



Copilot Adoption & Enablement for Dynamics 365, Power Platform & Microsoft 365

Service Definition Document

G-Cloud 15

Status: Definitive

Security Commercial – In Confidence

Version no.1/0

THINKING
BEYOND
LIMITATIONS

We're Kainos

Formed in 1986, we set about finding the best people to tackle the most difficult digital work. We fostered a culture where people truly care for each other and the world around them.

Our reputation for software engineering and problem-solving was quickly established, and our customers started to view us more as their colleagues

We're much bigger now, helping organisations across the globe to navigate change in more ways than ever. But some things never change, like our commitment to our people, delighting our customers, and our technical ability

Some say we're leading a quiet revolution in digital, but if you ask us, we're just doing our bit to make the world a little bit better.



3,132 amazing
people



13 consecutive
years of growth



40 years
of innovation



£382m revenue
(FY2024)



13 locations
globally



FTSE 250 listed
tech company



Our core expertise

The digital revolution is already happening. We're leading from the front to help our clients **seize every digital opportunity** and be future-ready.



Cloud



Business Applications



Data and AI



Managed services



Engineering



Service and
experience design



Workday services
and products

- Test
- Audit
- Shield
- Deployment
- Optimisation
- Spark & Grow

Copilot Adoption & Enablement for Dynamics 365, Power Platform & Microsoft 365

A structured discovery, readiness, and enablement service designed to help organisations safely adopt and scale Microsoft Copilot across Dynamics 365, Power Platform and Microsoft 365. The service assesses data, security, governance, business processes and user readiness to ensure rapid and compliant AI adoption with measurable business outcomes.

Features

1. Assess organisational readiness for Copilot across Microsoft cloud services
2. Identify high-value Copilot scenarios in Dynamics, Power Platform, M365
3. Analyse data, permissions, and security posture for AI enablement
4. Produce Copilot governance and safe-use policies
5. Configure copilots and supporting Microsoft cloud capabilities
6. Establish workforce enablement plan and change-management approach
7. Provide custom role-based training and hands-on Copilot labs
8. Build knowledge base and establish best-practice adoption frameworks
9. Deliver performance, usage, and benefits realisation reporting
10. Recommend roadmap for scaled Copilot deployment and automation expansion

Benefits

1. Accelerate safe organisation-wide Copilot adoption and value realisation
2. Improve productivity through AI-assisted workflows and task automation
3. Strengthen governance, compliance, and data security for AI usage
4. Reduce operational effort across business processes with Copilot
5. Empower users with modern AI productivity capabilities
6. Optimise licensing, data access, and security configurations
7. Increase ROI from Microsoft cloud investments
8. Reduce burdensome manual tasks across teams
9. Provide structured change management for smooth adoption
10. Create sustainable, scalable AI operating and governance model

Copilot Adoption & Enablement for Dynamics 365, Power Platform & Microsoft 365

The Copilot Adoption & Enablement service provides organisations with a structured assessment and planning engagement to support the safe and effective introduction of Microsoft Copilot across Dynamics 365, Power Platform and Microsoft 365. The service evaluates an organisation's current readiness, identifies opportunities to adopt generative AI, reviews governance and security requirements, and prepares a roadmap for implementation. The aim of the engagement is to ensure that Copilot capabilities are deployed in a controlled, compliant and value-focused manner, supported by a clear understanding of data dependencies, business processes, and user needs.

Discovery & Readiness Assessment

A discovery phase is conducted to provide a full understanding of the organisation's environment and ability to adopt Copilot. Activities include:

- Collecting information on existing Microsoft 365, Dynamics 365 and Power Platform usage
- Mapping data sources, storage locations and sensitivity classifications
- Reviewing access controls, permissions, DLP rules and security posture
- Identifying technical prerequisites for Copilot functionality across workloads
- Assessing business processes that may benefit from AI assistance
- Conducting user and stakeholder interviews to understand digital maturity and potential use cases
- Reviewing licensing, connectors and environment configurations

The outcome is a baseline assessment of readiness, including risks, constraints and dependencies that may affect adoption.

Opportunity Identification & Use-Case Definition

Workshops are conducted with business units to determine where Copilot can deliver the highest benefit. These sessions focus on identifying tasks, workflows and processes that could be improved through AI-assisted generation, summarisation, workflow automation or insights. Opportunities are assessed across Dynamics 365 applications, Power Platform workloads and Microsoft 365 productivity tools. Each opportunity is reviewed against feasibility, data readiness, business value, security requirements and organisational goals. Findings are recorded in a prioritisation matrix, which categorises opportunities into initial, secondary and longer-term adoption phases.

Governance, Responsible AI & Organisational Controls

To support compliant and secure use of Copilot, governance requirements are defined as part of the assessment. This includes:

- Reviewing current governance and identifying gaps relevant to generative AI
- Outlining Responsible AI considerations, acceptable-use guidelines and required organisational controls
- Assessing the need for changes in information protection, classification or labelling
- Identifying required updates to Power Platform and Microsoft 365 governance models
- Providing recommendations for environment configuration, connector management and auditing
- Establishing escalation paths and support processes for Copilot-related issues

This ensures the organisation can introduce Copilot within an agreed governance and compliance framework.

Technical Enablement Assessment

A technical assessment is completed to determine the level of effort and configuration changes required to enable Copilot features. This includes:

- Reviewing Microsoft 365 tenant configuration and semantic index readiness
- Assessing Dynamics 365 environments, security roles and access models
- Reviewing Power Platform environment strategy and Dataverse configurations
- Evaluating the suitability of existing automation, custom solutions or integrations
- Validating connectivity and plugin requirements for Copilot Studio
- Identifying areas where technical

remediation or adjustments may be required

This phase produces a clear view of the technical actions needed to support Copilot deployment.

Pilot Planning & Validation Approach

The service defines how a controlled introduction of Copilot should be conducted. This includes:

- Identifying pilot user groups across business areas
- Outlining pilot objectives, data boundaries and user permissions
- Defining monitoring and feedback mechanisms
- Establishing success criteria and measurement methods
- Describing required training and communications for pilot participants

This enables the organisation to test Copilot capabilities in a controlled environment before broader rollout.

Training, Adoption & Skills Development Planning

The assessment includes defining the training and capability requirements associated with Copilot adoption. Activities include:

- Reviewing user roles and identifying training needs
- Outlining a training plan for end users, super users and administrators
- Identifying materials required to support adoption (guides, walkthroughs, FAQs)
- Recommending approaches for ongoing skills development and knowledge sharing
- Providing a structure for establishing internal champions and adoption leads

This ensures that the organisation has the required capability to support Copilot once deployed.

Roadmap & Recommendations

Based on the findings of the assessment, a roadmap is produced outlining recommended phases for Copilot adoption. The roadmap includes:

- Sequenced adoption activities across Dynamics 365, Power Platform and Microsoft 365
- Dependencies and prerequisites for each adoption phase
- Estimated effort to enable key Copilot scenarios
- Recommendations for governance updates and security improvements
- A view of long-term opportunities for automation and AI-driven optimisation
- A summary of risks and mitigation actions

This roadmap provides a structured path to implement Copilot in a way that aligns with organisational priorities and readiness.

Deliverables

The following deliverables are provided as part of the engagement.

- **Readiness Assessment Report:** Summary of current state, risks, findings and compliance considerations.
- **Use-Case Definition & Prioritisation Matrix:** Document categorising AI opportunities and recommended first-phase

scenarios.

- **Governance & Responsible AI Recommendations:** Guidance outlining required governance updates, policies and controls.
- **Technical Enablement Recommendations:** List of configuration changes and prerequisites for Copilot adoption.
- **Pilot Planning Document:** Structure, scope and approval criteria for a controlled Copilot pilot.
- **Training & Adoption Plan:** Recommendations for user training, communications and internal capability development.
- **Strategic Roadmap: Sequenced view of adoption phases,** timelines and key dependencies.
- **Executive Summary:** A high-level overview of findings and recommendations for senior stakeholders.

Methodology

The methodology used for this service consists of structured phases designed to assess, plan and prepare the organisation for Copilot adoption.

Phase 1: Mobilisation

Kick-off activities, stakeholder alignment and confirmation of data collection requirements.

Phase 2: Discovery & Readiness Assessment

Interviews, workshops and technical assessments to evaluate readiness across data, security, governance and processes.

Phase 3: Opportunity Identification

Use-case workshops and benefit assessment activities to determine high-value Copilot scenarios.

Phase 4: Governance & Controls Definition

Review and document policy, compliance and governance requirements to support safe Copilot use.

Phase 5: Technical Assessment

Evaluate environments, permissions, integrations and configurations required to support

Copilot features.

Phase 6: Adoption & Skills Planning

Define training, communication and capability development needs for end users and administrators.

Phase 7: Roadmap Development

Produce the prioritised roadmap and recommendations for phased Copilot rollout.

Roles & Responsibilities

Supplier Team

- AI Adoption Consultant
- Microsoft 365 Consultant
- Dynamics 365 / Power Platform Architect
- Governance & Compliance Specialist
- Business Analyst

Customer Team

- IT Administration and Governance Representatives
- Business Owners
- Data & Security Officers
- End User Representatives

Estimated Duration

Typically 4–8 weeks, depending on organisational size and the number of workloads in scope.



Where we are

The Americas

Buenos Aires
Indianapolis
Nova Scotia
Toronto

UK and Ireland

London
Birmingham
Belfast
Derry
Dublin

Central Europe

Gdansk
Helsinki
Paris
Wommelgem

What makes us stand out



Our people



True collaboration



Innovation



Digital know-how



Common goals



Trust



Digital Services

We are **engineers**, specialists. We **overcome big challenges** for our clients, through delivery of **intelligent** digital services that use the best in **talent and technology**.



55 million UK citizens

positively impacted by
services we've delivered



**892
customers**



13 locations

And growing



99% of customers

rate our service as good,
great or excellent



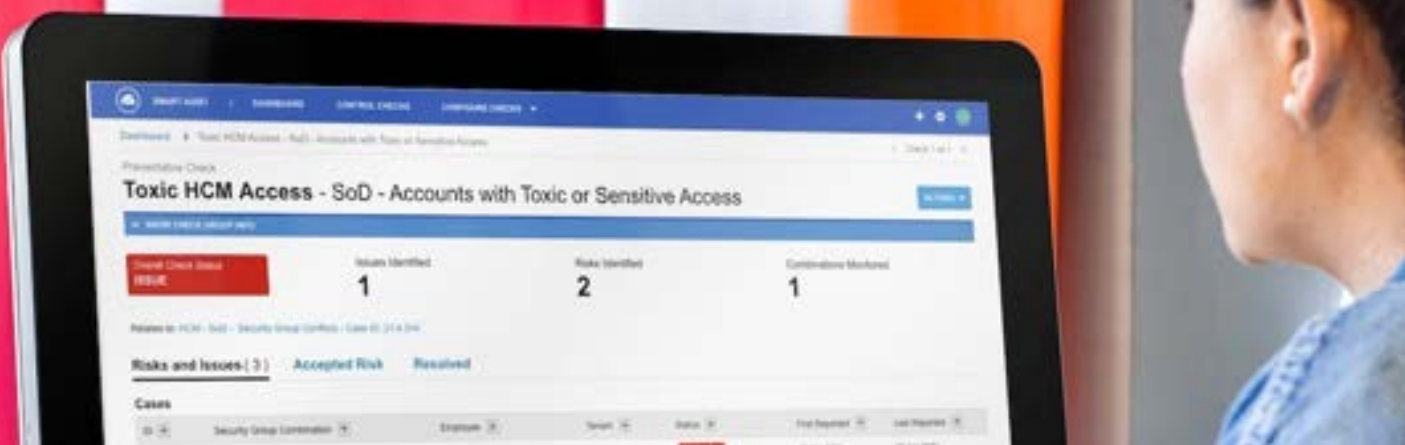
Key partners

Working closely with
Microsoft and AWS to
deliver results



Award-winning

90+ industry awards



Workday

Kainos is a Workday **phase one prime status partner** in all European, North American and Asia Pacific markets. We have worked with many public and private sector customers of various sizes and scale in over **40 countries worldwide**.



Partner Since 2011

We are the only certified Workday Services, Technology and Extend partner globally.



Workday Services

Full range provider from pre-deployment consulting, implementation and support.



650+ Customers

We have deployed to over 650 customers and are a proud Workday customer also, using HCM, Financials, Recruitment, Planning and PSA to run our business.



Workday Public Sector

We have worked with many UK Public Sector customers with their initial deployment, post-deployment support and adoption of new modules.



Kainos Smart

Our product is deployed to 500+ customers globally saving them 1000s of testing hours.



900+ Consultants

Hold over 2,700+ Workday certifications covering all areas of the platform.

65 million

citizens positively impacted
by services **built by Kainos**
for the UK Government



Every driver & every car on the road
Every piece of work to fix roads
Every court case & every prisoner
Every home helped with help-to-buy
Every passport & renewal application
Every COVID test sent out
Every COVID test result
Every user of the NHS App

Every voter registered
Every company opened & closed
Every UK civil servant trained
Every piece of produce grown in the UK
Every thing imported & exported to the EU
Every benefit fraud prevented
Every body's pension details

Our Social Values and commitment to HM Government strategy



Education & Capability Building

We empower people through technical and behavioral learning programs, academies, and outreach projects, fostering skills development and inspiring future technology leaders across communities and organisations.

Social Responsibility

Tackling workforce inequality and ensuring equal access to technical and vocational education, through our Academies, Camps and Earn as you Learn schemes.

Innovation & Future Readiness

Driving continuous improvement through technology

Health, Wellbeing & Accessibility

We support colleagues' physical, emotional, and career wellbeing through initiatives, guidance, and inclusive design, ensuring equal access, experiences, and compliance for all users with diverse needs.

Climate Action & Sustainability

With a comprehensive sustainability strategy underway, we will be a Carbon Net Zero company by 2030.

Equality, Diversity & Inclusion

Maximising service experience for citizens and civil servants by delivering projects with diverse teams, underpinned by our BAME, LGBTQIA+ and female communities.



The Code of Ethics

We are guided by our 6 ethical principles.



Wellbeing

We protect the wellbeing of our staff, customers and communities.



Equality

We improve access and inclusion and minimise bias.



Transparency

Our decisions are traceable and accountable.



Integrity

We hold ourselves and others to ethical standards.



Environment

We act responsibly towards the Earth and its resources.



Initiative

We take initiative to deliver social value and positive impacts.

BCDR and Exit Plan

Business Continuity and Disaster Recovery (BCDR)

A Business Continuity Plan can be provided if required. This shall set out the arrangements to be invoked in the event of an actual or perceived threat to business continuity, to ensure continued operation of the system and continuity of the services provided by Kainos pursuant to the Prime Agreement and shall include: the alternative processes, options and responsibilities that may be adopted in the event of a failure or disruption to the system and/or services provided by Kainos pursuant to the Prime Agreement; and the steps to be taken by Kainos upon resumption of the system and services provided by Kainos pursuant to the Prime Agreement in order to address any prevailing effect of the failure or disruption including a root cause analysis of the failure or disruption.

Exit Plan

An Exit Plan can be provided if required to detail the steps that would be carried out to ensure smooth transition of Kainos services to a new supplier. The steps outlined in the Exit Plan will help mitigate against any disruption to the service during the transition period. It is assumed that any new supplier will themselves have a procedure they wish to follow during the transition period, and as such the steps in this Exit Plan will serve as a checklist for the new supplier to ensure all key areas of the transition have been covered. The Exit Plan will therefore be subject to refinement should it be exercised.

Commercial Statement

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All information provided prior to execution of a contract is provided 'as is' and 'subject to contract' without warranty of any kind.

This document does not constitute an offer from Kainos. In the event that the parties elect to work together, they will only be contractually bound to each other upon signature of a contract.

Corporate information

"Kainos" is the trading name of the Kainos group of companies, further information on which can be found here: <https://www.kainos.com/corporate-information/>.

Kainos Software Limited/ Kainos WorkSmart Limited, will be the contracting entity under this tender / for the provision of the service and may be assisted from time to time by other Kainos group companies.

Freedom of information

Kainos considers that the following information provided in this document is exempt from disclosure under the Freedom of Information Act 2000 (FOI):

The CVs of staff qualify under the "Personal Information Exemption (s.40)" of the Freedom of Information Act and are exempt from disclosure under the Data Protection Act 1998. The Period for which this information should be confidential is the lifetime of the Data Subject.

Rate and pricing information is confidential and commercially sensitive and covered by the 'Commercial Interests' exemption (s.43) of the FOI, as the release of this information is likely to prejudice the commercial interests of Kainos and is likely to adversely affect its (and the Customer's) future negotiating position. The period that this information should be confidential for should be 5 years.