Microsoft 365 Copilot User Enablement Guide
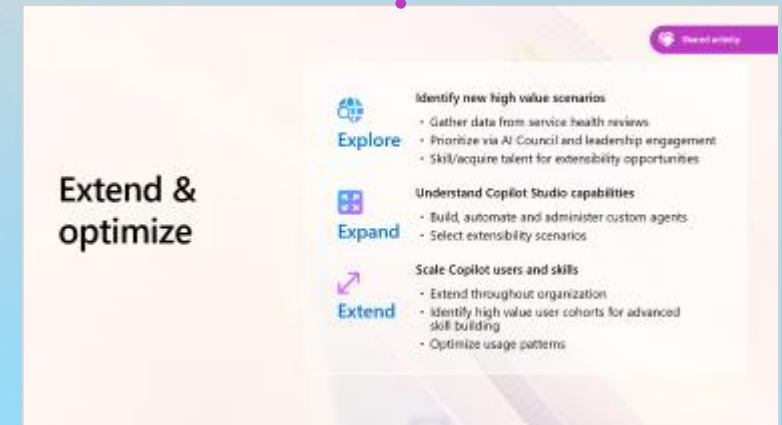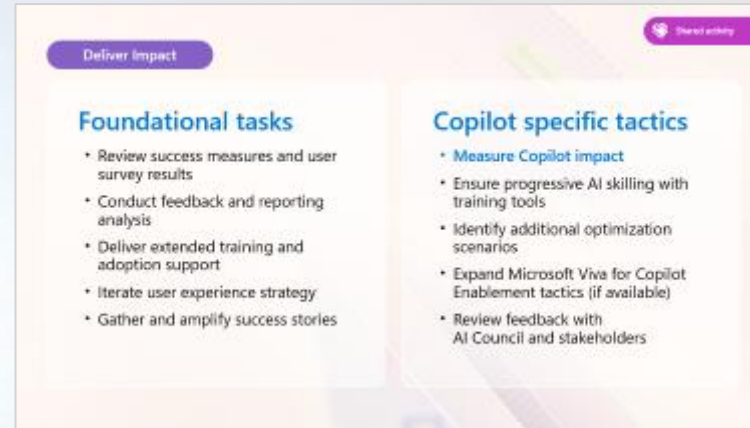
Creating the AI-powered organization

Sep 2024

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The journey to becoming AI powered

Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Foundational learning
- ✓ Business strategy
- ✓ AI Council creation
- ✓ Providing clarity and prioritization

Human change

You are here

Manage the human transformation with robust user enablement programs

- ✓ Invest in the employee experience
- ✓ Improve the culture
- ✓ Authentically integrate feedback

Technical readiness

Build and iterate technical skills to deliver on business results

- ✓ Provide access to training and experts
- ✓ Manage and mitigate risk
- ✓ Improve service management process

Responsible AI principles

Why does user enablement matter?

Microsoft 365 Copilot represents a new way of delivering business value, employee engagement, and creativity in your organization. To get the most from these transformational AI capabilities, an investment must be made in the human side of change. Employees seek purpose and satisfaction. Employers aim to harness worker ingenuity, and a diverse, multi-generational workforce can now work anytime, anywhere. Success depends on your ability to collaborate successfully, drive productivity, and unleash creativity within teams spread across the globe. Supporting your users in understanding these powerful tools will enable you to get the most from your investment and drive the positive transformation that AI capabilities can deliver.
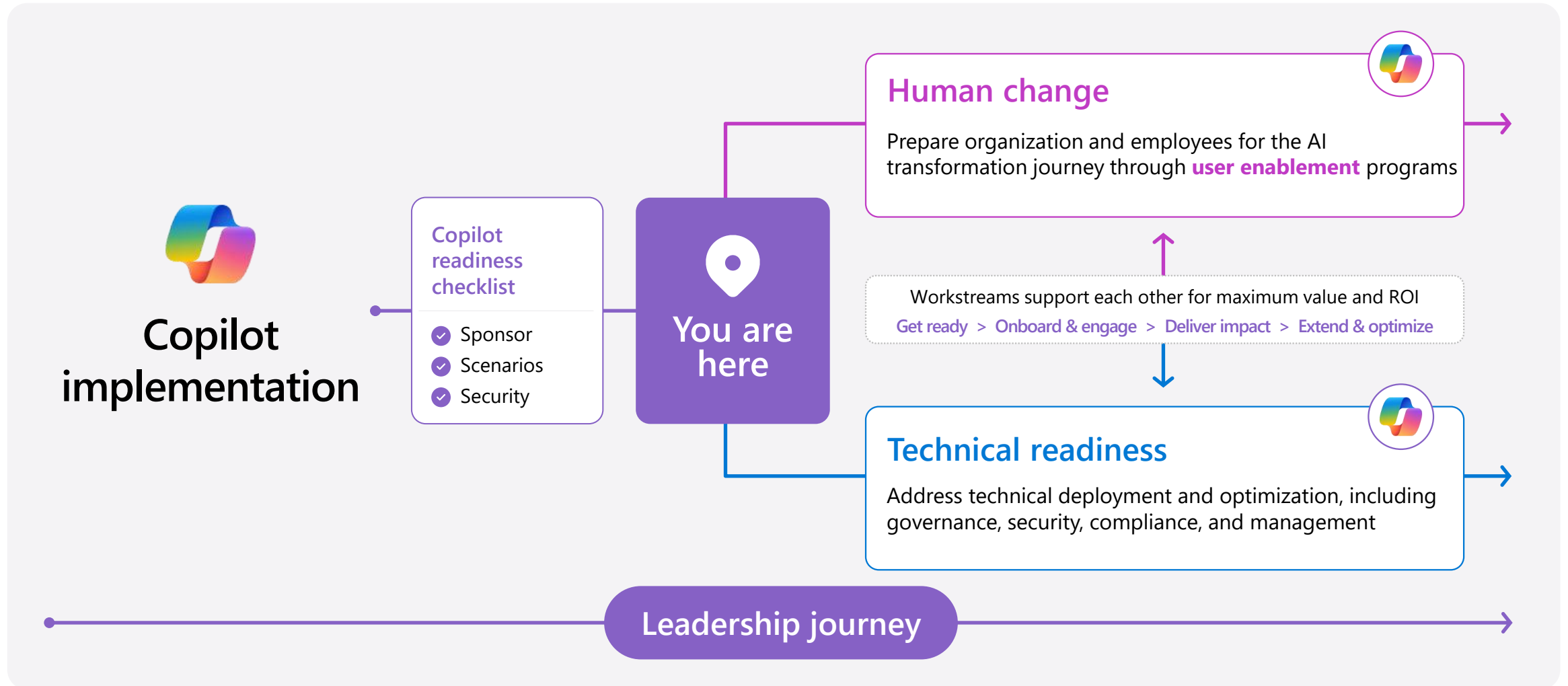
We understand that adopting new technology involves change, and change can be daunting even for the most innovative, cutting-edge organizations. **That's why we created the Microsoft 365 Copilot User Enablement Guide.** This guide is the partner to the Technical Readiness Guide and will reference the shared planning milestones essential in iterative project success.

From our research and real-world experience, we've compiled an easy-to-follow how-to that guides you and your teams, step-by-step, through the best way to roll out Microsoft 365 Copilot to your organization and drive continuous impact across your organization. The insights we share come from our shared learnings from the implementation of other emerging technologies, our most successful customers, and User Enablement experts from around the world. Throughout this guide you will find links to additional tools and resources as well as the <u>user enablement planning workbook</u> where you can build your custom approach to driving true user satisfaction.

Remember, you are not in this alone. There are many organizations who are currently launching Copilot and generative AI technologies from Microsoft, and you can connect with them in the <u>Driving Adoption Community</u> and through our free, worldwide <u>Microsoft 365 Champion</u> program.

Implementing a robust user enablement program is a journey. Let's take it together.

Microsoft 365 Copilot implementation

Copilot implementation

Copilot readiness checklist
- ✓ Sponsor
- ✓ Scenarios
- ✓ Security

You are here

Human change

Prepare organization and employees for the AI transformation journey through **user enablement** programs

Workstreams support each other for maximum value and ROI

Get ready > Onboard & engage > Deliver impact > Extend & optimize

Technical readiness

Address technical deployment and optimization, including governance, security, compliance, and management

Leadership journey

Essentials for Copilot user enablement success

Nominate and activate your Copilot executive **sponsors**, in partnership with your AI Council

Accelerate your business impact by defining highest value **scenarios**

Define your path to **secure** your data for compliance and peace of mind

Microsoft 365 Copilot
Implementation overview

You are here

Get ready	Onboard & engage	Deliver impact	Extend & optimize

USER ENABLEMENT

User Enablement Workstream

Get ready	Onboard & engage	Deliver impact	Extend & optimize
Secure exec sponsorship, create AI Council, and define RAI principles	Complete User Enablement Strategy training	Review success measures and user survey results	Extend to new high value scenarios
Identify success owners, Champions, and early adopter cohorts	Define user experience and feedback strategy	Conduct feedback and reporting analysis	Deliver business process transformation with Copilot Studio, plugins, and connectors
Detail high value scenarios and personas	Design and deploy training and engagement community (Community of Practice/Champion Platform)	Deliver extended training and adoption support	Drive group and cross-organizational productivity and innovation
Be intentional with assignment and concentrate seats	Launch employee communications and Champion program	Identify additional optimization scenarios	Understand custom line of business opportunities
Define success criteria, KPIs, and success measurement plan	Onboard executives and user cohorts	Iterate user experience strategy	
	Deliver user Champions and support staff training	Gather and amplify success stories	

TECHNICAL READINESS

Technical Readiness Workstream

Get ready	Onboard & engage	Deliver impact	Extend & optimize
Perform the Microsoft 365 Copilot Optimization Assessment	Ensure appropriate Data Security controls are in place	Establish service management plan	Design, build, and publish plugins to deliver unique experiences
Address data security, governance, and data access questions	Prepare your organization for Microsoft 365 Copilot with setup guide: deploy Microsoft 365 apps, if needed; assign licenses	Analyze Microsoft 365 Copilot usage reports and the Microsoft Copilot Dashboard to observe user adoption, retention, and engagement	Build your own custom agents
Build shared Microsoft 365 Copilot implementation plan with User Enablement team	Assign permissions by role to provide access to the Microsoft 365 Copilot usage report		

Microsoft 365 Copilot
Readiness checklist and key resources

USER ENABLEMENT

Get ready
- ✔ Secure exec sponsorship, create AI Council, and define RAI principles
- ✔ Identify success owners, Champions, and early adopter cohorts
- ✔ Detail high value scenarios and personas
- ✔ Be intentional with assignment and concentrate seats
- ✔ Define success criteria, KPIs, and success measurement plan

Onboard & engage
- ✔ Complete User Enablement Strategy training
- ✔ Define user experience and feedback strategy
- ✔ Design and deploy training and engagement community (Center of Excellence/Champion Platform)
- ✔ Launch employee communications and Champion program
- ✔ Onboard executives and user cohorts
- ✔ Deliver user Champions and support staff training

Deliver impact
- ✔ Review success measures and user survey results
- ✔ Conduct feedback and reporting analysis
- ✔ Deliver extended training and adoption support
- ✔ Identify additional optimization scenarios
- ✔ Iterate user experience strategy
- ✔ Gather and amplify success stories

Extend & optimize
- ✔ Extend to new high value scenarios
- ✔ Deliver business process transformation with Copilot Studio, plugins and connectors
- ✔ Drive group and cross-organizational productivity and innovation
- ✔ Understand custom line of business opportunities

Support continuous learning and optimization

MICROSOFT RESOURCES

Microsoft Unified
Unified unlocks the greatest value from your investment.

Microsoft FastTrack
FastTrack is a Microsoft delivered benefit designed to help you deploy Microsoft 365.

Microsoft Adoption
Resources to ensure you are delivering employee satisfaction and business value.

Copilot Learning Hub
Build your skills across Microsoft Copilot with industry leading online training and certification programs.
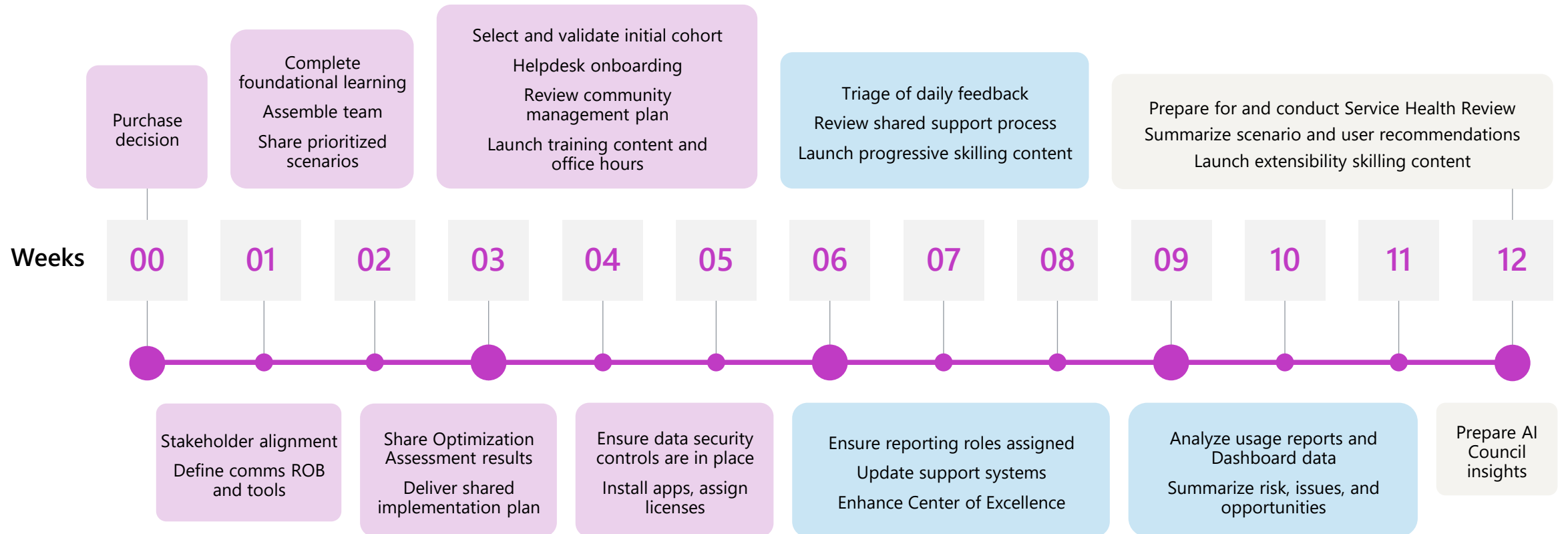
Evaluate your user enablement capabilities

Invest in a healthy **champions team**, who will provide peer learning and support during the AI journey

Leverage in-product experiences to create a culture of **continuous learning** and deliver training in the flow of work

Ensure a vibrant **community of practice** for ongoing user engagement and skill building

Microsoft Viva

Accelerate user satisfaction and value

Communications

Communicate Copilot rollout across multiple channels

Identify champions and set goals to assist in Copilot adoption

Share knowledge and expertise via communities

Skilling

Identify knowledge gaps and opportunities for upskilling

Target learning experiences with academies, learning paths, and collections

Create a Copilot knowledge base

Measurement

Understand readiness, usage and adoption trends

Quantify productivity gains and measure user sentiment

Create custom views with additional business context

User enablement

Realize value

Viva features for Copilot user enablement and measurement

Measurement		Communications			Skilling
Viva Insights	**Viva Glint Viva Pulse**	**Viva Goals**	**Viva Amplify**	**Viva Engage**	**Viva Learning**
Copilot Dashboard	**Copilot Impact Survey**	**Copilot adoption OKR template**	**Copilot Campaign in a Box**	**Copilot Community of Practice**	**Copilot Academy**
Tenant level visibility into activation, user enablement, and user sentiment*	Phase 1: Copilot Impact Survey to capture user sentiment	OKR import template prepopulated	Ready-to-send weekly communications to engage employees across multiple communication channels to create awareness on Copilot capabilities to accelerate user satisfaction	Copilot community creation*	Copilot Learning courses via Microsoft Learn and Microsoft 365 trainings*
Assess potential impact*	Phase 2: User Pulse sentiment data included in Dashboard (Q1 2025)	Faster time to configuration for driving clarity and transparency of Copilot investment		Templatized onboarding steps, suggested content, and members	Out-of-the-box structured learning environment for targeted Copilot upskilling with Copilot Academy
Scopes and filters for deeper organizational views	Phase 3: Integrate Pulse sentiment with benchmark data (Q2 2025)			External community to connect change managers across orgs and Copilot Subject Matter Experts	
Analyze and compare metrics between user cohorts				Intelligent Q&A	
Advanced tools for custom analysis					

Included with Microsoft 365 license

Foundational tasks

- Build the right team

- Identify scenarios

- Review Microsoft provided materials

- Onboard supporting resources (as needed)

- Identify communication channels and initial rhythm

- Build relationships with technical leaders

Copilot specific tactics

- Understand Microsoft 365 Copilot capabilities

- Review Responsible AI principles

- Identify early adopters and scale onboarding cohorts

- Target AI-ready scenarios

- Build prompt and natural language skills

- Embrace rapid feedback cycles

Who should be involved in your adoption effort?

Transforming to this new way of working requires buy-in and support from across the business. We have identified four key groups who will bridge technology and business outcomes that matter to your organization

Each group has a specific role in implementation and should be engaged early and often. The next few pages will outline the specific role these team members will play.

1. **Executive Sponsors**
2. **Success Owner**
3. **Early Adopters**
4. **Champions**
5. **Technical team**
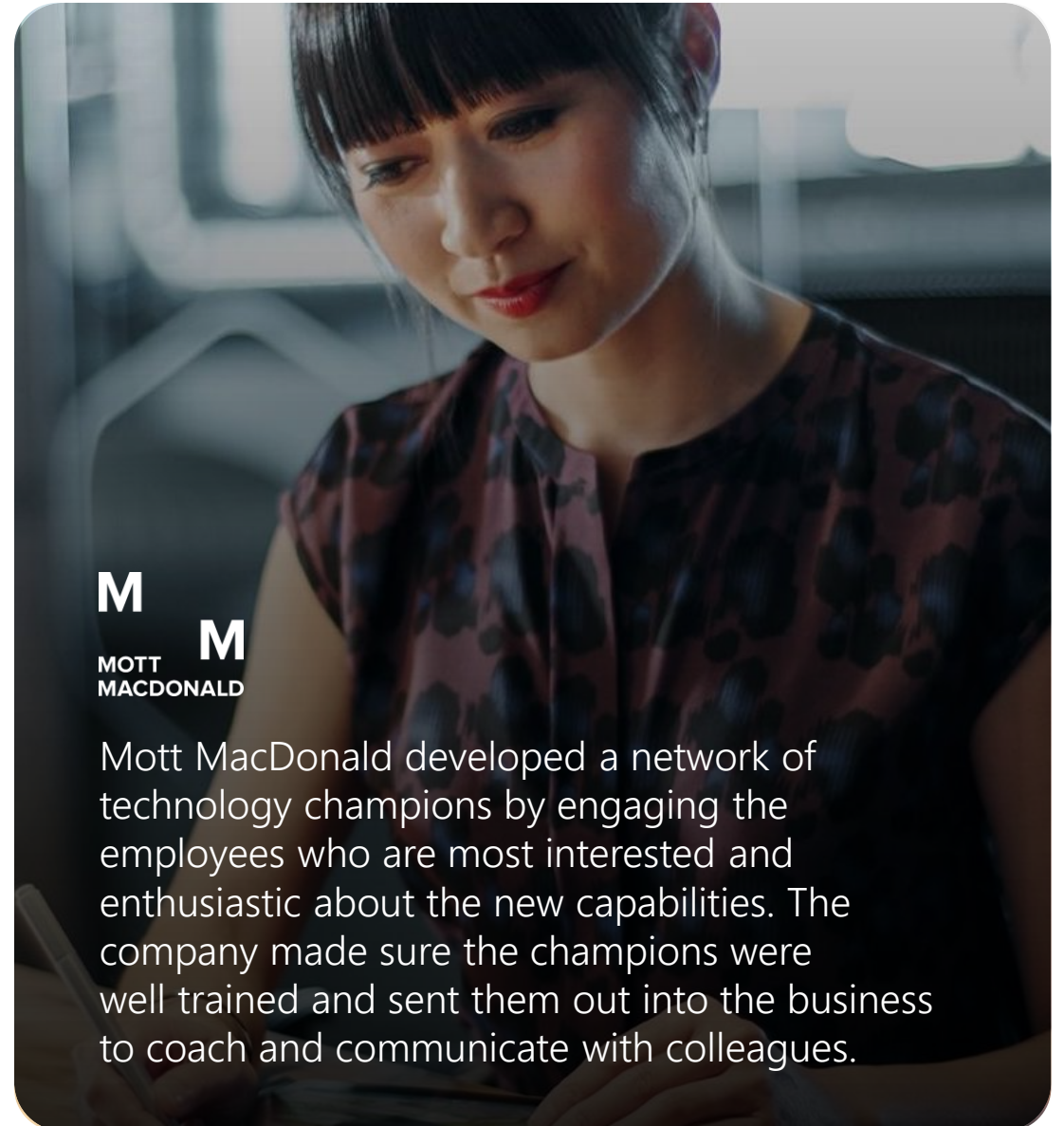
M M
MOTT MACDONALD

Mott MacDonald developed a network of technology champions by engaging the employees who are most interested and enthusiastic about the new capabilities. The company made sure the champions were well trained and sent them out into the business to coach and communicate with colleagues.

Secure exec sponsorship

Ensure they understand the ABCs:

A — Active, visible, and consistent participation

B — Build a coalition with their executive peers

C — Communicate directly with employees to support landing the change

Executive Sponsors should:

- Help the project team identify and prioritize their top business needs.

- Encourage shared planning between user enablement and technical teams.

- Play a role in communicating the vision to leaders across the organization.

- Actively participate in and use Copilot to help drive and reinforce enablement.

- Promote the enablement program. Studies show engaged employees are 2.6x[1] more likely to fully support a successful AI transformation.

Executive Sponsors may:

- Lead or participate in the organizational AI Council.

- Have purchasing authority for licenses or services from supporting suppliers.

- Be directly accountable for Microsoft 365 or broader digital workplace initiatives.

[1]*The state of AI change readiness eBook*, Microsoft Viva People Science

Get ready

Complete stakeholder mapping worksheet

Identify measures for stakeholder engagement:

- › **Level of interest**

- › **Level of organizational influence**

- › **Level of resistance**

- › **Engagement model**
  - Fulfill expectations

- › **Document relationship owners and contact methods**

Utilize stakeholder management lifecycle

1 Validate strategic objectives
Ensure clear mission and goals from existing executive stakeholders, AI Council or business leaders for AI transformation.

2 Identify stakeholders
Identify all your potential stakeholders (including senior executives, peers, customers, prospective customers, etc.) who have influence over your work or an interest in its outcome.

3 Understand and assess stakeholder relationship
Using the Power/Interest stakeholder grid, map each stakeholder based on their interest and influence over your work. Then color code each one based on their attitudes: Green=Supportive; Yellow=Neutral; Red=Critical.

4 Define stakeholder management approach and actions
Using the stakeholder planning sheet, list all stakeholders and assess their key interests/issues; attitudes; desired support; messaging; relationship owners; and actions.

5 Develop communication plan
Using the Power/Influence grid, define a communication strategy/cadence for each type of user. Use this as a guide to "personalize" the communication plan for your key stakeholders to meet their individual needs.

6 Monitor and adapt
On regular intervals, re-assess stakeholders' influence, interest, and attitudes and modify their communication strategy appropriately.

Understand and assess stakeholder relationships

Using the Power/Interest stakeholder grid, map each stakeholder based on their interest and influence over your work.
Then color code each one based on their attitudes:

● Green = Supportive
● Yellow = Neutral
● Red = Critical

Example of grid:

Stakeholder_1
Stakeholder_3
Stakeholder_4
Stakeholder_2

↑ **Influence**
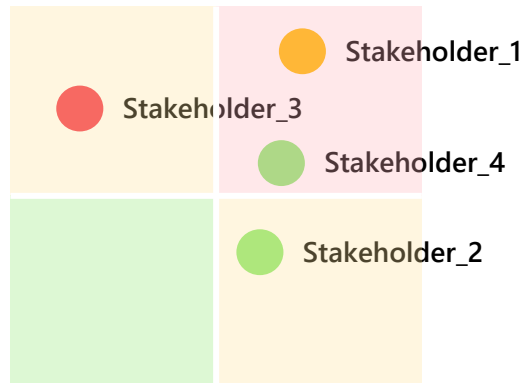
Develop stakeholder
- Develop to *Key stakeholder* by demonstrating value
- Active, infrequent stakeholder management
- Consult in key decision making

Key stakeholder
- Key stakeholders, main focus
- Active, frequent stakeholder management
- Involve in key decision making

Inform stakeholder
- These are the least critical stakeholders
- Inform infrequently via general, broad-based communications

Extended stakeholder
- Passive stakeholder management
- Provide information regularly
- Ask for feedback
- Involve in low-risk work

→ **Interest**

Assemble your team

Shared planning with Technical Readiness Team

Guidance

Your User Enablement (UE) Team is a component of the overall Copilot Implementation Team and includes a variety of roles. Your model may appear different based on the existing structure of your organization.

Below are characteristics of successful UE Teams, which should be considered as you recruit the UE Lead and additional resources:

> Understanding of organizational change management practices

> Technical skills across Microsoft 365 collaboration tools

> Advanced program management skills

> Relevant business acumen and visibility to overall AI vision

> Strong written and verbal communications skills

> Ability to model desired leadership skills

Identify your team members

Key roles	Responsibilities	Department	Team member identified for role
Executive Sponsor	*Send Microsoft Launch announcement. Help identify and prioritize top HR needs. Connect monthly with HR and IT leaders across the organization.* *Actively participate in and use the Microsoft 365 capabilities to help drive and reinforce adoption*	*VP, HR*	*Jane Doe*
Success Owner			
Program Manager			
Champions			
Training Lead			
Department Leads (Stakeholders)			
IT Specialists			
Communication Lead			
HR Manager			
Community Manager			

User Enablement Team model

WW Executive Sponsor

Worldwide User Enablement Team

Core IT services and support

- Provide scenario-based guidance on Microsoft 365 Copilot
- Provide global package of assets to leverage (comms, training, readiness, etc.)
- Provide onboarding, enablement, and issue reporting
- Consolidate feedback and share via Service Health Reviews
- Provide operations, service, and support experiences for new scenarios and features

Unit Executive Sponsor

- Sends key local communications
- Appoints Business Integration Lead

Business Integration Lead

- Represents sponsor with core team
- Monitors enablement
- Works with Executive Sponsor for communications and cascade

Local Copilot Champions

- Provide local support
- Provide local training as needed

Example model – Implementation teams can modify as needed. Supplier capacity may be added as needed for key activities.

AI Council

A cross-functional and multidisciplinary body

that oversees and guides the development, deployment and evaluation of AI capabilities.

It is essential for organizations to establish a governance framework that ensures the responsible and ethical use of AI across their operations and stakeholders.

One way to achieve this is to create an AI Council, a cross-functional and multidisciplinary body that oversees and guides the development, deployment, and evaluation of AI solutions within the organization. An AI Council can help to align the organization's AI strategy with its vision, values, and goals, as well as to identify and mitigate potential risks and harms of AI. An AI Council can also foster a culture of trust, collaboration, and innovation among the AI practitioners, users, and beneficiaries within and outside the organization.

Get started today

aka.ms/copilot/AICouncilSetupGuide

Rules

Responsible AI Standard

Records

our practice of Responsible AI by Design – the proactive ways in which we guide the design, build, and testing of AI systems

Establishes

a durable framework for the maturing practice of responsible AI and evolving regulatory requirements

Reflects

our deeper exploration of what our six AI principles mean and the steps we must taken to uphold them

Microsoft
Responsible AI
Standard, v2

GENERAL REQUIREMENTS

FOR EXTERNAL RELEASE

June 2022

Microsoft
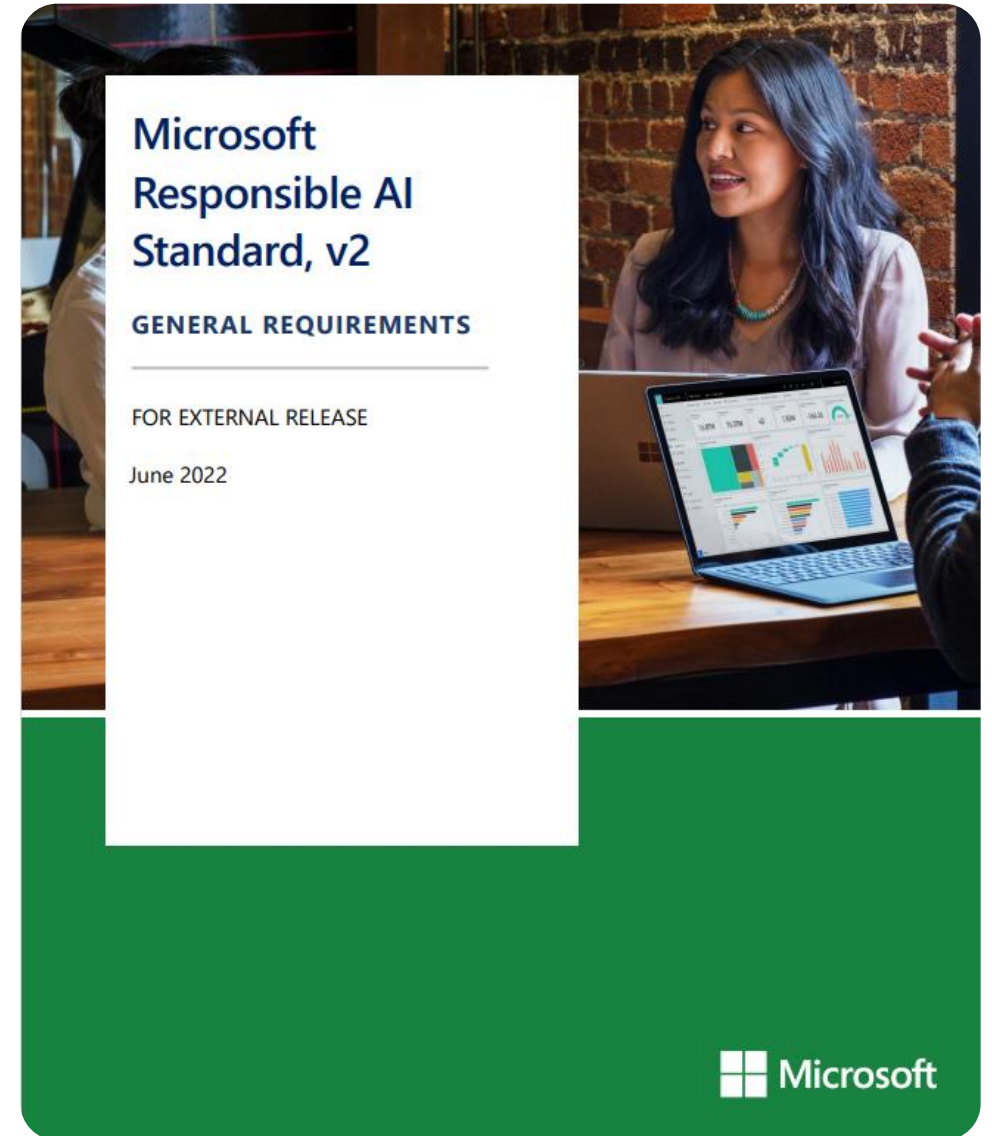
The anatomy of the Responsible AI Standard

Principles ▶ Which **enduring values** guide our responsible AI work?

Goals ▶ What are the **outcomes** that we need to secure?

Requirements ▶ What are the **steps we must take** to secure the Goals?

Tools and practices ▶ Which **aids** can help us meet the Requirements?
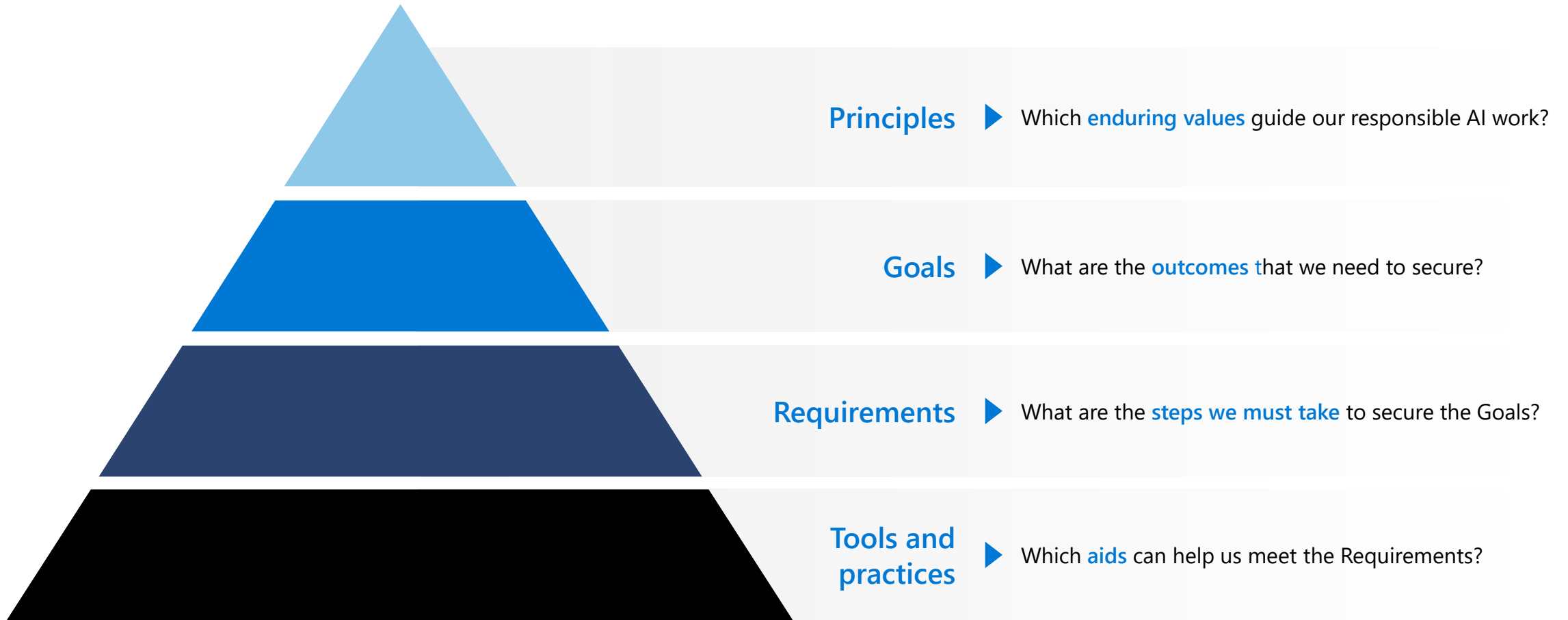
The Standard's goals at-a-glance

Accountability

A1: Impact assessment

A2: Oversight of significant adverse impacts

A3: Fit for purpose

A4: Data governance and management

A5: Human oversight and control

Transparency

T1: System intelligibility for decision making

T2: Communication to stakeholders

T3: Disclosure of AI interaction

Fairness

F1: Quality of service

F2: Allocation of resources and opportunities

F3: Minimization of stereotyping, demeaning, and erasing outputs

Reliability & Safety

RS1: Reliability and safety guidance

RS2: Failures and remediations

RS3: Ongoing monitoring, feedback, and evaluation

Privacy & Security

PS1: Privacy Standard compliance

PS2: Security Policy compliance

Inclusiveness

I1: Accessibility Standards compliance

Foundational tasks

- Complete User Enablement Strategy training and template

- Define user experience and feedback strategy

- Launch employee communications and Champion program

- Onboard executives and user cohorts

- Deliver user Champions and support staff training

Copilot specific tactics

- **Review Microsoft provided training and engagement content**

- Design and deploy training and engagement community (Center of Excellence/Champion Platform)

- Leverage Microsoft Viva for Copilot Enablement (if available)

- Review overall plans with AI Council and stakeholders

Craft a user experience strategy

A [user experience strategy](#) will enable you to quantify the value received from implementing Microsoft 365 Copilot.

1. **Identify target user personas**

2. **Quantify pain points and potential productivity gains**

3. **Define engagement touch points**

4. **Prioritize user feedback methods and issue resolution**

5. **Define success measures and use cases**

Driving enablement is an ongoing user and stakeholder engagement process. It is a lifecycle activity not a moment in time.

Your technology enablement team is central to the success of your project and your employees with your technology investments. Your user experience strategy gives them a vision and roadmap for success.

#ProTip

Use Microsoft 365 Copilot to create the initial draft.

Understanding the user journey

Getting to "Aha!"

When can I use it? → How can I get help?

Why should I care? → How will I use it? / **How will WE use it?** → How does this change my experience? → How can I do more? → **What's next?**

What's next? ↓ How can I share my success? ↓ **How can I enhance my profession with this?**
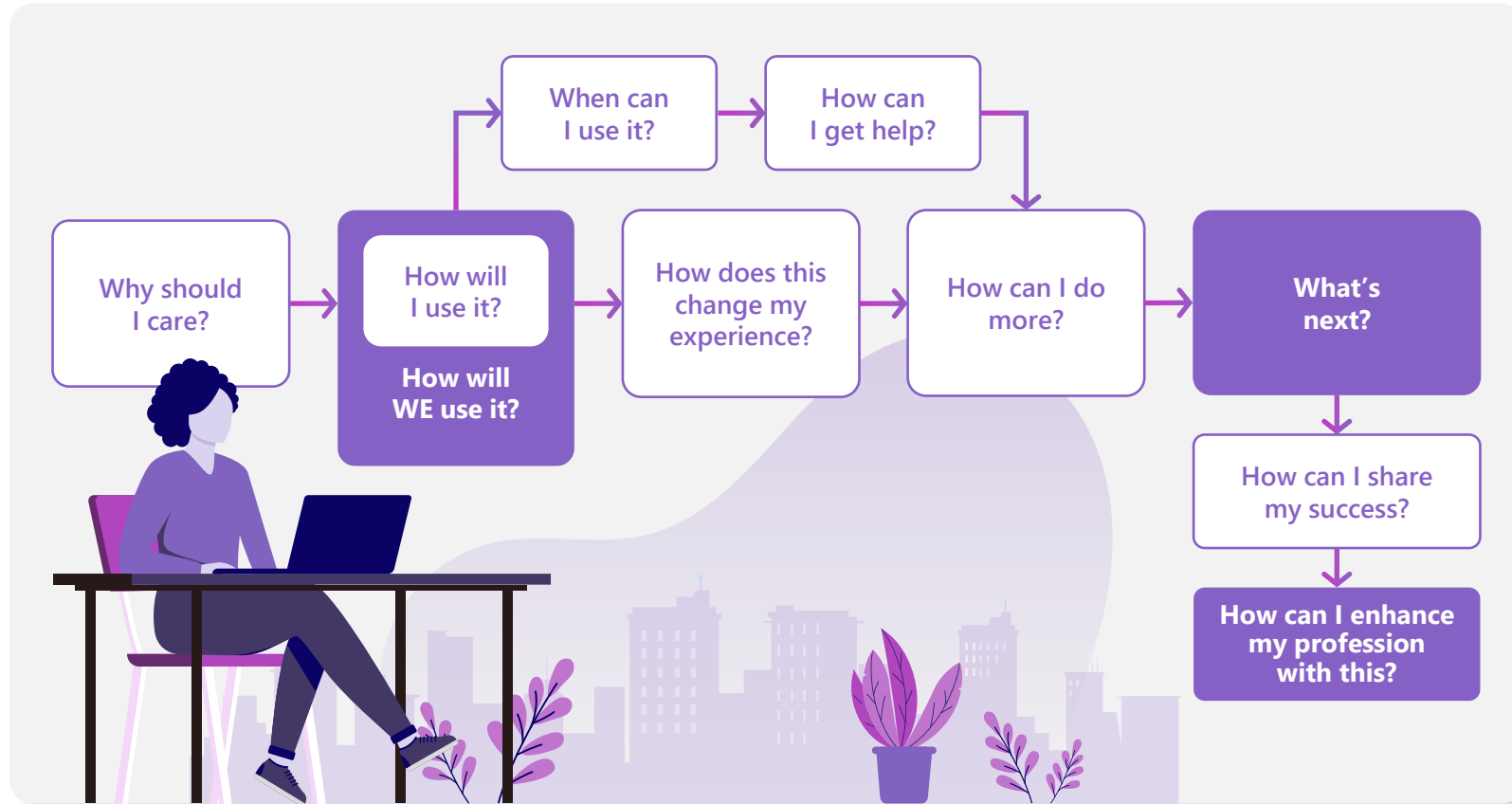
An aha moment is defined as *"a moment of sudden insight or discovery".*

Feel

Act   **Think**
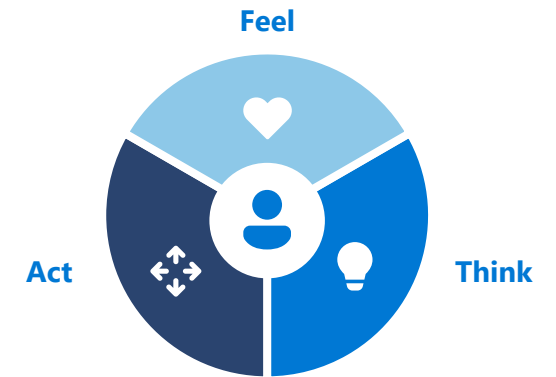
The Think-Act-Feel framework is grounded in decades of research showing a whole human understanding – including feelings – is critical to business outcomes.

Building on this framework we understand that **delivering accelerated change is based on trust.**

Keys to user enablement success

Research results below support suggested approach for building your adoption plan.

Top reported activities for driving successful product adoption*:

1 Define a vision and identify how target product will be used

2 Obtain proactive support from key roles to accelerate use of Copilot including senior leadership, legal, ITDMs, and key BDMs

3 Enable Champions and provide business **relevant, snackable, and on-demand** training for business users

4 Raised awareness through launch event and omni-channel communications planning

% of respondents that rated activity as having above average importance

75%

75%

32%

31%

*Results of a related Microsoft research study survey
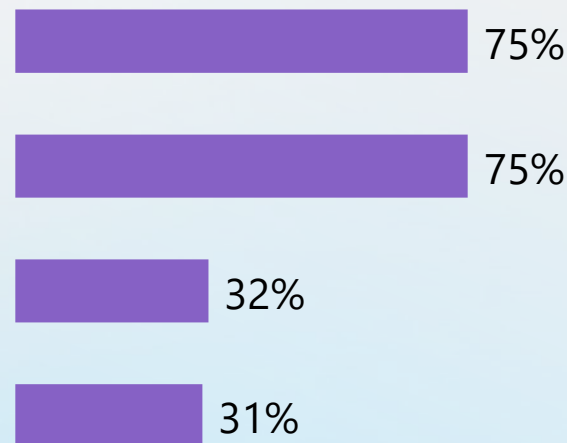
Build your Community of Practice with Viva Engage

Connect and empower employees

Create a community in Viva Engage to generate excitement, share learning, and support Copilot Champions and experts.

Give employees a place to:

- Share best practices, such as prompts

- Share success stories of Copilot saving time and driving productivity

- Access company announcements on AI usage, direction, and mission

- Facilitate peer to peer learning and Champion engagement

Get ready　　**Onboard & engage**

Deliver impact　　**Extend & optimize**
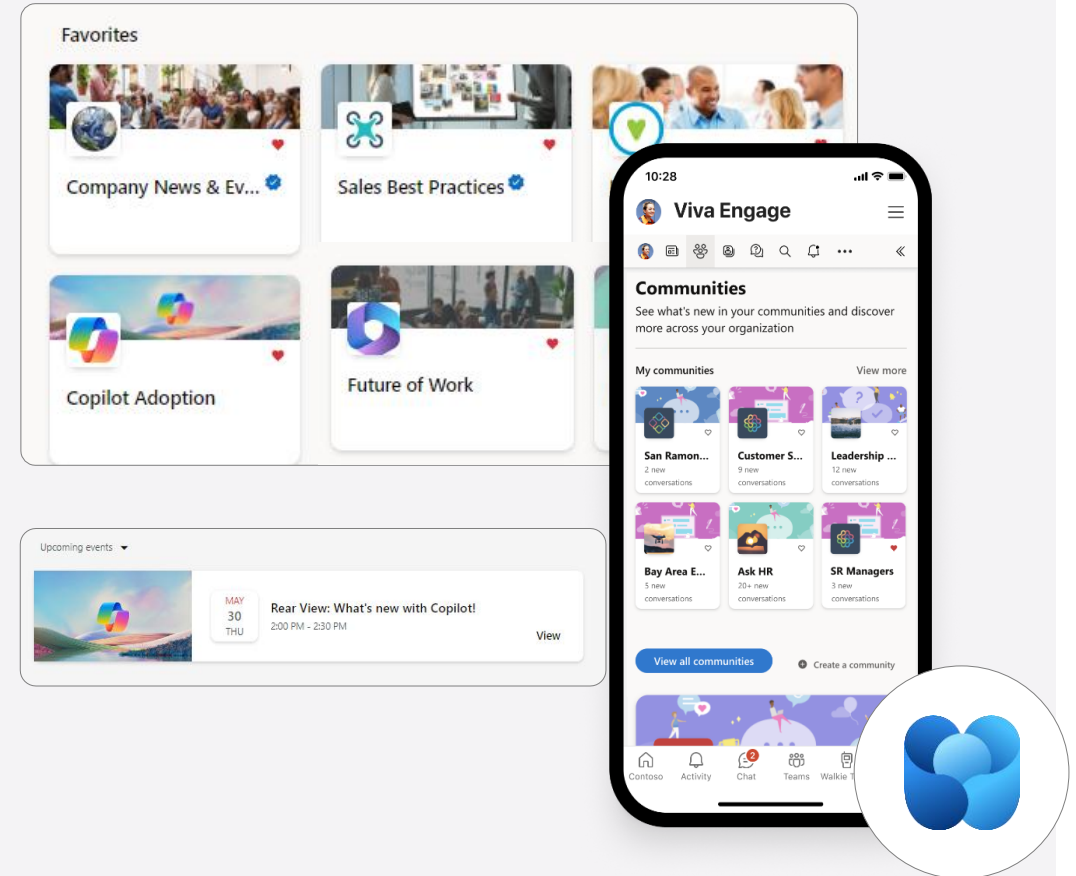
Identifying user cohorts

Selecting the right participants for the Early Adopter Program is key to gain valuable insights and inform the organization-wide launch. **For success, a much larger group of employees should be selected for Copilot onboarding than in other service enablement plans.** This allows for organic knowledge sharing, rapid feedback, and success at scale*.

The list below describes the types of employees to include in your program:

- ✓ Users primarily from the same lines of business or departments, preferably those who work together on a project or business process.

- ✓ Likely Champions or leaders who will become advocates during the broad launch to the entire organization.

- ✓ IT and help desk team members who will support users during launch.

- ✓ **Important:** Executive onboarding is a distinct category of business user with different needs and requirements. Plan for dedicated learning time and feedback cycles from these users.

*Based on observation and research from early Copilot customer implementations.
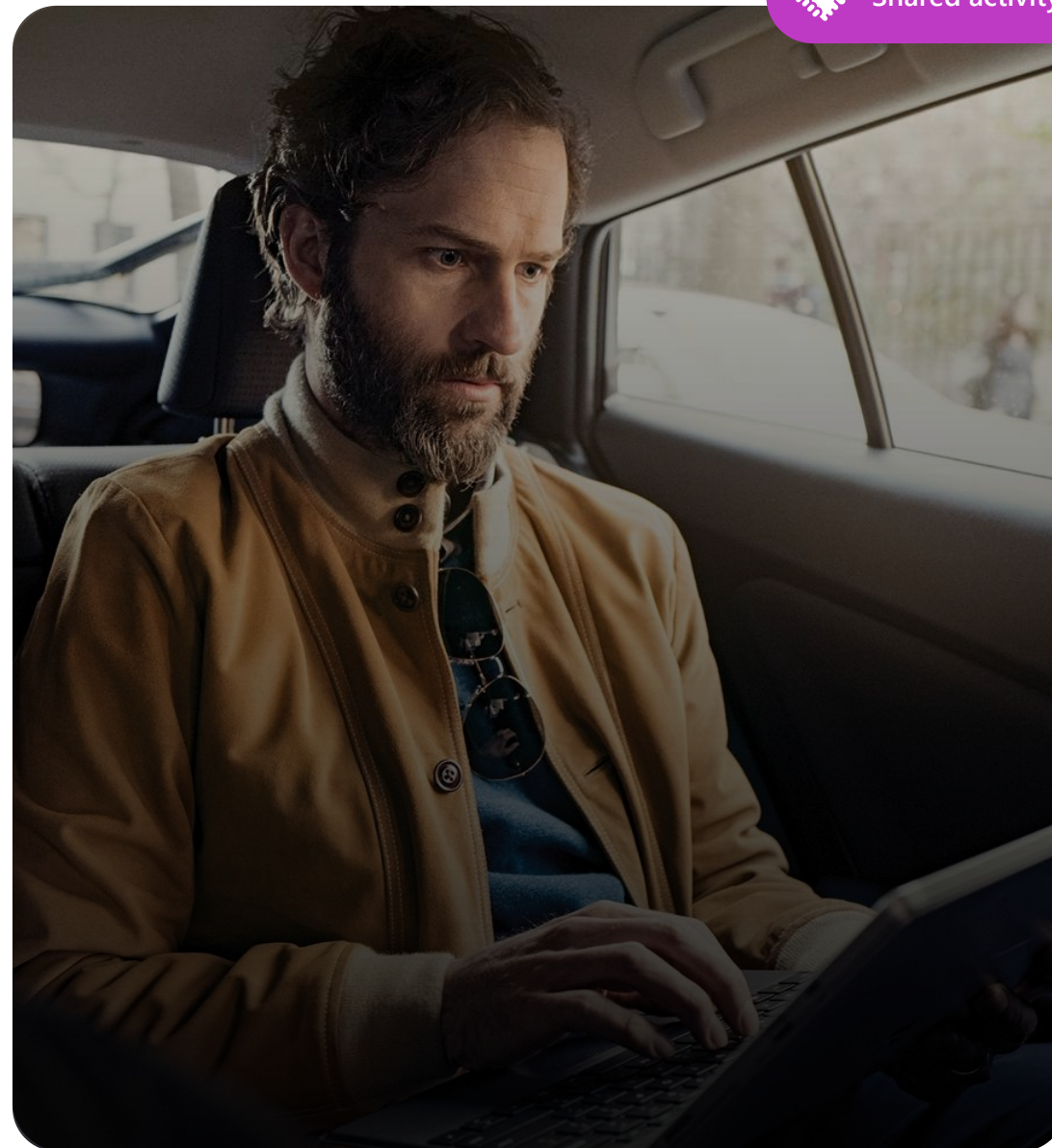
Create or extend your Champion program

Microsoft 365 Copilot capabilities will inspire you to transform existing business processes and drive innovation across employee experiences.

Peer to peer learning is a powerful tool for user enablement. Leverage this skill in your organization by creating or extending an internal Champion program.

Champions will supplement your help desk and support systems, acting as trusted advisors to their peers. They will also provide valuable feedback on your enablement.

Use our [step-by-step guide](#) to empower your Champions today.

Who are Champions?

Champions provide peer learning, early feedback, and organizational support throughout the user enablement lifecycle. They are motivated by helping others rather than the technology itself and often are an ongoing source of high value scenarios. They build awareness, understanding, and engagement throughout the community as a trusted resource to their peers.

Champions will help to:

- ✓ Create the groundswell of enthusiasm that grows adoption.

- ✓ Build a circle of influence among their teams.

- ✓ Bring the new ways of working to life across teams.

- ✓ Identify business challenges and possible solutions.

- ✓ Provide feedback to the project team and sponsors.

- ✓ Reduce strain on core project team through active, ongoing engagement.
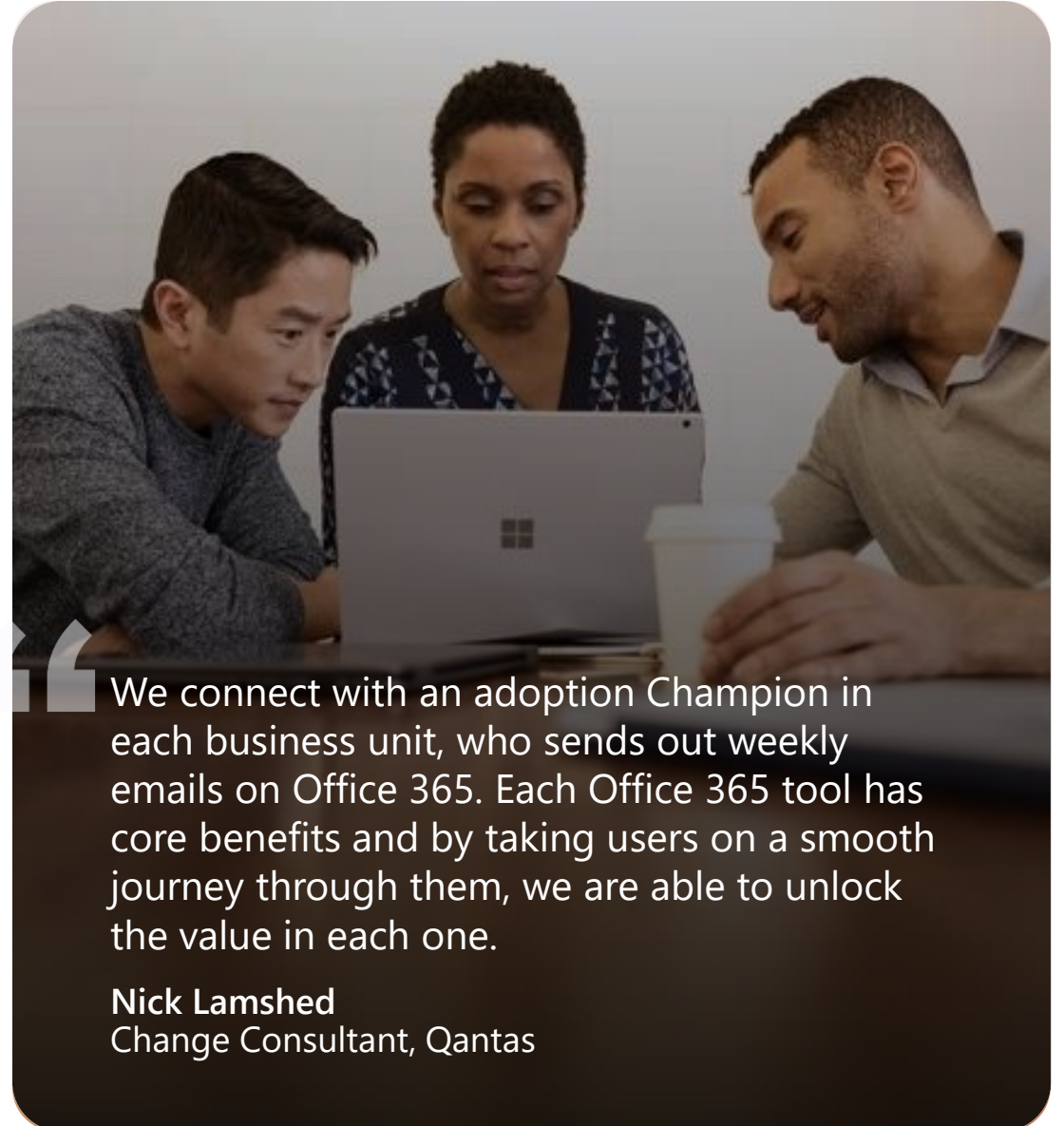
"We connect with an adoption Champion in each business unit, who sends out weekly emails on Office 365. Each Office 365 tool has core benefits and by taking users on a smooth journey through them, we are able to unlock the value in each one.

Nick Lamshed
Change Consultant, Qantas

Build a sustainable Champions community

🏆

Champions help build, grow, and sustain your Copilot implementation by gathering feedback, supporting the human change lifecycle, and providing peer to peer guidance.

Champions:

1. Should be formally trained to increase their depth and breadth of knowledge.

2. Should be encouraged and empowered to guide, teach, and train their peers.

3. Need consistent positive reinforcement that affirms the impact of their efforts.

4. Need a clear plan upon which to execute.

Five steps to developing a Champions community

1. Set the context.

2. Align the Champions community to organizational objectives and vision for your Copilot implementation.

3. Identify Champions and get buy-in.

4. Build a plan with Champions. Skill them first and often.

5. Execute and share Champion feedback with leaders and through Service Health Reviews.
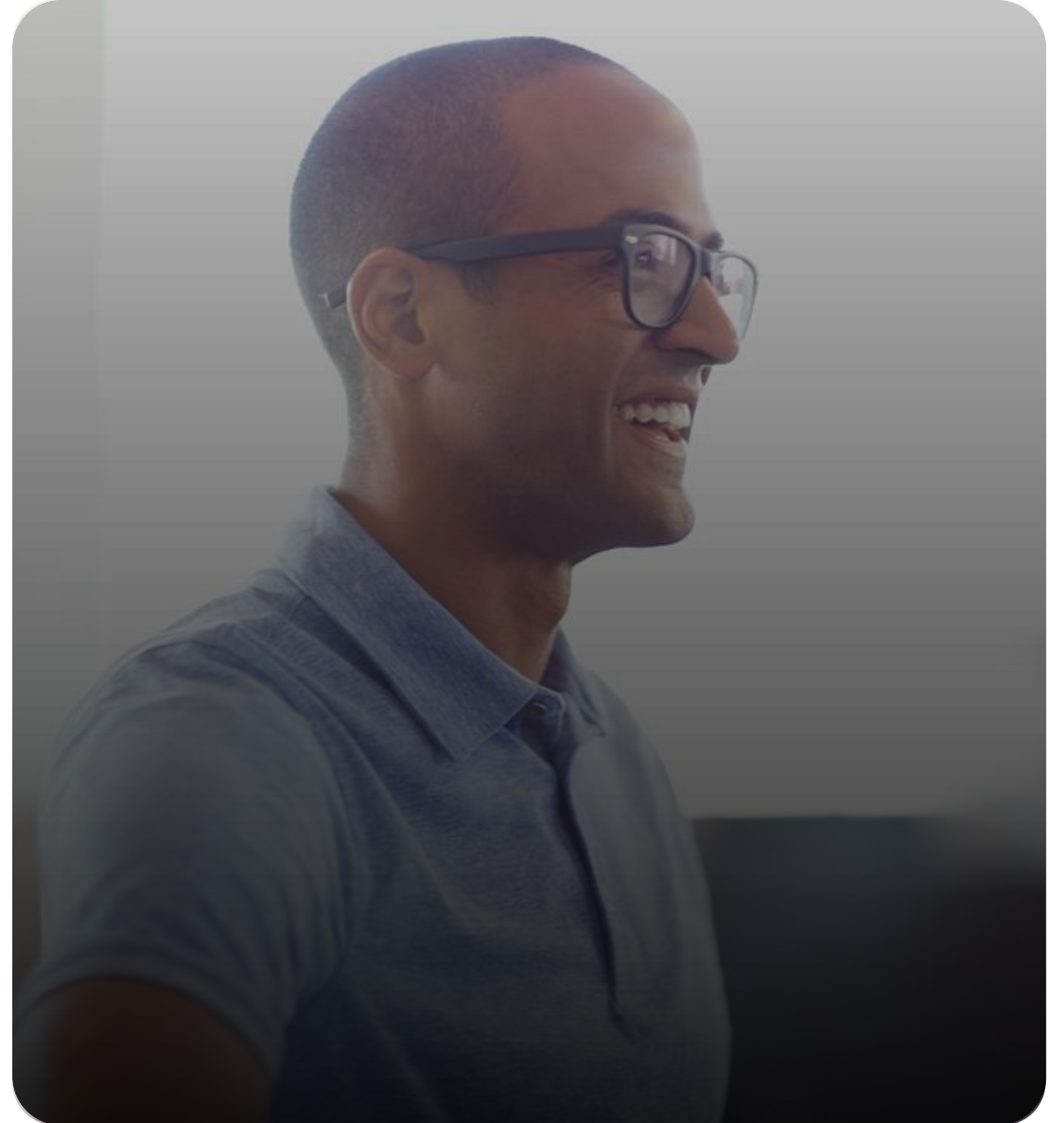
The Champions program checklist

- ✓ Find enthusiastic Champions who can commit time and effort.

- ✓ Build a Viva Engage or Microsoft Teams Group for Champions to share updates and successes. (See our Build Your Experience and Microsoft Viva for Copilot Enablement guides).

- ✓ Provide materials ready to support their work on the group with teams and individuals (e.g., lunch and learn sessions).

- ✓ Ensure a regular rhythm for discussions with the Champions on what's working and what's not.

- ✓ Design a program to engage and recognize their effort, such as providing privileged access to relevant events or speaking engagements.

- ✓ Communicate to individuals about the Champions role and where they can be found – remember, they are not an IT support function but business representatives.

- ✓ Incorporate Microsoft 365 training resources into your own internal training site.

- ✓ Create a contest (e.g., scavenger hunts and giveaways) between departments to encourage people to interact with Microsoft 365.

Branding your
Champion program

- ✓ Copilot Champions may be referred to with terminology that is in alignment with your company culture.

- ✓ Champions are professionally referred to as User Enablement Specialists.

- ✓ Microsoft Partners can aid you in creating your internal user enablement function.

- ✓ Champion recognition – in the form of badges for engagement, Praise via Viva Insights, or other forms – are essential to Champion morale.

- ✓ As advocates for the employee experience, regular feedback, employee engagement, and communications are required for role success.

- ✓ Champion duties are a part of the day-to-day duties of the employee alongside their core job function.

- ✓ Representation from across the organization ensures balanced viewpoints and early identification of risks and issues.

Make a difference
Become a Champion

- Get more from Copilot and Microsoft 365
- Help others do the same
- Expand your knowledge and enhance your career

Join the free program at **aka.ms/M365Champions**
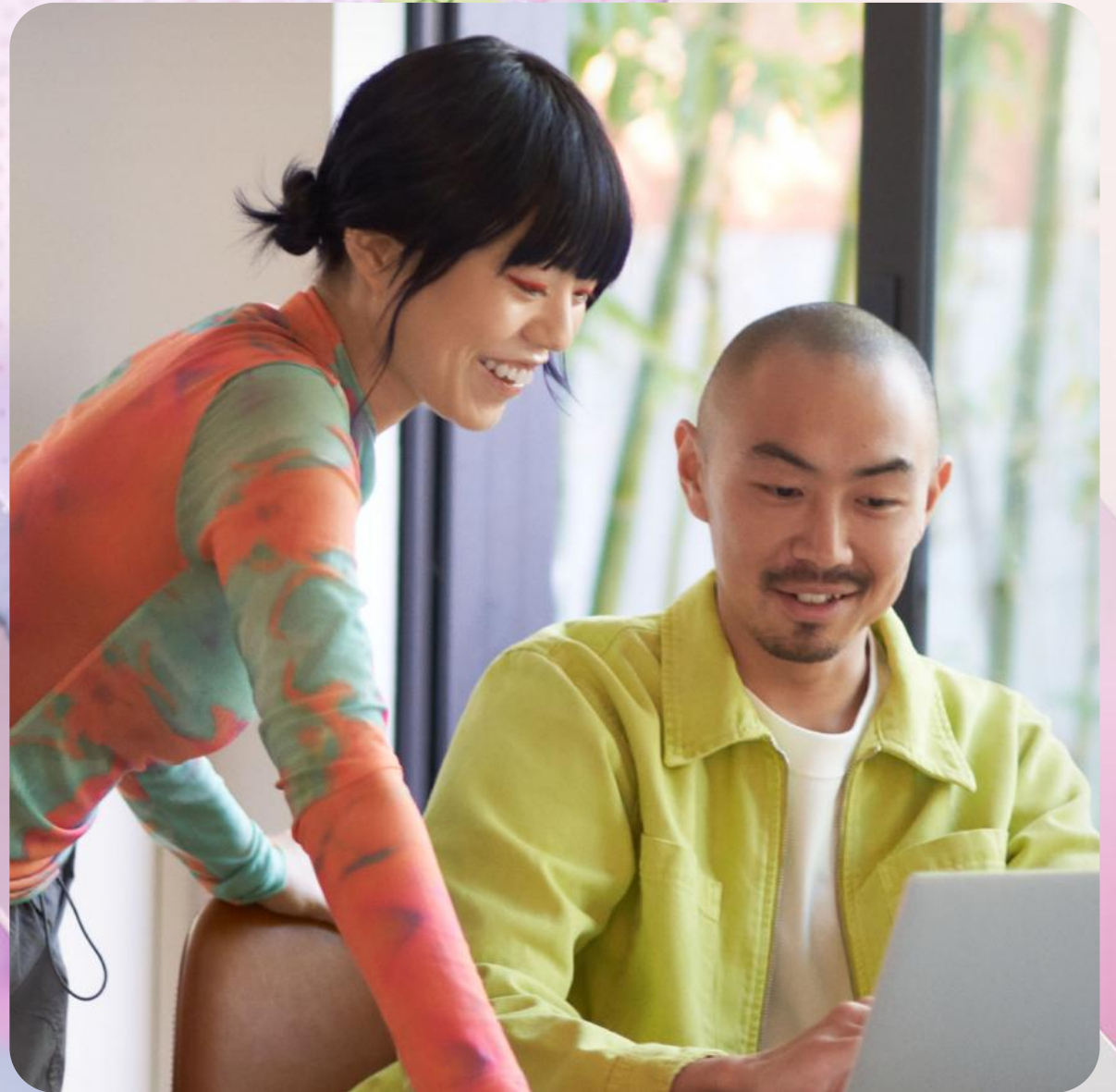
Identify and prioritize your scenarios

Microsoft 365 Copilot capabilities will inspire you to transform existing business processes and drive innovation across employee experiences.

Utilize the following scenario worksheets to complete your own investigation to locate AI-ready scenarios.

The following slides will identify the business areas that are AI-ready for transformation, then work through the prioritization exercise.

Leverage this content to develop key messaging in your awareness and training engagements.

AI transformation roadmap

	Quick wins 0 to 1 month	1 to 2 weeks	2 to 3 weeks	4 to 6 months	12 Months
Scenario 1	Purchase 1,000 seats of E3 and Teams Premium and deploy Copilot to the first set of employees	Introduce Copilot in Teams and Outlook	Deliver training sessions employees on Copilot and Teams Premium	Integrate LOB app to Copilot with custom plugins	Build your own agents
Scenario 2					
Scenario 3					

Copilot Scenario Library

Copilot brings AI value across **lines of business**

Use the Scenario Library to identify top use cases and business metrics you would like to improve in that functional area.

Library slides: https://aka.ms/CopilotScenarioLibrarySlides

https://aka.ms/Copilot/ScenarioLibrary
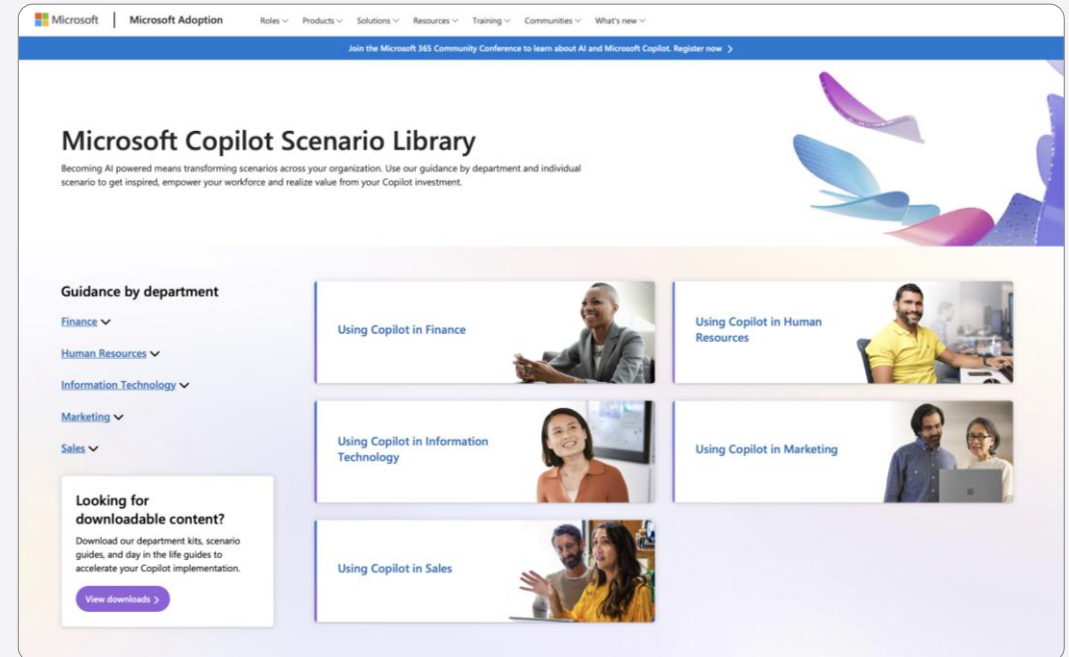
Be intentional with seat assignments and define success criteria

Copilot brings AI value across lines of business

1 Review which departments have the highest Microsoft 365 usage data, starting with Teams meetings and PowerPoint.

2 Concentrate licenses across entire teams or departments to start.

3 Use the **Scenario Library** to identify top use cases and the key metrics you would like to improve in that functional area.

All roles	HR	Marketing	Operations	IT	Sales	Finance
Improve meetings	Cost per hire	Leads created	Customer retention	Outstanding support tickets	Number of opportunities	Accelerate cash flow
Content creation	Employee turnover	Brand value	Product time to market	Application downtime	Close rate	Spend on ERP system
Manage daily agenda	Compliance risk reduction	Cost per lead	Supply chain efficiencies	Departmental spending	Revenue per sale	Risk reduction
Summarize information	Benefit usage				Customer retention	Departmental spending
Generate ideas	Onboarding time				Time to close	

Creativity scenario examples

As a knowledge worker, I'd like to...

Provide the impact of a campaign in a visual format

Create a presentation based on a word document

Generate a summary about a document

Help me write a paper on a topic I know little about

Review my HR Benefits

Have Copilot help me write a draft email about a topic I am not too familiar with

Give me insights on my data

Get a new coworker up to speed quickly

Create a job description or review a resume against a job plan
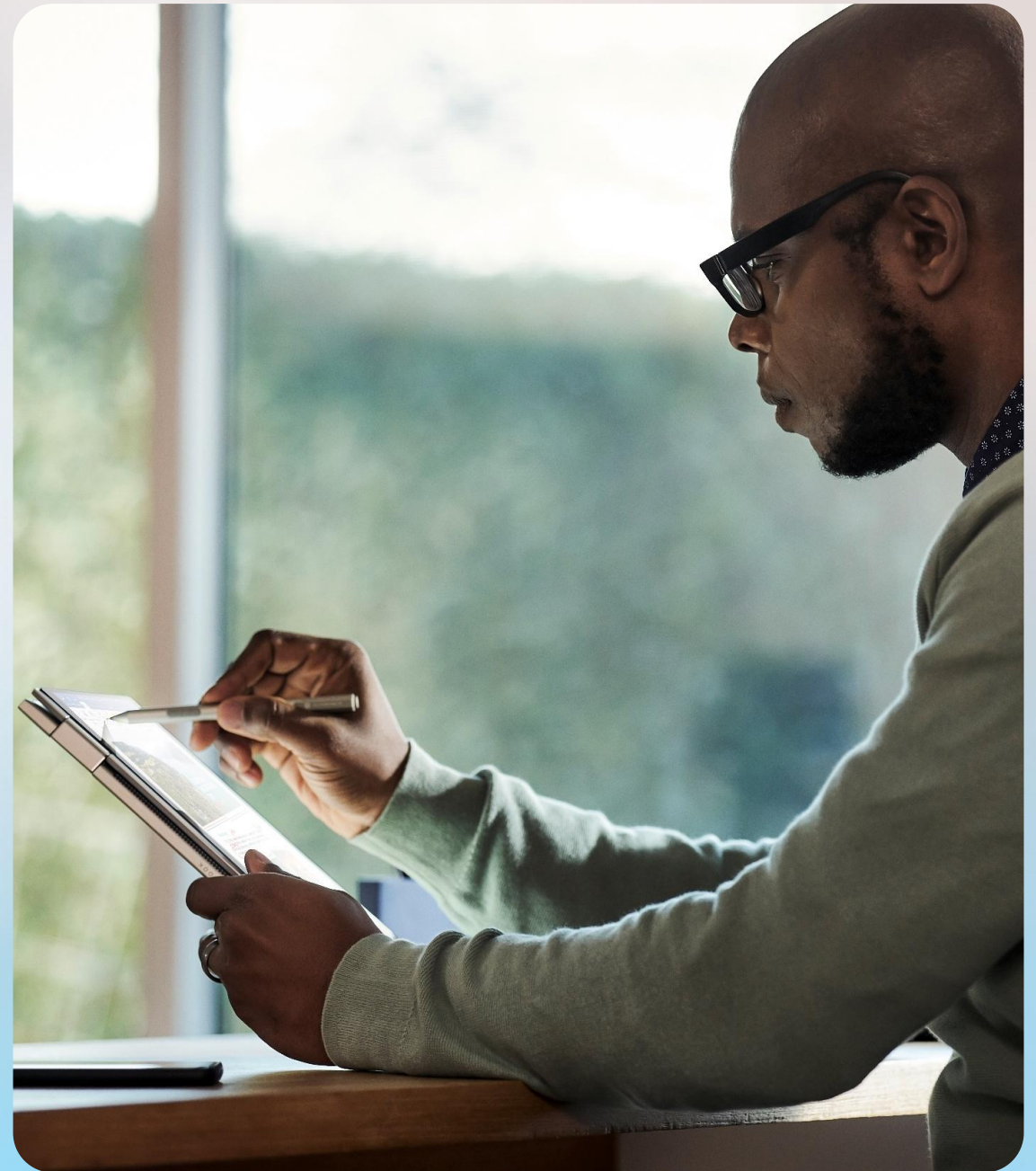
Productivity scenario examples

Track progress through task list reports

Create a table of pros and cons for a topic

Highlights of a Teams chat with actions

Respond to a customer's email in Outlook with a different tone of voice

Identify the decisions made and suggest next steps for a meeting

Summarize emails missed while on vacation and flag important items

Save time by helping me search across my org for information

Create a Teams channel to respond to an urgent issue

Actively ask for details and insights on a document

Create a SWOT analysis of a topic
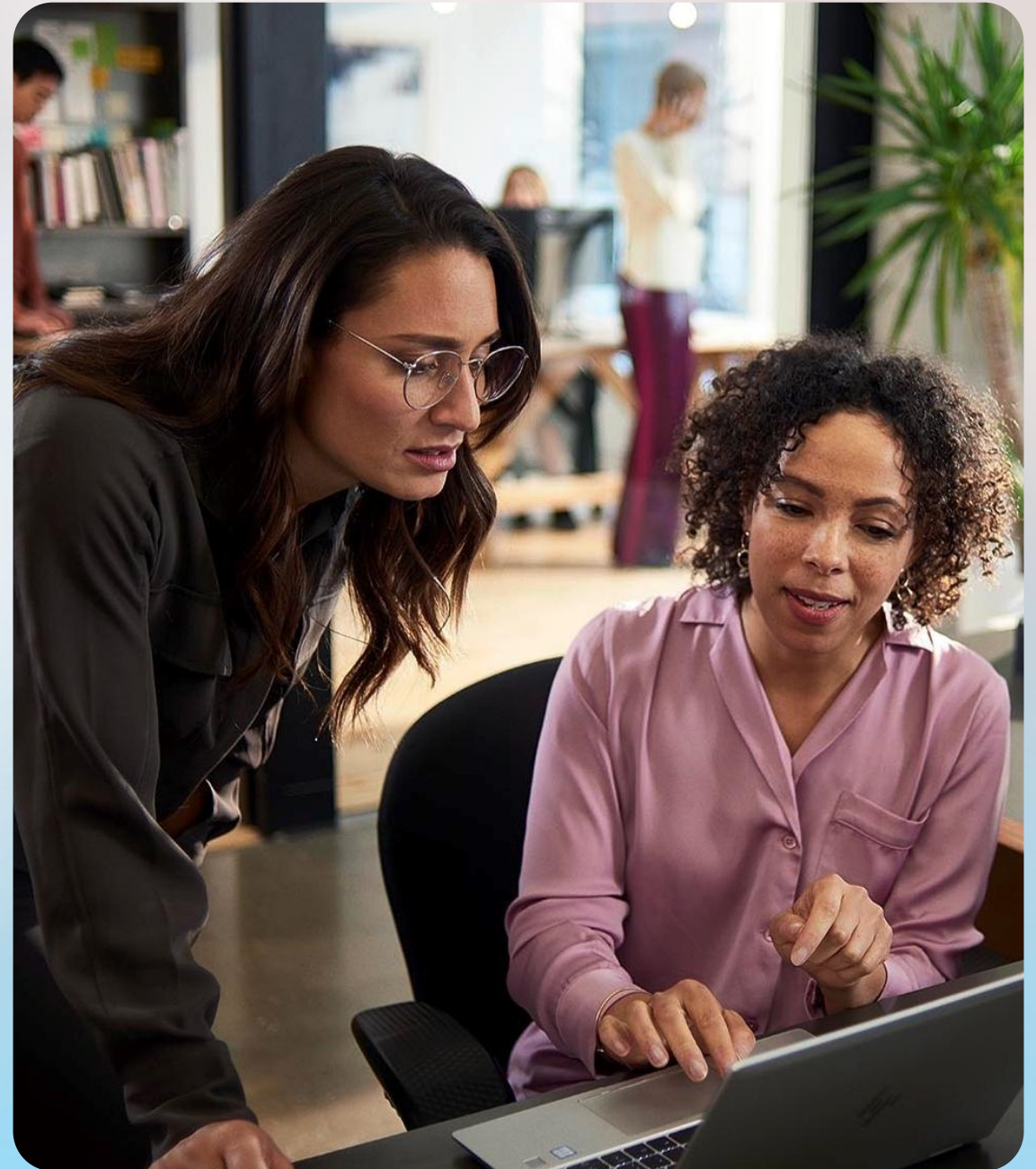
Skills scenario examples

Summarize emails, chats, and documents about a customer

Provide coaching on generating email replies

Generate a RACI chart or other PMP skills

Provide a gap analysis between documents

Create an RFP response with minimal effort

Determine upcoming milestones on a project

Ask about what a coworker or team member has been working on

Provide details on a project as a new member on the team

Review business results and summarize key trends

Analyze a complex sales report

Build your communications plan

Before building your engagement plan, take time to understand who needs to be informed, key messages to convey, and preferences for communication channels.

Objective:
Build daily AI habits and employee satisfaction

Awareness

- Land AI transformation vision
- Tailor content by audience, scenario, persona, and usage journey
- Copilot Champions launch
- Internal testing for some

Land the message

Engagement

- Deliver strategic engagements by org and role
- Ongoing partner and employee education
- Showcase successes via #CopilotStories
- Conduct ongoing feedback surveys

Support the change
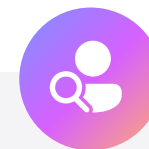
Measurement

- Usage, support, and health metrics inform baseline for enablement journey
- Drive listening systems engagement
- Improve employee guidance
- Identify additional scenarios for AI transformation

Analyze and adjust

Management

- Improve the experience from employee feedback
- Deliver integrated service roadmaps
- Iterate messages and tactics bi-monthly
- Provide employee insights signals in Service Health Review

Improve the experience

Lay the foundation for continuous learning and an intelligent progression of AI skills

3 Org value

2 Departmental value

Start here

1 Individual value

Advanced skills
Generate synergies across departments with extensibility
Streamline and automate cross-business process flows

Departmental skills
Use role-specific and multi-step prompts
Extend usage to role-based processes

Foundational skills
Inspire quick wins to reach value tipping point
Master basic prompts (e.g., summarization, revision)

1 Start with top 10 generic skills from Copilot Lab that deliver immediate success (e.g., summarize a meeting, email thread).

2 Use the Copilot Scenario Library to train users on new departmental use cases and process improvement to impact departmental KPIs.

3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Prioritize peer-to-peer learning through community engagement and knowledge sharing.

User enablement toolkit

The Microsoft 365 Copilot User Enablement Toolkit contains customizable communications templates, guides, and resources for user enablement specialists to share with employees to drive awareness and usage of Copilot. It includes:

User email templates

Customizable, role-specific email templates for end users.

- 9 customizable email templates for sales teams
- 9 customizable email templates for marketing teams
- 9 customizable email templates for IT teams
- 9 customizable email templates for legal teams
- 9 customizable email templates for finance teams
- 9 customizable email templates for HR teams

Manager resources

Resources to send to managers across your organization to inspire and motivate them to drive Copilot user enablement on their teams.

- 2 customizable email templates
- Copilot for managers flyer

And more user resources to come!
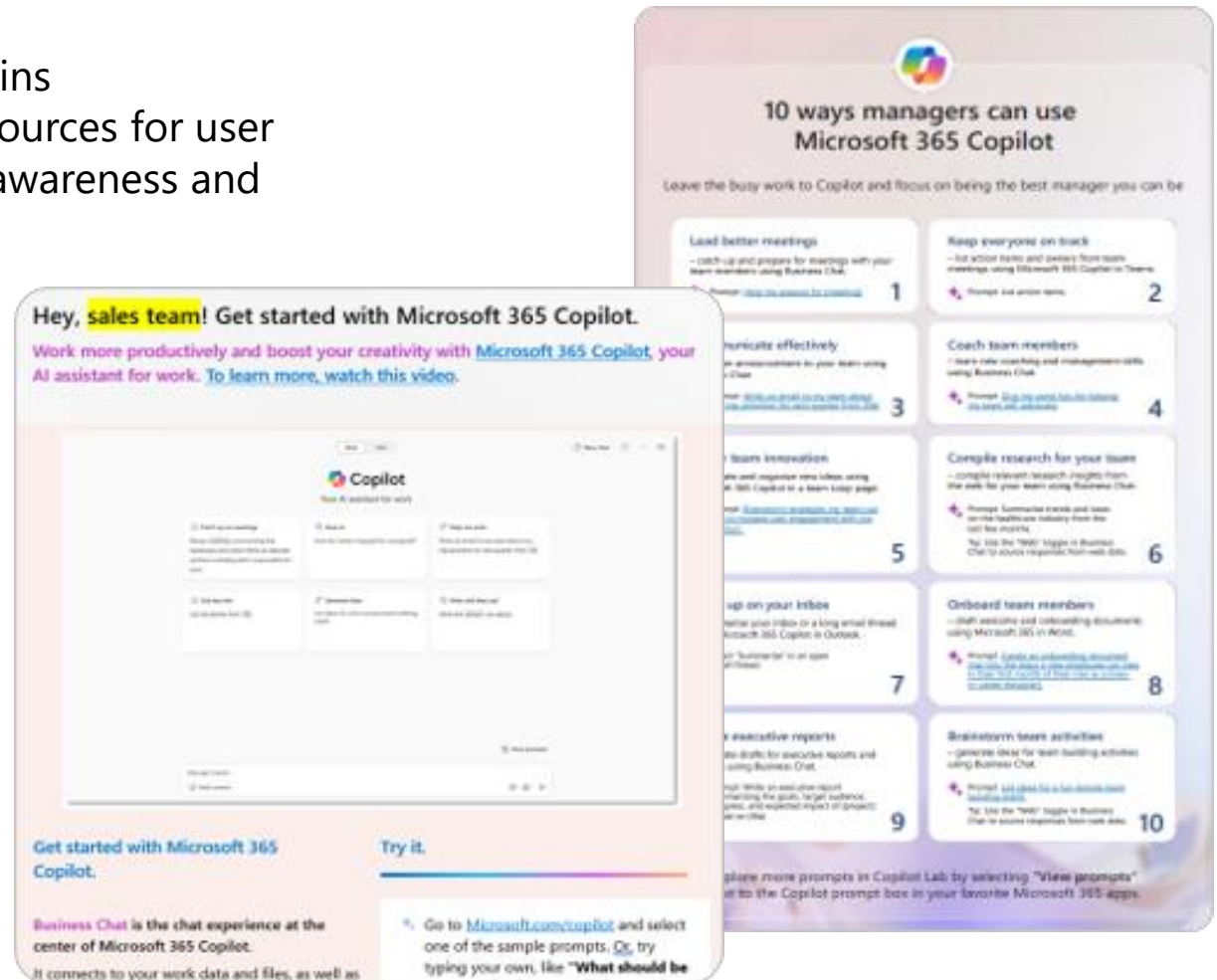
Available at aka.ms/UserEnablementToolkit

Top 10 to try first with Microsoft 365 Copilot

◢ Foundational skills for new users

1 Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from meeting

2 Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon

3 Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.

4 Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from file

5 Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about topic organized by emails, chats, and files?

6 Give me some ideas for …

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on file

7 Help me write …

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]

8 What did they say …

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic

9 Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot

10 Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit Copilot Lab at: aka.ms/CopilotLab

Copilot resources on Microsoft Adoption

One site for all your Copilot needs

https://adoption.microsoft.com/copilot

- Resources by role

- Interactive Scenario Library

- Product announcements and news

- Links to all other Microsoft sites

- Extended links for Small/Medium business, Copilot in Sales, Microsoft Viva, and more
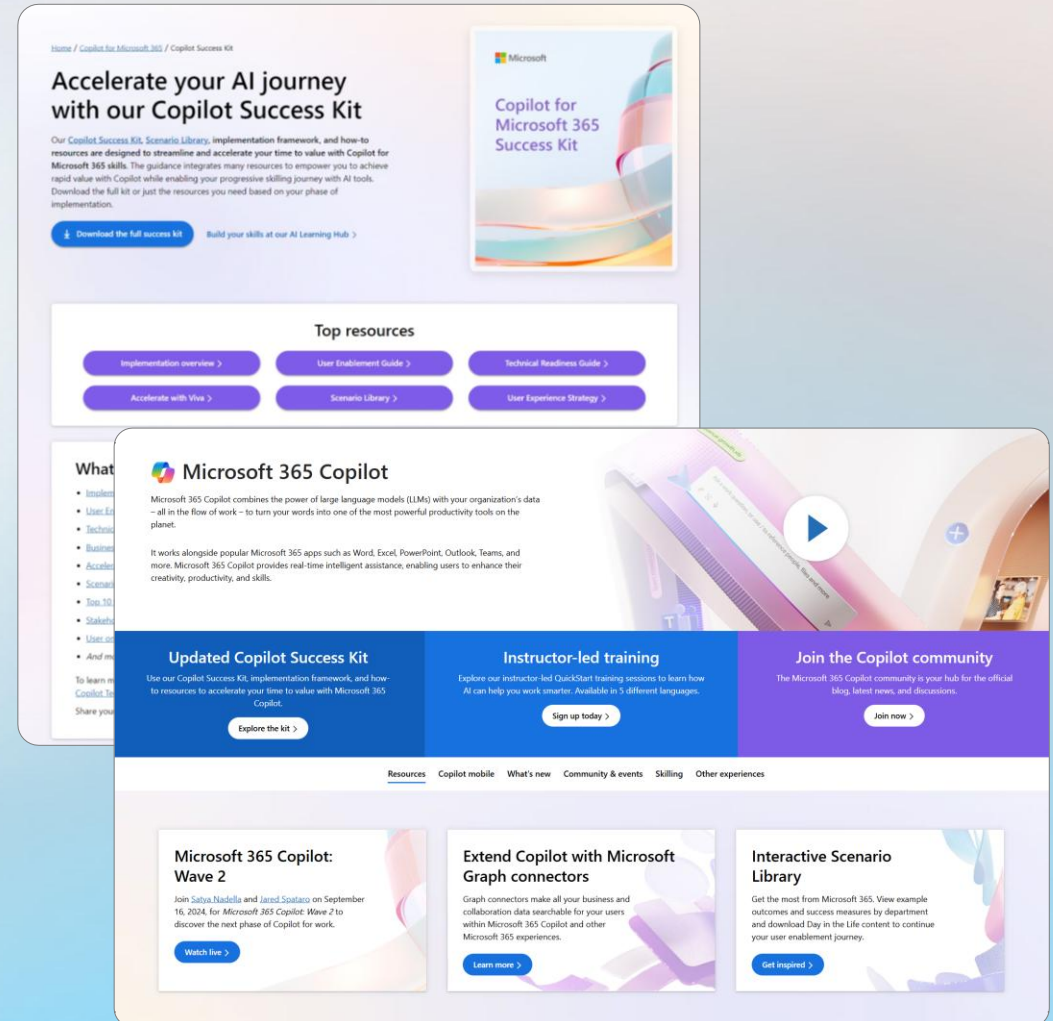
Copilot Lab

Boost AI confidence and success through prompting

Inspirational prompt collections

Explore prompts tailored to a variety of roles, industries, or scenarios to help users unlock greater value with Copilot.

In-app prompt ideas and suggestions

Find, save, and manage prompts directly in your favorite Microsoft 365 Copilot apps.

Viral prompt sharing and discovery

Empower users to share their favorite prompts, learn from others, and celebrate their Copilot success.

Learn more: aka.ms/copilotlab

Bookmark Microsoft enablement resources

Join Driving Adoption Tech Community

https://aka.ms/DriveAdoption
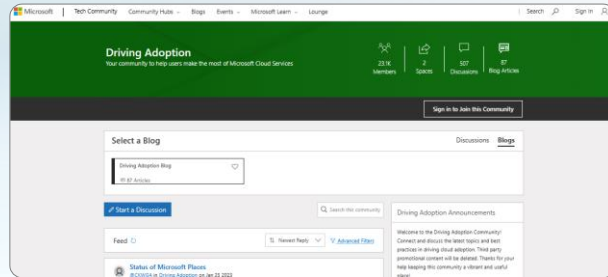
Collaborate, share, and learn from experts

Microsoft Learn

https://learn.microsoft.com
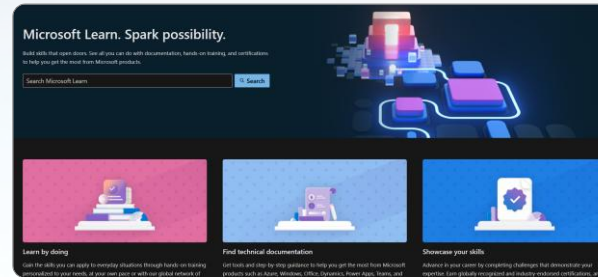
Technical documentation for developers and IT professionals

Microsoft Adoption Hub

https://adoption.microsoft.com
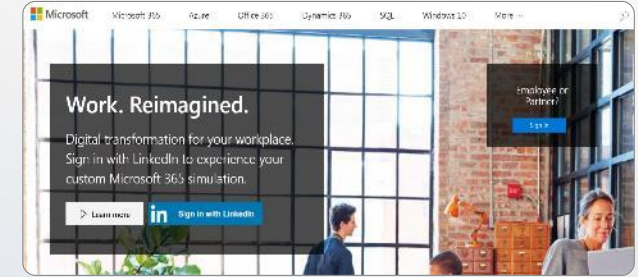
Resources to help you drive adoption of Microsoft services

Microsoft Support

http://support.microsoft.com/copilot
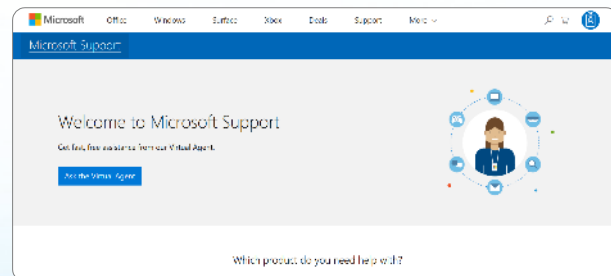
Access FAQs and user help and learning

Teamwork governance

https://aka.ms/TeamworkGovernance

Collaboration governance guidance for Microsoft 365

Join our communities

Utilize our resources

Achieve your goals

Deliver Impact

Foundational tasks

- Review success measures and user survey results
- Conduct feedback and reporting analysis
- Deliver extended training and adoption support
- Iterate user experience strategy
- Gather and amplify success stories

Copilot specific tactics

- **Measure Copilot impact**
- Ensure progressive AI skilling with training tools
- Identify additional optimization scenarios
- Expand Microsoft Viva for Copilot Enablement tactics (if available)
- Review feedback with AI Council and stakeholders

Review success criteria

- Validate key performance indicators (KPIs) that are improving based on Copilot skills.

- Choose criteria to help you show the impact Microsoft 365 Copilot is having on the organization.

- Use the end user surveys, listening systems, product feedback, and Champion insights to gather sentiment, risks, and issues.

- Leverage Microsoft reporting for further pattern analysis.

*Based on observation and research from early Copilot customer implementations.

Review your progress
The enablement outcomes matrix

Organizational → Cultural → Tangible → Individual (cycle diagram)
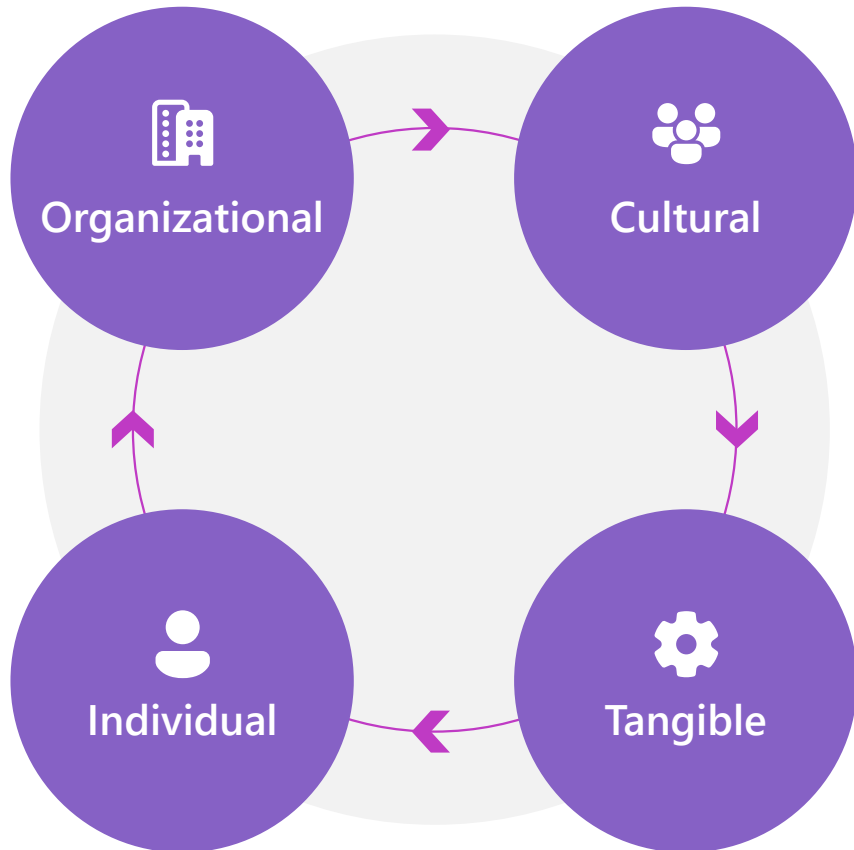
$$\frac{\text{Tangible measures}}{\text{Individual sentiment}} = \text{Change quotient}$$

Prioritize the section of outcomes that are most important for your business

Simplify your investment strategy in adoption activity against these outcome segments

Use these dimension to ascertain where you have resource or skills gaps in your organization to achieve your goals.

Enablement outcome examples

Assemble Your Team

Organizational

Cultural transformation

Employee retention

Talent acquisition

Social engagement

Operational agility

Cultural

Employee sentiment

Employee recommendations

Customer feedback

Innovation measures, e.g., idea forum contributions

Business process

Customer experience impact

Cost savings

Revenue generation

Data security

Process simplification

Individual

Use of AI capabilities

Employee morale

Employee productivity

Employee engagement

Idea generation

Questions

How is your organization progressing on these measures?

What is your business transformation process today?

Analyze feedback

Share with technical team and stakeholders

- > Identify common themes
- > Identify opportunities for expansion and extension
- > Validate support scenarios and guidance
- > Identify success stories
- > Conduct success/challenge analysis
- > Categorize issues: technical, enablement, strategy or communications, other

Service Health Reviews (SHR) components

Leadership, technical, user enablement teams, and business stakeholders contribute to a periodic Service Health Review to:

- ✓ Gain insight from the AI transformation journey progress
- ✓ Identify risks, issues and potential mitigations
- ✓ Identify opportunities for expansion and further optimization
- ✓ Highlight success stories

This process is critical to the overall success of the long-term transformation and realizing business value.

SHR components

- Performance
- Feedback analysis
- Incident review
- Success stories
- Roadmap planning
- Risk mitigation

Measure the impact of your Copilot investment

With the **Microsoft Copilot Dashboard powered by Microsoft Viva**, business decision makers and IT leaders can plan their AI readiness, drive adoption, and measure the impact of their Copilot investment

- **Plan for Copilot readiness** across Microsoft 365 and track by app
- **Evaluate Copilot adoption** across apps and by feature
- **Analyze the potential impact** of Copilot across meetings, email, chat, and documents
- **View employee sentiment** about the value and benefits of Copilot
- **Learn** about the latest research and findings about AI

Viva for measurement

With a Viva license (*available as an add-on*), get advanced analytics across behavioral, collaboration, and sentiment data to measure how Copilot has impacted work patterns. Leaders can also run custom queries and reports and survey employees about their sentiment about Copilot.
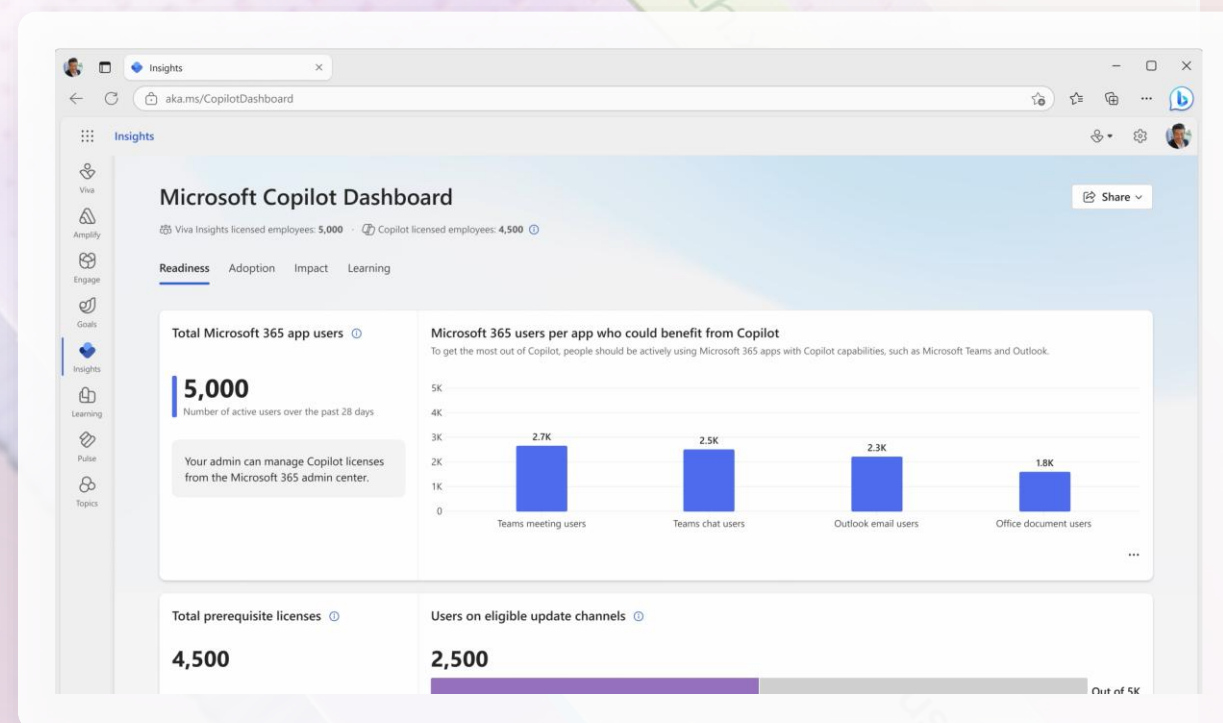
Use the Copilot Dashboard metrics eBook to help understand and interpret the data

Seeded vs. Premium

Microsoft Copilot Dashboard

Screenshots for illustrative purposes and subject to change.
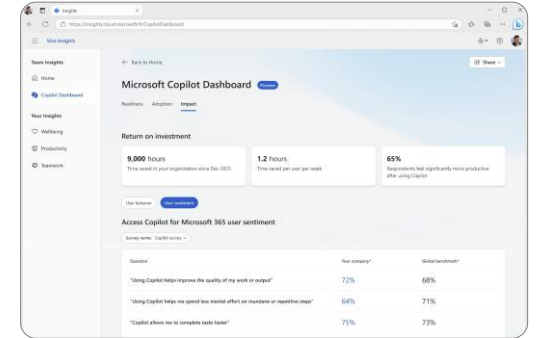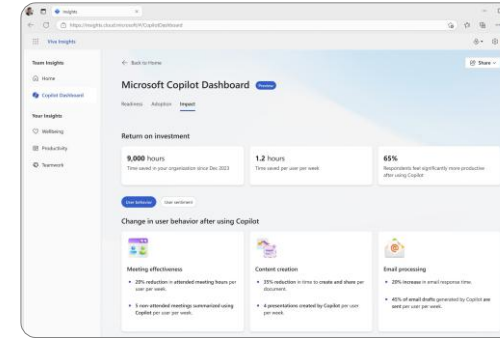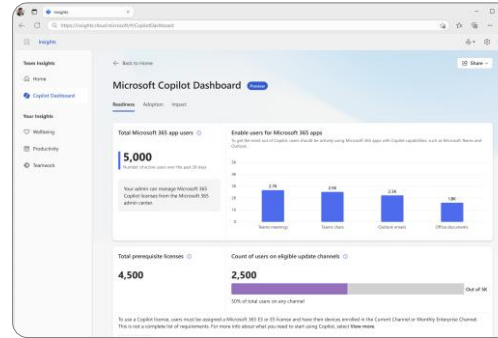
Microsoft Copilot Dashboard feature	Included with Microsoft 365	Added value with Microsoft Viva**
Readiness Number of people eligible to benefit from Copilot	• At the tenant level	• At the tenant level
Adoption Understand how many and in what ways people use Copilot	• At the tenant level	• Ability to filter across department, role, and other org attributes • Visualize adoption trends and behavioral changes
Impact Time savings	• Extrapolated time savings based on industry research • Metrics supported by research • At the tenant level	• Actual time savings calculated by combining copilot usage patterns and workplace collaboration data • Ability to filter across department, role, and other org attributes
Sentiment Understand user perception and perceived value	• At the tenant level	• Correlated with usage patterns and collaboration behaviors • Ability to filter across department, role, and other org attributes

**Available in web and Teams app experience for leaders and analyst tool bench for custom reports. Requires Viva Insights, Workplace Analytics, and Employee Feedback SKU, or Viva Suite SKUs.

Extend & optimize

Explore
Identify new high value scenarios
- Gather data from service health reviews
- Prioritize via AI Council and leadership engagement
- Skill/acquire talent for extensibility opportunities

Expand
Understand Copilot Studio capabilities
- Build, automate and administer custom agents
- Select extensibility scenarios

Extend
Scale Copilot users and skills
- Extend throughout organization
- Identify high value user cohorts for advanced skill building
- Optimize usage patterns

Extended view: Designing scenarios using the Modern Collaboration Architecture (MOCA) Framework

adopt attention-harnessing

contains essential

supported by

Person

#PeopleFirst

It's all about people.

A person's effectiveness can be increased by getting them to adopt the right 'attention-harnessing' behaviors.

Focus areas

Foundation focus areas provide an essential foundation for people to develop strong collaboration practices.

Extended focus areas enable improvement of business improvement and differentiation to focus on developing a culture of continual improvement.

Capability/needs

Essential elements that enable people to get *work done*. Performing the capability/needs enables people to accomplish their individual, team, community and organizational tasks.

Microsoft 365 apps

To address the specific capability/needs of people when they operate as individuals, teams, community, and organizational focus areas, specific Microsoft 365 applications can be used to accomplish the required tasks.

Behaviors

Behaviors that enable attention to be harnessed to create focus and flow for people to get work done. If *attention-harnessing* behaviors are not intentionally created, attention-distracting behaviors get adopted, resulting in a drop in people's effectiveness and a negative impact on collaboration across the team, and the wider organization.

Values

Organizational Cultural Values

An organization's culture is comprised of the behaviors of groups of people. When we help individuals adopt *attention-harnessing* behaviors, that in return contributes to the positive culture of an organization.

work within

are enabled by

contribute to the wider organizational

Microsoft Copilot Studio

Build your own agents
Create and publish a custom agent for your organization using the intuitive building experience enhanced with large language models and generative AI

Customize Microsoft Copilot
Extend and customize 1st party agents with your own enterprise scenarios. Copilot Studio will be included with the Microsoft 365 Copilot SKU.

Connected platform
Integrates and exposes various Microsoft's conversational AI technology stacks – integrated with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models, and more

Manage experiences
Governance and control features to monitor usage with full visibility of customizations, standalone agents as well as who is building and customizing them.
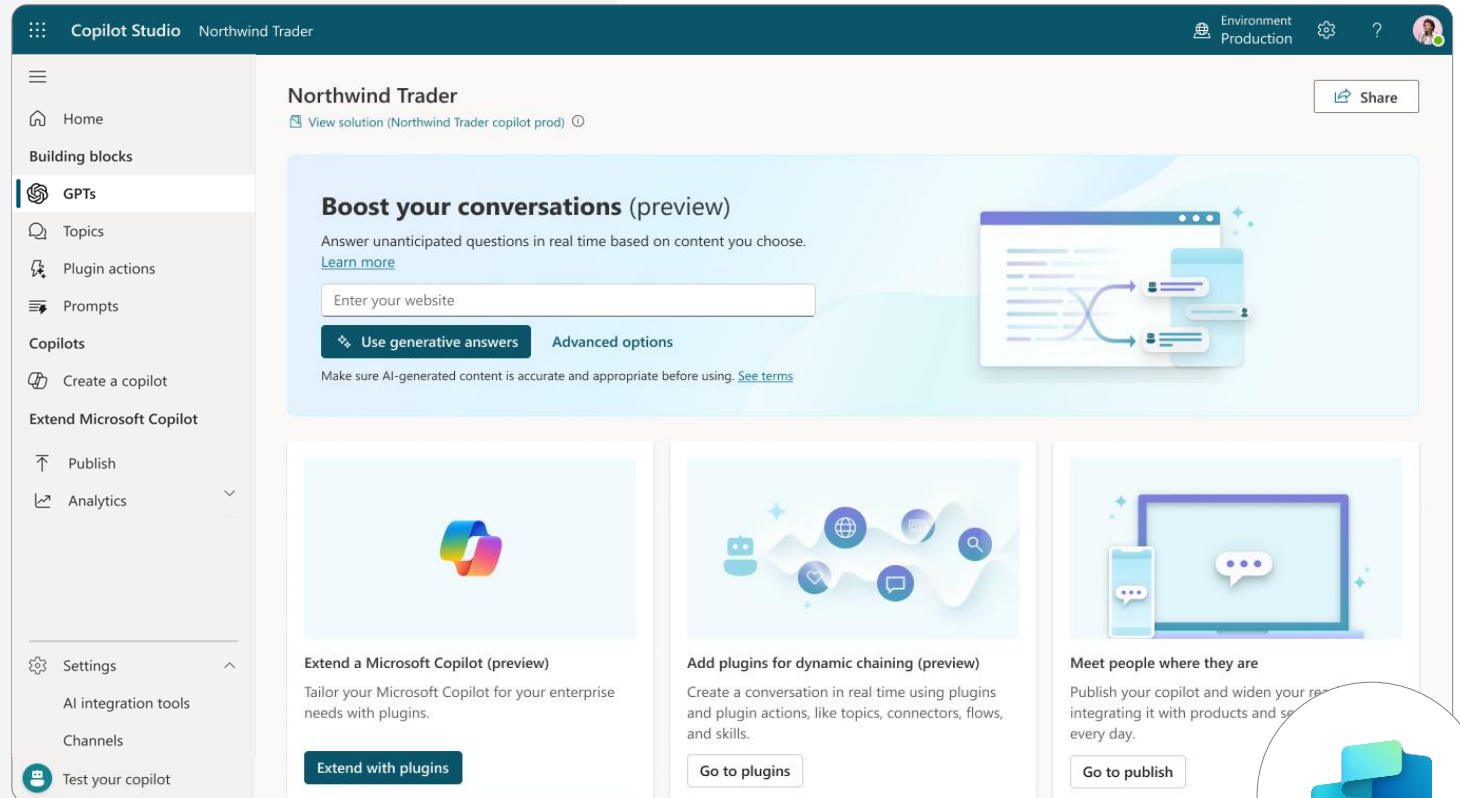
Microsoft investments to accelerate your time to value

Customers that buy more than 150 Copilot seats are eligible for Microsoft co-investment in **partner deployment and adoption services** through eligible Microsoft Partners.

Eligible customers can request technical and deployment assistance from **Microsoft FastTrack**.

Get started on your Copilot journey with expert-led services through **Microsoft Unified**.

Microsoft 365 Copilot
Skilling experiences

Microsoft Copilot Academy

- Centralized location to help with the basics of Copilot learning and upskilling, pulling the best content from available free Microsoft sources

- Structured content in easily consumable learning paths curated by Microsoft experts

- Develop your AI interaction skills from your Viva Learning app in Teams or webapp
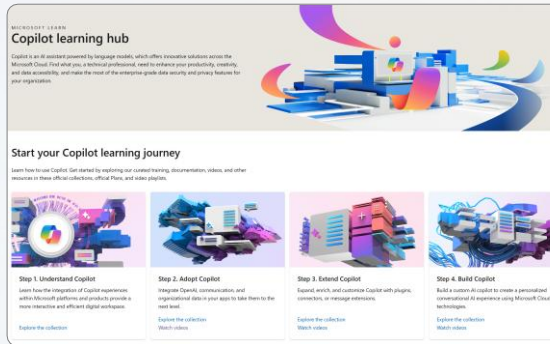
Microsoft Learn

- Free, on-demand training content for skill development

- Step-by-step exercises guiding learners through common Copilot prompts and use cases

Copilot Lab

- Free location to meet, learn about, and test the capabilities of Copilot

- Improve your prompt engineering skills in an interactive hands-on environment

Downloadable assets for customization available at adoption.microsoft.com/copilot

Microsoft 365 Copilot
Training and documentation by phase

Get ready

User Enablement

- VIDEO — [Copilot Experiences Explained](#) (11 mins)
- ARTICLE — [Leading in the Era of AI: Creating an AI Council](#)
- COURSE — [Discover how to drive enablement of Microsoft 365 Copilot in your organization](#) (2.5 hrs)

Technical Readiness

- COURSE — [Prepare your organization for Microsoft 365 Copilot](#) (1.5 hrs)
- VIDEO — [How Microsoft 365 Copilot works](#) (11 mins)
- VIDEO — [How to get ready for Microsoft 365 Copilot](#) (9 mins)
- DOCS — [Data, Privacy, and security for Microsoft 365 Copilot](#)
- DOCS — [Microsoft 365 Copilot requirements](#)

Onboard & engage

- DOCS — [User Experience Strategy template](#)
- TOOL — [Copilot Lab](#) (including app specific guidance)
- ARTICLE — [Leading in the Era of AI: It's about Trust](#)
- ARTICLE — [Learn about Copilot prompts](#)

- COURSE — [Get started with Microsoft 365 Copilot](#) (2 hrs)
- VIDEO — [Admin steps to get ready for Microsoft 365 Copilot](#) (46 secs)
- DOCS — [Apply principles of Zero Trust to Microsoft 365 Copilot](#)
- DOCS — [Enable users for Microsoft 365 Copilot](#)

Deliver impact

- COURSE — [Empower your workforce with Microsoft 365 Copilot Use Cases](#) (7 business group use cases)
- COURSE — [Craft effective prompts for Microsoft 365 Copilot](#) (2 hrs)
- ARTICLE — [Get better results with Copilot Prompts](#)
- ARTICLE — [Edit a Copilot prompt to make it your own](#)
- ARTICLE — [Share your best prompts](#)

- DOCS — [Microsoft 365 Copilot Documentation](#)
- DOCS — [Copilot Dashboard implementation](#)

Extend & optimize

- DOCS — [Modern Collaboration Architecture](#) people-centric scenario guidance

- DOCS — [Extend Microsoft 365 Copilot](#)
- COURSE — [Create agents with Microsoft Copilot Studio](#) (4 hrs)
- COURSE — [Optimize and extend Microsoft 365 Copilot](#) (1 hr)
- COURSE — [Extend and manage Microsoft Copilot Studio agents](#) (2 hrs)
- COURSE — [Build connectors and plugins for Microsoft 365 Copilot](#) (3 hrs)

Links to learn more (1 of 2)

[Copilot Readiness Hub](#)

What is Copilot?

- [Introducing Microsoft 365 Copilot](#)
- [The Copilot System](#)
- [ChatGPT vs. Microsoft 365 Copilot: What's the difference?](#)

How Copilot works

- [How Microsoft 365 Copilot works: Microsoft Mechanics video](#)
- [Semantic Index for Copilot](#)
- [Microsoft Graph](#)
- [Microsoft Graph connectors](#)
- Additional copilot experiences across the Microsoft Cloud
  - [Microsoft Dynamics 365 Copilot](#)
  - [Copilot in Power Platform](#)
  - [Microsoft Security Copilot](#)
  - [GitHub Copilot](#)
  - [Copilot in Microsoft Stream](#)

Privacy

- [Microsoft's privacy policy](#)
- [Microsoft Privacy Statement](#)
- [Trust Center data protection and privacy](#)
- [Data, privacy, and security for Microsoft 365 Copilot](#)
- [Data, privacy, and security for Azure OpenAI Service](#)
- [Role-based access control](#)
- [User permissions and permission levels in SharePoint Server](#)
- [Customer Lockbox requests](#)
- [Microsoft 365 isolation controls](#)
- [Data Protection Addendum](#)

Links to learn more (2 of 2)

Data residency and storage

- EU Data Boundary
  - Website
  - Blog
  - Documentation

Compliance

- Microsoft Compliance
- Service Trust Portal
- Compliance offering definitions
- General Dat Protection Regulation (GDPR)
  - Full summary
  - Short summary

Security

- Configure usage rights for Azure Information Protection (AIP)
- Universal Licensing Terms for Online Services
- Data Protection Addendum
- Isolation and Access Control in Microsoft 365

How to prepare for Microsoft 365 Copilot

- Learn about Microsoft feedback for your organization
- Manage Microsoft feedback for your organization
- How to manage Microsoft Search
- Microsoft 365 Product Terms
- Content management and security in SharePoint, OneDrive, and Teams
- Transcription Management in Microsoft 365 Copilot

Responsible AI

- Responsible AI core principles
  - Videos
  - Documentation
- Microsoft Responsible AI Standard
- Governing AI: A Blueprint for the Future