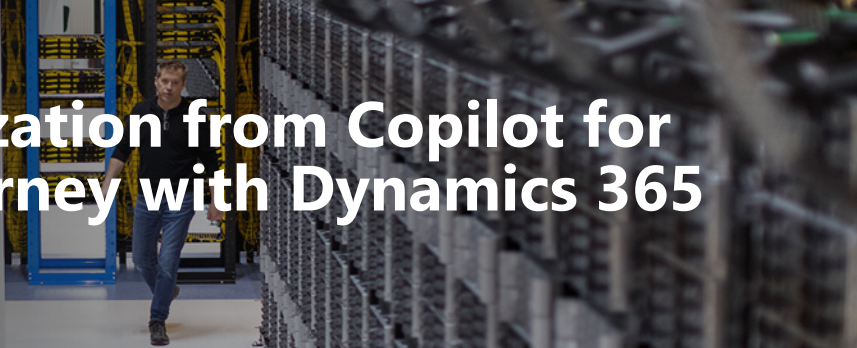


# Accelerate - Value Realization from Copilot for Customer Insights - Journey with Dynamics 365



## Adoption Services

**Duration:** 5 Days [ Remote | Onsite ]

**Difficulty Level:** 200 - Intermediate

### Description

In this engagement, you will work with Microsoft experts to quantify business value and benefits, receive support to overcome internal barriers, and boost end-user adoption of Copilot for Customer Insights Journey scenarios tailored to your business.

### Objectives

- Envision Copilot for Customer Insights Journey scenarios and extensions to deliver increased value to your sellers.
- Quantify expected and actual business value and benefits.
- Boost adoption through support with change management and compliance.
- Influence and keep informed of the roadmap for Copilot for Customer Insights Journey with Dynamics 365.

### Outcomes

- Define Copilot for Customer Insights Journey use cases, which includes identifying extension scenarios.
- Quantify expected and actual business value according to agreed success measures.
- Support internal control functions to approve Copilot for Customer Insights Journey adoption where necessary.
- Define an approach to drive user adoption.
- Understand the product roadmap and next steps.

### Methodology

#### Learn by example

Work closely with a Microsoft engineer to learn change management concepts and best practices.

#### Hands-on

Participate in group discussions with a Microsoft specialist.

### Scope

Users who completed an initial Copilot for Customer Insights Journey with Dynamics 365 activation (in either a sandbox or in production) and want help with accelerating adoption and maximizing business value.

### Agenda

The agenda and timeline will be tailored according to your current situation and needs. For example:

- Week 1: Envision
- Weeks 2-5: Adopt
- Week 6: Assess

# Delivery outline

## Requirements

### Participants

- Dynamics 365 Architects
- Administrators
- Customer Insights Journey Analysis and Enablement Team, Decision Makers, and Early Adopters
- Champion users

### Skill Requirements

- An understanding of your Dynamics 365 business and Customer Insights Journey processes and administration activities.

### Time Commitment

- 5-day engagement with relevant roles.
- Time usage is spread across 6 weeks.

### Delivery Requirements

- Access (if needed) to the targeted production or sandbox environment with Copilot for Customer Insights Data for assessment.

## Adoption

### Scoping

Scope with customer and executive team

- Scope the engagement, review the prerequisites, and define roles and responsibilities.

### Week 1

Envisioning session

- Review of the overall planning.
- Attend a listening session with your feedback and a questionnaire for you to review and complete.
- Create a Customer Insights Journey Copilot Adoption project team, which includes early adopters and champions.
- Establish a preferred communication channel with the Copilot for Customer Insights Journey Adoption project team.

### Week 2

Data Analysis/Discussion

- Review the questionnaire and have an interactive discussion with a Microsoft architect to remove blockers and drive adoption.
- Prepare your organization and staff with the knowledge to implement adoption practices based on the Copilot for Customer Insights Journey features that are useful for the business.

### Week 3

Assess

- Prepare your organization and staff for a series of planned 30-minute office hours to ask questions and provide feedback.
- Track Copilot usage for Customer Insights Journey.

***If you are interested in this engagement for your organization, contact your Microsoft Account Representative.***