

Make Copilot work for your team.

One useful workflow. A team equipped to run it.

Learn & Implement combines Copilot Studio implementation with practical team learning. Build one recurring finance workflow in your Microsoft environment, evaluate the result and prepare your team to operate it.

Six weeks

Working sessions + implementation

4-8 people

A focused client team

From \$12,500

USD / scope agreed first

A practical starting point

Month-end commentary, management reporting or forecast review. Start with a recurring task, approved inputs and a person who can judge whether the result is useful.

What you take forward

01 Configured workflow

The agent, agreed integrations and calculation logic in your environment.

02 Evaluation record

Test cases, observed results, known limits and a release recommendation.

03 Operating pack

Source/configuration, review instructions, access notes and release steps.

04 Team handover

Your team demonstrates operation and recognises when to intervene.

Start with a 20-minute workflow conversation.

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Choose the right first workflow.

A short readiness check for the business owner and Microsoft platform lead.

01 The work

What repeats, how often, and who owns the result?

02 The inputs

Which files, systems and definitions are approved and available?

03 The platform

Who can support Copilot Studio access, connectors and the execution environment?

04 The review

Which errors, missing facts or unsupported claims would matter?

05 The baseline

How much effort does preparation and review take today?

06 The ownership

Who will operate, review and maintain the workflow after handover?

How the six weeks work

Define / Learn / Implement / Test / Operate / Transfer

Agree success criteria before building. Evaluate numerical accuracy, unsupported claims, omissions, preparation and review effort, and independent operation. Release depends on the agreed criteria; unresolved work is documented and further remediation is scoped before it begins.

Scope and prerequisites

The programme assumes approved data, a ready environment and time for team participation. A fixed scope and fee are agreed after discovery. Licences, taxes, travel and substantial platform or data work are separate. Ongoing support and monitoring ownership are agreed explicitly.

Inspect the method: felix.yt/skills | Draft book, finance skill packs and companion examples.