**Copilot for Microsoft 365 Business Case Template**

**AUTHOR:** [YOUR NAME/COMPANY]

# **Introduction**

This document guides you through building a business case for Copilot for Microsoft 365, an AI-powered productivity tool. Analyse your organisation's needs, explore Copilot's functionalities, and assess its potential benefits to justify its adoption.

# **Business Case Template Overview**

**Business Need:**

* **Trigger:** Briefly explain the reason for this Copilot for Microsoft 365 business case.
* **Strategic Alignment:** Show how this proposal aligns with your organisation's overall strategy.
* **ROI:** Highlight the significance of this proposal, emphasising its potential impact and ROI.

**Proposal and Options:**

* **Proposed Action:** Clearly state your recommendation (e.g., implementing Copilot for Microsoft 365).
* **Rationale:** Explain the reasoning behind your proposal and its expected benefits.
* **Alternatives Considered:** Briefly mention any alternative solutions explored and why they weren't chosen (e.g., "doing nothing").

**Next Steps:**

**- Action Items:** Outline the immediate steps required to move forward (e.g., conducting a cost-benefit analysis, seeking approvals).

# **Copilot for Microsoft 365 Business Case Template**

Shape

1. ***Business Need and Opportunity***

* Briefly describe your current need or opportunity that is driving the need for Copilot.

***Example:*** *Current meeting processes for our sales team are inefficient. The need to manually compile information after meetings leads to delays and lost opportunities to progress deals quickly.*

***Example:*** *Increased competition in our market demands faster turnaround times, and Copilot can help us achieve that goal. Additionally, our existing M365 infrastructure positions us well for a smooth Copilot implementation.*

1. ***Copilot for Microsoft 365***

* Provide a concise overview of Copilot for Microsoft 365.
* Highlight its key functionalities relevant to your organisation's needs.

***Example:*** *Copilot for Microsoft 365 is an AI-powered add-on subscription service that will enhance our Microsoft 365 experience. It acts as a productivity assistant, automating tasks, analysing data, and improving communication workflows.*

*Sales Team:*

* ***Focus:*** *Data analysis for enhanced customer interactions, email automation for post-meeting follow-ups with key talking points, document automation for sales reports and activity logs.*
* ***Example:*** *Copilot can help our sales team gain a competitive edge by identifying sales opportunities. Additionally, it can automate post-meeting follow-up emails with key talking points captured during the meeting, ensuring timely communication with potential customers. Copilot can also automate the creation of sales reports and activity logs, freeing up valuable time for our sales team to focus on closing deals.*

*Marketing Team:*

* ***Focus:*** *Content creation tools for social media and email marketing campaigns, data analysis for campaign performance insights, scheduling and automation for social media posts.*
* ***Example:*** *Copilot can assist our marketing team by generating content ideas and automating social media posts. Its data analysis features can help us to track campaign performance and optimise future efforts.*

*Customer Service Team:*

* ***Focus:*** *Automated responses to frequently asked questions (FAQs), better understanding of customer enquiries, knowledge base creation and management tools.*
* ***Example****: By automating responses to common questions, Copilot can free up our customer service team to handle more complex issues. These insights can help us to understand customer needs and frustrations better, leading to improved service delivery.*

1. ***Business Case Analysis***

Summarise the key findings from your business case analysis, including the estimated ROI.

***Example:*** *Our analysis indicates that Copilot can potentially save the sales team X% of their time spent on crafting and summarising key talking points after meetings. This translates to an estimated Y% increase in time available for focused prospecting and customer outreach. Additionally, Copilot's data analysis capabilities can help identify sales opportunities through competitive intelligence gathering. By leveraging these features, we project a return on investment (ROI) of Z% within the first year of implementation.*

1. ***Proposal***

* Clearly state your recommended course of action (e.g., implementing Copilot).
* Outline the resources needed (financial and human) and the expected benefits.

***Example:*** *I recommend a phased rollout of Copilot, initially focusing on the sales team. The financial resources will include the cost of Copilot subscriptions and potential training materials. I anticipate needing X hours of human resources for initial set-up and training.*

*Implementing Copilot can:*

* *Increase sales team productivity by X% through automation.*
  + *Automate post-meeting follow-up emails with key talking points captured during the meeting, ensuring timely communication with potential customers.*
  + *Automate the creation of sales reports and activity logs, freeing up valuable time for your sales team to focus on securing deals.*
* *Reduce proposal creation time by Y%.*
  + *Utilise Copilot's data analysis capabilities to identify sales opportunities through competitive intelligence gathering.*
* *Increase personalised email interactions with leads by X%.*
  + *Analyse customer email communication to identify buying signals (e.g., urgency, budget mentions, specific product enquiries). This can help sales teams prioritise leads and tailor their outreach with relevant information.*

1. ***Cost Analysis***

Estimate the Total Cost of Ownership (TCO) of Copilot for Microsoft 365, including:

* + Licence fees for the Copilot add-on subscription
  + Training costs
  + Licence uplift costs (X number of users need to be upgraded to Business Premium)
  + Any required infrastructure upgrades

|  |  |  |
| --- | --- | --- |
|  |  | Comments |
| Contract Term | 24 months |  |
| Cost to implement | £ |  |
| Annual total licence cost | £ |  |
| Year 1 | £ |  |
| Year 2 | £ |  |
| Overall Total Cost | £ |  |
| Overall cost per user | £ |  |
| Cost per user per year | £ |  |
| Cost per month per user | £ |  |
| Overall training cost | £ |  |
| Overall other miscellaneous costs | £ |  |
| Overall infrastructure upgrade costs | £ |  |

1. ***Benefits Analysis***

* Quantify the potential benefits of Copilot, such as increased productivity, reduced errors, and improved customer satisfaction.
* Calculate the projected return on investment (ROI) based on the TCO and quantified benefits.

**Example:**

* **Streamlined Meetings:**
  + Reduce time spent summarising meetings manually by X%, freeing up valuable time for sales representatives to focus on customer outreach and deal progression.
  + Improve meeting follow-up efficiency by Y% through automated tasks like sending summaries and action items, ensuring timely communication and progress on next steps.
* **Enhanced Integration:**
  + Increase sales representative preparedness for client meetings by Z% through Copilot's ability to automatically surface relevant customer data and past interactions before meetings.
  + Improve the accuracy and completeness of data by capturing key talking points and action items directly from meetings, leading to a more robust customer profile.

1. ***Detailed Business Case***

* Forecast Copilot costs and how it can boost your performance, considering different scenarios.
* Assess whether your business is ready for Copilot and if not, what is needed.

**Example:** To estimate how much time Copilot can save our sales team and potentially lead to more sales, we'll look at our team's past workload and what industry averages suggest. We can also dig deeper to see how well different levels of use by our team might impact our return on investment (ROI).

1. ***Risks***

* Identify potential risks associated with Copilot adoption, such as user adoption challenges or data security concerns.
* Develop mitigation strategies to address each identified risk.

**Example:** To address user adoption challenges, we can provide comprehensive training and user support programmes. For data security concerns, we can leverage Copilot's existing security features and ensure alignment with our organisation's compliance policies.

1. ***Analytical Process***

Outline the steps taken to conduct your analysis and the people involved.

**Example:** We conducted the following to analyse Copilot's potential benefits:

**Data Analysis:** We've analysed the sales team's workload, specifically focusing on:

* **Meeting Efficiency:** We've identified areas where meetings could be optimised, such as time spent capturing key talking points and action items.
* **Better Integration**: We will be able to provide better customer interactions and information integration by pulling relevant product info, customer info, and anything else relevant to that customer meeting from within our microsoft tenant.

1. ***Alternatives Considered***

Summarise any alternative solutions explored and the rationale for rejecting them (including "doing nothing" if relevant).

**Example:** We considered alternative solutions such as email and meeting management tools, but Copilot came out on top:

* Summarising Meetings: Copilot can automatically generate summaries of meetings, capturing key talking points and action items. This saves our sales representatives time and ensures everyone has access to a clear record of the discussion.
* Meeting Preparation: Copilot can automatically surface relevant customer data and past interactions before meetings, allowing sales representatives to be better prepared.
* Meeting Follow-up: Copilot can automate post-meeting follow-up tasks such as sending meeting summaries and action items to attendees, ensuring timely communication and progress on next steps.

1. ***Next Steps***

Identify the actions needed to move forward with the proposal.

**Example:**

* Secure approval from the relevant decision-makers.
* Conduct a pilot programme with a small group to test Copilot's functionality and user adoption.
* Finalise the implementation plan based on the pilot programme's results.

1. ***Action Items***

* **Subscription Verification:** Emphasise the need to verify your current Microsoft 365 subscription plan to identify any potential licencing upgrades for full Copilot functionality.
* **Security & Compliance:** Highlight the importance of identifying any additional security or compliance considerations specific to your organisation's needs.

1. ***Implementation Plan***

This section will be filled out in detail after securing approval. Here, you can outline the scope of deployment (e.g., department-wide or phased rollout), training strategy (e.g., online tutorials, in-person workshops), and a realistic timeline for implementation.

1. ***Resource Requirements and Approvals***

* Specify the financial and human resources needed for implementation.
* Identify any required approvals from the board and the associated timeline.

1. ***Impact of Delay***

Explain the potential consequences of delaying or rejecting the decision to implement Copilot.

**Example:** Delaying Copilot implementation could:

* **Reduced Meeting Efficiency:** Delaying Copilot implementation will continue inefficiencies in the sales team's meeting lifecycle. This can include:
  + Time wasted summarising meetings manually.
  + Difficulty for attendees to recall key talking points and action items.
  + Inefficient follow-up due to delayed communication of meeting outcomes.
* **Hampered Sales Team Productivity:** Time spent on manual meeting tasks reduces the sales team's capacity for customer outreach, relationship building, and deal progression.
* **Weakened Customer Management:** Without Copilot's ability to automatically surface relevant customer data before meetings, sales representatives may be less prepared for client interactions, potentially impacting sales opportunities.
* **Competitive Disadvantage:** In a fast-paced market, delays in implementing Copilot can leave your sales team at a disadvantage compared to competitors who utilise similar productivity tools.

1. ***For Reference: Document Length***

For optimal clarity, aim to fit your business case within 4 to 5 pages, including a separate 1-page executive summary.