

Charting the Microsoft 365 Copilot Implementation Lifecycle

– Part 1: The Organize Phase



Microsoft 365 Copilot is one of the most game-changing enterprise tools to hit the business IT marketplace in years. But in the rush to adopt this new AI assistant, organizations must remember that the solution is not turnkey when it comes to implementing Copilot in enterprise systems. As a Microsoft Gold Partner and trusted adviser to financial firms eager to put Copilot to use, ECI is helping clients chart that implementation journey.

Not only is there a fair amount of customization required to launch Copilot, but we've found that the implementation itself should ideally happen in phases designed to align and configure enterprise resources ideally to work with Copilot. This journey through four phases – Organize, Assess, Deploy and Manage – will ensure Copilot is implemented for maximum business value and ROI. In this first of a four-part blog series dedicated to charting that journey, let's examine the initial Organize phase.

Organizing IT Assets, Policies and Procedures is an Essential First Step

As tempting as it is to simply install Copilot and start using it, organizations must first take care to properly organize IT assets and the processes and policies that govern how these assets are going to be used by Copilot. This is an essential first step before ramping up Copilot as an AI assistant that will begin to take over many of the daily, mundane tasks that eat up a business user's workday.

Examples of these tasks include Copilot's ability to work within Teams to automatically generate meeting notes, action items or flags where a particular person was mentioned. In Outlook, Copilot can set reminders and suggestions for replies based on relevant e-mail and other M365 content. And compared to other industry sectors, the ROI

from these Copilot abilities is magnified in financial sector organizations, where employee salaries tend to be higher.

Yet while these time-saving capabilities are what give Copilot its value in streamlining and accelerating the pace of business in the modern workplace, they can also introduce security or compliance risk if IT assets, policies and procedures are not properly organized and aligned. For example, access controls must be revisited to ensure users don't leverage Copilot to indirectly access content or data that would otherwise be off limits to them – such as when an entry level employee uses Copilot to build an Excel spreadsheet that ends up drawing from highly protected earnings data.

Key Activities in the Organize Phase

The Organize phase consists of key activities like reviewing all policies, procedures and controls; and setting up working groups to monitor the functionality of Copilot and all relevant business impacts, security issues and compliance considerations. As such, this phase requires organizations to examine the entire spectrum of people, processes and technologies – from infrastructure, connectivity and file access, to authentication, workflows and user training.

The rigorous discovery that happens during the Organize phase lays the initial groundwork for Copilot to operate effectively within a given organization's IT systems and business processes. This phase helps identify process gaps or bottlenecks, such as whether a database is

accessible for indexing by Microsoft 365 – a prerequisite for Copilot to be able to work effectively with enterprise data.

Especially if a firm hasn't done this kind of discovery before, the Organize phase can be a sobering and eye-opening experience. Implementation teams may come out of this phase with a daunting to-do list for system configuration, cyber asset management and related tasks that will need to take place in subsequent Assess, Deploy and Manage implementation phases. Not surprisingly, many firms find that a qualified MSP can help simplify the journey and maximize Copilot's business value.

ECI's Microsoft Gold Partner status and our specialty in the financial sector makes us the ideal MSP partner for alternative investment firms looking to take advantage of Microsoft 365 Copilot. We handle deployment and ongoing management of Copilot in the demanding, highly regulated IT environments that most financial firms operate within. Contact us today at sales@eci.com to learn more.

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