A close up of a logo

Description generated with very high confidence

Closing The Loop

functional specification

# Executive Summary

The "Closing the Loop" initiative is a comprehensive program designed to enhance communication and feedback mechanisms with our customers. The primary objective is to ensure that customer feedback regarding Copilot adoption blockers is systematically tracked throughout its lifecycle. Once these issues are addressed, the resolution will be communicated back to the customers, thereby effectively "closing the loop".

This problem involves multiple blockers, originating from various sources and communicated through different channels. We'll address it in phases, starting with a solid foundation to expand upon.

We will make CCH the center of gravity for this initiative, thereby decoupling the collection of blockers from multiple sources and streamlining communication across various channels once the blockers are resolved.

The initial step involves developing a comprehensive blockers tracking mechanism within CCH, starting with UATs, thus enabling us to establish a baseline. Following this, we will integrate the publication of release notes to various endpoints as the first set of communication channels. Once this basic infrastructure is established, we will consider incorporating additional sources for blockers and expanding communication channels to enhance the scope of our communications regarding the resolution of said blockers.

This work contributes back to our [100% of resolved Copilot sales and deployment blockers communicated to customers through one or more comm channels](https://goals.cloud.microsoft/org_uuid/394ccf57-8ddc-47e5-8c54-6598b6bf88f0/objectives/b6a053d6-7bbc-11ef-afdf-a68d38e995ac?time_period_id=3619&tdbr=SIP&link_source=copy_link&link_object_type=okr) KR.

# Goals & Non-Goals

## Goals & Measures

* Establish a baseline for Copilot sales blockers that have been communicated to customers after resolution (numerator) vs resolved sales blockers (denominator): ***resolved and communicated / resolved***.
* Ensure that information about resolved blockers is communicated widely once they are resolved.

## Non-Goals

* The aim of this initiative is not to ensure that all blockers are resolved.

# Scenarios

Alex, an IT Admin at a medium-sized company, was always on the lookout for tools that could streamline operations and boost productivity. When Alex's company expressed interest in adopting Microsoft Copilot, Alex was thrilled. However, during the testing phase, they discovered a crucial feature was missing, which halted their plans. Alex promptly reported this missing feature to Microsoft, highlighting it as a blocker for their adoption.

Despite the setback, Alex believed in the potential of Copilot and continued to advocate for its adoption within the company. Alex kept an eye on updates and feedback channels, hoping for a resolution.

<magic happens>

*UAT and Copilot Release notes*

Joe, a CSAM who manages Alex’s account, records the feedback in Feedback 360. Sally, on the CSA team, then triages this feedback and creates feature requests in UAT on behalf of customers. Next, Sally collaborates with Sam, an engineering team member responsible for that product feature, to verify if they are working on these features. Sam confirms that the feature is committed to be released after four months and provides the ADO or CCH ID of that feature. If the CCH item does not exist, Sam submits the feature into CCH for release tracking and customer communications.

Sally verifies these features in CCH and records the CCH Release ID in UAT. Once recorded, CCH pulls all the feedback metadata (feedback source, type, impact) for the feature, while UAT periodically pulls the release status from CCH.

Bruce on the Copilot release notes team identifies that the feature, requested by 20 customers and identified as a sales blocker, is ready to release in the coming weeks. Just weeks before the release, CCH sends an email to Sam (PM) to approve the feature to be included in the Copilot release notes. Sam reviews feature information and approves it to be published on the release notes

Once the feature is released (Generally available), Joe (CSAM) learns about the release status through UAT reports, notifications, or by Sally. Joe uses this information to report back to Alex that the feature they asked for is now available for their organization.

At the same time, Bruce publishes the feature on Copilot Release Notes to inform all customers that Microsoft has released a feature based on customer feedback, enhancing the perception that Microsoft is always listening to and acting upon customer feedback.

</magic happens>

One day, while going through the latest Copilot release notes, Alex's eyes widened with excitement. The missing feature had been added in the previous release! It was a moment of revelation. Alex quickly informed the team, and they decided to proceed with the adoption.

The implementation of Copilot was a resounding success. It transformed workflows, enhanced collaboration, and significantly improved efficiency across the company. Alex was delighted, not just because the feature was finally available, but also because the information was easy to find. It felt like Microsoft had listened to their feedback and acted on it.

Feeling heard and valued, Alex realized that their voice had made a difference. The experience reinforced Alex's trust in Microsoft and its commitment to continuous improvement and customer satisfaction. The successful adoption of Copilot became a highlight in Alex's career, showcasing the power of persistence and effective communication.

# Feature component diagram

We will make CCH the center of gravity for this initiative, thereby decoupling the collection of blockers from multiple sources and streamlining communication across various channels once the blockers are resolved.

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A diagram of a diagram

Description automatically generated with medium confidence

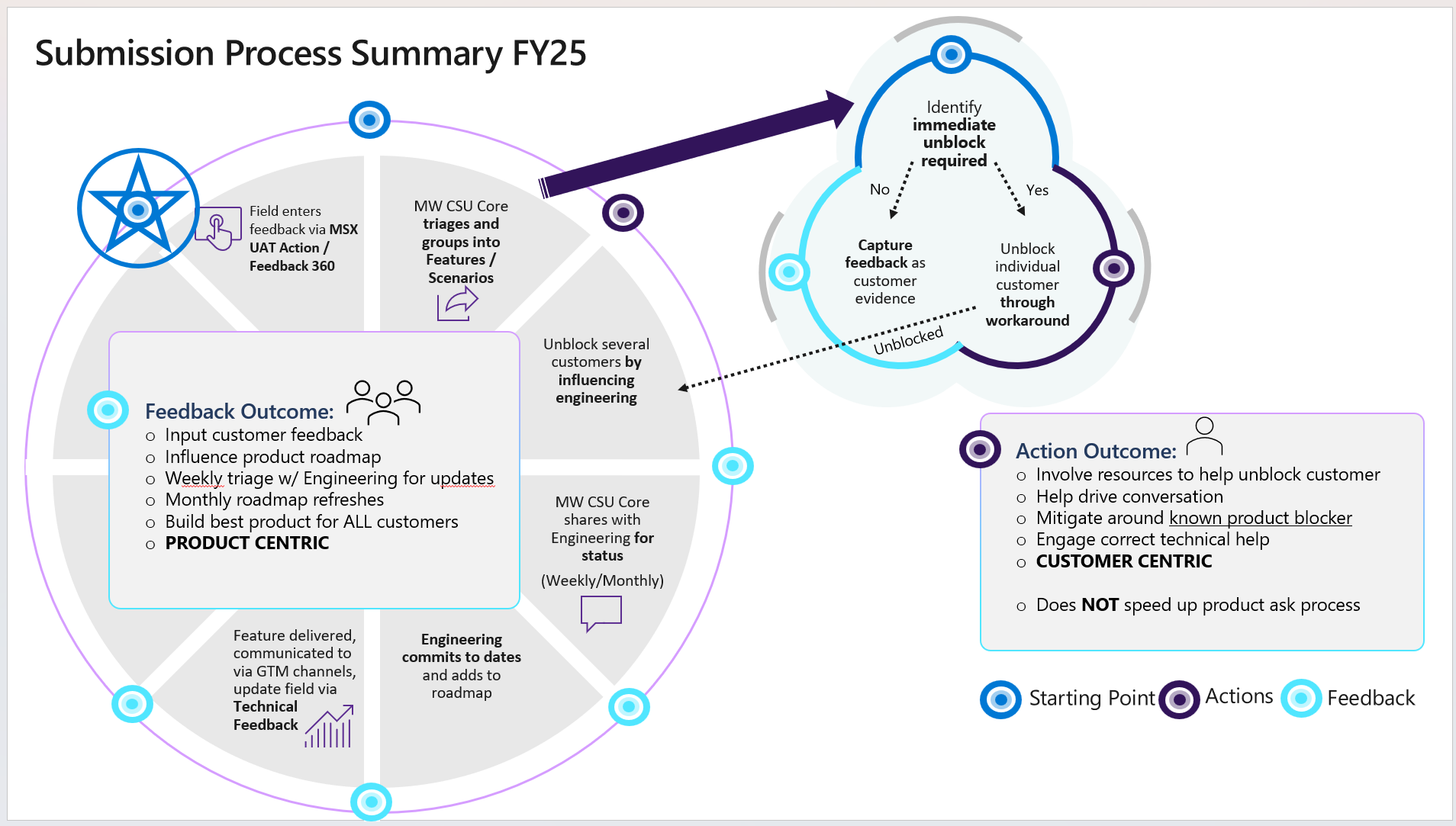
A diagram of a customer feedback

AI-generated content may be incorrect.

* *Technical Feedback Notification* emails are sentautomatically by the UAT tool:  
  A screenshot of a email

  AI-generated content may be incorrect.
* There is also an *MCAPS Technical Feedback Monthly Update* newsletter, curated and manually sent on a monthly basis:  
  A screenshot of a computer

  AI-generated content may be incorrect.



# Partners & Dependencies (internal and external)

*What unique or major dependencies do these features have, that impose material risk to delivering the feature?  For these critical dependencies, declare the delivery timing at a good level of granularity so the dependent team can plan appropriately.  Focus on the important ones.*

*Be sure to include dependencies on internal as well as external partner teams.*

|  |  |  |
| --- | --- | --- |
| Who | What | When |
| Jaime Weber | UAT Point of Contact |  |
|  |  |  |
|  |  |  |

# Import Copilot Sales and Deployment blocker UATs in CCH

[Initiative 9558277](https://office.visualstudio.com/CLE/_workitems/edit/9558277): Include 'improvements based on customer feedback' related to Sales and Deployment blockers for Copilot in CCH to close the loop with customers

## Process Steps for tracking customer feedback and release status via UAT and CCH to close the loop with customers

A diagram of a company

Description automatically generated

Source: [CCH-UAT Integration.pptx](https://microsoft.sharepoint-df.com/:p:/t/M365ChangeManagementvNext/EZHfeeHwh-tPmciGjCCsFs4BOjSUB6oA1TG_OFtWLBzBMQ?e=PUbAPs)

## Prioritized Functional Requirements (High-Level)

|  |  |  |
| --- | --- | --- |
| # | Requirement | Priority |
| 1 | Add metadata in CCH to identify feature in CCH that are 'improvements based on customer feedback'. | P0 |
| 2 | Add feedback metadata in CCH at release level to enable prioritization and triage of features that have higher importance to close the loop. | P0 |
| ~~3~~ | ~~Ingest features/improvement in CCH related to Sales and Deployment blockers.~~ | ~~P0~~ |
| 4 | Enable UAT team to pull info from CCH to close the loop with customers.  (The purpose here is for UAT team to help the Field close the loop with the customer when features roll out) | P0 |
| 5 | Build capability to highlight which features should be communicated on which end points **based on** **# of Customers, # of Feedback, and Priority (P0)** defined in UAT. (The thinking here is that we may need some additional logic to determine if a sales blocker is important for all end points, or a specific one.) | P1 |
| 6 | Ability to target specific customers based on info in UAT. If possible, we will ask field to communicate the target Tenant IDs. Alternatively, we may need to come up with some heuristics to identify the “’main tenant(s)” for a given TPID. | P2 |

~~Need to clarify requirement #3 with Micky~~

Requirement clarified. We are NOT going to import features from UAT into CCH. Instead, the onus will be on Product teams to create a CCH entry as needed and link the UAT to it in the UAT tool.

~~Any other pivot we want to consider on top of #5? To be discussed with Jamie.~~

# of Customers first, # of Feedback, Priority (P0).

~~What is the criteria for features to fall off the Copilot blockers list? UATs falling off the list shall be the criteria to signal we “closed the loop”. We will need a way to capture that signal in CCH.~~

Features fall off once they are changed to ‘P2’.

## Detailed Requirements

### Exposing UAT fields in CCH

UATs are stored in ADO, which is the single source of truth for triage / data quality / reporting tool, along with the "Feedback 360" tool as a frontend where folks actually contribute the feedback and some triage and querying takes place (as well as AI/Copilot experiences). They are mostly exact mirrors of each other in terms of fields, although it requires working with two different teams to implement new fields in both systems (and PowerBI and MSXi reporting is yet another, third, team).

* UATs will be linked to Releases (as opposed to Features). This granularity makes sense because UATs *migh*t be pertaining to specific clouds, and the UAT team is primarily interested into the release status/GA date in each environment.
* We will add feedback metadata in CCH at release level to enable prioritization and triage of features that have higher importance to close the loop.
* ~~Feedback Type and Feedback Source will have to be added to the relevant source ADO instances~~. Feedback Count and Customers Count will have to be pulled as raw data from UAT data sources to compute the Feedback and Customer count aggregates:

A screenshot of a computer

AI-generated content may be incorrect.

We will pull the list of feedbacks along with the TPIDs for each, which will allow us to calculate the Feedbacks and customers counts on CCH side. The ADO query is already filtering the entries we care about.  
A screenshot of a computer

AI-generated content may be incorrect.  
[ADO query](https://unifiedactiontracker.visualstudio.com/Technical%20Feedback/_queries/query-edit/34ec064b-8876-4918-bd37-fd2d7e149d4f/)

Connecting UAT entries to CCH Releases

* Product teams will be creating Features in CCH and communicating their IDs to UAT for addition, thus organically creating a (1, n) mapping between UAT and CCH items.
* UAT can then later on use these IDs to track the resolved status of work items in CCH (via an OData API).
* CCH on the other hand “only” needs to know that a given CCH item *is* linked to a UAT, along with a couple metadata so we can track and prioritize UATs for which we did communicate through various endpoints (e.g. Release notes, What’s New, MCP, Field, etc.), thus effectively “closing the loop”.

~~Why did we decide to link UATs to Releases rather than Features?~~

UATs will be linked to Releases (as opposed to Features). This granularity makes sense because UATs typically pertain to specific clouds, and the UAT team is primarily interested into the GA date in each environment. Spec updated.

Do we have a scope within UATs? Possible to have a couple example UATs to look at?

See this ADO query for an example of UATs: <https://unifiedactiontracker.visualstudio.com/Technical%20Feedback/_queries/query-edit/34ec064b-8876-4918-bd37-fd2d7e149d4f/>.

The following fields shall be added to CCH at Release level, from UATs that have a CCH Release ID:

|  |  |  |
| --- | --- | --- |
| Attribute | Description | Sample value |
| Release.FeedbackId | * Feedback ID: Unique ID of item from the feedback source for e.g. UAT ID |  |
| Release.FeedbackSource | The source of the feedback. One or several of:   * “Unified Action Tracker” * “OCV” * [“Get Help” (CXP)](https://portal.gethelp.services.microsoft.com/escalation) * Assist365 (for escalations – the "I don't know where to go to help my customers" portal) * Dynamics for Microsoft (DfM - what we use for support tickets, RAVE successor)   *Note:* A single release can be associated with multiple feedback items from various sources (e.g., UAT, Support, OCV, etc.), with each source and type potentially differing as we scale beyond UAT. | Unified Action Tracker |
| Release.FeedbackType | The type of feedback. One or several of:   * “Sales Blocker” *(Sales or Consumption Blockers. Currently both of these are being reported on Top Sales and Blocker list.)* * “DCR” * “Support”   *Note:* A single release can be associated with multiple feedback items from various sources (e.g., UAT, Support, OCV,etc.), with each source and type potentially differing as we scale beyond UAT. | Sales Blocker |
| Release.FeedbackCount | Count of Feedback per feature. *Calculated on CCH side based on the data imported from UATs.* | 52 |
| Release.CustomerCount | Count of customers (TPIDs) requesting the feature. *Calculated on CCH side based on the data imported from UATs.* | 41 |
| Release.FeedbackState | State of the Feedback. One of:   * “Active”: not GA’d in UAT * “Closed”: GA’d in UAT | Closed |
| Release.FeedbackPriority | ‘Priority’ of the feature in UAT  Note: Priority is manually set. Features change priority based on a variety of factors including but not limited to: stakeholder discussions, revenue and/or usage impact, number of Customers/Geos with Feedback.  0: It’s part of the Top Blockers slide shared in Sales and Blocker meeting.  1: [In Process Pilot] “Next set” of potential Top Blockers.  2: Default value for all Features.  ~~Note:~~  ~~0: Its part of the Top blockers slide shared in Sales and Blocker meeting.~~  ~~1: ??~~  ~~2: Gets set on features when they GA and fall off the Top blockers list.~~ | 0,1,2 |

Source: <https://ms.web.purview.azure.com/resource/csepurview-prod/main/catalog/entity?guid=cf449306-b671-4b7b-aacb-2c27d3e6020f&section=schema&feature.tenant=72f988bf-86f1-41af-91ab-2d7cd011db47>

### CCH UI

* Display Feedback fields in List views
  + **Internal ID**
  + **External ID**
  + **Source**
  + **Type**
  + **Count**
  + **Customer Count**
  + **Priority**
* Enable Feedback fields in Column preference panel
* Display Feedback fields in Detail Panel (All non editable)
  + Option 1: A close-up of a document

    Description automatically generated
  + Option 2:

A screenshot of a computer

Description automatically generated

### Exposing CCH fields to UAT

* We already have an OData endpoint for this that should return the requested information based on the feature IDs. The attribute names are although not as we have defined them in our schema and I don't think we should have a bespoke endpoint for this integration but rather reuse the existing which would be: [https://oacms-prod.trafficmanager.net/cch/Features?$filter=Id in (123, 456, 789)&$select=Id, Title, Description, Products/ProductName, State, Releases/Id, Releases/ReleaseDate, Releases/CloudInstances, Releases/Platforms, Releases/ReleaseStatus](https://oacms-prod.trafficmanager.net/cch/Features?$filter=Id%20in%20(123,%20456,%20789)&$select=Id,%20Title,%20Description,%20Products/ProductName,%20State,%20Releases/Id,%20Releases/ReleaseDate,%20Releases/CloudInstances,%20Releases/Platforms,%20Releases/ReleaseStatus)
* This is the eng.ms doc for the CCH API for reference on the other fields to be added: [Change Communications Hub Web API](https://eng.ms/docs/experiences-devices/customer-success-engineering/rdx/m365-service-communications/office-admin-controlled-messaging-service/change-communications-hub-web-api#get-/cch/Features)
* As per conversation with Jaime, UATs will be linked to specific *Release* IDs.
* For reference, here are the key attributes tracked in CCH: [Change Communications Hub.pptx](https://microsoft.sharepoint-df.com/:p:/t/M365ChangeManagementvNext/EWWwsaJqnzlPvdHKTCARwwEB4020lL1C2YfxPXmcHwfT1A?e=UkpFx0&nav=eyJzSWQiOjIxNDc0ODAzMTYsImNJZCI6Mjg3MzU2MjA1Mn0)

**Conceptual flow from UAT team:**

* Input: a list of CCH Release IDs

|  |  |  |
| --- | --- | --- |
| Attribute | Description | Sample value |
| Release Ids | **List** of unique **Release** IDs in CCH. | 123, 456, 789 |

* Output: a list of CCH features and their respective releases’ attributes.

|  |  |  |
| --- | --- | --- |
| Attribute | Description | Sample value |
| Feature.Id | Unique ID for the feature. | 123 |
| Feature. Name | Title of the feature. | Copilot meeting scheduler |
| Feature. Description | Description of the feature. | User can ask Copilot to schedule a meeting on their behalf. |
| Feature.Products | Product or service related to this feature. | Copilot, Exchange. |
| Feature.State | The state fo the feature in CCH. One of:   * Active * Removed | Active |
| Release.ReleaseId | Unique ID for the Release. | 789 |
| Release.Title | The title of the Release. | Worldwide General Availability |
| Release.Description | The description of the Release. | Worldwide rollout of the feature to the public cloud. |
| Release.ProductionReleaseDate | The date when the feature starts to rollout to the selected cloud environment. | 2025-01-15 |
| Release.CloudEnvironments | Cloud environments to which the feature will release to on the above Release date. | Worldwide |
| Release.Platforms | Platforms to which this feature will release i.e. Web, Desktop, Mac, etc. | Web |
| Release.ReleaseStatus | Rollout status of the release i.e. In-development, Rolling Out, Launched | Launched |

## Target Audience for Advertising the New UAT Process (Teams/Forums/Stakeholders)

Need to add a table of who we need to advertise this new UAT process to (teams/forums/stakeholders).

# Automate the publishing of release notes

[Initiative 9558179](https://office.visualstudio.com/CLE/_workitems/edit/9558179): Automate the Copilot release notes workflow in CCH to provide a complete set of features released that have released in a given period

## Prioritized Functional Requirements (High-Level)

|  |  |  |
| --- | --- | --- |
| **#** | **Persona** | **Activity** |
| 1 | System | **Triage of Upcoming Copilot Features:** Every Monday, triages all commercial Copilot features in CCH that are expected to release within 2 weeks. |
| 2 | System | **AI-Generated Draft Release Notes:** If roadmap info is available, AI will use similar roadmap title/description; else, draft with CCH feature information available. |
| 3 | System | **Email Notification for Release Notes Review:** Trigger email to PMs, PMMs, Magic PM requesting them to review release notes title/description/learn more links. **(Consider consolidating notification to PM to update release date and status)** |
| 4 | Feature, PM/PMM, Magic | **Approve RN over email –** PMs/PMMs/Magic PM will respond to system email with their approval, as well as with title/description changes and learn more links for release notes. (No system action needed here). |
| 5 | RDX Ops PM | **CCH Release notes view –** RDX Ops PM will use the ‘Release notes’ > ‘Triage’ view in CCH for querying features based on approval status. |
| 6 | RDX Ops PM | **Update Release Note Title and Description and Approve:** Ability to override the AI generated title/description values, include learn more link, and **approve or deny** feature for publishing. |
| 7 | Feature PM | *(Existing process)* **Set status to Launched:** Set the release status in CCH as ‘Launched ’. |
| 8 | System | **Weekly Publishing of Approved & Launched Release Notes**: Every week, publish into LMC release notes (https://learn.microsoft.com/en-us/copilot/microsoft-365/release-notes) features that have been launched and approved for release notes.  **Publish/Live view to view list of items published, unpublish and publish updates (in future ability to request udpates by Fetaure PM)** |
| 9 | System | **Email Notification for Release Notes Publishing:** Notify PMs, PMMs, Magic that their feature has been published on the Copilot release notes page.(One email to all PM, PMMs, Magic confirm the features published that week, show the list of features in the email) |

## Detailed Requirements

### Copilot Release Notes CCH Object

* Copilot release notes for a feature will include the following values:
  + **Release notes product name**: external facing branding for product – e.g.: “Prompt Gallery”
  + **Release notes title:** feature title – e.g.: “Share a prompt with a co-worker”
  + **Release notes description:** feature description. – e.g.: “Easily create, save, and share your favorite prompts using Copilot Prompt Gallery, inspiring your co-workers to achieve more with Copilot.”
  + **Release notes platform(s):** platforms for the release in– e.g.: [Windows, Web, Android, iOS, Mac]
  + **Release notes learn more link:** additional resource link for readers – e.g.:” <https://learn.microsoft.com/en-us/copilot/microsoft-365/copilot-prompt-gallery-export-prompts?branch=main&branchFallbackFrom=danbrown-copilot-labdsr>”
  + **Publishing status:** publishing process status. One of the following:
    - **“--"** – Release notes object is empty and has not been auto-triaged by system.
    - **“Draft”** – System has drafted release notes & notified PM/PMM owners for approval
    - **“Approved”** – release notes is ready to be published once marked as ‘Launched’.
    - **“Published”** – release is live on the LMC Copilot release notes page.
    - **“Rejected**” – feature explicitly denied from being published.
  + **AutoGeneratedContent:** Bool on whether the AI draft was kept in the final publication or if it was manually overwritten (True= AI, false = manual)
  + **ContentSource**: Primary data source used by AI draft (‘Roadmap’, ‘CCHRelease’, ‘MessageCenter’)

### Automatic Triage & AI-Generated Draft Release Notes

A. Triage Process

* The system will run a background triage process every day.
* Query CCH for features with the following criteria:
  + Feature has ‘Microsoft Copilot (Microsoft 365)’ marked as one of its ‘Products’. As an example, this feature in CCH: <https://cch.azureedge.net/feature/74639/release/77697,> its Product(s) values are: Word, Microsoft Copilot (Microsoft 365) - indicating it's a Word feature but also for Copilot
  + Release ‘Proposed title’ and ‘Proposed description’ values are not empty.
  + Release ‘Customer types’ and ‘Customer segments’ are NOT market as consumer.
  + Release ‘Production release date’ is within two weeks (<= 14 days) of system date.
  + Release has not been previously denied.
  + System has NOT previously notified PMs/PMMs about this feature.

B. Draft Generation via AI

* AI prompting - for each feature, check if a roadmap object exists:
  + If yes, we’ll pass the roadmap title and description as part of the AI generation part.
  + If no, generate a draft release notes item using CCH release Proposed title and descriptions.
  + Prompt: [Copilot release notes – AI Generation.docx](https://microsoft-my.sharepoint-df.com/:w:/p/briandesouza/EfkBaPNe_0RImLQ4O2yk3TEBWGrHxLrHbNZU8Y0LfG1xYg?e=Bt48cs)
* Save the draft release note details to the “Release Notes Copilot” object in CCH.
* Capture the following fields for the release note draft:
  + Product name
  + Title
  + Description
  + Platform(s)

### Email Notification for Review & Offline Approval

A. Email Trigger

* See Copilot release notes notification at: [CCH Notifications.docx](https://microsoft.sharepoint-df.com/:w:/t/M365ChangeManagementvNext/EaY4B6sp2mdLrxTZxtWm9WABziPpwRhmlFmFKJSYh43vBw?e=l17JPd)

B. Email Approval Workflow

* The email notification is used as a first signal. The stakeholders then reply) to confirm approval. RDX Ops PM will send manual follow-ups as needed.
* Once approval is received via email response, the RDX Ops PM enters the approval/denial into CCH.
* CCH adds an “Approval Flag” on the Feature Release Note and optionally captures the approval timestamp.

### Feature Status Updates and Publishing Flow

A. Publishing Cycle

* A scheduled weekly job (or as configured) aggregates all “Approved & Launched” release notes.
* The publishing job pushes these release notes to the external publish target (such as the Copilot Release Notes page on LMC).
* Send a consolidated email summary out to all PMs (and Magic PM/PMM) listing the features published for that cycle.

### Ops PM User Interface – Triage and Live View

A. Triage View (for pending approval)

* Provide an OPS PM–visible page (in the CCH admin UI for Copilot release notes) that lists:
  + All features that have been triaged and have a generated draft release note.
  + Their current status (Draft, Pending Approval, Approved, Rejected).
* In this view, OPS PM can:
  + Click to “Approve” or “Reject” a draft.
  + Edit the release note content (e.g., update title, description, release date if needed).
  + Optionally “Reset” the release note work item if a correction is needed.

B. Publishing / Live View

* In a separate tab (e.g., “Copilot Release Notes – Live”), display all published release note items.
* Include metadata fields such as:
  + Approved Date
  + Published Date (if applicable)
  + Current status (“Published,” “Queued,” “Rejected”).
* The OPS PM’s UI will also support future workflows—for example, handling update requests (allowing a feature PM to request an update post publication), subject to manual intervention for now.

### Future Considerations (MVP Scope and Beyond)

A. Update Request Workflow

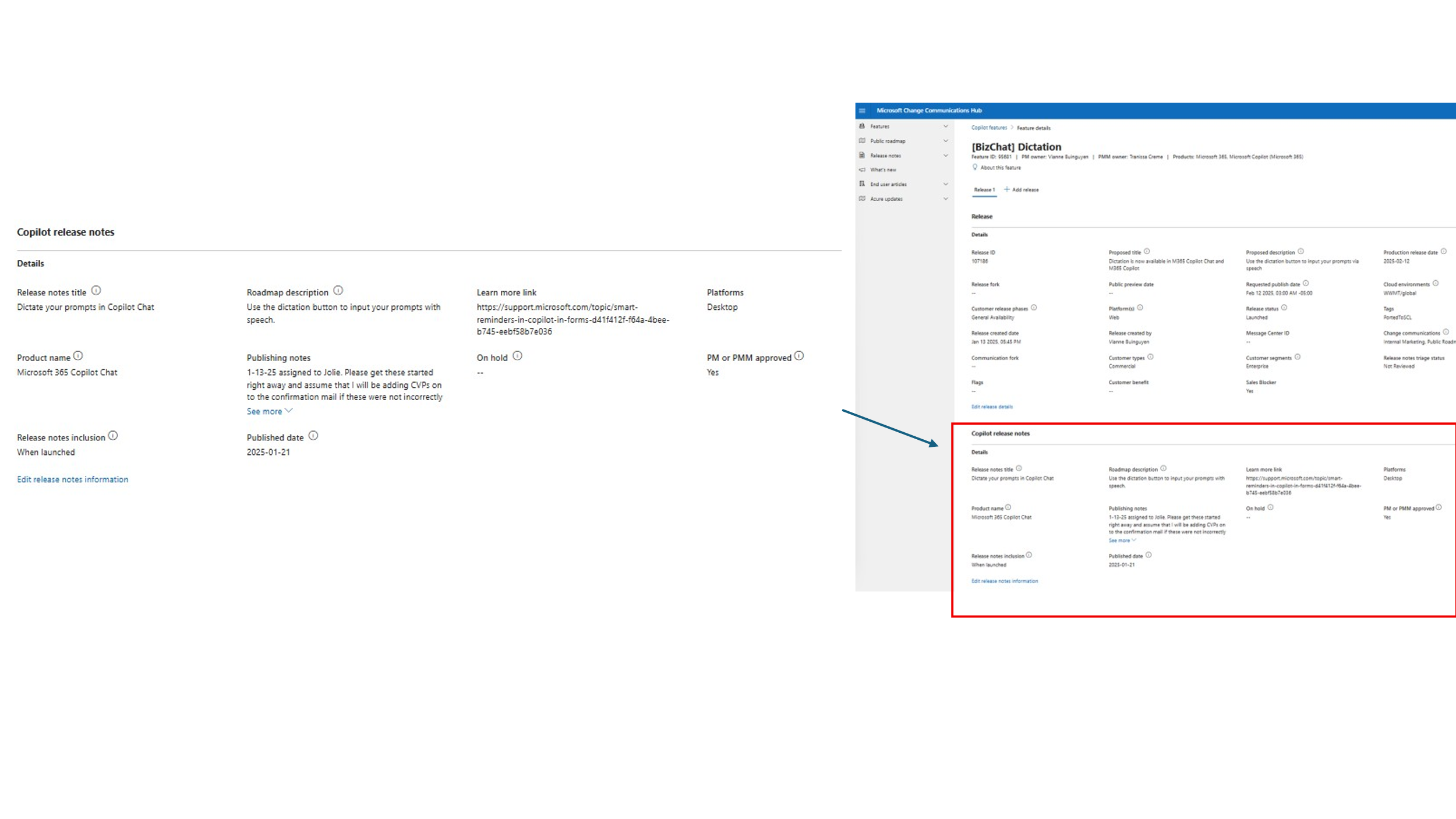
* For release notes already published (live view), allow feature teams to submit a “request update.”
* OPS PM then reviews the requested changes in the UI and, if approved, performs the update manually.

B. Multiple Platforms / Separate Features

* Note from transcript: If a feature is planned to ship on multiple platforms with different release dates, the system requires separate feature entries in CCH. (No merging logic is being added at this stage.)

C. Flexibility of Approval Process

* For MVP, all approvals (“Approve/Reject/Edit”) may be done offline (via email and manual entry into CCH).
* In later iterations, consider in-UI inline approval actions to reduce manual overhead.



## Miscellaneous

**Data**

CCH to integrate data from UAT, and feature information

**Publish**

Publish from CCH into LMC

**Some designs**

<https://www.figma.com/design/RernRwWviofzxNUURBVX7r/Copilot-release-notes?node-id=589-2309&t=9eXzF3TFoZJEkd0D-4>

LMC Page Staged: <https://review.learn.microsoft.com/en-us/copilot/microsoft-365/release-notes?branch=dstrome-copilot-release-notes>

# Reporting

*Telemetry can be used to understand how components are used and where investments should be made in the future. When looking at telemetry investments, consider the following:*

*What business questions are you trying to answer?*

* *How can you measure the success of the feature you are implementing?*
* *Do you already have a baseline measure established? Or are you setting one?*
* *What do you need to know during the development cycle to improve this release?*
* *What do you need to know to improve future releases? Once it has shipped, what do you need to collect?*
* *What decisions can you make with those answers? What is your action plan for the resulting data?*

*What data needs to be collected in order to answer the above questions?*

* *What would your report look like? What are your questions?*
* *What are the data points that you will implement? Are there existing data points that can be used or modified? What are the specific events or user behaviors to be tracked?*

*How will you present the data to answer your questions?*

* *Who is the audience for your reports?*
* *What pivots & filters do you need?*

## KPIs

Is this section relevant for this initiative?

## Reporting

* For each UAT entry that is at least **Engineering Committed** in its lifecycle, we want to track its *communicated status* by communication channel (e.g. Release Notes, What’s New, etc.). *This is how we will establish our baseline and track our KR.*

What/where do we surface the above datapoint for our KR tracking?

There will be cases where UAT says closed but CCH still doesn’t show GA’d. The current thinking is that we want to keep the data clean and apply this logic in the UI layer. Where do we apply this logic? Need to add a reporting requirement to track that state, which might need follow-up with the CCH entry owner.

More details needed here. Might already be there (at least partially) according to Miguel.  
  
See [Engagement Metrics CCH - Power BI](https://msit.powerbi.com/groups/1f21e31f-6a28-49dd-9798-67f1d8b36930/reports/ec293c16-6c9b-47d5-9c80-521e77cbed3a/9e7f7feec00a3c4bbf09?experience=power-bi) which is still a work in progress, but should allow us to drilldown communications per status, channel, etc.

Month over month trends to show:

Ops Metrics

* Number of Sales Blockers features being tracked in CCH
* Number of Sales Blockers features Indevelopment, Rolling out and Launched (Closed)
* Number of Sales Blockers features not tracked in CCH (may have to get this from UAT)
* Number of Sales Blockers features that were closed in UAT before CCH signal (may have to get this from UAT)

Success Metrics:

* Track Features slip:

Release dates change (track delays if the dates change beyond X period. Quarter delay is important for UAT)

* + Out of date (release dates are in the past or status is incorrect)

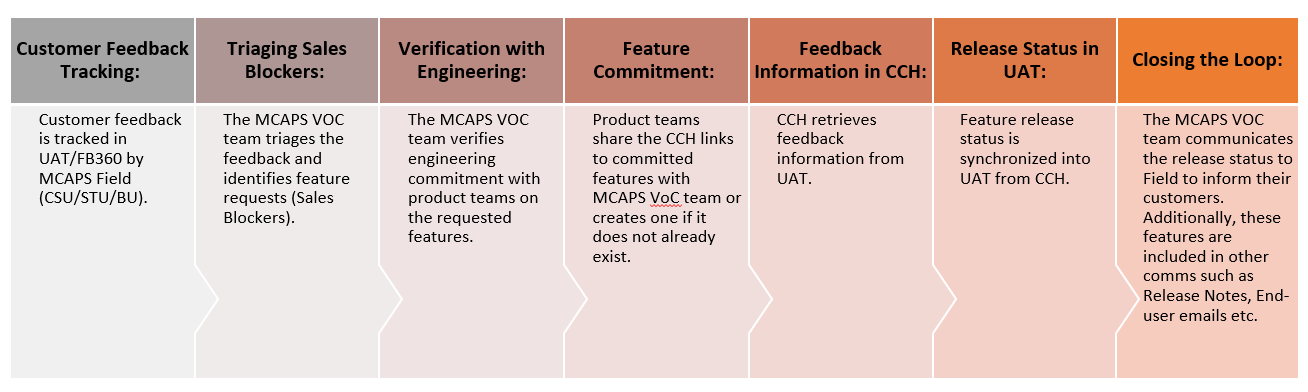
# Communications to Product teams

* Email to Product DRIs Leads

Hello Product Leads,  
The Modern Work Voice of Customer Unified Action Tracker (UAT) and Change Communications Hub (CCH) teams are excited to collectively inform you that starting this April, an integration between UAT and CCH will enable us to systematically track the release of Copilot Sales (and Adoption) blocker features and close the loop with customers.

**Why This Matters:**

1. **Customer Unblocking**: Acting on customer feedback helps unblock Copilot deployment, license assignment, and additional purchases.
2. **User Retention**: Highlighting improvements effectively encourages users who encountered issues to return and try our product again.
3. **Increased Trust**: Customers feel heard and develop increased trust in Microsoft when their feedback is acted upon.

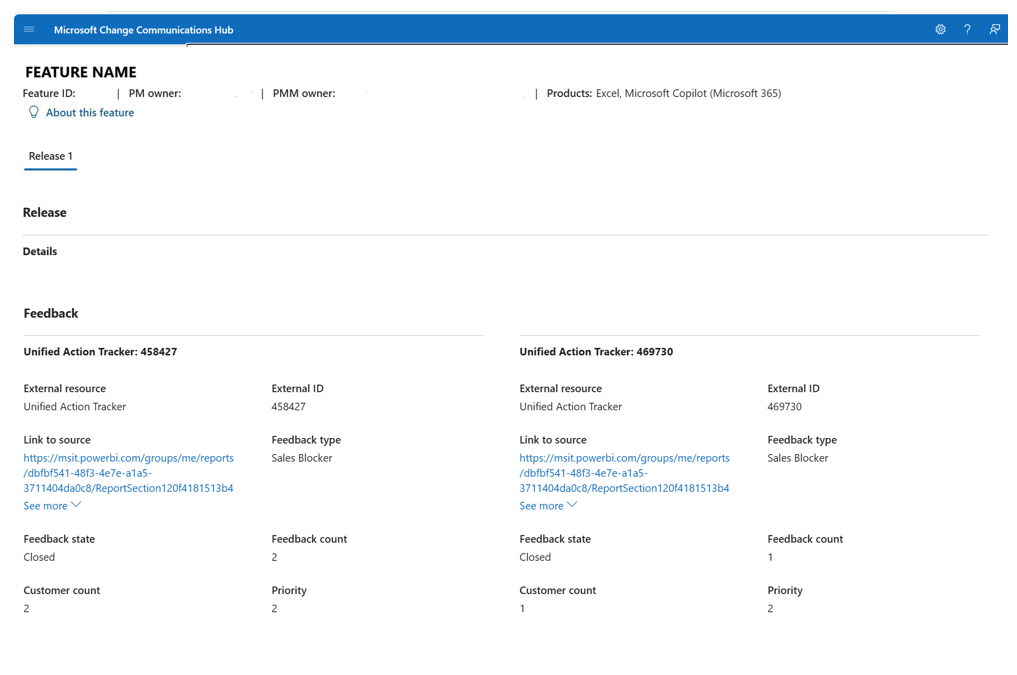
**High Level Process:**  
  


**What’s Changing:**

* **Lifecycle Tracking**: We will systematically track the release status of Copilot Sales and Adoption Blockers features from identification to resolution.
* **Closing the Feedback Loop**: Automation will help us accurately and timely communicate resolutions back to the Field team, ensuring customers are informed.
* **Amplify Improvements**: These features will be included in communications such as Copilot Release Notes, end-user emails, and more.

**Action Required:** To ensure the success of this initiative, if you are the Product DRI, please add the Sales Blocker features identified during your conversations with the Voice of Customer team into CCH.

Once the two systems are linked, there will be a reference to the UAT ID(s) in the Feedback section of the corresponding CCH Release ID. The links will lead to PowerBI reporting where specific Customers can be quickly viewed.



Resources:

* What are MCAPS (includes Copilot) Sales Blockers ([the MCAPS org Tech RoB program](https://microsoft.sharepoint.com/sites/TechRoB))?
* What are the field feedback tools [Unified Action Tracker (UAT)](https://microsoft.sharepoint.com/teams/UnifiedActionTracker) and [Feedback 360 (FB360)](https://microsoft.sharepoint.com/sites/FB360)?
* [What is CCH?](https://aka.ms/AboutCCH)
* [How to add features in CCH](https://www.owiki.ms/wiki/Change_Communication_Hub#Submit_features_into_CCH)

This enhancement aims to improve our responsiveness to customer feedback and ensure critical issues are addressed and communicated effectively.

Thank you for your continued support and cooperation.

# References

* [Dev design doc](https://microsoft.sharepoint-df.com/:w:/t/RDXChangeManagement/EQMJ_CoXeIJPqJ32r9biK-cBMQrJZpRejCPDpbYfpcnyuw?e=Ja4XEm).
* [Closing the Copilot feedback loop through comms.docx](https://microsoft-my.sharepoint-df.com/:w:/p/ktorg/EQBwBUVhc_1Fuqo1Y3nuuUcBMhMCFYPQLEd7a_us6Mc8Dg?e=ajF4FO).

The one doc that Kristi had created for Closing the Loop.

* [CopilotChangeCommunicationConsideration.docx](https://microsoft-my.sharepoint-df.com/:w:/p/yinghao/ESTmxnIAQypLuQomc0J49FsBnO_yyCPslg7vhGITI0pKYA?e=CZP3fV)

Ying’s key Aspects to think about for change management & communication.

* Unified Action Tracker:
  + UAT PBI: [Technical Feedback Top Drivers - Power BI](https://msit.powerbi.com/groups/me/reports/dbfbf541-48f3-4e7e-a1a5-3711404da0c8/ReportSection120f4181513b4cbb9903?ctid=72f988bf-86f1-41af-91ab-2d7cd011db47&experience=power-bi)
  + UAT Training Videos: [UA Tracker Video Portal](https://microsoft.sharepoint.com/teams/UnifiedActionTracker/SitePages/UAT-Video-Portal.aspx?ga=1)
  + UAT Top Blockers List: <https://aka.ms/mwcsu/TopFeedback>
  + UAT Portal: [Unified Action Tracker](https://uatracker.microsoft.com/)
  + UAT import: [ADO query](https://unifiedactiontracker.visualstudio.com/Technical%20Feedback/_queries/query-edit/34ec064b-8876-4918-bd37-fd2d7e149d4f/)
* [Top Copilot Feature IDs Mapping to CCH Release IDs.loop](https://microsoft-my.sharepoint.com/:fl:/p/jawebe/EVTTi6-BCJpAjtrcfQUcbW0BJzvKLWLBTCMSajYfhZIy_g?e=noocu8&nav=cz0lMkZwZXJzb25hbCUyRmphd2ViZV9taWNyb3NvZnRfY29tJmQ9YiUyMU9lWEZYWHRHRmttUDJmZlRORklsZWJpSDNfY0ZiZnRLbjZNUHBBRWY3aU5TQWNiRkJKVG5TcXZTZjhHQU9nMXgmZj0wMTJKTUdJNVNVMk9GMjdBSUlUSkFJNVdXNFBVQ1JZM0xOJmM9JTJGJmE9TG9vcEFwcCZwPSU0MGZsdWlkeCUyRmxvb3AtcGFnZS1jb250YWluZXI%3D)
* CCH-UAT Integration Slides: [CCH-UAT Integration.pptx](https://microsoft.sharepoint-df.com/:p:/t/M365ChangeManagementvNext/EZHfeeHwh-tPmciGjCCsFs4BOjSUB6oA1TG_OFtWLBzBMQ?e=gBfWuE)
* [Engagement Metrics CCH - Power BI](https://msit.powerbi.com/groups/1f21e31f-6a28-49dd-9798-67f1d8b36930/reports/ec293c16-6c9b-47d5-9c80-521e77cbed3a/9e7f7feec00a3c4bbf09?experience=power-bi)  
  Work in progress, but should allow us to drilldown communications per status, channel, etc.
* Education and Awareness deck for Product teams and stakeholders: [MCAPS Copilot Sales Blockers - Closing the Loop.pptx](https://microsoft.sharepoint-df.com/:p:/t/M365ChangeManagementvNext/EQmEnlgKP4dAhPN8jRT_ROoBmcvaNDsz_ycSkrC9T8LnOg?e=0bjelZ)