

**A blue and white logo

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APRIL 2025

**Awards**

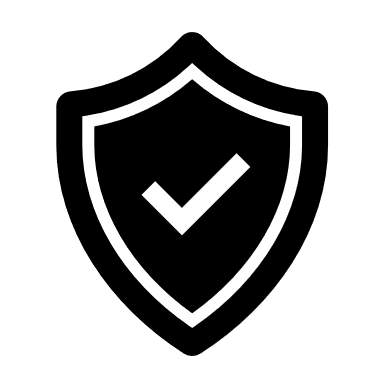
1. Microsoft Country (Nigeria) Cloud Productivity Partner of the Year 2016, 2023
2. Microsoft Country (Nigeria) Cloud Excellence Partner of the Year 2016
3. Cisco Winners Circle EMEA 2016.

**OEM Partners**

1. Microsoft (Gold Partner)
2. CISCO (Gold Partner)
3. CA (Gold Partner)

PROPOSAL FOR THE IMPLEMENTATION OF MICROSOFT 365 COPILOT FOR KEYSTONE BANK

Submitted By: Signal Alliance Consulting



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Document Control

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| Action | Name | Date |
| Prepared By | Signal Alliance Consulting | 9th April 2025 |

Version Release

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| 1.1 | 9th April 2025 | N/A | N/A | Initial Draft |

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# Introduction

This project involves the deployment of Microsoft 365 Copilot, an AI-powered assistant, for KEYSTONE BANK. The goal is to enhance productivity, improve customer service, and streamline operations. Microsoft Copilot for Microsoft 365 is a sophisticated processing and orchestration engine that provides AI-powered productivity capabilities by coordinating the following components:

* Large language models (LLMs)
* Content in Microsoft Graph, such as emails, chats, and documents that you have permission to access.
* The Microsoft 365 apps that you use every day, such as Word and PowerPoint.

Microsoft 365 apps (such as Word, Excel, PowerPoint, Outlook, Teams, loop, and more) operate with Copilot to support users in the context of their work.

## Document Purpose

This document details the responsibilities, objectives, and deliverables to be achieved by all the involved parties as well as the identification of risks that could impact the project deadline and deliverables.

## Authority

This document is issued subject to the terms and conditions of any agreement executed by both parties or, in the absence of an executed agreement, on the terms and conditions which formed part of the request for this deployment.

## Change Control

This document, if agreed upon by all relevant parties and decision makers, will form the first phase approach of the project. Any change(s) after this document has been agreed upon will be noted in the change control process and handled accordingly as continued phases to the project.

## Approach

Information on the development of this document was obtained from meetings held with the appropriate parties of Signal Alliance Consulting and KEYSTONE BANK.

# Microsoft 365 Copilot Enablement

## Executive Summary

As Keystone Bank continues to drive innovation and operational excellence, adopting intelligent workplace technologies is pivotal to maintaining a competitive edge. This proposal outlines a strategic approach for enabling Microsoft 365 Copilot, with the aim of transforming employee productivity, enhancing data-driven decision-making, and modernizing collaboration across the organization. Leveraging Microsoft 365 Copilot positions Keystone Bank at the forefront of AI-powered workplace transformation—ensuring your teams are empowered to do more with less, uncover deeper insights faster, and deliver exceptional experiences to both internal and external stakeholders.

## Proposed Approach

Our approach is structured into key focus areas that will guide the successful enablement and adoption of Microsoft 365 Copilot:

**a. Tenant Readiness Assessment**

We propose conducting a thorough assessment of the existing Microsoft 365 environment to ensure that all technical prerequisites for Copilot are met. This includes reviewing licensing, identity and access policies, data governance, and information protection configurations.

**Outcome:** A readiness report highlighting potential gaps and a prioritized remediation plan to align the tenant with Microsoft's Copilot requirements.

**b. Data Access and Security Configuration**

To unlock the full value of Copilot, it is essential that the right data is accessible while maintaining strict security boundaries. We will review and recommend optimizations to Microsoft Purview, SharePoint, OneDrive, Teams, and Outlook configurations, ensuring that sensitive content remains protected while Copilot has access to high-value organizational knowledge.

**Outcome:** Fine-tuned data access policies that balance AI enablement with regulatory compliance and information security.

**c. Adoption and Change Management Strategy**

Adopting Copilot is not just a technical implementation—it is a cultural shift. We propose developing an engaging change management plan, inclusive of internal awareness campaigns, user personas, pilot programs, and feedback loops, tailored to Keystone Bank’s unique operating culture.

**Outcome**: A well-informed and enthusiastic user base, equipped with the knowledge and confidence to embrace AI-powered productivity.

# Copilot Studio Overview

Copilot Studio is a low-code development platform that enables the creation, customization, and extension of Copilot experiences within Microsoft 365. With Copilot Studio, Keystone Bank can go beyond the out-of-the-box capabilities of Microsoft 365 Copilot by designing domain-specific copilots, automating business processes, and securely integrating with internal systems and third-party services.

**Key Features:**

* **Custom Copilot Creation:** Build tailored copilots for specific departments (e.g., HR, Legal, Customer Service) using guided conversations, forms, and workflows.
* **Seamless Integration:** Connect with external and internal data sources, including SharePoint, Dataverse, SQL Server, and legacy systems via APIs.
* **Natural Language Interface:** Empower users to interact with organizational data and processes through intuitive, natural language prompts.
* **AI-Driven Workflows:** Automate tasks such as leave requests, customer onboarding, claims processing, and data retrieval using AI-infused workflows.
* **Data Governance & Security:** Define user roles, data boundaries, and responsible AI policies to ensure organizational and regulatory compliance.

**Strategic Value for KEYSTONE BANK:**

* **Enhanced Employee Experience:** Build internal copilots that serve as intelligent assistants across departments—e.g., HR Copilot for employee queries, Compliance Copilot for regulatory checks.
* **Improved Customer Interaction:** Deploy customer-facing copilots for first-level support, customer onboarding, and personalized banking services.
* **Faster Time to Value:** Reduce dependency on custom development cycles by empowering business users to build and iterate copilots with little to no code.
* **Analytics and Feedback Loop:** Monitor usage and optimize custom copilots with built-in analytics and user feedback collection.

## Project Scope

|  |  |
| --- | --- |
| MCS-01 | MICROSOFT 365 COPILOT SOLUTIONS |
| EVN-01 | ENVISIONING |
| RED-01 | ASSESSMENT / READINESS |
| DEP-01 | DEPLOYMENT / SETUP |
| ADP-01 | ADOPTION & CHANGE MANAGEMENT |
| EXT-01 | M365 COPILOT EXTENSIBILITY |

### MCS-01: Microsoft 365 Collaborative Solutions Detailed Scope

|  |  |  |
| --- | --- | --- |
|  | MICROSOFT 365 COLLABORATIVE SOLUTIONS | DAYS |
| Milestone 1: | Envisioning   * Define the vision and goals of the project | **1** |
| Milestone 2: | Assessment & Readiness   * Environment Readiness * Evaluate the current systems and processes in place. | **2** |
| Milestone 3: | Deployment & Setup   * Assign licenses. * Send a welcome email. * Enable feedback using group policies for users. | **2** |
| Milestone 4: | Adoption & Change Management   * Presenting/Approving the adoption plan * Implementing adoption/ communication plans * Delivering Companywide training program for the users with assigned Copilot licenses * Monitor & evaluate usage of M365 Copilot to get a summary of user adoption, retention, and engagement. | **10** |
| Milestone 5: | M365 Copilot Extensibility (*Extended/Tentative Engagement*) \*   * Service driven deployment (Custom Solution deployment and services deployment) - *(Terms & Conditions Applies)* | **TBD** |
| **TOTAL DAYS** | | **15** |

## Training Agenda

|  |  |  |  |
| --- | --- | --- | --- |
| # | Session | Description | Outcome |
| 1 | Introduction to Copilot for Microsoft 365   * Explore the intricacies of Copilot for Microsoft 365. * Understand its functionality and Microsoft’s commitment to responsible and ethical AI implementation. * Learn the Art of Prompting, how to properly craft prompts to give you the best answers | Demonstrate and practice using Copilot for Microsoft 365 in a rapid learning session with early adopters and champions by practicing Copilot for Microsoft 365 in Copilot Labs. | Early adopters and champions will get hands on experience of using Copilot for Microsoft 365. |
| 2 | Exploring Copilot features in M365 Apps   * Microsoft Teams Copilot * Microsoft Word Copilot * Microsoft PowerPoint Copilot * Microsoft Excel Copilot * Copilot on Web/ Microsoft Edge Browser * Microsoft Loop Copilot * Q/A | Hands-on Scenario based demos showing how to use this feature | Early adopters and champions will get hands on experience of using Copilot for Microsoft 365. |
| 3 | Questions & Answers / Post training Surveys | Get users feedback and gauge level of understanding | Get users feedback |
|  | Duration: 2 hours / session,   * Virtual Session for Champions on Teams. * Physical Session at Stallion Plaza for EXCOs |  |  |

## Project Deliverables

|  |  |
| --- | --- |
|  | 2.2.1. Signal Alliance Consulting |
|  | * Compile and submit the Scope of Works document. * Compile and submit the functional specification document (Where required) * Compile and submit the UAT document (User acceptance testing, where required) * Prepare Proper design documentation, As-built document, Architecture diagram, User manual, Use-case, sequence, and activity diagrams. * Recommend changes where needed – using the Change Control Process. * Sign-off UAT * Sign-off project on completion of project based on timelines. |

|  |  |
| --- | --- |
|  | 2.2.2. KEYSTONE BANK |
|  | * Approve the Scope of Works document. * Acceptance of reports & Acceptance of recommendations. * Sign-off project on completion of project. * UAT document (User Acceptance Testing) sign off: * Acceptance of reports * Supervise implementation of processes. * Create Admin credential to host SIGNAL ALLIANCE CONSULTING engineer that will implement the project. That includes the minimum admin rights to complete the project. * Recommend changes where needed – using the Change Control Process * Project signed off on completion of project |

## Review success of the Engagement

|  |  |
| --- | --- |
|  | What does success look like at the end of this engagement |
|  | Content Generation   * Time saved per day * Faster to first draft (email, presentation, document) \* * Overall satisfaction * Active users   Personal productivity   * Time saved per day * Ease of content summaries and searches (email, presentation, documents, chats, etc.) \*\* * Overall satisfaction * Active users   Personal productivity   * Time saved per day * Faster time to catch up after meetings (summary of meetings) \*\*\* * Increased collaboration * Active users |
|  | *Content creation – survey questions*   * *Number of documents, emails, and chats per day* * *Estimated time savings per item in minutes*   *\*\*Search and summaries – survey questions*   * *Number of searches and summaries per day* * *Estimated time savings per search and summary in minutes*   *\*\*\*Summarize meetings – survey questions*   * *Hours of meetings summarized per day per department* * *Estimated time savings per meeting hour summarized in minutes* |

### Define Success Summary (Measurable KPIs) (1/2)

|  |  |  |
| --- | --- | --- |
|  | Quantitative KPIs  [Source: Microsoft Copilot Dashboard](https://insights.cloud.microsoft/) and [Microsoft 365 Admin Center](https://admin.microsoft.com/Adminportal/Home)  Note: All quantitative KPIs are available for the prior 28 days. | Target |
|  | Usage   * Number of users assigned Copilot licenses * # Copilot active users * Active users rate: Copilot active users / enabled users * Increase where already deployed, e.g., 50-1,000 users | * *2000* * *60%* * *70%* * *50%+* |
|  | Adoption Usage by App   * Teams Copilot * Outlook copilot * Word Copilot * PowerPoint Copilot * Excel Copilot * Copilot Chat | * *60%+* * *60%+* * *60%+* * *50%+* * *50%+* * *50%+* |

### Define Success Summary (Measurable KPIs) (2/2)

|  |  |  |
| --- | --- | --- |
|  | Qualitative / Quantitative KPIs  Source: Survey + Copilot for Microsoft 365 Value Assessment | Target |
|  | Usage   * Quantified benefits – Cost Savings (ROI, payback) * Role-based value insights: overall time saved – summarizing meetings, content creation, search, and summaries * Perception of increase in wellbeing * Satisfaction level of Copilot overall | * *$1,000 pp* * *32 min. a day per meeting* * *3+* * *65%* |
|  | Survey Questions   * Your Department * Using Copilot helps improve the quality of my work or output * Using Copilot helps me spend less mental effort on mundane or repetitive tasks * Using Copilot allows me to complete tasks faster * When using Copilot I am more productive * (other questions can be added by the Union Team) | * *5-point rating score* * *100-point scale (0, 25, 50,75, 100)* |

### At the end of the engagement, we will ….

|  |  |
| --- | --- |
|  |  |
|  | 1. Collect user data with a pre-built survey to understand how user cohorts utilize Copilot daily. 2. Analyze user data and deliver Copilot for Microsoft 365 value summary with the Business case builder tool. 3. Review Readiness and Adoption tabs in Copilot Dashboard to track Copilot adoption across apps and features. 4. Together with you, create an AI transformation roadmap. |

## In & Out of Scope

|  |  |
| --- | --- |
|  | In Scope |
|  | * Training KEYSTONE BANK employees on Microsoft 365 Copilot * Creating a Copilot Center of Excellence on Viva Engage * Sharing the Responsible AI policy from Microsoft * Delivering the Copilot Excitement Day physical engagement at KEYSTONE BANK HQ * Deliver Workshops on Studio and Azure Open AI solutions to I.T stakeholders * Provide Usage Report on Copilot at the end of the Program * 1-month post implementation Support |

|  |  |
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|  | Out of Scope |
|  | Any items not explicitly mentioned in this document are considered out of scope. This includes, but is not limited to, changes to other systems, additional features for the AI assistant, and tasks not related to the deployment of Microsoft 365 Copilot. |

### Milestone Deliverables

|  |  |
| --- | --- |
|  | MCS-01: MICROSOFT 365 COLLABORATIVE SOLUTIONS |
| Milestone 1:  EVN-01 | Envisioning Phase   * Stakeholder Workshop * Deliver business transformation conversations with Copilot. * Identify personas and scenarios that would deliver the most value if reimagined with AI. * Identify high-value scenarios leveraging the Art of the Possible workshop. * Summary of key insights gathered from stakeholder workshops. * Conduct envisioning sessions and identify high-value scenarios. * Identified pain points, requirements, and expectations.   Project Charter:   * Formal document outlining project goals, scope, roles, responsibilities, and constraints. |
| Milestone 2:  RED-01 | Assessment & Readiness Phase  Infrastructure Assessment Report:   * Assess licensing and technical readiness. * Assess customer data protection and governance. * Perform optimization assessment.   Security and Compliance Assessment Report:   * Analysis of security and compliance measures. * Recommendations for enhancing data protection. |
| Milestone 3:  DEP-01 | Deployment & Setup Phase  Configuration Plan:   * Detailed plan for configuring Microsoft Copilot based on assessment findings. * Close readiness gaps & build a business case. * Plan customer success with Microsoft account teams * Evaluate Microsoft 365 tenant usage and configure security and compliance! * Launch pilot!   Phased Deployment Schedule:   * Timeline for deploying Microsoft Copilot in phases across the organization.   Deployment Completion Report:   * Confirmation that Microsoft Copilot is successfully deployed. * Summary of any challenges encountered, and resolutions applied. |
| Milestone 4:  ADP-01 | Adoption & Change Management Phase   * Drive change management programs * Establish employee communication channels. * Drive adoption across the organization and set up a champ community for 2 – 3 scenarios. * Measure business impact * Conduct employee training * Continuously support and optimize.   Training Materials:   * Comprehensive training materials for end-users. * Training schedule and curriculum.   Change Management Plan:   * Document outlining strategies to address resistance and promote user adoption. * Communication plan for keeping users informed about changes.   User Feedback Report:   * Summary of feedback from end-users during the initial adoption phase. * Adjustments and improvements based on feedback. |
| Milestone 5:  EXT-01 | M365 Copilot Extensibility \*   * Deliver a workshop on Copilot built on Copilot Studio & Azure Open AI * Assess current environment with the I.T team to see where we can extend value with Copilot plugins and connectors. * Drive to identify integration, customization, and configuration services.   Customization and Integration Plan:   * Create a Roadmap for customizing Microsoft Copilot to meet specific Org needs.   Future Enhancements Roadmap:   * Long-term plan for extending the capabilities of Microsoft Copilot. * Exploration of new features and updates*)* |
| Milestone 6: | Project Completion - Final Deployment Report   * Comprehensive report summarizing the entire deployment process. * Lessons learned and recommendations for future projects.   User Adoption Metrics Report:   * Measurement of user adoption rates and the overall success of the deployment. * Identification of areas for ongoing support and improvement. |
| -  These milestone deliverables provide a structured approach to the Microsoft Copilot deployment, ensuring that each phase is well-documented and assessed for success before progressing to the next stage**.**  **-** | |

### Risks

|  |  |
| --- | --- |
|  | RISKS |
|  | The following risks have been identified that could delay the project and need to be mitigated:   * Delay in provision of requirements. * Delays in accessing necessary resources. * Unavailability of Implementation resources due to unforeseen circumstances. * Resistance from employees or customers to adopting the new technology. * Technical issues during the integration process * Data accessibility. * Scope creep. |

## Post Implementation Support – 1 month

|  |  |  |  |
| --- | --- | --- | --- |
| # | Support |  |  |
| 1 | Review and optimize | Regularly review adoption metrics and optimize the strategy based on usage analytics. | * Get usage report from Microsoft 365 Admin Center and Copilot Dashboard |
| 2 | Feedback Loop and success story sharing | * Implement a feedback loop via Surveys or Polls to continuously improve user experience and adoption and share success story | * Leverage polls / Surveys or any other feedback mechanism used in KEYSTONE BANK |
| 3 | Sustain Engagement | * Keep the Momentum going with ongoing training sessions as new features are released * Scale Up: Expand the use of Copilot to more teams and departments within KEYSTONE BANK * Exploration of new features and updates such as what new in Copilot. | * Leverage FastTrack Engagement to drive. |
| 4 | Champion Network | Build an AI champions network community on Viva Engage where users can connect, get ideas on prompting and share little wins and productivity tips using Copilot | * Center of Excellence on Viva Engage |
| 5 | Extended Training and Adoption Support | Provide extended user enablement support for Copilot for Microsoft 365 as agreed by partner and customer. Customized user training and materials are developed to support the new business processes enabled by Copilot. | * Deliver additional virtual training to end users during 1-month post-implementation stage, training sessions as agreed by partner and customer. * Enable Champions are well equipped to train End users within the bank after post implementation support is done. |

## Assumptions

|  |  |
| --- | --- |
|  | ASSUMPTIONS |
|  | * Stakeholders have been notified of the project and are readily available. * SOW document has been signed off to commence. * Work hours is between 9am and 5pm |

## Software Products / Technologies Requirements for this Delivery

|  |  |
| --- | --- |
|  | SOFTWARE PRODUCTS / TECHNOLOGIES REQUIREMENTS FOR THIS DELIVERY |
|  | The products listed in the table below are required to deliver this project. KEYSTONE BANK Plc is responsible for obtaining all required licenses and products. |

## Requirements (Software Products / Technologies)

|  |  |
| --- | --- |
|  | REQUIREMENTS |
|  | * M365 Copilot licenses. * Microsoft 365 Apps must be deployed. * Users must have Microsoft Entra ID accounts. * Microsoft OneDrive * Microsoft Outlook * Microsoft Teams. * Microsoft Teams Phone (Copilot in Teams Phone supports both voice over Internet Protocol (VOIP) and public switched telephone network (PSTN) calls) * Network quality |

## Dependencies

|  |  |
| --- | --- |
|  | DEPENDENCIES |
|  | * Copilot Software and license Availability * Availability of excellent network connections within infrastructure for Virtual training Sessions. * Resource to manage the Copilot Center of Excellence on Viva Engage * Stakeholders have been notified of the project. * Stakeholders are available during the project |

# Project Organization

|  |  |  |
| --- | --- | --- |
| PROJECT BOARD | | Name |
| PROJECT SPONSORS | KEYSTONE BANK |  |
|  | Signal Alliance Consulting | Kenneth Ufomba |
| PROJECT MANAGER | KEYSTONE BANK |  |
|  | Signal Alliance Consulting | Chima Onuegbu |

# Communication Plan

**Meetings**

Meetings will be scheduled with a minimum of 48 hours’ notice and will be coordinated by the Project Managers.

Project progress meetings will be coordinated between the project managers.

On-site project progress meetings will be coordinated (if required) by the project managers.

Ad-hoc meetings will be coordinated by the project managers.

All meetings will be documented; and the minutes distributed to the stakeholders.

**General Communication**

General communications will be done via telephone and e-mail.

Issues, Risks and Change Requests must be communicated to the Project Sponsor via e-mail.

# Change Control Process

|  |
| --- |
| CHANGE CONTROL PROCESS |
| The change control process has been defined as follows:   * The change will be submitted by the change requestor to the project sponsor for approval and review. * The reviewed change will be submitted to the project managers to manage the change if the request is authorized. * Should the request be declined, the request will be returned to the requestor. * The project manager will advise all stakeholders of the change progress up to completion. * The change will be reviewed once completed and the results will be communicated to the stakeholders. |

# Scope of Work Approval

|  |  |  |
| --- | --- | --- |
| Acceptance / Completion | | |
| Company: KEYSTONE BANK | Project Sponsor: KEYSTONE BANK P | |
| Implementation of Microsoft 365 Copilot | Project Manager: | |
| Contract: SA CONSULTING | Date: | |
| Description of deliverables: | Deployment of Microsoft 365 Copilot for KEYSTONE BANK | |
| The following signatories agree to the contents of this document. The project will only be implemented according to the contents of this Scope of Work Document.    Any changes that will impact on the software development & hardware of the project contrary to this Scope of Works document will be quoted and charged for as a separate exercise and will be treated as a change request.    This document is provisionally signed off on the basis that all the deliverables in this document will be implemented and tested until all errors have been resolved. Support for fixing outstanding errors pertaining to the Functional Specification Document will be provided as stated in the project plan. | | |
| The above-mentioned deliverables are hereby accepted / completed subject to the following conditions: | | |
| Approval: **KEYSTONE BANK** | | |
| Project Owner  KEYSTONE BANK PLC | Signal Alliance Consulting | Chima Onuegbu  Project Manager  Signal Alliance Consulting |
| Signature | Signature | Signature |