customization are our areas of expertise. Gain a deeper understanding of what kinds of data the Copilot system is analyzing. Configure policies and integrate other systems to optimize experiences. And ensure your employees know how to apply generated responses to their unique situations and objectives.



Engineer prompts

Prompts are how you can ask Copilot to do something for you – like creating, summarizing, editing, or transforming information. The experience of crafting a prompt is similar to having a conversation in that you'd use plain but clear language to communicate something while providing the necessary context.

While the experience seems simple enough, mastering the art of prompt engineering takes practice. To get the best results, employees need to learn how to structure their prompts – a skill we can help your organization hone over time. Work with a Microsoft Partner to drive continuous learning and experimentation and establish best practices to ensure the accuracy and appropriateness of AI-generated content.



Empower others to lead

When deployed correctly, Copilot can transform each team member into a leader who is equipped to handle not just mundane tasks but also complex challenges. Beyond automating repetitive processes, employees can entrust Copilot with bigger responsibilities – ranging from research and analysis to creative ideation. However, to realize the fullest potential of Copilot, you'll need to alter how employees think about work, adopting the qualities of an adept leader that can be helpful, such as delegation, communication, and analytical thinking.

We can help you sow the seeds that will grow these capabilities across all levels of your organization. Receive guidance on how to integrate advanced AI tools into everyday operations. And get your people to understand all the powerful ways Copilot can impact their work.

Navigate your AI journey with confidence

Work with a Microsoft Partner to transform your business with Copilot for Microsoft 365

Step 1

Build your AI transformation strategy

We offer AI advisory services that empower organizations to rethink processes with Microsoft AI. Build your transformation strategy around core Microsoft Copilot workloads to meet business needs. Identify top personas that would deliver value if reimaged with AI then come up with a plan. Together, we'll collaborate to create the roadmap to successful implementation and adoption.

Step 2

Prepare your technology environment

Confirm you have the right platforms and licenses in place to successfully deploy Copilot for Microsoft 365. We'll work with you to evaluate and close technology gaps by conducting a comprehensive readiness assessment. Reassure stakeholders that you're starting your AI journey from a solid foundation with a well-defined operating and governance model. Go beyond awareness and get security ready by configuring policies in your Microsoft 365 tenant and ensuring data privacy and protection.

Step 3

Customize and deploy with confidence

Don't just assume Copilot for Microsoft 365 will fit your organization's needs out of the box. In most cases, customization is necessary. We can help you determine the best use cases, personas, and extensibility options that are right for your organization. Then we'll work on customizing and deploying Copilot experiences to meet those needs.

Step 4

Empower your people to drive adoption

Change begins with empowering people. If you want to become an AI-powered business, you must invest in the people your AI investments will impact the most. We work closely with organizations to drive change management and adoption activities to ensure your employees are equipped with the knowledge and skills they need to become Copilot power users. Work with a dedicated team to transition processes and adapt behaviors, providing continuous support, training, and updates to maximize impact.



Step 5

Extend Microsoft AI capabilities

Did you know that Copilot for Microsoft 365 can become even more powerful when integrated with other systems within your organization? If you're looking to expand, enrich, and customize Copilot further, we can help you create plugins and Graph connectors to extend capabilities. There's more than one way to personalize Copilot for Microsoft 365 by drawing from the intelligence of external services, apps, and data. Let us help you make those connections to achieve more than you ever thought was possible.

Achieve more with your everyday AI companion

We are all struggling under the weight of work. We are overwhelmed by information, deadlines, and the crush of always-on communication. AI can help – not just by making work easier or faster, but by making it more fulfilling. When we don't need to spend as much cognitive energy on figuring out what happened in that meeting, getting caught up on email, or finding that document from that chat last week, we can spend more time on the substance of our work – and our purpose for doing it.

Copilot for Microsoft 365 has the potential to transform how we navigate our workdays. To realize the value, take charge of how you're driving adoption and get your organization AI-ready with the support of a Microsoft Partner.

Start your adoption journey today

Learn more:

Email: hello@otava.com

Phone: 877-740-5028



¹The Art and Science of Working with AI | Microsoft

²Work Trend Index Special Report | Microsoft

³This Fixable Problem Costs U.S. Businesses \$1 Trillion | Gallup



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