



Level Up CSP Microsoft 365 and Copilot

In person series

Modern Work & Business Applications



During



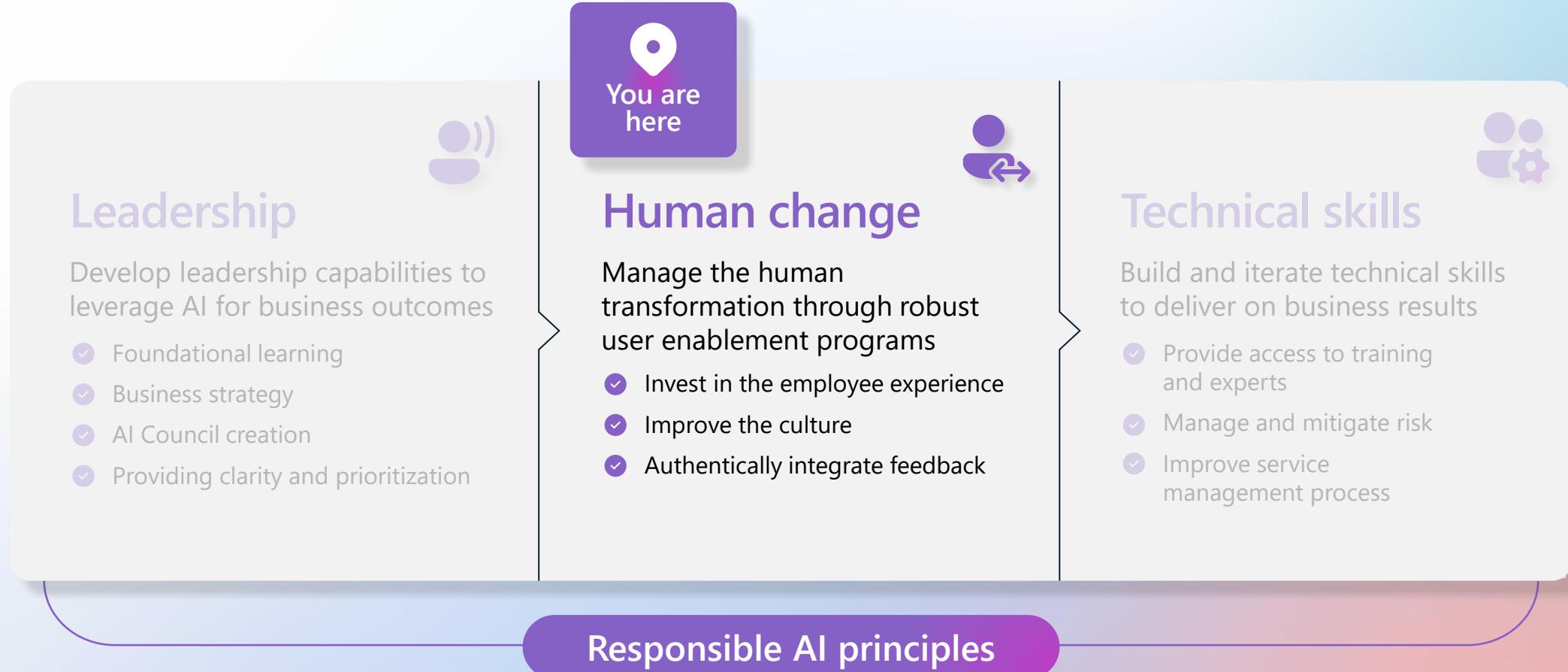


Copilot for Microsoft 365 User Enablement Guide

Creating the AI-powered organization



The journey to becoming AI powered



Essentials for Copilot success



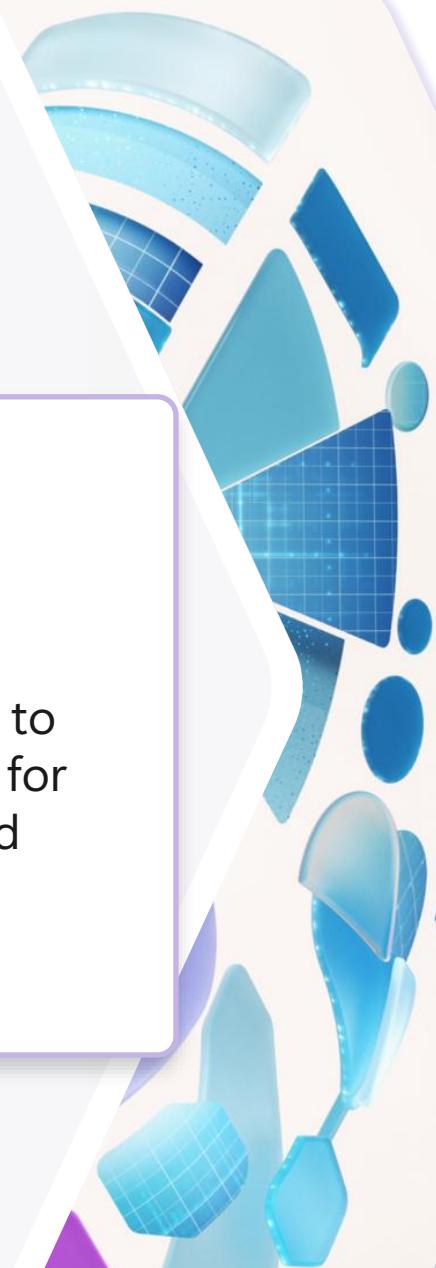
Nominate and activate your Copilot executive **sponsors**, in partnership with your AI Council



Define initial high value **scenarios** and target a critical mass of users for rapid value



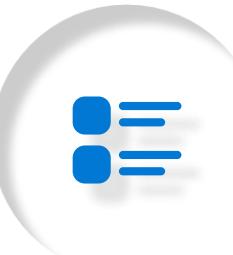
Define your path to **secure** your data for compliance and peace of mind



Copilot expansion best practices



**Stay in touch
with your
customers**



**Teach customers
to use/prompt
with Copilot**



**Drive knowledge
exchange for
your customers**



**Use Microsoft
adoption
workshops**

Microsoft 365 Copilot

Implementation executive summary

USER
ENABLEMENT



TECHNICAL
READINESS

1 Get ready

Select initial departments for rollout with the [Scenario Library](#). Target a critical mass of users for rapid impact.

- Identify your success team
- Be intentional with assignment and concentrate seats

Perform the Microsoft Microsoft 365 Copilot [Optimization Assessment](#)

- Address data security, governance, and data access questions
- Build shared Copilot implementation plan with User Enablement team

2 Onboard & engage

Lay the foundation for an intelligent progression of AI skills with [Copilot Lab](#).

- Deploy training and Champion programs, engagement community
- Make ongoing training the standard

Prepare Microsoft 365 for AI deployment with the [Setup Guide](#)

- Ensure appropriate Data Security controls are in place
- If needed, deploy additional Microsoft 365 apps

3 Deliver impact

Review success measures with the [Copilot Dashboard](#) and the [User survey kit](#).

- Quantify impact including growth, cost savings and employee benefits
- Build momentum with success stories and knowledge sharing

Mature AI management skills through improved IT service delivery

- Establish service management plan
- Review Admin usage reports and the [Copilot Dashboard](#) to analyze user retention and engagement

4 Extend & optimize

Extend to new scenarios and transform business processes.

- Identify new high value functional and cross-org scenarios
- Recognize and reward success

Provide insights on service health and optimization opportunities

- Design, build, and publish plugins to deliver unique experiences
- Build your own copilots

Microsoft is here to help accelerate your Copilot journey with expert-led services

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



7

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](#)



8

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]



9

What did they say ...

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

→ What did [person](#) say about [topic](#)



10

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

→ Translate the following text into French:

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

Why does user enablement matter?

Copilot for Microsoft 365 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.

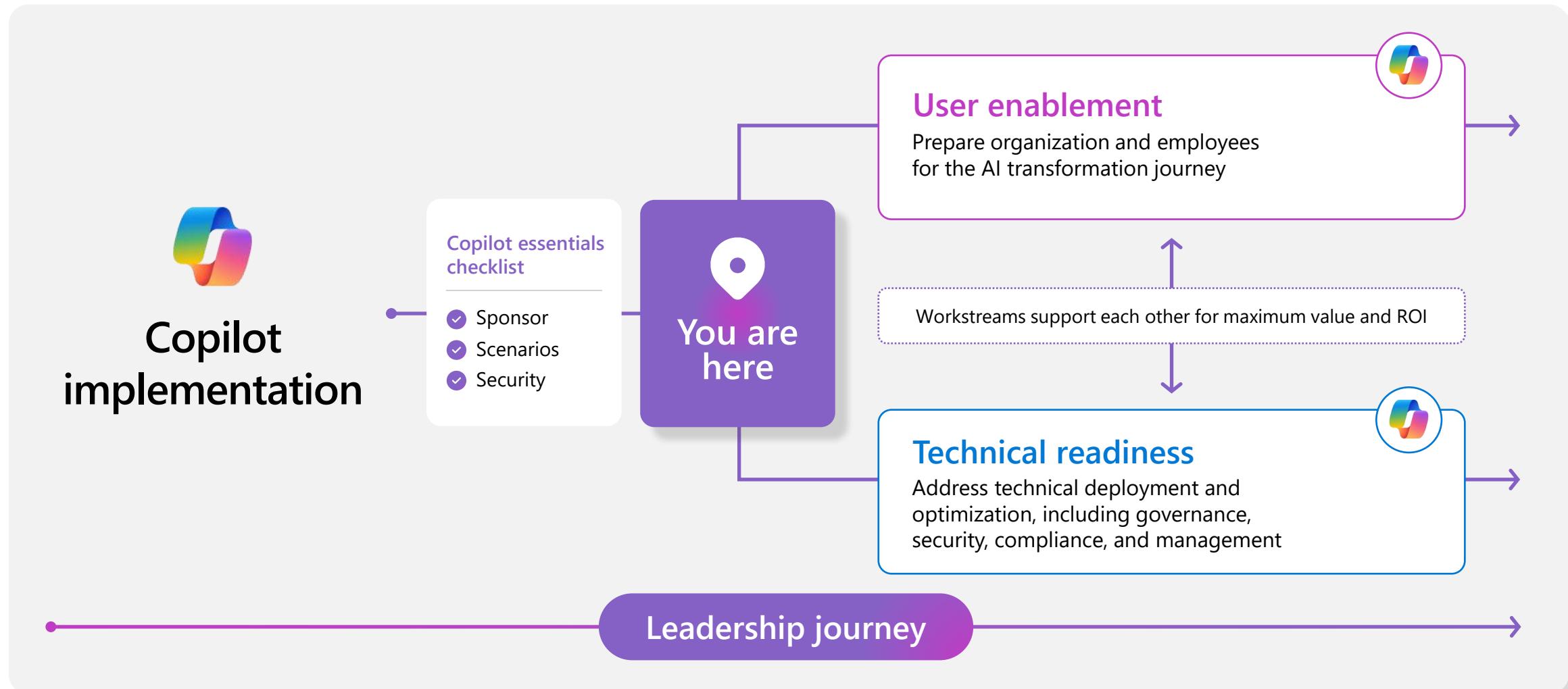
We understand that adopting new technology involves change, and change can be daunting even for the most innovative, cutting-edge organizations. **That's why we created the Copilot for Microsoft 365 User Enablement Guide.** This guide is the partner to the Technical Readiness Guide and will reference the shared planning milestones essential in iterative project success.

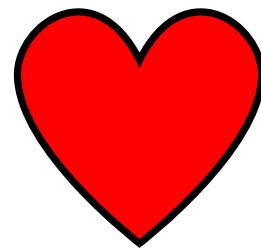
From our research and real-world experience, we've compiled an easy-to-follow how-to that guides you and your teams, step-by-step, through the best way to roll out Copilot for Microsoft 365 to your organization and drive continuous impact across your organization. The insights we share come from our 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 [user enablement planning workbook](#) 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 [Driving Adoption Community](#) and through our free, worldwide [Microsoft 365 Champion](#) program.

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

Copilot for Microsoft 365 implementation





Creators

Essentials for Copilot 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

Copilot for Microsoft 365

Implementation overview

USER
ENABLEMENT

TECHNICAL
READINESS

Get ready

- User Enablement Workstream**
- ✓ 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

Technical Readiness Workstream

- ✓ Perform the Copilot for Microsoft 365 Optimization Assessment
- ✓ Address data security, governance, and data access questions
- ✓ Build shared Copilot for Microsoft 365 implementation plan with User Enablement team

- ✓ Ensure appropriate Data Security controls are in place
- ✓ Prepare your organization for Copilot for Microsoft 365 with setup guide: deploy Microsoft 365 apps, if needed; assign licenses
- ✓ Assign permissions by role to provide access to the Copilot for Microsoft 365 usage report

- ✓ Establish service management plan
- ✓ Analyze Copilot for Microsoft 365 usage reports and the Microsoft Copilot Dashboard to observe user adoption, retention, and engagement

- ✓ Design, build, and publish plugins to deliver unique experiences
- ✓ Build your own copilots

Copilot for Microsoft 365

Implementation overview



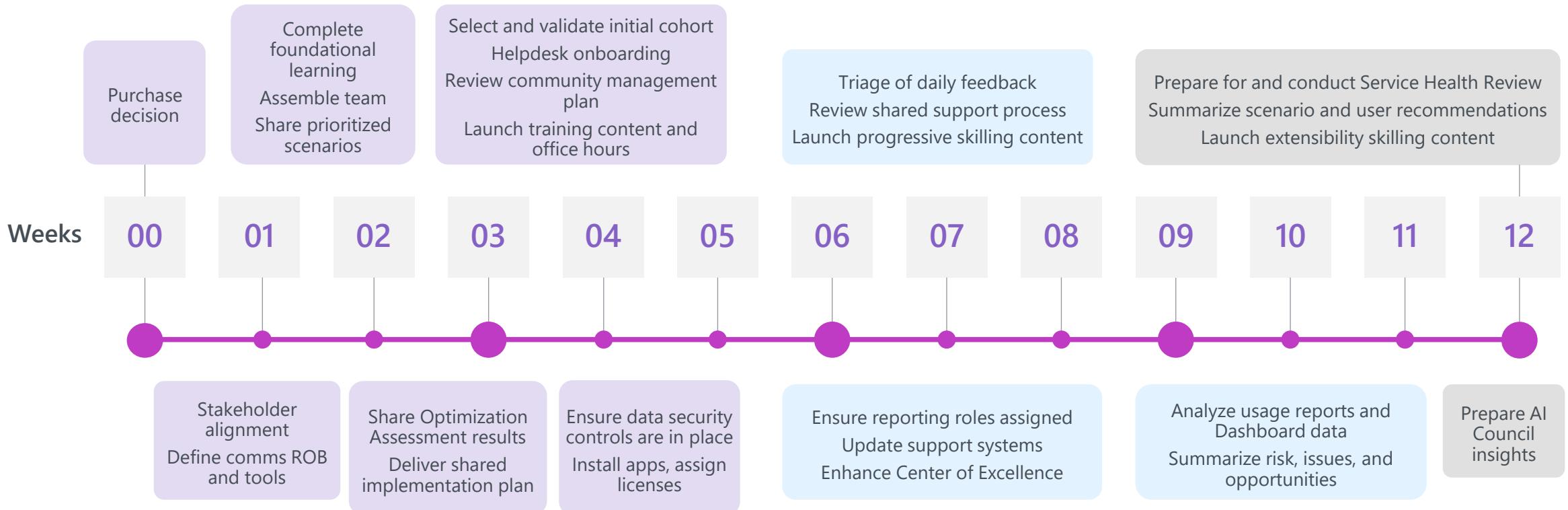
Implementation project summary

First 30 days

30-60 days

Recurring tasks

Shared milestone view

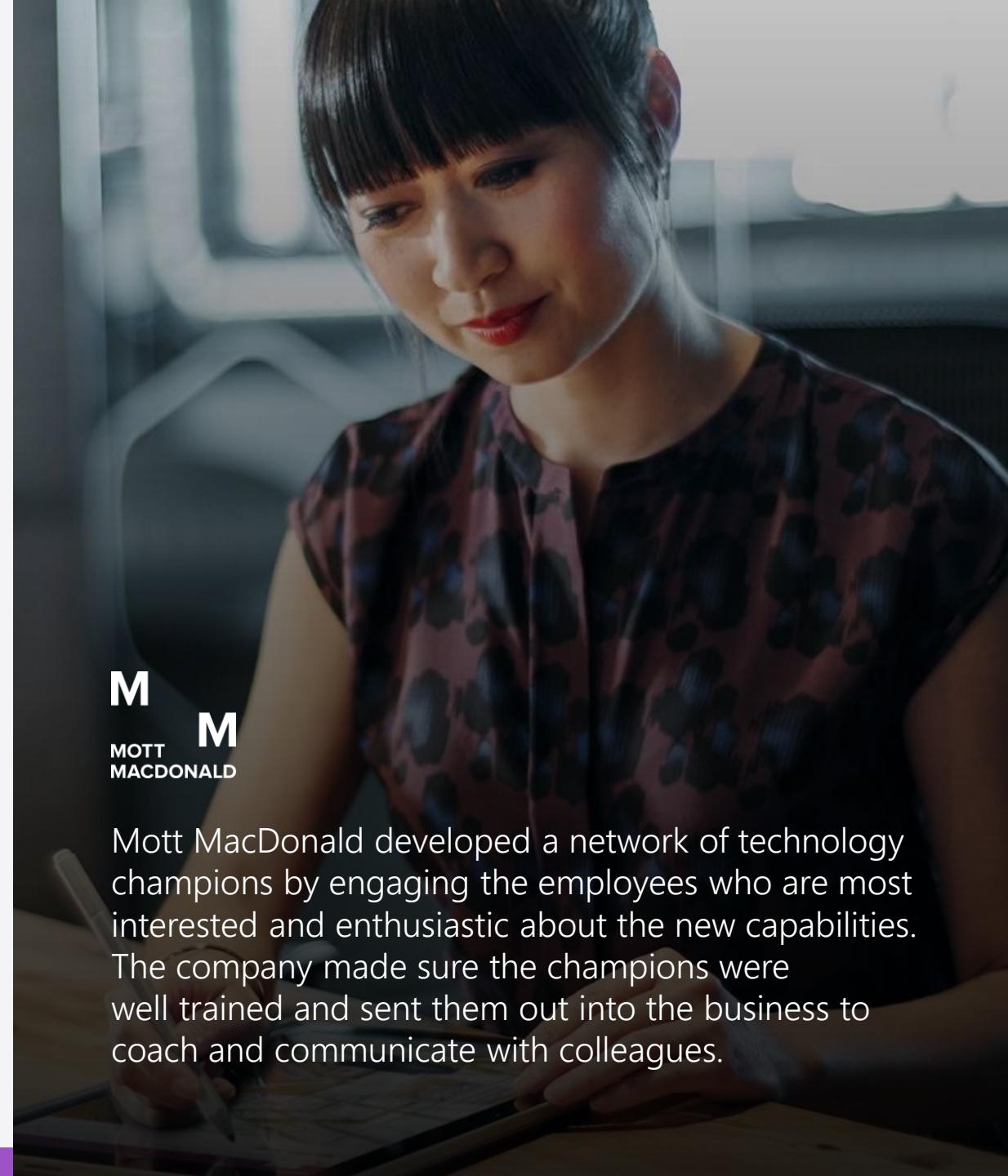


Who should be involved in your adoption effort?

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



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 implementation teams.
- Play a role in communicating the vision to leaders across the organization.
- Actively participate in and use the Copilot capabilities to help drive and reinforce enablement.
- Promote the enablement program. Studies show that 87% of successful transformation projects had visible engagement by Executive Sponsors.

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.



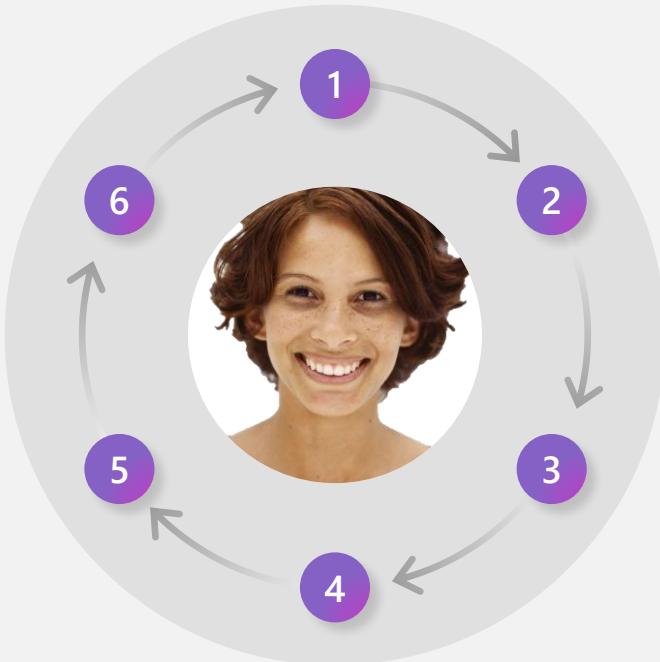
Get ready

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

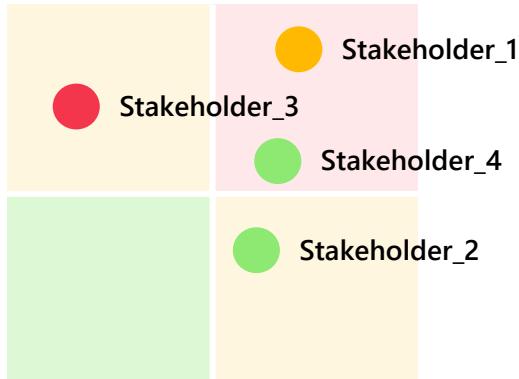
On regular intervals, re-assess stakeholders' influence, interest, and attitudes and modify their communication strategy appropriately.

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:



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:

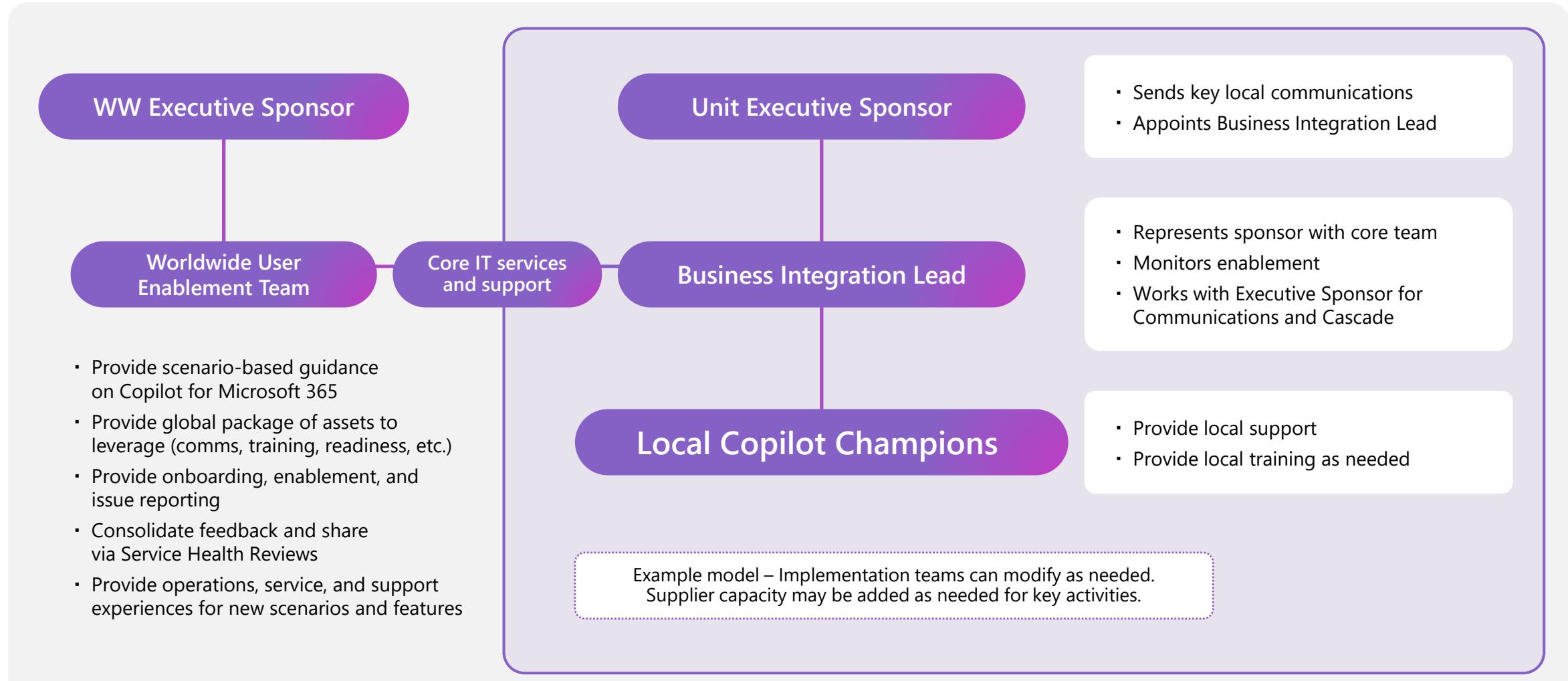
- Understanding of organizational change management practices
- Technical skills across Microsoft 365 collaboration tools
- Advanced program management skills
- Relevant business acumen and visibility to overall AI vision
- Strong written and verbal communications skills
- Ability to model desired leadership skills



Identify your team members

Key roles	Responsibilities	Department	Team member identified for role
Executive Sponsor	<i>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</i>	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



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



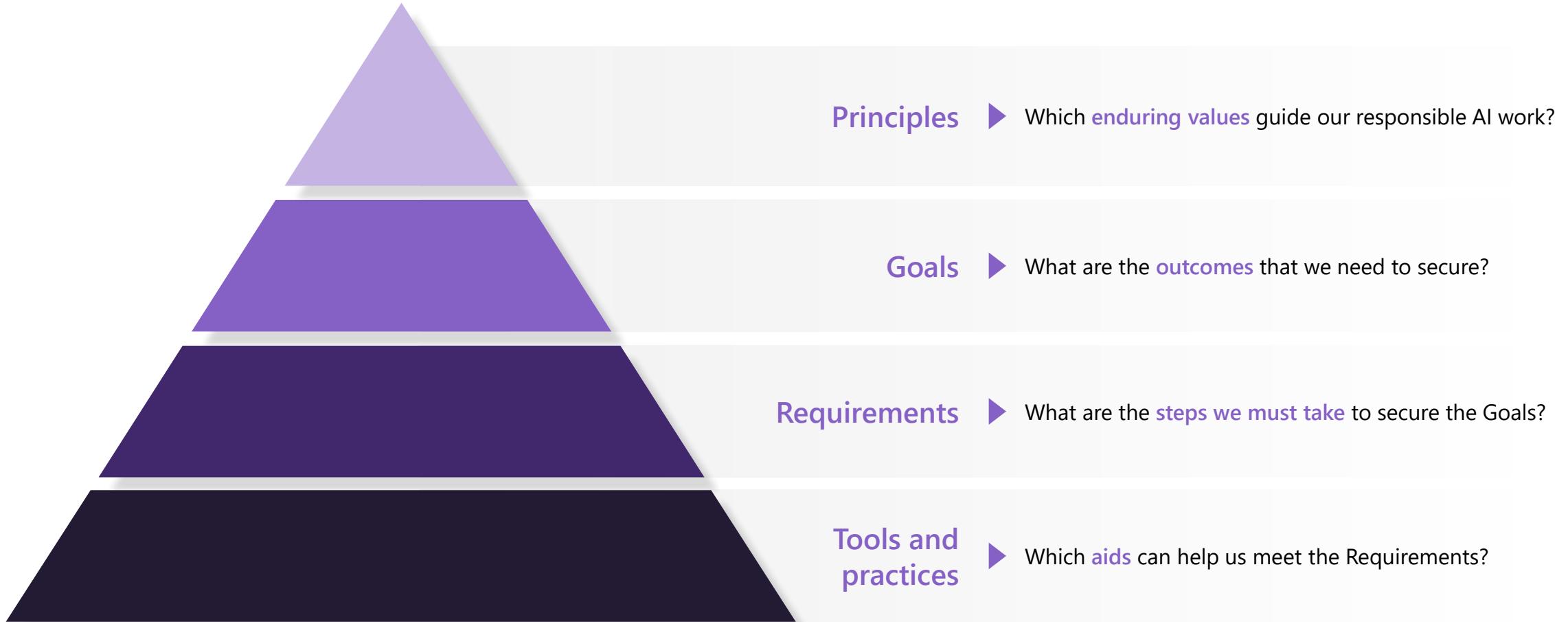
Reflects

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

The image shows the front cover of the Microsoft Responsible AI Standard, version 2. The cover is white with blue text. It reads "Microsoft Responsible AI Standard, v2" at the top, followed by "GENERAL REQUIREMENTS" and "FOR EXTERNAL RELEASE" below it. At the bottom, it says "June 2022". To the right of the document cover is a photograph of a woman with long dark hair, wearing a necklace, sitting at a wooden table and looking at a laptop screen. The laptop screen displays various charts and data visualizations. The entire composite image is set against a green background.

 Microsoft

The anatomy of the Responsible AI Standard



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



Onboard & engage

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 Copilot for Microsoft 365.

- 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.

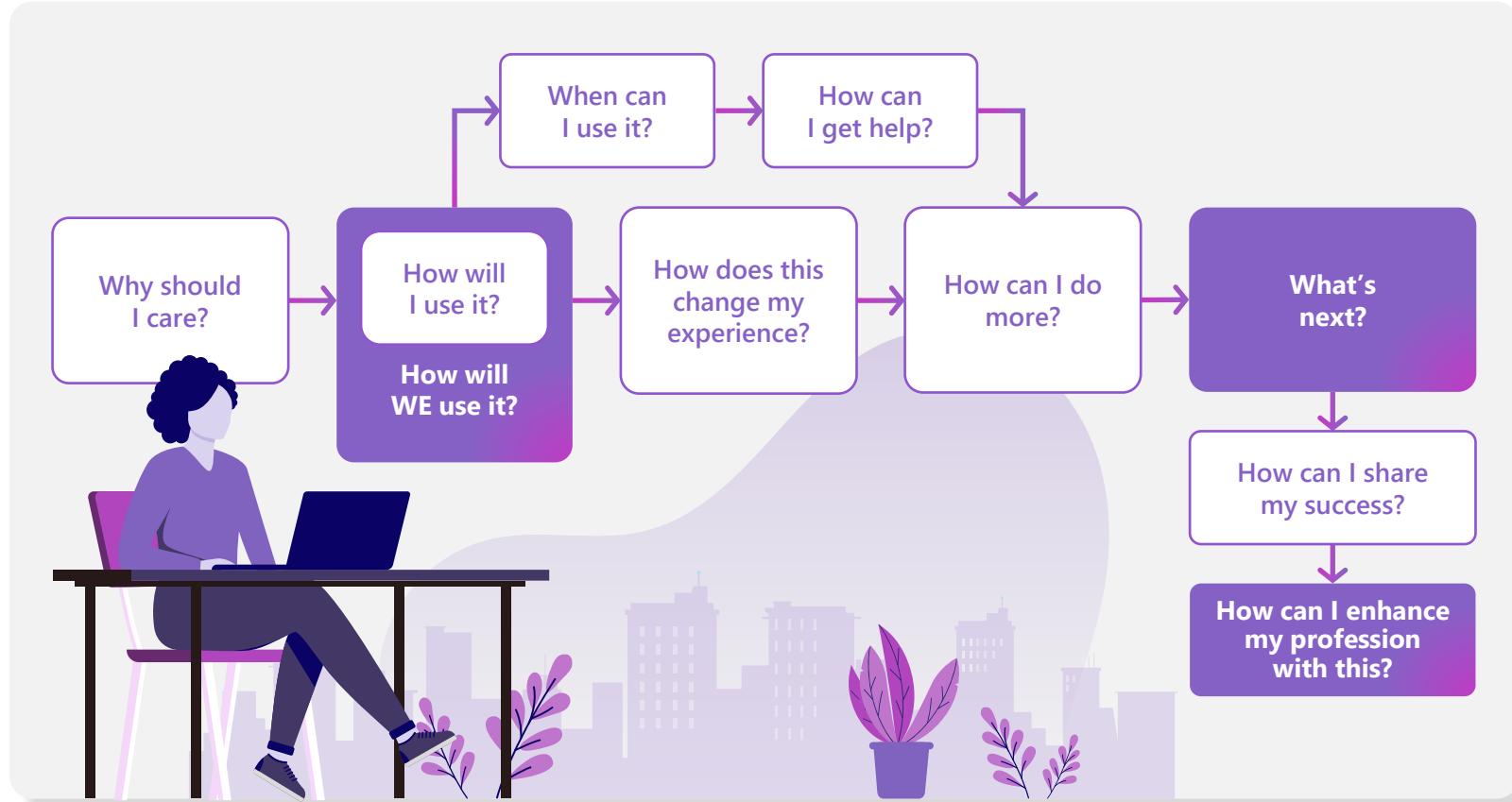
Your technology enablement team is central to the success of your project and your employees with your technology investments. Your user experience strategy gives them a vision and roadmap for success.

#ProTip

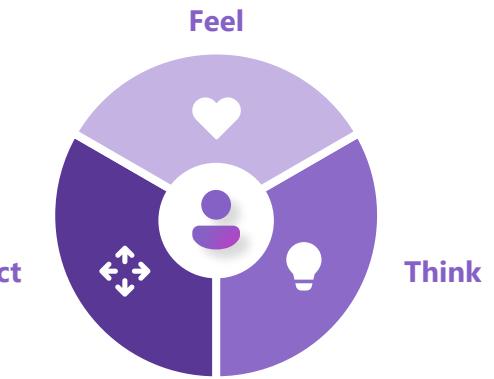
Use Copilot for Microsoft 365 to create the initial draft.

Understanding the user journey

Getting to “Aha!”



An aha moment is defined as “*a moment of sudden insight or discovery*”.



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**.

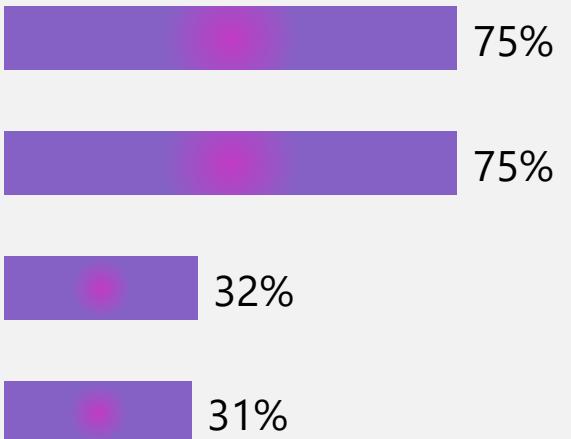
Keys to user enablement success

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

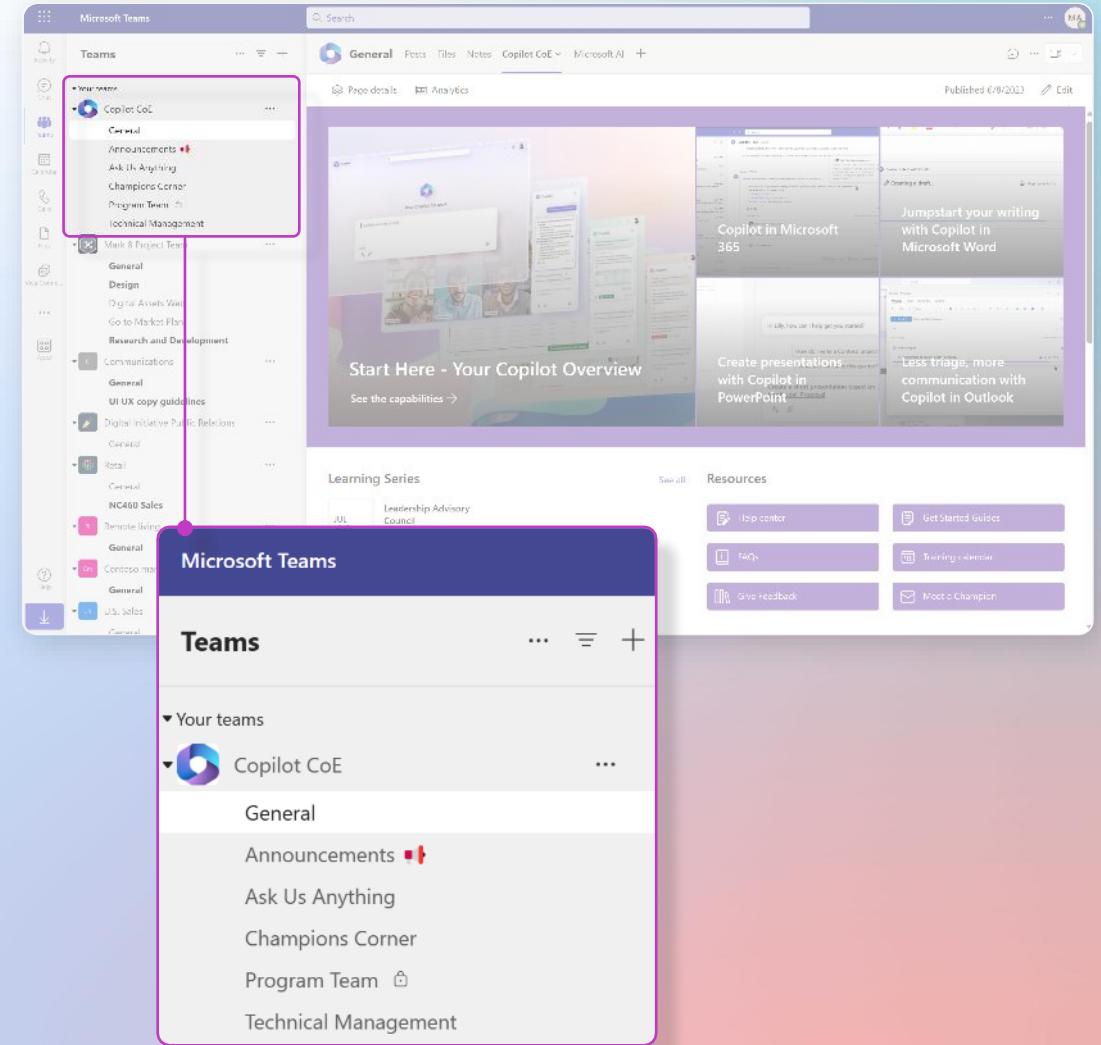


Build your experience

Utilize Microsoft 365 technology to drive the adoption of Copilot for Microsoft 365 by using our Center of Excellence (CoE) best practices to build your own community of practice.

- 1 Centralize team communications
- 2 Implement adoption and project management tools
- 3 Enable Microsoft communication and engagement

Use our [Copilot CoE guidance](#) to build these capabilities into an existing team. Supplement by using our Microsoft Viva for Copilot Enablement guide. Providing a community of practice for training, questions, support, and information improves the velocity of delivering user satisfaction.



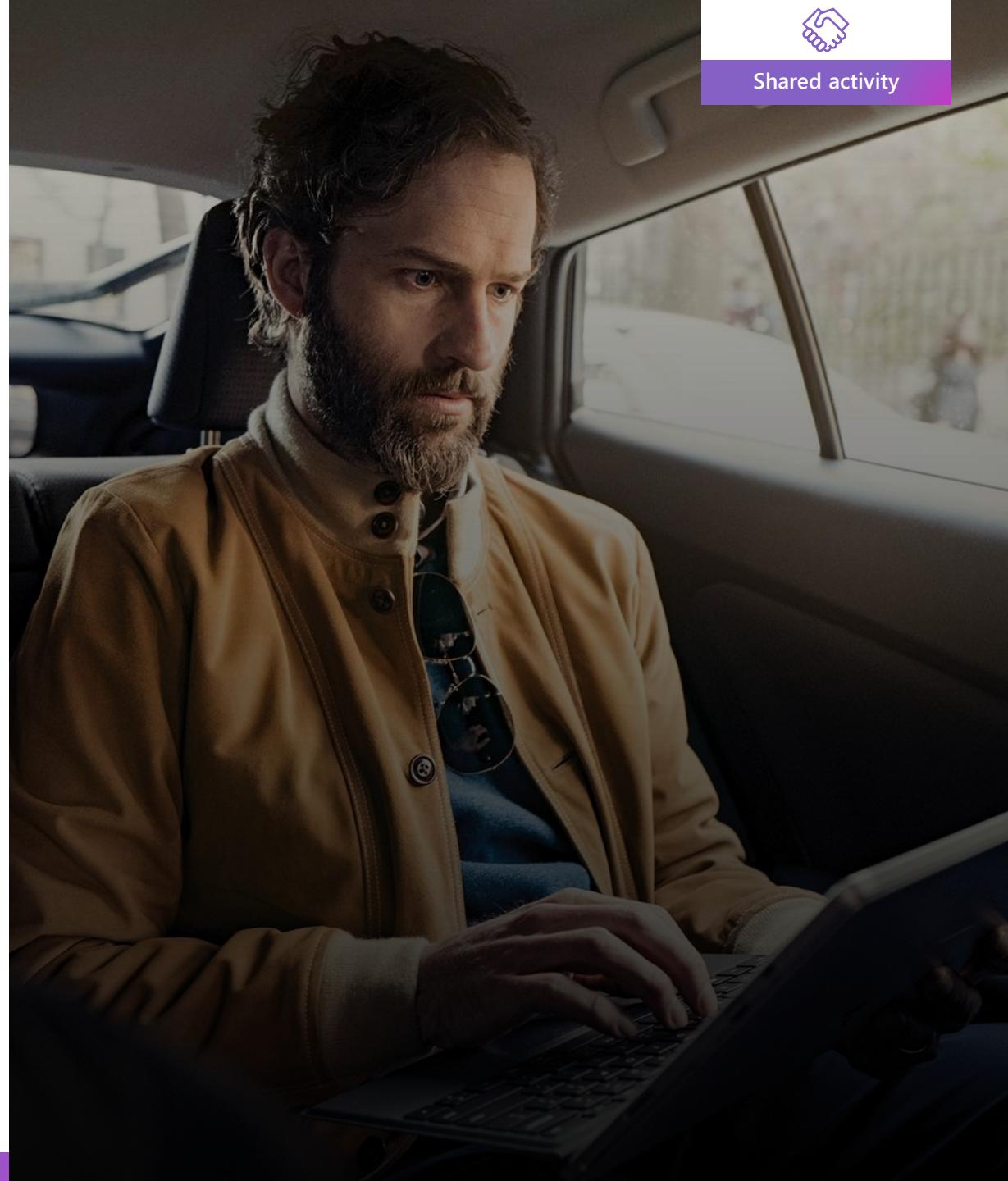


Identifying user cohorts

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.



Create or extend your Champion program

Copilot for Microsoft 365 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



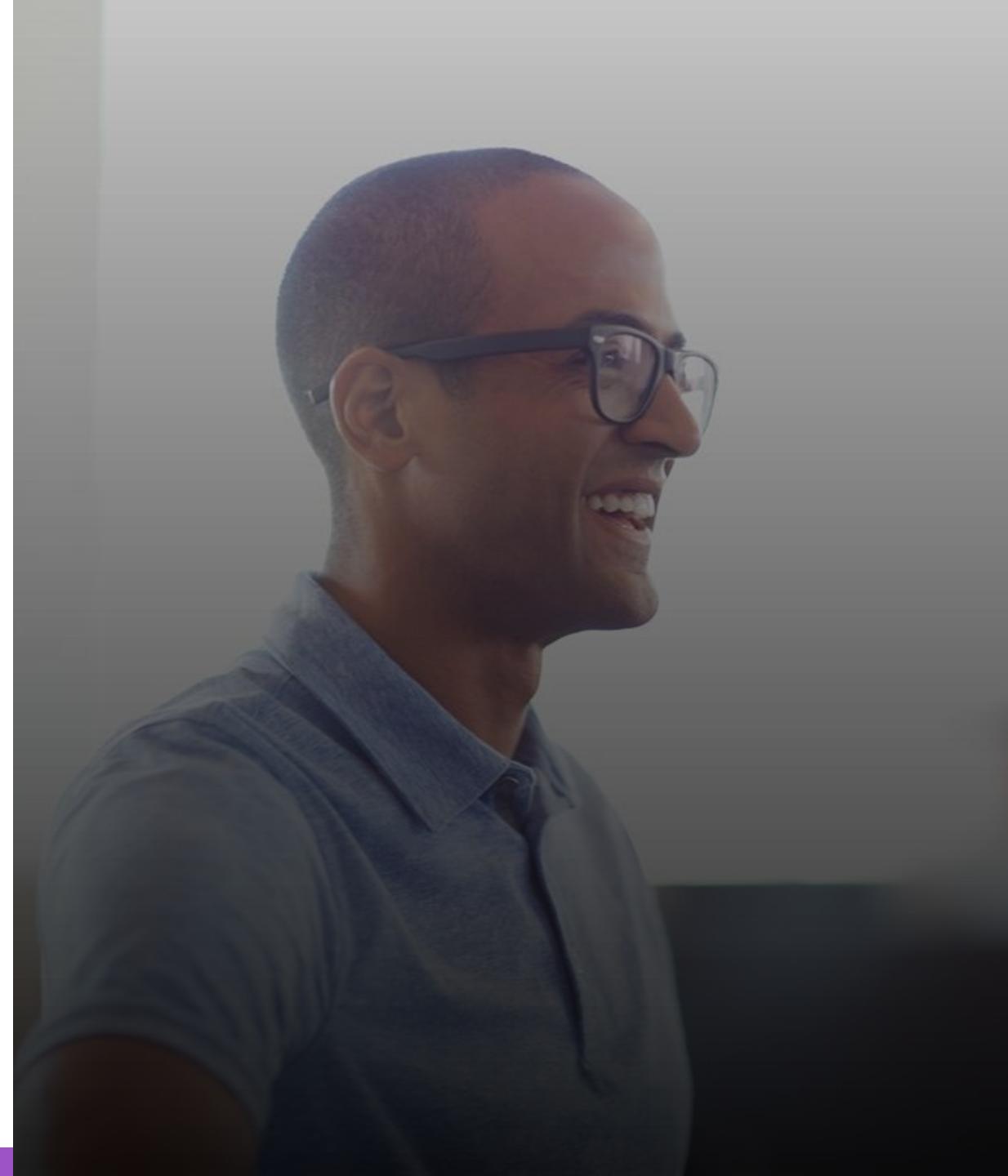
Champions help build, grow, and sustain your Copilot implementation by gathering feedback, supporting the human change lifecycle, and providing peer to peer guidance.

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.

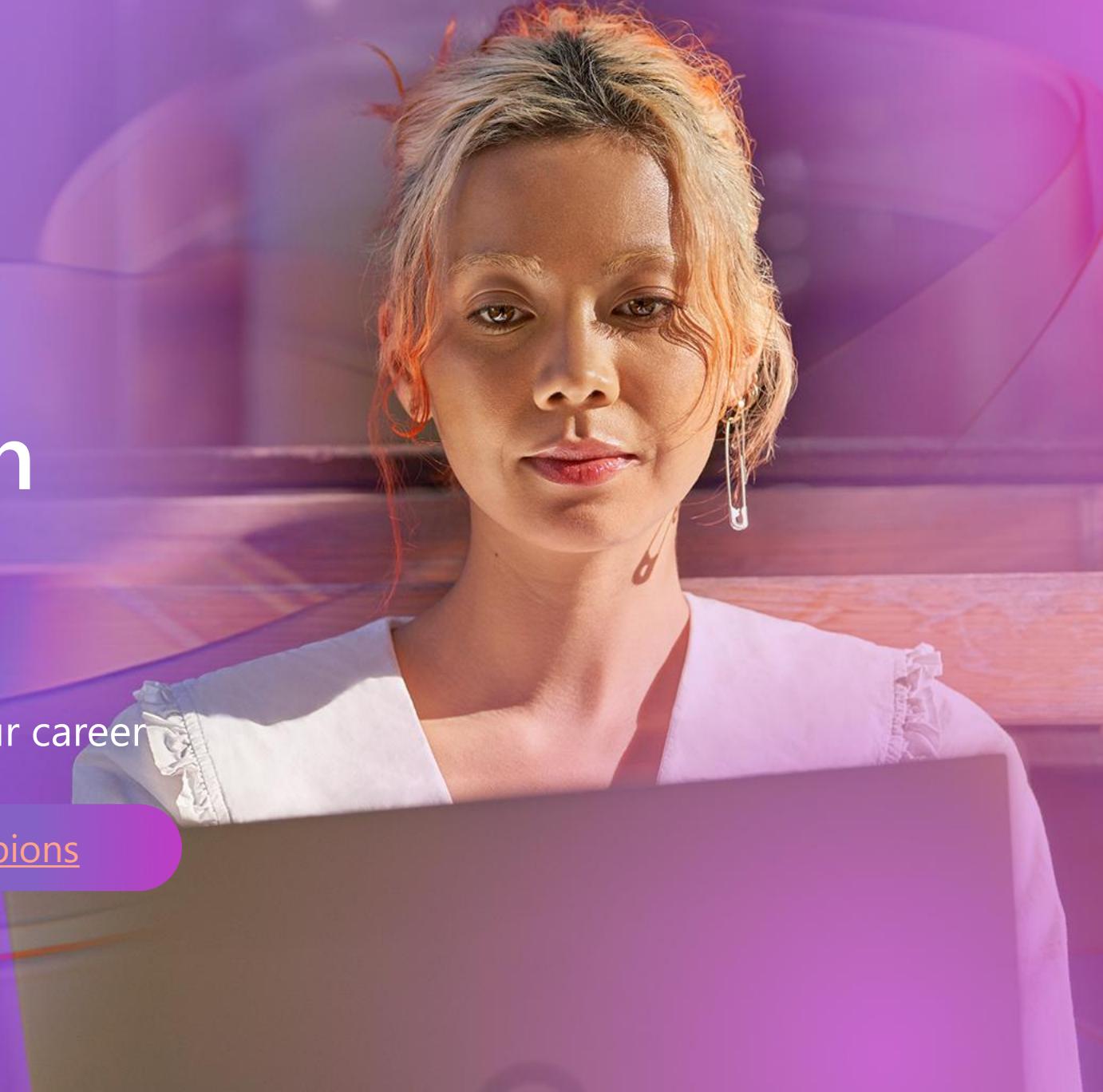
Branding your Champion program

- ✓ 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

Copilot for Microsoft 365 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	<ul style="list-style-type: none">Purchase 1,000 seats of E3 and Teams Premium and deploy Copilot to the first set of employees	<ul style="list-style-type: none">Introduce Copilot in Teams and Outlook	<ul style="list-style-type: none">Deliver training sessions employees on Copilot and Teams Premium	<ul style="list-style-type: none">Integrate LOB app to Copilot with custom plugins	<ul style="list-style-type: none">Build your own copilots
Scenario 2					
Scenario 3					

Role based scenario guidance

Utilize our role-based scenario guidance to start the conversation with business users about their pain points, opportunities, and ideas.

aka.ms/AlforAll

Scenarios by persona

Unlock productivity, unleash creativity, create more value



HR

Sales

Marketing

Finance

IT

Onboard & engage

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

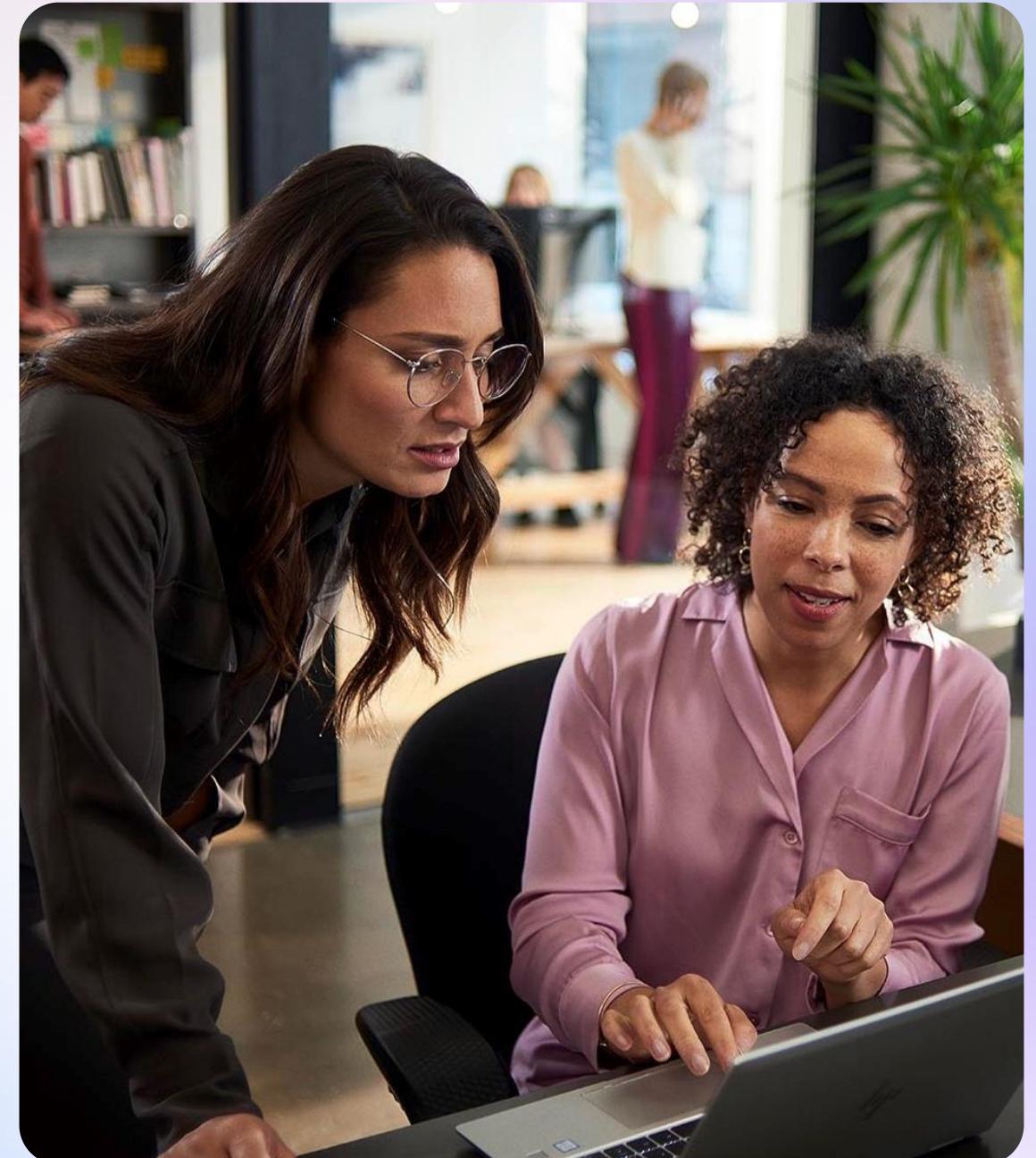
Summarize emails missed while on vacation and flag important items

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





Shared activity

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.



Shared activity

Objective: Land and expand Copilot for Microsoft 365 awareness and AI skill centric vision for employees



Awareness

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



Engagement

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



Measurement

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



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

Land the message

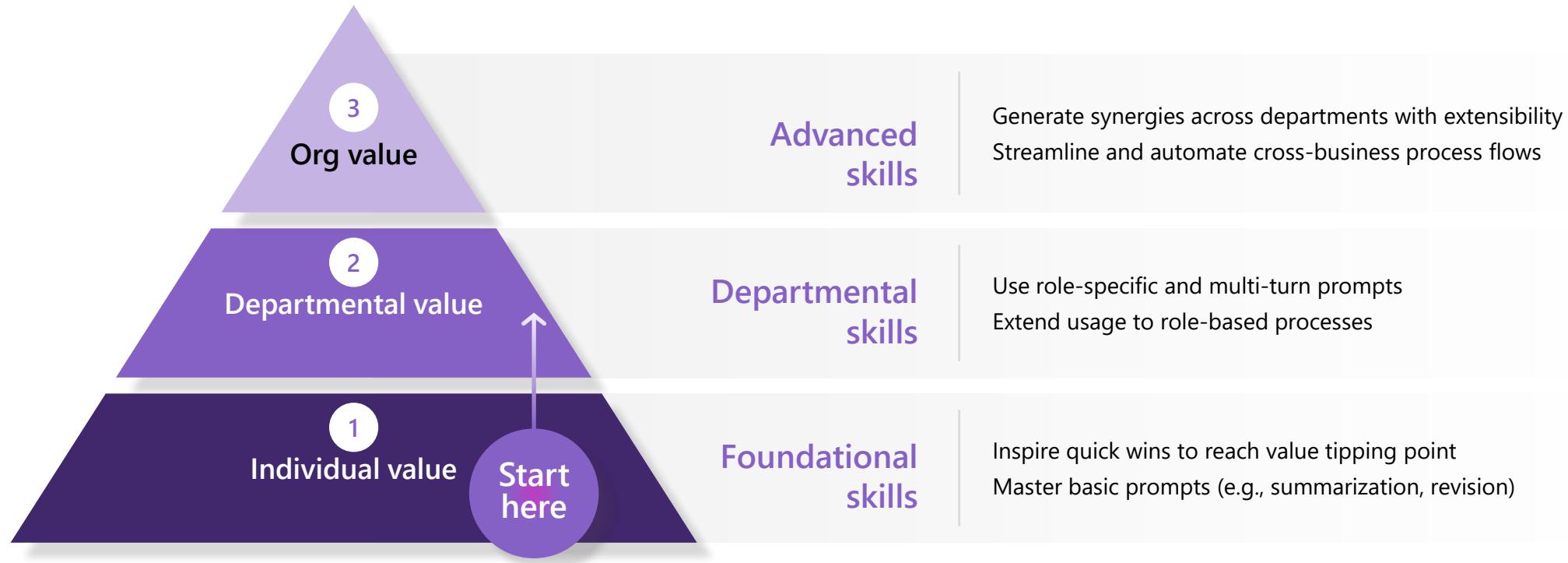
Support the change

Analyze and adjust

Improve the experience

Onboard & engage

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



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.

Top 10 to try first with Copilot for Microsoft 365

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](#)

1



2 Summarize an email thread

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

- Click on the Summarize icon

2



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.

3



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](#)

4



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?

5



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](#)

6



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]

7



8 What did they say ...

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

- What did [person](#) say about [topic](#)

8



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

9



10 Translate a message

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

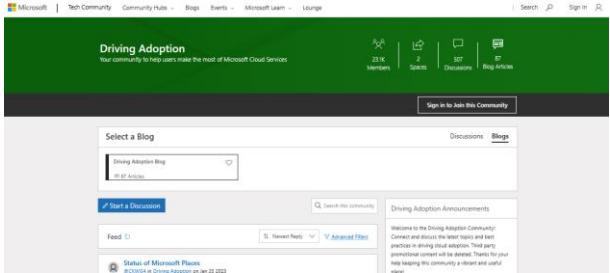
- Translate the following text into French:

10

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

Bookmark Microsoft enablement resources

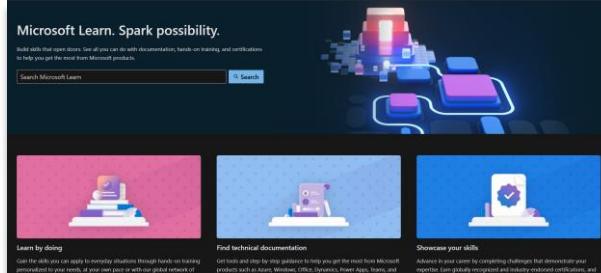
Join Driving Adoption Tech Community



<https://aka.ms/DriveAdoption>

Collaborate, share, and learn from experts

Microsoft Learn



<https://learn.microsoft.com>

Technical documentation for developers and IT professionals

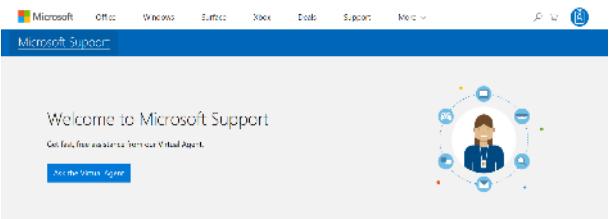
Microsoft Adoption Hub



<https://adoption.microsoft.com>

Resources to help you drive adoption of Microsoft services

Microsoft Support



Welcome to Microsoft Support

Get fast answers from our Virtual Agent.

Next Step: Answer

Which product do you need help with?

<http://support.microsoft.com/copilot>

Access FAQs and user help and learning

Teamwork governance



<https://aka.ms/TeamworkGovernance>

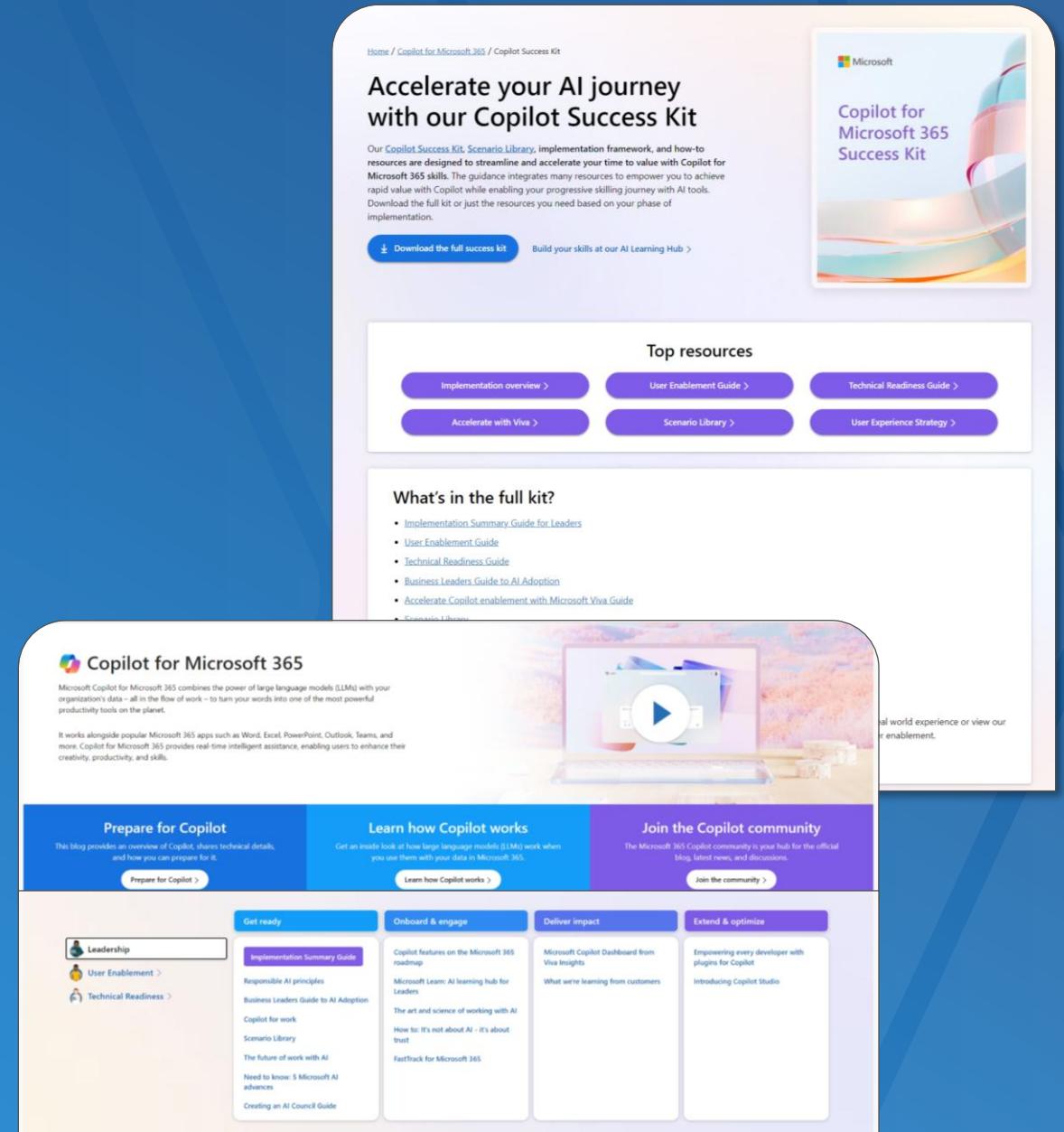
Collaboration governance guidance for Microsoft 365

Join our communities
Utilize our resources
Achieve your goals

Copilot resources from Microsoft

One site for all your Copilot needs:
<https://adoption.microsoft.com/copilot>

- Resources by role
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Small/Medium business, Copilot in Sales, Microsoft Viva, and



The screenshot shows the landing page for the Copilot for Microsoft 365 Success Kit. At the top, there's a banner with the Microsoft logo and the text "Copilot for Microsoft 365 Success Kit". Below the banner, a heading says "Accelerate your AI journey with our Copilot Success Kit". A paragraph of text explains that the kit includes a Scenario Library, implementation framework, and how-to resources designed to streamline and accelerate the user's time to value with Copilot for Microsoft 365 skills. It also mentions that the guidance integrates many resources to empower users to achieve rapid value with Copilot while enabling their progressive skilling journey with AI tools. Buttons for "Download the full success kit" and "Build your skills at our AI Learning Hub" are present.

Top resources

- Implementation overview >
- User Enablement Guide >
- Technical Readiness Guide >
- Accelerate with Viva >
- Scenario Library >
- User Experience Strategy >

What's in the full kit?

- Implementation Summary Guide for Leaders
- User Enablement Guide
- Technical Readiness Guide
- Business Leaders Guide to AI Adoption
- Accelerate Copilot enablement with Microsoft Viva Guide
- Scenario Library

Copilot for Microsoft 365

This section provides an overview of Copilot, its integration with Microsoft 365 apps like Word, Excel, PowerPoint, Outlook, Teams, and more. It highlights how Copilot provides real-time intelligent assistance to enhance creativity, productivity, and skills.

Prepare for Copilot

This blog provides an overview of Copilot, shares technical details, and how you can prepare for it. Buttons include "Prepare for Copilot" and "Learn how Copilot works".

Learn how Copilot works

Get an inside look at how large language models (LLMs) work when you use them with your data in Microsoft 365. Buttons include "Prepare for Copilot" and "Join the Copilot community".

Join the Copilot community

The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions. Buttons include "Join the community" and "Get ready".

Get ready

- Leadership
- User Enablement >
- Technical Readiness >
- Implementation Summary Guide
- Responsible AI principles
- Business Leaders Guide to AI Adoption
- Copilot for work
- Scenario Library
- The future of work with AI
- Need to know: 5 Microsoft AI advances
- Creating an AI Council Guide

Onboard & engage

- Copilot features on the Microsoft 365 roadmap
- Microsoft Learn: AI learning hub for Leaders
- The art and science of working with AI
- How to: It's not about AI - it's about trust
- FastTrack for Microsoft 365

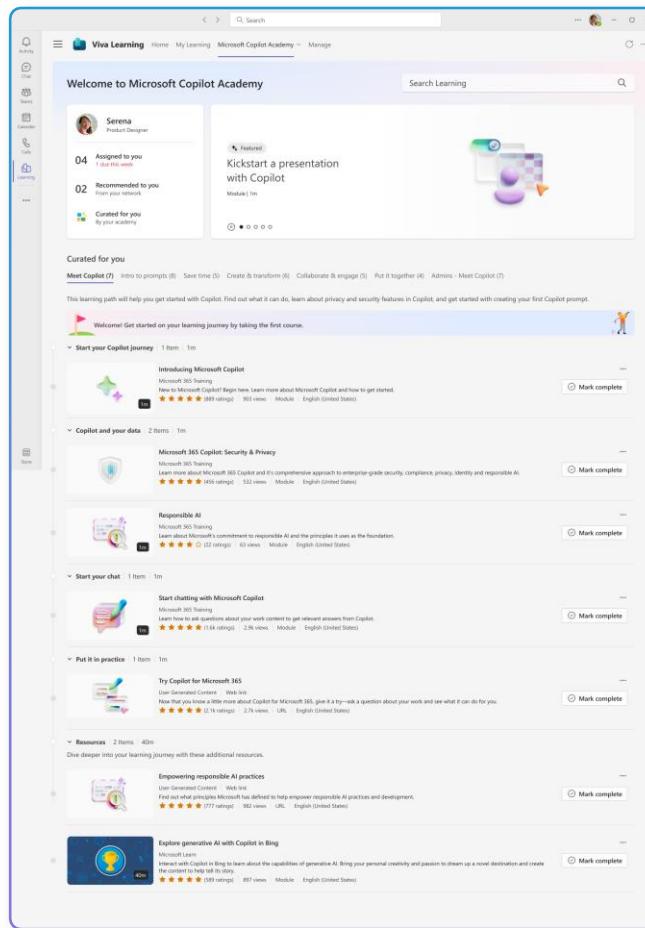
Deliver impact

- Microsoft Copilot Dashboard from Viva Insights
- What we're learning from customers

Extend & optimize

- Empowering every developer with plugins for Copilot
- Introducing Copilot Studio

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

Two screenshots of Microsoft Learn content. The top screenshot shows the 'Microsoft 365 learning pathways' page with sections for 'Start with six simple steps' and 'Get started with Microsoft Teams'. The bottom screenshot shows the 'Copilot Lab' page with a large heading 'Start your Copilot journey' and three cards: 'What you can do with Copilot', 'Start using Copilot', and 'What is a prompt?'. Both screenshots feature a blue header with the Microsoft logo and 'Microsoft Learn'.

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

Copilot Scenario Library



Copilot brings AI value across lines of business

Use the [Scenario Library](#) to identify top use cases and key metrics you would like to improve in that functional area.

All roles & execs

Improve meetings
Content creation
Manage daily agenda

HR

Cost per hire
Employee turnover
Compliance risk reduction

Marketing

Leads created
Brand value
Cost per lead

Sales

Number of opportunities
Close rate
Revenue per sale

The screenshot shows the Microsoft Copilot Scenario Library page. At the top, there's a navigation bar with links for Microsoft Adoption, Roles, Products, Solutions, Resources, Training, Communities, and What's new. A banner at the top right encourages users to join the Microsoft 365 Community Conference. The main title is "Microsoft Copilot Scenario Library", followed by a subtitle: "Becoming AI powered means transforming scenarios across your organization. Use our guidance by department and individual scenario to get inspired, empower your workforce and realize value from your Copilot investment." To the right is a decorative graphic of three stylized, colorful leaves or petals. On the left, there's a sidebar titled "Guidance by department" with dropdown menus for Finance, Human Resources, Information Technology, Marketing, and Sales. Below this is a box for "Looking for downloadable content?" with a "View downloads" button. The main content area features five cards, each with a thumbnail image and a title: "Using Copilot in Finance" (a woman in a suit), "Using Copilot in Human Resources" (a man in a yellow shirt), "Using Copilot in Information Technology" (a woman in an orange shirt), "Using Copilot in Marketing" (a man and a woman), and "Using Copilot in Sales" (a man and a woman).

Copilot Success Kit

What's included

Implementation summary guide

The journey to becoming AI powered



PowerPoint

Adoption guide for business leaders



eBook

User Enablement Guide

Role based scenario guidance

Utilize our role-based scenario guidance to start the conversation with business users about their pain points, opportunities, and ideas.



aka.ms/AIforAll

PowerPoint

Technical Readiness Guide

Microsoft

Copilot for Microsoft 365
Technical Readiness Guide
Creating the AI-powered organization

Mar 2024
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PowerPoint

Learn more at aka.ms/CopilotSuccessKit

Copilot Demo Possibilities

Click-Thru Demos

- ✓ Simple to use
- ✓ Little Copilot familiarity needed
- ✓ Quick setup
- ✓ No risk of oversharing



Build Your Own Demo

- ✓ Live demo in your M365 tenant
- ✓ Requires Copilot familiarity
- ✓ Needs one-time setup



Immersion Experience

- ✓ Simple to use
- ✓ Role function-based demos
- ✓ Quick setup
- ✓ No risk of oversharing

Choose your preference

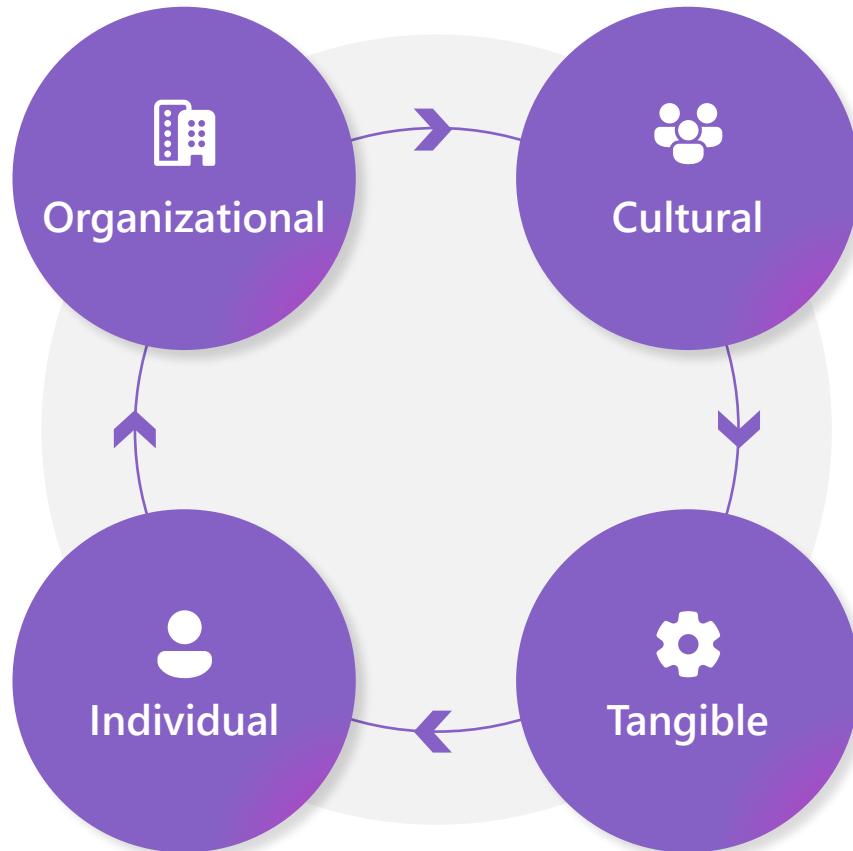
Review success criteria

- Validate key performance indicators (KPIs) that are improving based on Copilot skills.
- Choose criteria to help you show the impact Copilot for Microsoft 365 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



Tangible measures

Individual sentiment

=
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

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



Shared activity

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.





Shared activity

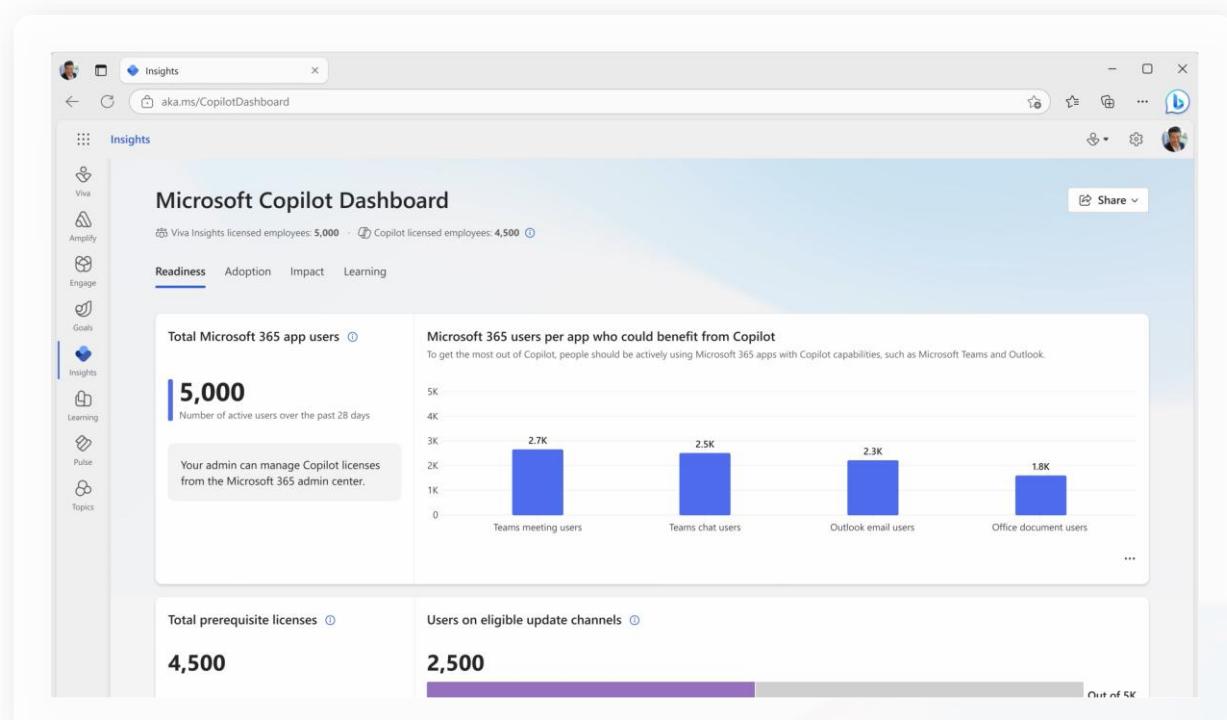
Measure the impact of your Copilot investment

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

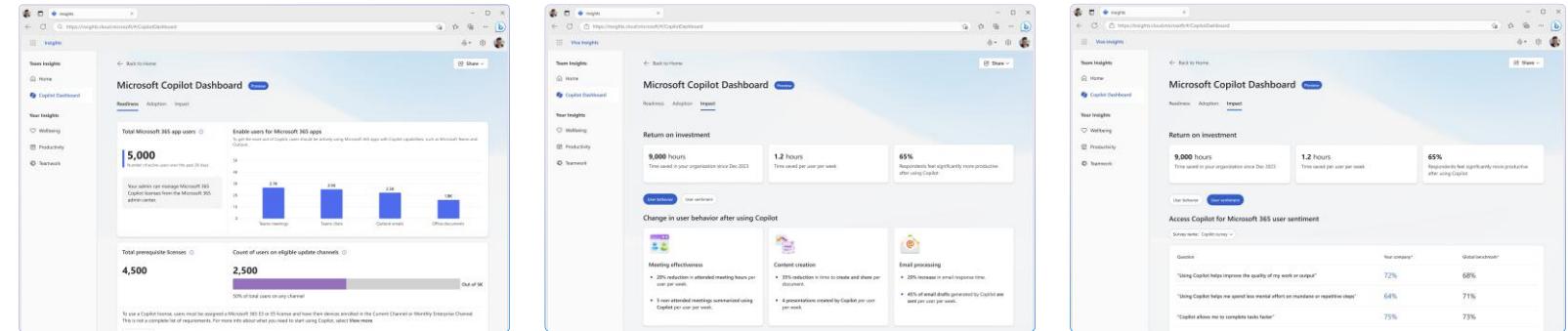
With a **Viva license** (*available as an add-on*), get advanced analytics across behavioral, collaboration, and sentiment data to measure how Copilot has impacted work patterns. Leaders can also run custom queries and reports and survey employees about their sentiment about Copilot.



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

Adoption

Understand how many and in what ways people use Copilot

- At the tenant level

Impact

Time savings

- Extrapolated time savings based on industry research
- Metrics supported by research
- At the tenant level

Sentiment

Understand user perception and perceived value

- At the tenant level

- At the tenant level

- Ability to filter across department, role, and other org attributes
- Visualize adoption trends and behavioral changes

- Actual time savings calculated by combining copilot usage patterns and workplace collaboration data
- Ability to filter across department, role, and other org attributes

- 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.



Shared activity

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 copilots
- Select extensibility scenarios

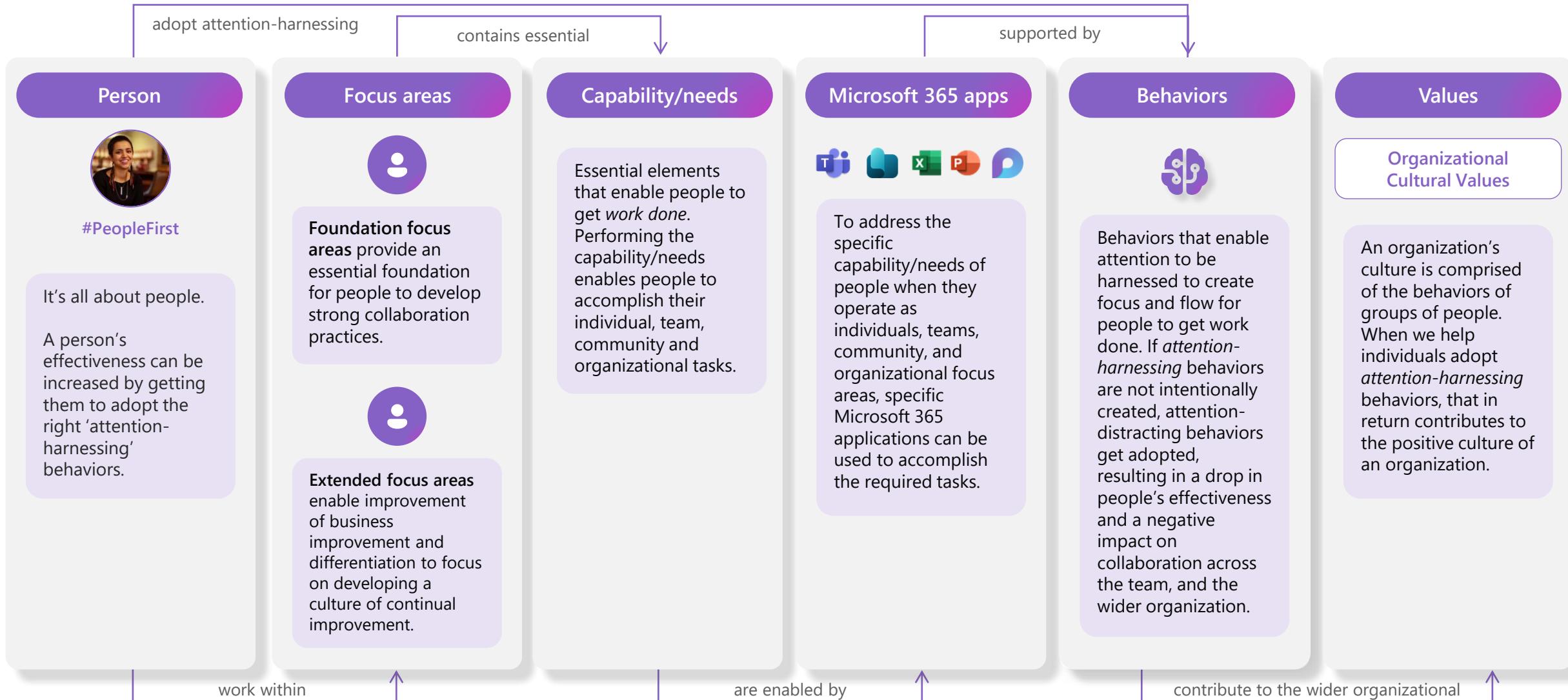
Extend



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



Microsoft Copilot

Answers based on your enterprise data
but cannot natively answer other queries.

Ask again

Microsoft Copilot is now
instantly capable of
handling the previously
unanswered query.

Publish back to Microsoft Copilot

Publish and enable your
new plugin in Microsoft
Copilot in minutes.

Copilot Studio

The fastest way to build
and extend powerful
Generative AI Copilots

Extended in Copilot Studio

Add reusable AI plugins
(based on pre-built/custom
connectors, AI prompts, and
Power Automate flows) or
build Conversational Plugins.

Build a Conversational Plugin

Use the state-of-the-art dialog
builder. Using 1000s of connectors,
combine multiple data sources and
manipulate data.

EXAMPLE

Customizing Copilot

Copilot for Microsoft 365

Training and documentation by phase

Get ready

- ✓ **Docs:** User Experience Strategy template (coming soon)
- ✓ **Video:** [Copilot Experiences Explained](#)

Onboard & engage

- ✓ **Course:** Copilot for Microsoft 365 User Enablement Specialist (coming soon)
- ✓ **Tool:** [Copilot Lab](#) (including app specific guidance)
- ✓ **Video:** Creating a User Experience Strategy (coming soon)
- ✓ **Docs:** User Experience Strategy template (coming soon)

Deliver impact

- ✓ **Course:** [Empower your workforce with Copilot for Microsoft 365 Use Cases](#) (7 business group use cases)
- ✓ **Course:** [Craft effective prompts for Copilot for M365](#) (2 hrs)
- ✓ **Article:** [Learn about Copilot prompts](#)
- ✓ **Article:** [Get better results with Copilot Prompts](#)
- ✓ **Article:** [Edit a Copilot prompt to make it your own](#)
- ✓ **Article:** [Share your best prompts](#)

Extend & optimize

- ✓ **Docs:** [Modern Collaboration Architecture](#) people-centric scenario guidance
- ✓ **Course:** [Craft effective prompts for Copilot for Microsoft 365](#) (2 hrs)
- ✓ **Docs:** [Extend Microsoft Copilot for Microsoft 365](#)
- ✓ **Course:** [Optimize and extend Copilot for Microsoft 365](#) (1 hr)
- ✓ **Course:** [Create copilots with Microsoft Copilot Studio](#) (4 hrs)
- ✓ **Course:** [Extend and manage Microsoft Copilot Studio copilots](#) (2 hrs)

USER
ENABLEMENT

TECHNICAL
READINESS

Links to learn more (1 of 2)

Copilot Readiness Hub

What is Copilot?

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

How Copilot works

- [How Copilot for Microsoft 365 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 Copilot for Microsoft 365](#)
- [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 Copilot for Microsoft 365

- [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](#)

Responsible AI

- Responsible AI core principles
 - [Videos](#)
 - [Documentation](#)
- [Microsoft Responsible AI Standard](#)
- [Governing AI: A Blueprint for the Future](#)



<https://bit.ly/ciacspcopicopilot2025>