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Microsoft 365 Copilot and AI Agents

G-Cloud 15 Service Definition

1. About Chess

We help you deliver a 'Modern Workplace', providing flexibility of access to services and information in a secure and compliant environment. Addressing your challenges through professional services, support, adoption and change management.

We have extensive experience supporting public sector organisations across central and local government, emergency services, healthcare, higher education, the third sector and housing associations. Our expertise spans both modern cloud platforms and legacy application environments.

Why Chess

- Proven Microsoft 365 Adoption & Change Management practice, following Prosci™ methodology advocated by Microsoft.
- Highly experienced technical specialists across Microsoft 365 and Azure.
- Over 30 years of delivering successful Microsoft-aligned transformation services.
- Comprehensive portfolio including Microsoft 365 security and compliance, identity and access management, device management, Power Platform, and cloud migration services.

2. Service Overview – Microsoft 365 Copilot & AI Agents

Microsoft 365 Copilot brings an AI assistant to Microsoft 365 that supercharges productivity. It combines secure, web-grounded chat with enhanced work chat grounded in your organisation's business data, and integrates directly into apps such as Outlook, Teams, Word, PowerPoint, Excel and OneDrive.

AI Agents are AI-powered assistants you can configure (via the Agent Builder) to answer questions and perform tasks using your internal content and systems — for example, an HR agent that responds using policies and handbooks. Agents can be created with prompts and extended to connect to other data and systems.

3. Key Service Features

- Enablement of Copilot & Copilot Chat: readiness checks, configuration, pilot planning and enablement for targeted user groups.
- Security, Privacy & Permissions by Design: Copilot respects existing Microsoft 365 permissions and only surfaces content users are entitled to see. Content should be stored in Microsoft 365 for best results.
- App Scenarios: Outlook (drafting/replies/attachment summaries), Meetings (prepare/summarise/recordings), Word (summarise/ask/rewrite), PowerPoint (create decks from documents), Excel (formula suggestions/insights), OneDrive (summarise across multiple documents).
- AI Agents (optional): design and build of task-specific agents; configuration using prompts; enable PAYG or licensed capability depending on requirements.
- Education & Adoption: expert-led training, role-based guidance, and change management to embed safe, effective use of AI.
- Data Readiness Assessment: identify risks from out-of-date, non-authoritative, overshared and sensitive content; recommend remediation to improve AI outcomes.

4. Service Benefits

- Accelerate secure AI adoption with a structured, public-sector-ready approach.
- Improve productivity at scale through integrated AI across everyday apps.
- Reduce shadow-AI risk by enabling secure, approved Copilot Chat and providing user education.
- Unlock value from business data with readiness assessments and governance recommendations.

5.1 Readiness & Planning

- Discovery workshops to identify priority user groups and scenarios.
- Technical prerequisites review and environmental checks.
- Data readiness assessment (oversharing, sensitivity, authority, lifecycle).

5.2 Copilot Enablement

- Configuration and enablement for selected users.
- Guardrails aligned to Microsoft 365 permissions, privacy and compliance.
- Pilot governance (success measures, feedback loops, and expansion planning).

5.3 Training & Adoption

- Expert-led online training (role-based), quick-reference materials and best-practice usage patterns.
- Communications plan to drive awareness, confidence and responsible use.

5.4 AI Agents (Optional Workstream)

- Agent design (use cases, scope, data sources).
- Build using Agent Builder with prompt engineering and connectors.
- Testing, governance and handover, with usage insights and reporting.

6. Delivery Packages – AI Accelerators: Ready, Set, Copilot!

Package	What's included	Recommended Audience	Guide Price*
Basic	Identify users & scenarios; review prerequisites; enable Copilot; 4× expert-led online training	Up to 10 People	£2,000*

Standard	As Basic, plus Data Readiness Assessment; 10x expert-led online training	Up to 25 people	£5,000*
Premium	As Standard, plus create an AI Agent; usage insights & reporting; 15x expert-led online training	Up to 5 users for the agent	£7,500*

*Excludes purchase of Microsoft 365 Copilot licences.

7. Security, Privacy & Compliance

- Copilot only accesses data the user is permitted to see; it respects existing Microsoft 365 access controls.
- · For best results, relevant content should be stored in Microsoft 365 (SharePoint, OneDrive, Exchange, Teams).
- · Enablement is aligned to your Microsoft 365 security and compliance posture.

8. Licensing Notes (Informative)

- Copilot Chat: included at no cost to help users get started with secure, web-grounded AI.
- · Microsoft 365 Copilot: per-user licensing with annual commitment (commercial terms subject to change).
- · AI Agents: available via Microsoft 365 licences with additional capabilities enabled by Copilot or PAYG usage, depending on scenario.

9. Out of Scope (Available on Request)

- Remediation of legacy file server content or third-party repositories not in Microsoft 365.
- · Development of custom line-of-business integrations beyond agreed agent connectors.
- · Ongoing managed service (can be added separately).

10. Customer Responsibilities

- Provide access to relevant Microsoft 365 tenant information and stakeholders for discovery.
- · Ensure required licences are in place for pilot users (where applicable).
- · Nominate champions and coordinate attendance at training sessions.

11. Ordering Process

Please contact us to discuss scope and timings. We will agree a detailed Statement of Work and issue a work order for approval.

Email: bids@chessict.co.uk | Call: 0344 770 6000

12. Related Services (Available on G-Cloud 15)

- Microsoft 365 professional services & consulting
- · Adoption & Change Management
- · Power Platform services
- · Microsoft 365 Security & Compliance
- · Identity & Access Management

13. Assumptions & Dependencies

- Delivery is remote-first unless otherwise specified.
- · Timelines depend on stakeholder availability and access to required tenant information.
- · Pricing excludes VAT, travel & expenses, and Microsoft licensing unless stated.