

AI Transformation

Targeted, measurable, value in six months

A focused transformation that takes you from readiness assessment to live use cases on Microsoft 365 Copilot. Delivered through targeted training, pre-built agents and custom agents that unlock key workflows and revenue-generating opportunities.

Challenges

- M365 Copilot is licensed but adoption is patchy and ROI is unclear
- Teams don't know which use cases will move the needle first
- Proof-of-concepts stall before they reach production value
- Full-scale transformation programmes feel too slow, too heavy, and too costly

How Dovetail helps

A focused six-month programme that starts with a readiness assessment, converges on the use cases with the strongest business case, and delivers them live through a mix of training, pre-built agents and custom builds.

Mid-level scope, senior-level impact - measurable adoption, unlocked workflows and new revenue levels, all inside your Microsoft tenant.

The six-month transformation journey

1. Assess

Month 1 - Readiness & priorities

- Copilot readiness assessment across people, data and tenant
- Shortlist of candidate use cases with value and feasibility

2. Prioritise

Month 2 - Use case selection

- Value-vs-effort ranking with Finance, Ops and business sponsors
- Roadmap of 3-5 priority use cases with owners and success metrics

3. Enable

Month 2 - 4 - Skills & pre-built agents

- Tiered Copilot training: introduction, intermediate and advanced
- Pre-built Dovetail agents deployed for quick wins in weeks

4. Scale

Month 4 - 6 - Custom agents & revenue

- Custom agents for your differentiated workflows and offerings
- Adoption, ROI and revenue tracked in a Power BI dashboard



DELIVERABLES & OUTCOMES

What you get, and what changes

Over six months, the programme delivers practical outputs in your tenant and measurable shifts in how the business works.

What you get

- Readiness assessment, prioritised use case roadmap and business case
- Tiered Copilot training for users, power users and champions
- Pre-built Dovetail agents live in your tenant within weeks
- Two to three custom agents for you highest-value workflows
- Power BI dashboard tracking adoption, cycle time and ROI

Business outcomes

- Copilot adoption lifted from license cost measurable productivity
- Key workflows unlocked. Faster cycles, fewer hand-offs
- New revenue opportunities opened through AI-enabled offerings
- Governed, auditable AI running inside Microsoft 365
- A scalable foundation for the next wave of use cases

FROM KICKOFF TO LIVE VALUE IN SIX MONTHS

Month 1

Readiness &
Priorities

Month 2

Use case
selection

Months 2-4

Skills & pre-built
agents

Month 4-6

Custom agents
& revenue

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