

# Fast-Track Your Copilot Journey with Sonata's Accelerator Workshop

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Start your **Copilot** journey with **Sonata's Accelerator** workshops – ensuring secure and efficient AI integration within your organization.



Software Product and Platform organizations often encounter challenges like managing complex development cycles, staying ahead of the competition, and ensuring fast time-to-market. That's where Copilot comes in, turbocharging productivity, speeding up development, and delivering higher quality outputs with its advanced AI prowess. For Independent Software Vendors (ISVs), Copilot is a game-changer!

### **Copilot**

A solution allowing global businesses to harness the capabilities of AI without compromising data security or crossing company boundaries.

At Sonata Software, we love partnering with ISVs! Our strength is in-depth Product Engineering across various technology stacks, empowering our clients to deliver top-notch software to their users. With our extensive experience working with ISVs, both as consumers of software products during the engineering process and as partners in modern software development, we're especially excited about blending Generative AI with existing software products.

## **5 Reasons Companies Should Adopt Copilot**

- **Streamlined Administrative Tasks** – By automating mundane administrative tasks like scheduling, email handling, and document processing, Copilot frees up employee bandwidth for strategic endeavours, thereby enhancing overall efficiency
- **Enhanced Data Analysis and Reporting** – Copilot analyses organizational data, including documents and emails, and makes it accessible to employees for use in their everyday decision-making processes.
- **Improved Customer Relationship Management** – Employing Copilot in sales & marketing facilitates personalized customer interaction and improved CRM data management, resulting in heightened engagement, loyalty and accelerated business growth.
- **Innovative Product Development** – Leveraging copilot in development to automate code generation, streamline workflows and foster innovation, accelerate product cycles, drive creativity and maintain competitiveness in tech trends.
- **Effective Human Resource Management** – Supporting HR team with talent acquisitions, onboarding and analysing employee engagement optimized HR operations, boosts satisfaction, and refines talent management processes.

# Key Strategies to Integrate Copilot

Successfully integrating Copilot into your organization requires a strategic and well-planned approach. We have developed a comprehensive framework to guide you through the process, ensuring that you maximize the benefits of Copilot while addressing key considerations. Our approach encompasses the following critical elements:

## Identify Relevant Processes

Focus on integrating Copilot where it aligns with your business needs.  
A framework to evaluate opportunities and prioritize (potential vs implementation complexity).

## Data Privacy & Security

Ensure that Copilot adheres to your organization's data privacy policies. Protect sensitive information while leveraging its benefits.  
Security Review through Optimization Assessment.  
Determine Risk and implement controls to mitigate & reduce risk.

## Comprehensive Training

Train your team members on how to use Copilot effectively. Familiarize them with its features and best practices.  
Enable Copilot usage through Learning Management System - Train and Measure learning and usage.

## Integration with Existing Systems

Seamlessly integrate Copilot with other tools and systems. Ensure smooth interoperability.

## Support, Monitor and Evaluate Effectiveness

Regularly assess how Copilot impacts your workflows. Gather user feedback and track performance metrics to optimize its usage.  
Support users & power users (IT Admins). Monitor & report usage to measure Copilot effectiveness.

# Roadmap: Copilot Rollout

Adopting Copilot involves a well-defined process to ensure a smooth and effective rollout. Sonata's strategy for implementing the Copilot rollout consists of four key phases:

- Discovery
- Assess & Prepare
- Setup, Train & Rollout
- Support, Monitor & Report<sup>4</sup>

From discovery to support, each phase is carefully designed to ensure a smooth transition and maximize the benefits of this transformative tool. Below is a detailed breakdown of each stage and the respective benefits derived from each.

## Discover

### Copilot Overview:

- Present an in-depth overview of Copilot architecture, emphasizing required security governance.
- Conduct live demos to showcase persona-based scenarios.
- Highlight Copilot's extensibility overview

### Admin Trainings:

- Provide Copilot admin training to empower administrators in performing essential tasks.

### Security Review:

- Conduct a Copilot Optimization Assessment.

### Benefits

- Knowing Copilot features
- Understanding necessary configurations required
- Comprehending security best practices

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## Assess & Prepare

### Security Assessment and Implementation Plan:

- Discover customer data (identify sensitive data, its location, access, and usage).
- Determine risk tolerance and implement controls (data lifecycle, protection, labeling).
- Set up SSO for Copilot access, conditional access, and real-time policies.
- Mitigate device risk through mobile device management and compliance policies.
- Control AI app usage by setting up mobile application management and app protection policies for apps

### Security Implementation:

- Implement security measures based on assessment findings.
- These security measures will involve changes to the configurations, network layer settings, updates to authorizations for people in the organization, etc.

### Procure Licenses

- Procure Copilot licenses based on the assessment (needed license volume)

## Benefits

- Creating necessary access control system (groups, policies, etc.) by IT Admin
- IT Security team capable of addressing data security aspects
- Procurement of licenses and assignment for eligible audience

## Setup, Train & Rollout

**App Deployment:** Deploying the latest versions of Apps and configuring deployment channels.

**Copilot Configuration:** Configuring Copilot and assigning licenses

**Support Setup:** Establishing a service desk and Learning Management System (LMS)

**User Training:** Providing training on using apps with Copilot features.

## Benefits

- Upgrading apps to latest supported versions for Copilots
- Eligible audiences are equipped with the knowledge to use Copilot

## Support, Monitor & Report

### Set up a COE for Continuous Updates

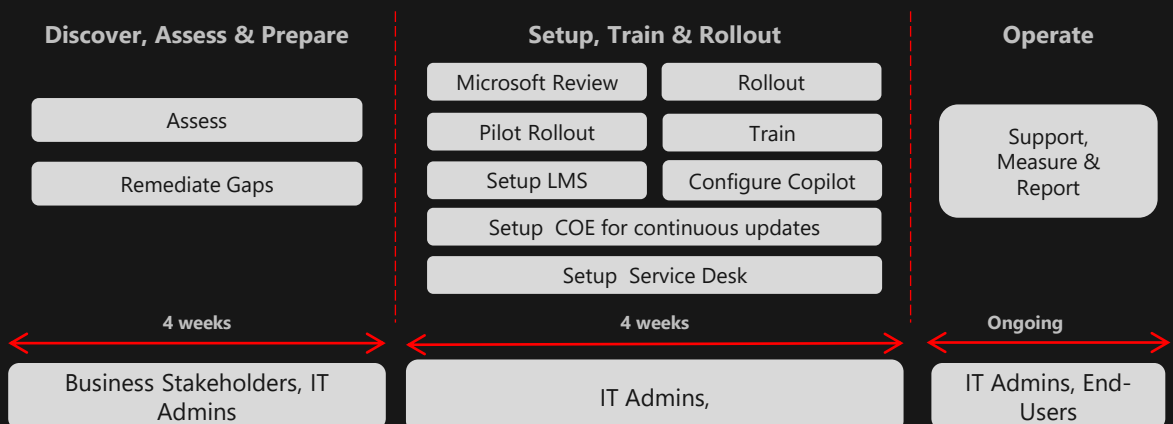
New features are frequently delivered to Copilot. This COE will be responsible for keeping the organization's Copilot configurations up to date and will leverage the latest features of Copilot to maximize value for the organization.

### Copilot Dashboards

Dashboards that showcase metrics such as Copilot adoption, Copilot usage, and feedback on the content generated by Copilot. Any feedback or issues raised by users will be triaged and addressed through a solution, fix, or workaround.

## Benefits

- End-user support after rollout
- Weekly report on Copilot usage
- Monitor for any new possible security threats and strengthen the policies
- Upgrade Copilot with latest features



# Addressing Key Challenges with Sonata's Copilot Workshops

Sonata's comprehensive Copilot workshops are designed to tackle key industry challenges by:

- Optimizing usage
- Enhancing security measures, and
- Enabling organizations to navigate the evolving landscape of digital collaboration and productivity effectively

Here are the specifics of both the workshops:

## Copilot Workshop

Provides a comprehensive understanding of Copilot features and their applications.

Offers hands-on training sessions to help users integrate Copilot into their daily workflows.

## Copilot Accelerator Workshop

Emphasizes the security aspects of Copilot.

Offers in-depth training on identifying and managing sensitive data, implementing risk controls, and ensuring compliance.

As of now, we have effectively conducted this workshop for more than 15 customers.

## Key benefits of this workshop

We assist managers in multiple roles to effectively utilize Copilot. For instance, we recently conducted a successful project for a client, where we supported their HR and Marketing teams in achieving the following outcomes:

### For HR Managers:

Cost per hire – HR team can improve the hiring process by using Copilot to help write job descriptions, summarize interviews, avoid bias when identifying top candidates, improve candidate communications, and improve onboarding process.

Employee turnover rate – Copilot can help all employees with job satisfaction by reducing stress-full tasks, and work on higher value activities. It also makes many tasks faster, which can reduce overtime requirements.

## Similarly, for Marketing Managers:

Number of leads created - Simplifying and automating tasks like preparing for meetings, tracking tasks, sending emails, creating proposals and researching customer and product information allows sellers to pursue more opportunities.

Cost per lead generated - Copilot makes researching product information easier and can prepare detailed responses to RFP questions with a simple prompt.

Companies can also use Copilot Studio to create custom bots to answer questions based on curated information. It can also automate simple tasks that may currently be outsourced or performed by low-level employees to save costs.

These examples in HR and Marketing illustrate how Copilot can optimize processes and outcomes. Our workshops extend beyond these roles to empower various professionals to leverage Copilot effectively in their respective fields, enhancing their performance and success.

## Why partner with Sonata?

Sonata Software, a leading Modernization Engineering company, is an ideal partner for organizations looking to adopt and effectively utilize Copilot.

### Microsoft Approved Workshops

- Sonata offers workshops designed to help IT administrators and end-users embark on their Copilot journey.
- The workshops are conducted by skilled teams who are trained to provide comprehensive guidance and support.

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### Continued Support

- Sonata provides ongoing support to customers even after the completion of the workshops.
- This ensures a smooth transition and effective utilization of Copilot within the organization.

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### Extensive Microsoft Partnership

- Sonata has been a dedicated Microsoft partner for over 30 years and is the top 1% of Microsoft Partners worldwide.
- The company is a strategic launch partner for Microsoft Fabric, a unified analytics platform.

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### Sonata Expertise

- Sonata's teams possess extensive knowledge and experience in Microsoft technologies, with over 3,500 professionals working on it.
- The company holds esteemed positions such as being a member of Microsoft's Dynamics Inner Circle for 2023-24

By partnering with Sonata, organizations can leverage our expertise, resources, and strong partnerships to ensure a successful adoption and implementation of Copilot, ultimately driving productivity and innovation within their businesses.

## Workshop Impact: Client Success Stories

Here are a few case studies demonstrating how Sonata has helped clients effectively adopt and utilize Copilot:

Case Study	Copilot workshop	Benefits
Multinational information technology services and consulting company covering multiple industry verticals	Delivered copilot workshop along with security governance (Organizational risk tolerance define next steps)	We have demonstrated solutions to a few use cases raised by customers during the call which can reduce their manual efforts, boost productivity, and upskill.
Multinational conglomerate with a presence in 36 countries, with annual revenue of \$75 billion	Conducted Copilot workshop for all the functional units in the organization	Demonstrated the capabilities of Copilot solution integrated with all applications which will help them in reducing manual efforts. Copilot offers improved efficiency, productivity and innovation.
Business Process Management Services Company	Copilot workshop for BDM, Technical architects and knowledge workers to get the benefits of the service	Demonstrated the benefits of Copilot which is an AI solution embedded with applications and walked through various scenarios that would help automate day-to-day tasks by increasing productivity and creativity so that resources can utilize efforts for other activities.



<b>Case Study</b>	<b>Copilot workshop</b>	<b>Benefits</b>
Multinational Technology Company Specializing in Mobile-First Platforms	Copilot workshop for BDM, Technical architects and knowledge worker to get the benefits of the service	Demonstrated the benefits of Co-pilot and walked through various scenarios which would help in automating day to day tasks by increasing productivity, ensure upskill creativity and innovation.

## **Empower Your Organization with Sonata's Copilot Workshops**

Are you ready to unlock the full potential of Copilot for your organization?

Sonata Software, a trusted leading modernization engineering company, is here to guide you through the journey. Sonata's Copilot workshops are designed to help you and your organization in the following ways:

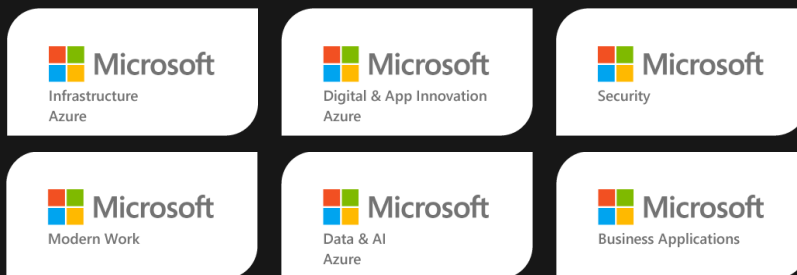
- Gain insights into the features and mechanisms of Copilot, understanding how this advanced AI technology can elevate your business performance.
- Benefit from skilled teams trained to conduct workshops and provide ongoing support post-workshop.
- Learn from real-world case studies showcasing how Sonata has successfully helped clients across various industries optimize their workflows and boost productivity with Copilot.

Don't miss this opportunity to enhance your organization's efficiency, productivity, and innovation with Copilot. Contact us now to embark on a transformative digital journey with Sonata Software.

# Our Microsoft Relationship

## Jointly Driving Customer Success

<p><b>30+ Years</b>  <b>Microsoft Partnership</b>          GISV, ISP, CSP, ISV Dev Centre, SI.          Global alliance footprint</p>	<p><b>400+ Clients</b>  <b>Across The Globe</b>          USA, Europe, Asia, India, Australia, Middle East</p>	<p><b>\$650+ Million</b>  <b>Per Annum Revenue To Microsoft</b>          21.9% YoY Growth, Cloud Mix 73.4% \$25 Mn+ DBR</p>
<p><b>3500+ Team</b>  <b>On Microsoft Technologies</b>          1500 + on Microsoft Biz Apps          300 + on Microsoft Azure</p>	<p><b>Azure Expert MSP</b>  <b>Competencies.</b>  <b>18 Gold Certified</b>  <b>10 Advanced Specialisation in</b> Dynamics 365, Data Analytics, Teams, CAF, M365, Azure</p>	<p><b>Joint Execution</b>          Microsoft Fasttrack, Global Delivery, Microsoft Consulting Services</p>
<p><b>Catalyst Led</b>  <b>Sales Process</b>          Industry Point Of View, Business Value Assessment, Envisioning Workshops, Design Thinking</p>	<p><b>Industry Clouds</b>  <b>Go To Market</b>          Healthcare, Retail, Sustainability, Manufacturing</p>	<p><b>Industry</b>  <b>Digital Transformation</b>          Retail, Consumer goods, Distribution, Agri Manufacturing, Service, Healthcare, ISV, BFSI</p>



**Joint GTMs with MS:**  
**D365 Modernization, SFDC Migration, RPA Migration, Fabric, Gen AI and Contact Centre Migrations**

**Launch Partner**  
**“Microsoft Fabric”**  
 For early adoption, evolution

**Winner**  
**“Technology Partner of the Year - BizApps”**

**Launch Partner**  
**“RPA Migration 100”**  
 For early adoption, evolution

**Winner**  
**“Microsoft US Eagle Award”**  
 For winning new D365 customers

**SI Partner**  
**Bayer’s New “Agri-Food Cloud” Solution**

### Copilot Jumpstart Partner

It is an **invite-only initiative for Microsoft partners** focused on enabling skills and developing offerings for Copilot

# Awards and Recognitions



HFS

Recognized as a **"Disruptor"** in  
Data Modernization Services 2023.



Recognized as a **"Star Performer"** in the  
**"Major Contender"** category for  
Microsoft Dynamics 365 Services 2023.



Recognized as **"Aspirant"** for  
Cloud Services - North America and Europe 2023.



Recognized as a **"Major Contender"** for  
Software Product Engineering Services 2022.



Achieved a **CDP rating of B**  
(Management band).



Received **IGBC Green Interiors  
Platinum Certificate** for the new  
Tower -F Facility at Bangalore.



Recognized for CSR efforts  
by **Microsoft** and **TUI**.



Winner of the prestigious **'Golden Peacock Award  
for Excellence in Corporate Governance'** in a  
national category under IT Sector by the Institute of  
Director (IOD) for 2022.

# Sonata at a Glance

**38 Years**

IT Solutions Provider

**~\$1B**

Revenue

**6500+ Engineers**

Across US, UK, EU, APAC & ANZ  
17 Nationalities

**Public Listed**

(SONATSOFTW) Debt-free;  
Robust Balance sheet

Sonata is a leading Modernization Engineering company, powered by its unique Platformation™ framework that brings together industry expertise, platform technology excellence, design innovation, and strategic engagement models to deliver sustained value to customers.

We partner with Fortune 500 clients to help them reimagine their business processes as part of modernization programs. As part of this phase, we drive business enablement sessions, consulting, and business processes to be aligned with best-in-class industry-specific practices.

Sonata has a strong global presence, including key regions US, UK, Europe, APAC, and ANZ. We are a trusted partner of world leading companies in TMT, Retail & CPG, Manufacturing, HLS, and BFSI space. Our bouquet of Modernization Engineering Services cuts across Cloud, Data, Dynamics, Contact Centers and around newer technologies like Generative AI, MS Fabric, and other modernization platforms.

We are proud to be recognized as a Microsoft Inner Circle Partner, ranking among the top 1% of Microsoft Partners. We continue to invest in our other select partners to achieve this recognition with them.

Sustainability Target:

**Carbon Neutrality by 2030**

10% Reduce Energy consumption in FY 22-23

10% Increase Renewable Energy REC mix in FY 22-23

