

## **Disclaimer:**

This document has been prepared by Microsoft to provide insights into internal Microsoft Customer and Partner Solutions best practices for driving Copilot adoption including, but not limited to, Microsoft Copilot and Copilot for Microsoft 365. This document is provided on an “as is” basis and to the maximum extent permitted by law Microsoft disclaims all conditions, warranties, and guarantees, express or implied, including but not limited to any warranty or guarantee that the use of the framework set out in this document will not infringe any rights or any warranty or guarantee of merchantability or fitness for a particular purpose. The document is intended to be used to supplement and inform your Microsoft Copilot and/or Copilot for Microsoft 365 adoption approach for your organization. Content specified in the document should be used as an example only. Before using components set out in this document, you should evaluate their suitability for your organization. If you choose to act upon the recommendations of the approach, then you do so at your own risk. Apart from any use permitted under the Copyright Act 1968, and the rights explicitly granted above, all rights are reserved. This document is intended for informational purposes only and does not constitute legal, compliance, or regulatory advice. It reflects Microsoft’s internal practices as of the date of publication and may not be suitable for all organizations. Microsoft makes no representations or warranties regarding the accuracy or completeness of the information contained herein.

## Copilot definition:

The terms Microsoft Copilot and Copilot for Microsoft 365 are often used interchangeably, but they refer to distinct offerings within Microsoft's AI ecosystem. Here's a clear breakdown of the differences:

### ◆ Microsoft Copilot (General)

Microsoft Copilot is the umbrella term for Microsoft's family of AI-powered assistants. It includes various Copilot experiences across different products and platforms, such as:

- **Copilot in GitHub** (for developers)
- **Copilot in Dynamics 365** (for business apps)
- **Copilot in Power Platform**
- **Copilot Studio** (for building custom copilots)
- **Copilot Chat** (web-based assistant experience)

It is designed to provide AI assistance across a wide range of Microsoft and partner services, and can be embedded in apps, accessed via web, or integrated into workflows

---

### ◆ Copilot for Microsoft 365

**Copilot for Microsoft 365** is a specific implementation of Microsoft Copilot, deeply integrated into the Microsoft 365 productivity suite. It includes:

- **In-app AI experiences** in Word, Excel, PowerPoint, Outlook, Teams, Loop, and more.
- **Contextual intelligence** powered by Microsoft Graph, which uses your organization's data (emails, meetings, files, chats) to generate personalized, relevant responses.
- **Enterprise-grade security and compliance**, inheriting Microsoft 365's permissions and policies.
- **Copilot Studio integration** for building custom agents and workflows using your own data.

It is licensed separately and requires a Microsoft 365 Copilot subscription.

# Copilot 'Adoption in a Box' Lite

# What's Inside

This document outlines the change management strategy and approach for the rollout of Microsoft AI Copilot products internally for the Microsoft Commercial and Partner Solutions organization. It is designed to help you customize and personalize content to drive localized AI Copilot adoption.

## 'Adoption in a Box'

- 1 [Change Management Strategy & Approach](#)
- 2 [Adoption in a Box Overview](#)
- 3 [Leadership Support](#)
- 4 [Influencers](#)
- 5 [Employee and Manager Engagement](#)
- 6 [Learning & Skilling](#)
- 7 [Gamification](#)
- 8 [Reporting and Feedback](#)



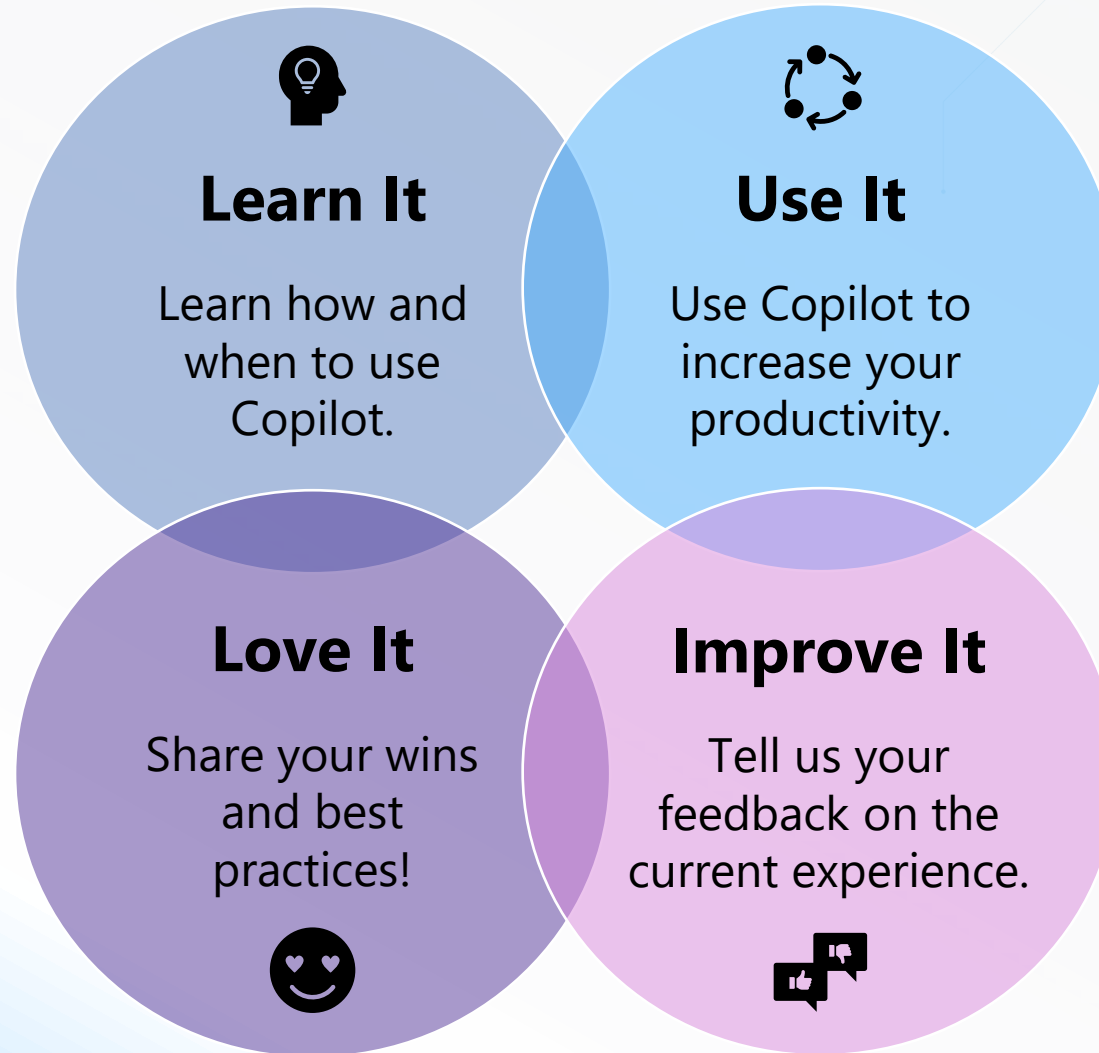



# Change Strategy & Approach

# Change Management Approach

Overall Change Strategy	Sponsor/Champion Strategy	Communications Strategy	Training/Readiness Strategy
<ul style="list-style-type: none"> <li>Overall Change Strategy: Focus on a <b>manager first approach, targeting specific user groups and Hero scenarios</b>, expanding based on lessons learned and feedback.</li> </ul>	<ul style="list-style-type: none"> <li><b>Active and visible sponsorship from leadership.</b></li> <li>Bring <b>key influencers and early adopters</b> along on the journey to build and launch the solution via the <b>AI Influencer program</b>.</li> </ul>	<p>Prepare the field using multiple modalities.</p> <ul style="list-style-type: none"> <li>Use Copilot specific channels to drive awareness and excitement around new features and capabilities.</li> <li>Use local teams to help drive comms specific to their groups and drive energy.</li> <li>Bring field AI Influencer Community along on the journey to build excitement and encourage adoption of the solution.</li> </ul>	<ul style="list-style-type: none"> <li>Training/Guidance that is <b>Hero scenario based and relevant to their day-to-day</b>.</li> <li>Prepare the field using multiple modalities and provide guidance around prompt engineering and internal tools data hygiene.</li> </ul>
Field Engagement	Resistance Management	Support strategy	Adoption & Reinforcement
<ul style="list-style-type: none"> <li><b>Field Engagement and adoption will be driven by Local v-Teams in the Areas/Regions/Business Units.</b></li> <li><b>Adoption in a Box</b> guidance and associated assets will be provided.</li> </ul>	<ul style="list-style-type: none"> <li>Proactively gather potential resistance points, <b>partnering with AI Influencers and management community to build mitigation plans.</b> (Teams Privacy, Recording Concerns, Coexistence of multiple Copilots).</li> <li>Utilize peers to show support, articulate benefits and encourage adoption.</li> </ul>	<ul style="list-style-type: none"> <li>Clear pathways for feedback vs. support.</li> <li>Product Group Monthly Meetings for new releases, roadmap and status of new requests.</li> </ul>	<ul style="list-style-type: none"> <li>Review progress against adoption metrics, track stats on field enablement activities, and adjust activities as needed to address.</li> <li>Visible recognition by senior level sponsors.</li> </ul>

# Field Engagement – User Journey





# **Module 1:**

## **Adoption in a Box Overview**



# Supporting local adoption with 'Adoption in a Box'



## Purpose

Support adoption at scale by providing a customizable package of assets to enable change management for local v-Teams across regions, areas, and business units.

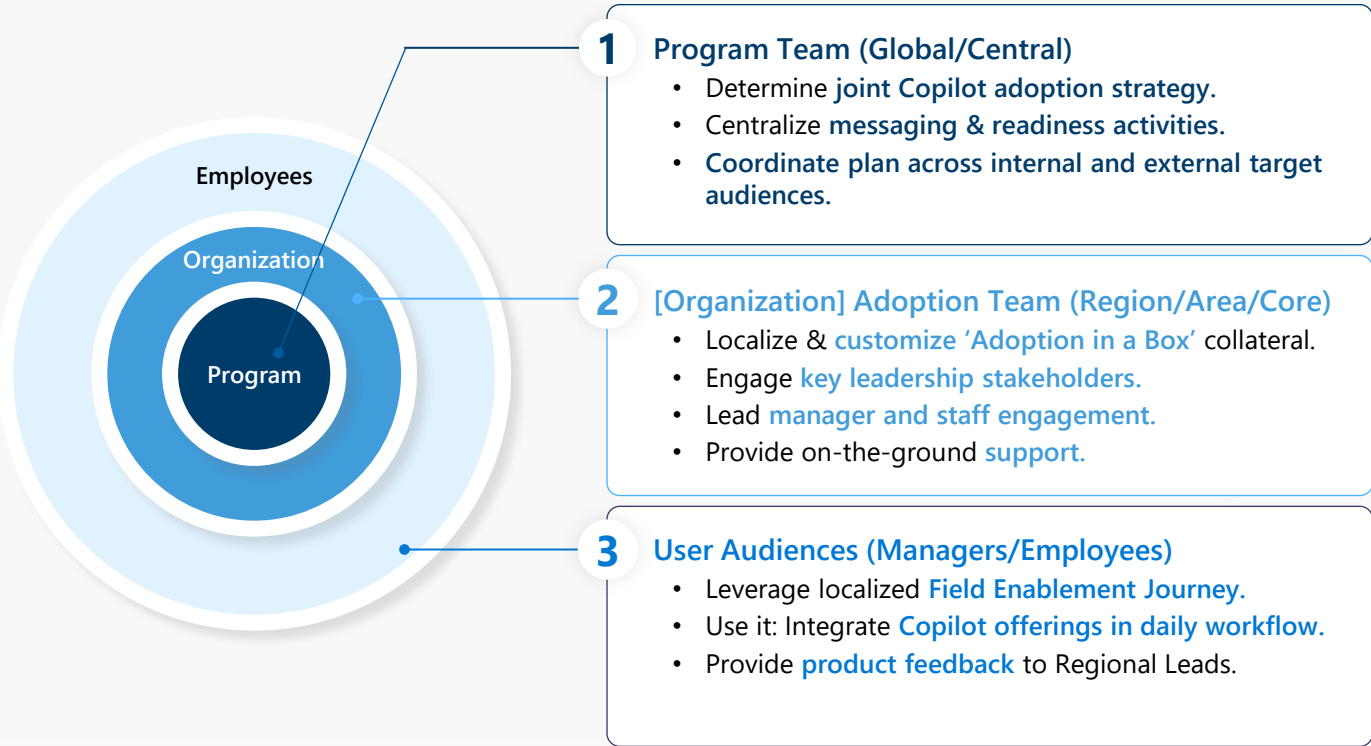
## Primary Objectives

**Develop a scalable governance model**  
to distribute accountabilities, drive adoption, and engage key stakeholders.

**Provide unified Copilot adoption plans**  
to drive clarity and better communicate product value proposition.

**Implement a flexible cross-team workflow**  
to keep materials up-to-date, identifying new use cases and scenarios, and chart best practices.

## The Hub & Spoke Operating Model



## What's in the 'Box?'

1) Build your Adoption Strategy and Comms Plan

2) Gain Leadership Alignment

3) Build your Influencer Community

4) Engage Managers and Staff

5) Skilling and Learning

6) Launch Gamification and Campaigns

7) Report Progress, Impact and Ongoing Maintenance

# Adoption Strategy R&R

1

## Core Team Activities

We will begin the adoption journey by starting with a common Core team-led training that will address product basics and common use cases and provide a central set of materials for use in the creation of local adoption plans.

2

## Local Landing Initiatives/Focus

After the baseline training, we'll allow our local landing v-Teams to create their adoption plans that are tailored to their business.

## Core Team Activities

- Copilot functionality basic training
- Ideal Setup Scenario(s)
- Common use cases and Hero Scenarios
- Adoption Best Practices
- Round Tables/Listening Circles
- AI Influencer Reward Distribution
- Adoption Metric Reporting and Tracking
- Adoption v-Team Office Hours
- Adoption status meetings and plan support

## Local Landing Initiatives/Focus

- Build a customized adoption plan to meet the needs of your business.
- Engagement activity selection and execution.
- Build an engaging AI Influencer community to help drive adoption.
- Feedback Mechanisms: Identify new Copilot use cases via Mini-Hacks, Feedback 360 Submissions, Product feedback.
- AI Influencer Activity Assessment
- AI Influencer Reward and Progress Reporting
- Survey Email requests and response encouragement

# What is your role in landing Copilot?


*Local Copilot Adoption Lead will need to form their adoption v-Team to drive Copilot adoption. The following is an example v-Team structure which can be leveraged and updated.*

## Local Copilot Adoption Team

### Adoption Leads / Regional Transformation Leads (RTLs)

Leads local adoption v-Team to create a local Change Management plan and landing plan for Microsoft Copilots and empowering area leaders to be active sponsors of Microsoft Copilots.

Skilling/Capability Lead	Learning Lead	Business Program Managers	Landing & Change Managers/Sales Excellence	Area Leads	Regional and Area Comms Leads	Time Zone Project Managers
Engages with field leaders at the executive and manager levels to develop the area's Copilot skilling plan reflecting prioritized employee persona scenarios and product capabilities.	Leads the local realization of the Copilot strategy amongst managers and employees encouraging adoption of best-practices such as Learning Days. Advocate for a culture of learning across Customers, partners and Microsoft leaders.	Drive the adoption velocity of Microsoft Customer Zero prioritized early adopter experiences through localized change plans, user engagement, communication, training, and KPI measurement.	Accelerate the adoption of Copilots through the validation of highest value user scenarios and amplification of messaging across their respective communities.	Actively participate in Copilot local v-Team: Raise readiness needs with program owners to enable new habits, Integrate Copilot message and analytics into local RoB, where appropriate.	Lead the creation of the local comms plan, draft and send comms for the execs and adoption effort, as well as inform on local comms channels the global program team can leverage.	Project management around local landing efforts and coordination of Local Core Change Team and Field v-Teams. Provide status updates to the global team as part of the ROB process.



# **Module 2: Leadership Support**

# M2 | Goals, Objectives and Pro Tips!

The goal of Module 2 is to create awareness and gain Leadership support of your local Copilot adoption strategy.  
**Leadership support and visibility is key to a successful adoption plan and a key indicator of success.**



## Share

- Share the MCAPS Copilot adoption scope and key expected outcomes.
- Present your strategic approach to key change management areas.
- Communicate specific asks to your leadership team.



## Support

- Gain visible leadership support for the plan and activities.



## Improve

- Collect valuable feedback to improve Copilot and identify business challenges.
- Act as a liaison for resource and support needs.

### Pro Tips



#### Engage Leaders

Create an AI leadership team competition or challenge.



#### Sponsor Activities

Get a leader to sponsor and join your events.



#### Showcase Usage

Ask a leader to make a video showing how they use Copilot.



#### Set Metrics

Set goals for leader support, like 100% endorsement and 80% attendance at kickoff sessions.



# Request of Leadership



## **Sign Off**

Approve local 'Adoption in a Box' support, allocate resources, and remove barriers for adoption.

## **Assist Leads**

Help AI Copilot Adoption Leads with communications to boost participation and adoption.

## **Share Messages**

Distribute AI Copilot program messages to Managers and employees to raise awareness.

## **Ensure Accountability**

Send leadership communications to Managers to ensure accountability.

## **Evangelize**

Promote key leadership team messages across existing channels like RoB, forums, newsletters, and more.

## **Champion Use Cases**

Actively support and sponsor AI Copilot use cases and examples.

## **Lead by Example**

Demonstrate how you use Copilot in your work and participate in local activities and contests.

# Key Leadership Messages

As early adopters, we gain valuable experience with this technology, enabling us to guide our customers and partners in their AI transformation. We also have a responsibility to provide feedback to the engineering teams to help advance the technology.



## We are leaders in this AI journey

We have the opportunity to lead customers in developing generative AI solutions that align with meaningful business outcomes.

---



## We are building trust

We build trust with customers by demonstrating a 'do as we do' mindset and showcasing our own AI experiences to drive productivity.

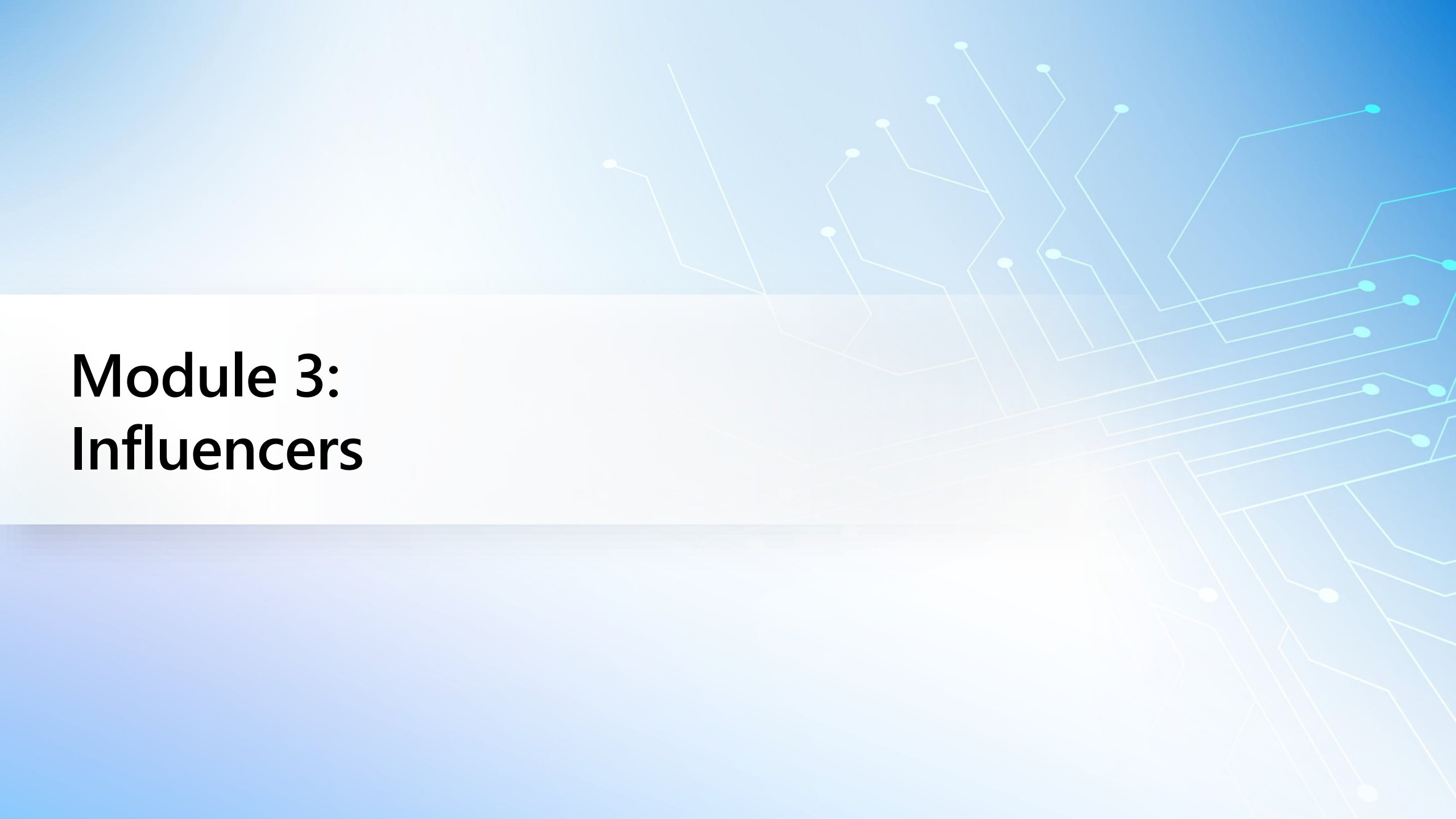
---



## We are learning and leveraging for impact

By leveraging AI we can be even more effective and efficient as an organization.

# **Module 3: Influencers**

The background of the slide features a light blue gradient. Overlaid on this are several thin, white, angular lines that resemble circuit traces or a network diagram. These lines are scattered across the right side of the image, with some ending in small, solid blue dots. The overall aesthetic is clean, modern, and tech-oriented.

# M3 | Goals, Objectives and Pro Tips!

Goal: Create an Influencer community to bridge the gap between peers and leadership and drive Copilot adoption.



## Engage and Excite!

Cultivate excitement and interest for Copilot adoption. Demonstrate Copilot's application in day-to-day work across teams.



## Amplify

Enhance strategic communication and key messages. Develop a strong sphere of influence within communities to further promote Copilot.



## Improve

Offer valuable feedback to the core CM team. Identify business challenges and propose solutions through Copilot integration. Act as a liaison for resource and support needs.

### Pro Tips



#### Get Creative!

Create a custom video to promote the AI Influencer community.



#### Deadlines/Follow up

Include specific dates, follow-ups, and reminders to gain traction for AI Influencer volunteers and nominations.



#### Flexible Scheduling

Offer multiple options for the kick-off session to accommodate various schedules and time zones.

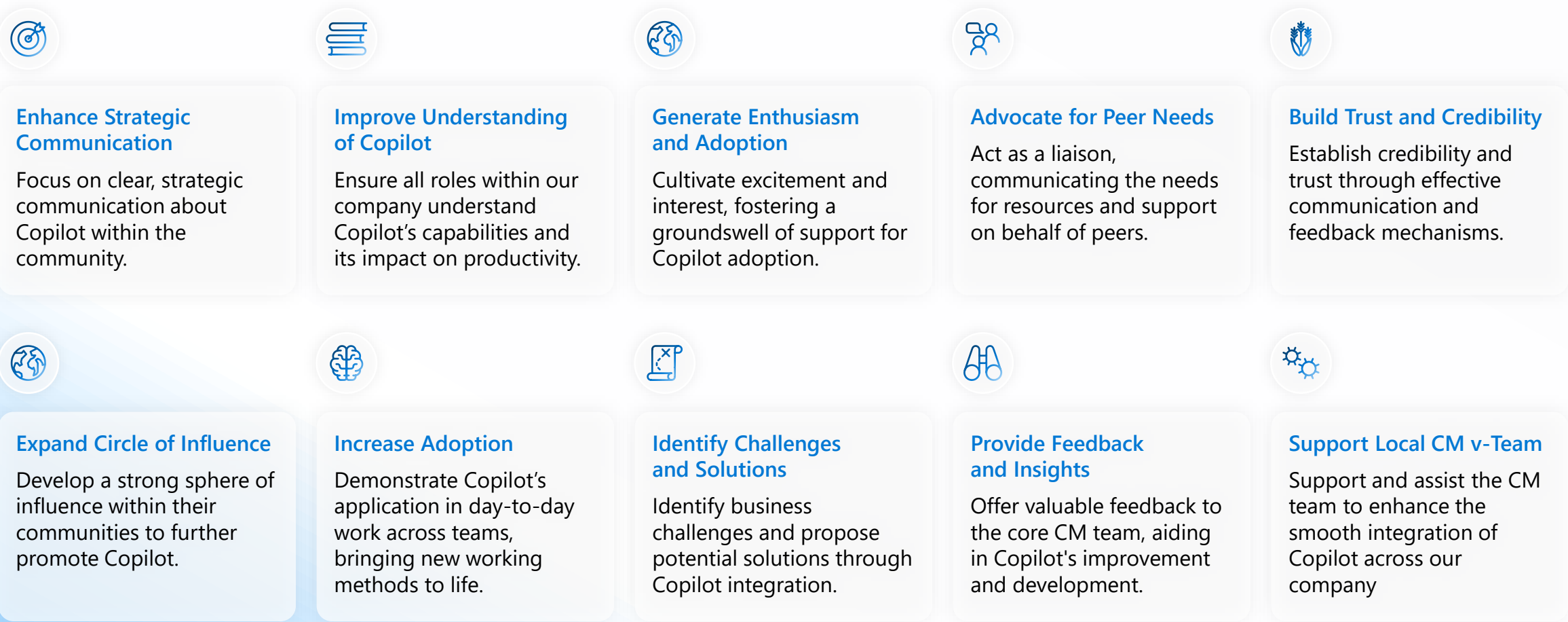


#### Diverse Champions

Aim for a diverse set of champions, 1-2 per department or location.

# Unlocking the Role of AI Influencer: A Network's Purpose

The AI Influencer Community is a dedicated group of employees who play a key role in driving Copilot adoption. They bridge the gap between peers and leadership, reduce resistance to AI, and encourage new ways of working. These Influencers are passionate about their work and support their colleagues in using Copilot effectively.





## Criteria for selecting an AI Influencer

### Willingness

- Eager to participate and promote change through the champion network.

### Credibility

- Respected and influential within the organization.

### Knowledgeable

- Familiar with the inner workings of the organization and change processes.

### Attributes

- Effective communication skills, empathy, and problem-solving abilities.

## Who can be an AI Influencer

### Individuals in the Target Audience

- Individuals directly affected by Copilot, serving as primary advocates and offering crucial support.

### People Managers

- Key figures leading teams to adjust workflows, conveying the personalized impact of adoption, and influencing team attitudes.

### Leaders/Sponsors

- Communicate business motivations, lend support, and endorse Copilot adoption, significantly impacting employee perception and acceptance.

# What does it mean to be an AI Influencer?

## What do I give?

- **Be a Game-Changer** – Play a big part in getting everyone on board with Copilot and making our organization thrive.
- **Get in the Mix** – Jump into the action, stir up some excitement, and keep our community vibes positive.
- **Be the Advocate** – Speak up for Copilot, tackle any doubts in your team, and be the voice for what matters.
- **Team Player** – Be the cheerleader for smarter ways of working.
- **Be an Influencer** – Build your influence in the team, help folks understand and get on board.
- **Think Outside the Box** – Bring fresh ideas to the table and help us tackle challenges in new ways.
- **Lead the Charge** – Show how it's done, share your thoughts, and help shape the way we talk about change.

## What do I get?

- **Stand Out** – Gain recognition as a standout contributor in our organization.
- **Spotlight Moments** – Get featured in newsletters and posts, showcasing your achievements.
- **Share Your Expertise** – Showcase your skills and contribute to the development of the team.
- **Network Expansion** – Network, learn, and connect with peers globally and across diverse roles, gaining unique insights.
- **Visibility Boost** – Seize opportunities to increase your visibility and make impactful contributions.
- **Rewards** – Unlock rewards as a token of appreciation for your dedication, enthusiasm, and impactful engagement in driving Copilot adoption.

# Step-by-Step Influencer Action Guide

Pre-Launch Planning					Launch	Post Launch	
		Week 1	Week 2	Week 3	Week 4	Day 1 – 30	+30 Days
Local AI Influencer Program	Milestones	<ul style="list-style-type: none"><li>Attend Adoption in a Box Kickoff Meeting.</li><li>Review AI Influencer Guide.</li><li>Start updating/ customizing AI Influencer Kickoff &amp; Overview deck.</li></ul>	<ul style="list-style-type: none"><li>Attend Bi-weekly Central x Regional Adoption Sync Session.</li><li>Build local AI Influencer community.</li></ul>	<ul style="list-style-type: none"><li>Schedule AI Influencer Kickoff Meetings.</li></ul>	<ul style="list-style-type: none"><li>Attend Bi-weekly Central x Regional Adoption Sync Session.</li></ul>	<ul style="list-style-type: none"><li>Host AI Influencer Kickoff Meetings.</li><li>Copilot Engagement Activities powered by AI Influencer.</li></ul>	<ul style="list-style-type: none"><li>Attend Monthly Regional Adoption Lead Check-ins.</li><li>Schedule monthly AI Influencer Check-ins.</li></ul>
Local AI Influencer Lead	Activities	<ul style="list-style-type: none"><li>Start updating/ customizing AI Influencer Kickoff &amp; Overview deck.</li><li>Build Copilot AI Influencer HUB- Viva Engage Channel/ SharePoint Corner [T-30].</li><li>Establish owners for activities &amp; communications.</li><li>Establish the strategy for identifying AI Influencers.</li><li>Set up the local forms for collecting the names for AI Influencer.</li><li>Begin drafting plan for AI Influencer engagement activities.</li><li>Integrate approach for Gamification in tandem.</li></ul>	<ul style="list-style-type: none"><li>Customize local AI Influencers timeline according to adoption strategy.</li><li>Start implementing the strategy for identifying AI Influencer and send out the communications.</li><li>Set up the upcoming workshops for AI Influencer Kick Off.</li><li>Check for progress on identifying the AI Influencer count and establish additional actions if needed.</li></ul>	<ul style="list-style-type: none"><li>Establish a rhythm of communication with the AI Influencer community to address questions or guidelines (Office Hours, Teams channel, etc.).</li><li>Send the invitations for the Kickoff Meeting and Skilling and Learning workshops.</li><li>Finalize engagement activities and due dates for the AI Influencer.</li><li>Check for progress on identifying the AI Influencer count.</li><li>Get onboard local LT for reinforcement.</li></ul>	<ul style="list-style-type: none"><li>Send out Influencer Kickoff Email.</li><li>Refine engagement activities process .</li><li>Customize rewards and recognition process.</li><li>Customize recognition elements for AI Influencer engagement.</li><li>Check for progress on identifying the AI Influencer count.</li></ul>	<ul style="list-style-type: none"><li>Influencers initiate select engagement activities, Gamification, etc.</li><li>Monitor Influencer channels, Q&amp;A support, launch misc. feedback mechanisms.</li><li>Report adoption metric progress.</li><li>Adapt AI Influencer strategy or approach based on any feedback received.</li></ul>	<ul style="list-style-type: none"><li>Generate team report(s) to gauge adoption progress.</li><li>Program/Local AI Lead to assess low-trending teams and engage to address resistance areas (double click by role, feature, etc.).</li><li>Recognize and celebrate the contributions of Influencer impact through shout-outs, badges, or awards.</li><li>Gather lessons learned or insights and share them with Core Adoption Team.</li></ul>



# **Module 4:** **Employee and Manager Engagement**

# M4 | Goals, Objectives and Pro Tips!

The goals of Module 4 are to enable you to customize the Field Enablement experience for Managers and Employees in your regions/areas.



## Engage

Prepare your managers to lead the way on Copilot adoption. Provide a variety of activities across the Learn It, Use It, Love it user journey phases to get people excited about using Copilot!



## Empower

Amplify curated resources that will empower and enable your people to use Copilot.



## Listen

Establish a robust feedback loop that encourages users to share their experiences, suggestions, and concerns regarding Copilot.

## Pro Tips



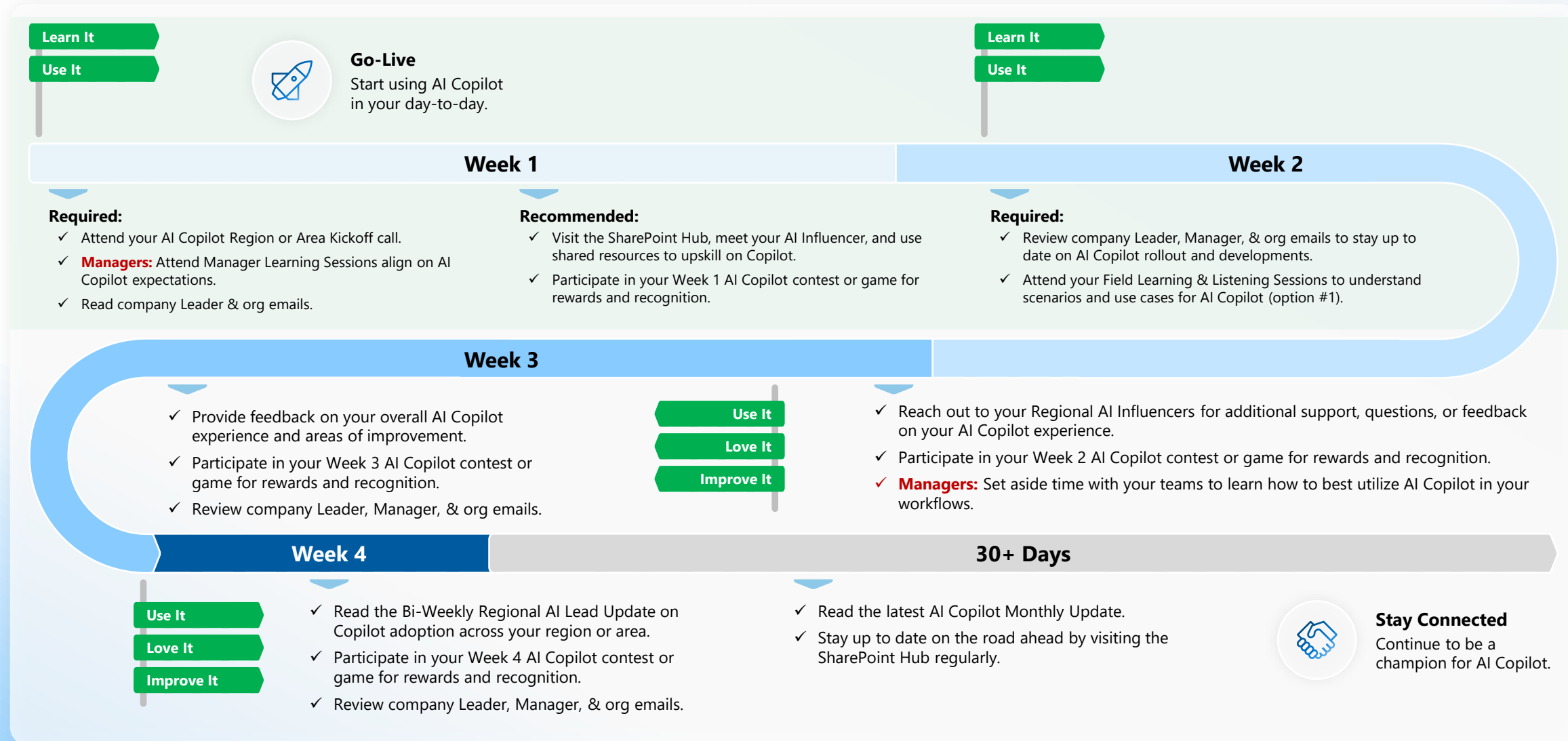
## Feedback

Establish a robust feedback loop that encourages users to share their experiences, suggestions, and concerns regarding Copilot.



# Field Enablement Journey Map

**\* NOTE:** Events and timelines need to be adjusted based on AI Copilot timeline and decisions.



# Learn it, Use it, Love it

## Learn it

Arm the employee with the knowledge of how. Give our employees the information they need to learn how to use Copilot.

### Power Sessions

Workshops to demonstrate Copilot's functionalities, offering hands-on experience to users within their teams.

### Q&A and Support Sessions

Host sessions where users can ask about Copilot, receiving immediate support and guidance from the AI Influencers.

### Curated Content, User Guides/Resources

Create role-based Copilot guides and a central hub with scenarios, tips, and resources to boost user success.

### Viva Engage/Teams Channels Advocacy

Use comms channels to build Copilot buzz—share tips, wins, and updates to spark community interest.

### Peer-to-Peer Mentoring

Pair up experienced Copilot users (AI Influencers) with others to mentor their peers in using Copilot effectively.

### Learning Days

Utilize the existing framework of Learning Days to promote and encourage the exploration and discovery of Copilot's capabilities and benefits.

## Use it

Give the Employees opportunities to practice and use Copilot in a way that is meaningful to them. Using Hero Scenarios that are specific to their role and persona, give employees a chance to practice their newfound knowledge.

### Power Sessions

Workshops to demonstrate Copilot's functionalities, offering hands-on experience to users within their communities.

### Gamification and challenges

Implement fun challenges or gamified activities related to Copilot usage, encouraging engagement and rewarding active participation.

### Peer-to-Peer Mentoring

Pair up experienced Copilot users (AI Influencers) with others to mentor, guide, and support their peers in using Copilot effectively.

### Viva Engage/Teams Channels Advocacy

Use comms vehicles to advocate for Copilot, sharing tips, success stories, and updates to create buzz and interest within their communities.

## Love it

Give opportunities to share those success stories and ways that Copilot is changing how they work! Provide Platforms for employees to share their best practices, the success they are having with Copilot and how they are using their experience to generate excitement across their team and with their customers and friends!

### Day in the Life Videos

Post Videos of how our people, managers and leaders are using Copilot in their day-to-day work.

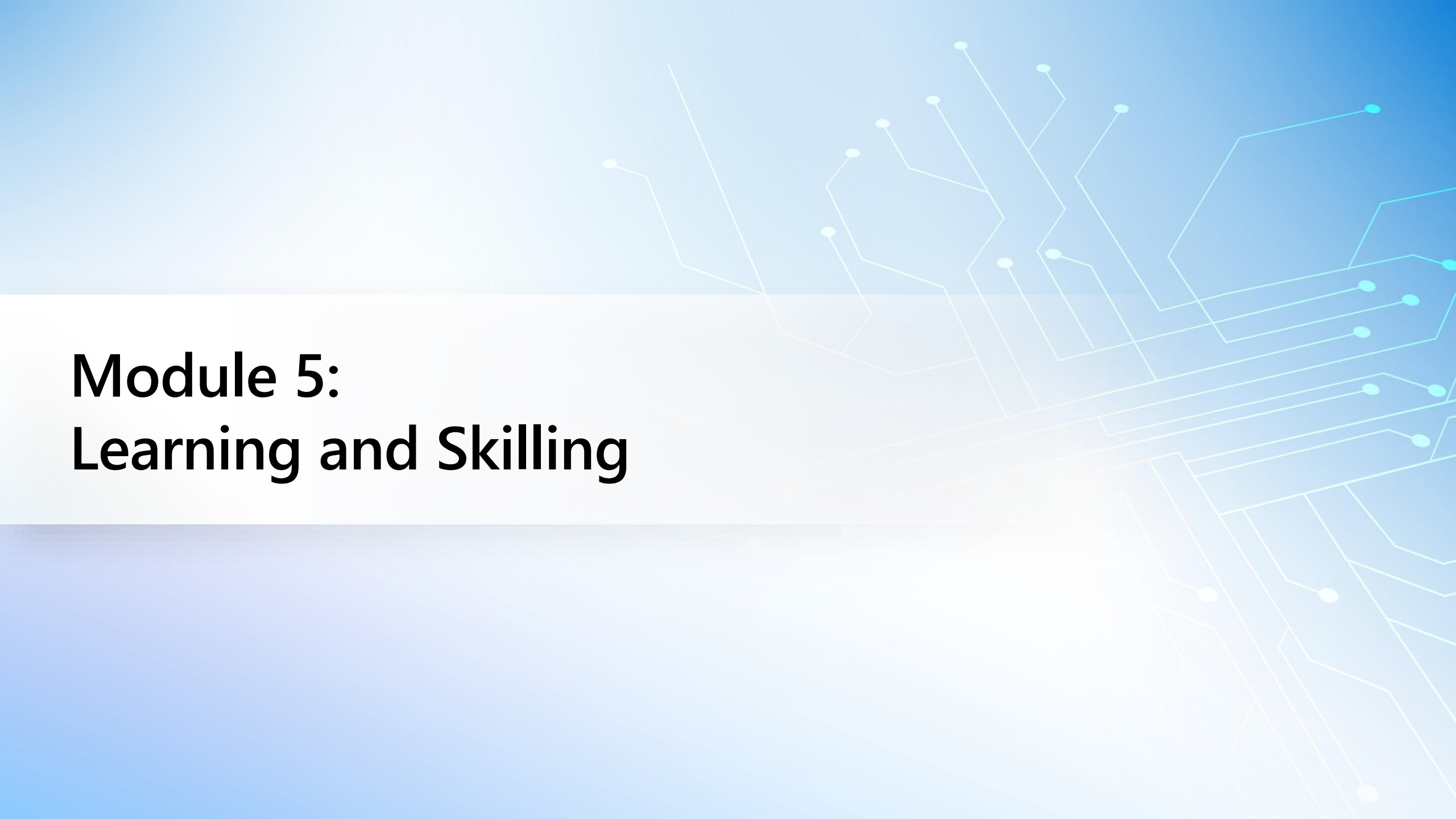
### Spotlight Sessions

Share success stories and real-life case studies showcasing how Copilot has positively impacted similar roles or tasks within the organization.

### Viva Engage/Teams Channels Advocacy

Use comms vehicles to advocate for Copilot, sharing tips, success stories, and updates to create buzz and interest within their communities.

*These examples serve as a guide. The local adoption v-team can choose and incorporate activities that best align with their specific needs and goals. The aim is to provide a framework, allowing customization to suit the unique requirements of local communities. Approved for external use*



# **Module 5: Learning and Skilling**

# M5 | Goals, Objectives and Pro Tips!

Module 5 aims to enhance team knowledge and skills with Microsoft AI Copilot products.



## Elevate

We highlight the best content to keep you on the cutting edge!



## Empower

Customize learning plans to meet employees where they are in their journey.



## Listen

New content is built based on your feedback and needs!

### Pro Tips



#### Tailored Content

Content aligned to flow of work is key to gain understanding and increase usage.



#### Educate

Prompt education is the foundation to success with Copilot.



#### Interactive Learning

Make learning interactive! People want to know what others are doing and like to learn from their peers.



#### Curate

Curate content to help employees focus on what's important.

# Roadmap for success

1

## Learn It



**Establish a structured learning framework** to support both Managers and Individual Contributors by integrating a centralized asset repository with multiple training modalities – Live Events, Virtual Instructor-Led Training (VILT), and Online Training.

For Managers, this framework offers tools to **guide team development** and reinforce adoption strategies. For ICs, it provides accessible, job-relevant content to **build confidence and capability**. The repository serves as the foundation, supplying curated content that fuels all learning experiences.

2

## Use It



Encourage both Managers and ICs to **embed Copilot into their daily routines**. For Managers, Copilot can streamline team operations, reduce administrative overhead, and support strategic planning. For ICs, it simplifies repetitive tasks, enables more time for creativity, collaboration, and client engagement.

Support adoption with a SharePoint-hosted repository of **bite-sized resources** – such as case studies, video demos, and job aids – designed to meet the unique needs of both roles.

3

## Improve It



Create a **feedback loop** that empowers both Managers and ICs to shape the Copilot experience. **Managers** can surface team-wide insights and recurring challenges, while **ICs** can provide direct, task-level feedback.

Collect input through **thumbs up/down** on Copilot outputs, VILT sessions, and training surveys. Close the loop by communicating how feedback has led to issue resolution, backlog updates, or new feature releases.



# Function-Based Immersion

- Scenario-based content specific to each function, includes:
  - Video demos
  - Suggested prompts
  - Examples of how peers are using Copilot in their daily routine
- This approach ensures that Copilot is relevant and valuable to every team member.

**Customer Planning**

AI TRANSFORMATION - PRODUCTIVITY GAINS CASE STUDY

INTERNAL ONLY

[Productivity Gains Overview](#)

[Account Planning with Copilot](#)

[Case Study - Customer Planning](#)

Thomas Endersley, Manufacturing AI, Microsoft Belgium decreased Account Planning time by **68%** with Copilot

**The goal**  
Streamline effort to identify opportunities  
Account Planning is a critical part of customer planning, ensuring that the account team has a comprehensive view of the customer's business and a clear plan for how Microsoft can help them achieve the desired business outcomes.  
There are numerous data sources that the Account Executive must look at and analyze to put together an effective account plan. Without the capabilities of Copilot, account planning requires extensive time to identify new priorities and opportunities, time that could be spent building pipeline instead.

**The solution**  
Copilot assistance through products and agents  
By utilizing Copilot across products and for several key activities, Thomas was able to ensure that the account plan reflected the right strategy for the team to pursue, in a fraction of the time it would normally take.

**The results**  
**68%** productivity gain through account planning with Copilot.  
**17 hours** Time saved across each account – time that will be used for pipeline creation.

**Account Planning**

Evaluate customer priorities and drive quality account planning

With Copilot in MSX, you can quickly access valuable data to evaluate your pipeline and inform your account planning. Drive the quality of your account plans as you identify areas that need attention, identify gaps to discuss with the account team, and find areas to focus on with your customer.

Watch demos

Create a quality account plan:

- **Get started with account planning** by understanding your account plan health and evaluating opportunities that are not tied to customer priorities
- **Gather market insights** to understand the customer's industry, including trends, opportunities, and regulatory influences
- **Research account strategies** by evaluating your customer's MACC commitment and identifying how to focus the efforts of your account team
- **Get account details** to understand your customer's ACR growth, recommendations for expansion, key executive movements at your customer, and more

Further prompts to try

- Get the account plan health details for <Account >
- What are the top priorities for <Account >?
- Show my Opportunities without customer priorities
- Add <Email Contact> to deal team
- Who is the <Solution Area> Specialist for <Oppty ID>?
- Show me financial insights for <Account>
- What is <Account> MACC commitment?
- Show me ACR
- ACR for <TPID/customer> by servicelevel2

**Digital Selling with Copilot**

Welcome | LinkedIn customer engagement | Sales Chat | Sales Agent for Lead Intelligence | Build your own Agent

Opportunity excellence | Master customer communications | Make meetings matter | Next steps & resources

Manager's Forum

Welcome to your Digital Sales with Copilot learning platform

Providing the latest guidance on using Copilot to drive your digital sales workflow. As new Copilot capabilities are released, new learning modules including demos and step-by-step instructions will be added.

Top users of Copilot achieve 9.4% higher revenue. Interested in more pipeline, faster close rates and higher revenue? Find out how Copilot can make it happen.

VIEW

External Link: AI is Already Changing Work - Microsoft Included MSFT Business benefits of Copilot

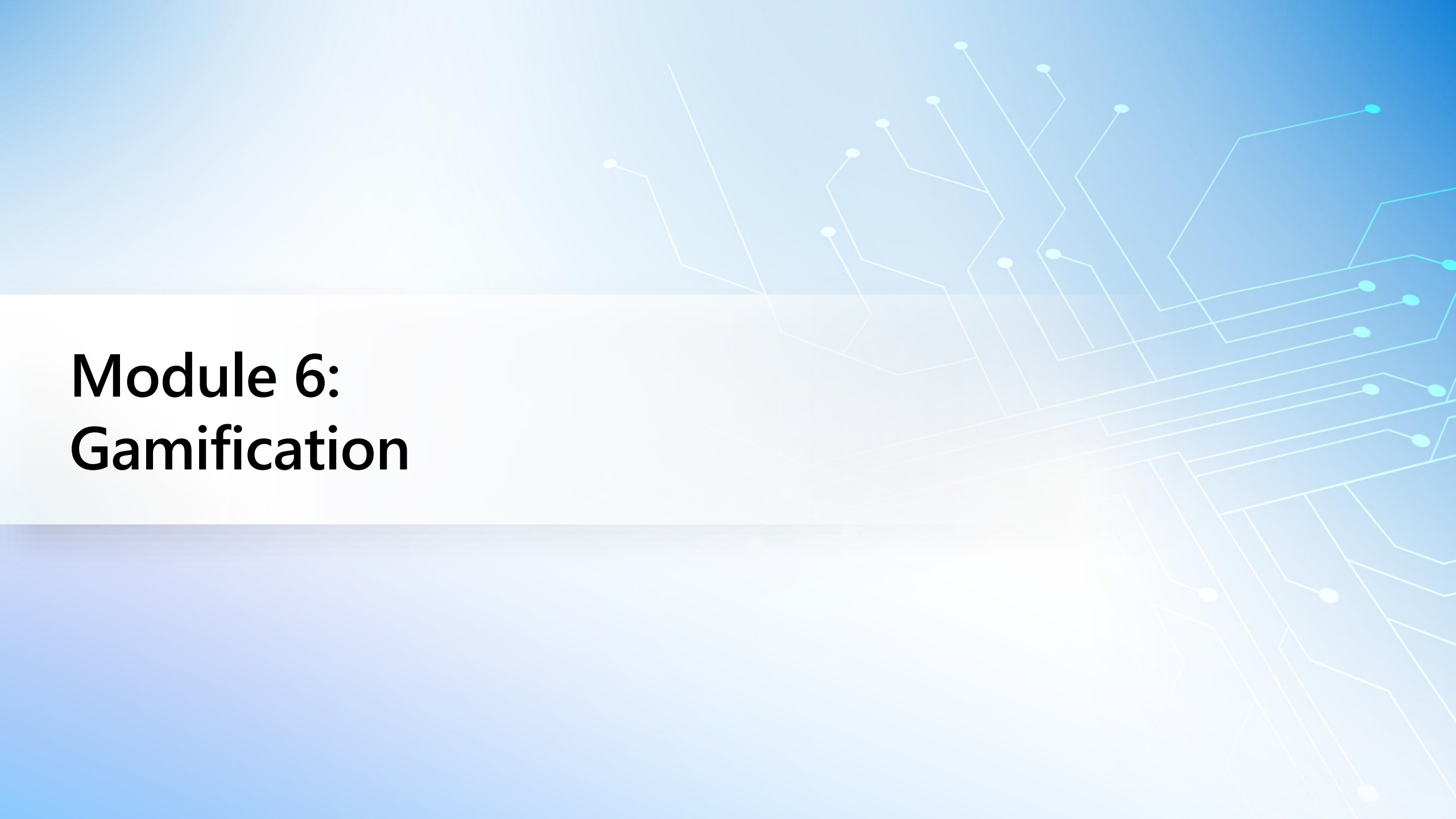
What's in it for me? Build your Copilot expertise, knowledge and credibility to help our customers on their AI Transformation journey.

Earning badges for each sales scenario. Learn more about the course and how you earn badges for completion. Time commitment ~ 10.

Document: Build your Digital Seller's

POLL: Personal Assessment. How often do you use Copilot?

# **Module 6: Gamification**



# M6 | Goals, Objectives and Pro Tips!

The goals of Module 6 are to enable and engage your people in a fun and non-intimidating way through games, contests and friendly competition!



## Have Fun

Utilize gamification to introduce fun as a way to get people to try something new in a safe and non-threatening environment.



## Engage

Getting people to try Copilot via games or contests will allow them to engage not only with the product, but each other for knowledge and support.



## Reward

Whether it's bragging rights, leader recognition, a small gift or SWAG, reward your people for engaging and trying something new with Copilot!

### Pro Tips



### Gamification

Drive exciting Gamification activities like scavenger hunts, leaderboards, and hacks to drive engagement.



### Communications

Utilize follow-up and reminder comms for active participation.



### Awards

Entice employees through prestigious awards and recognition opportunities.



### Voluntary

Keep it optional and voluntary! Use it to boost enthusiasm, not create a naughty list.



### Low Stakes

Keep it friendly and low-stakes-the aim is learning, not stress!

# Why use Gamification



## What is needed to make Game-style learning successful?

- Facilitator committed to engaging all participants.
- Careful integration of the training objectives.
- Ensuring learners have adequate prior knowledge.
- Explaining to participants how the game will help them learn.
- Adequate time spent on crystal clear instructions.



## What are some common type of learning games?

Scavenger Hunt	Quiz games
Mysteries	Speed Challenges
Jeopardy	Model Building
Role-play	Simulations

## Why Game-style learning?



Encourages active engagement through peer-to-peer interaction participation.



Provides a natural setting for practice, feedback, and reflection loops.



Creates a platform for collaboration.



Increases retention and application of learning.



## How does it help?

Increases alertness and attention.

Practice-feedback loops turn misconceptions into clear understandings.

Collaboration gets people talking about what they learn.

Retention and application help people see the benefits of training.

## What is the benefit?

Alertness and attention increase the ability to understand.

Decreases incorrect understanding of the content.

On-topic discussion helps people apply what they learned on the job.

Improves the perceived and actual results of training.

# Local Copilot Gamification Strategy

Guiding Principles: Games and competitions should be built with the following in mind to promote visibility and sharing.

Proposed Gamification Tactics					
Current Quarter					Future State
Completed	Week 1	Week 2	Week 3	Week 4	H2+
<div><b>Kick-off Training</b><ul style="list-style-type: none"><li>Collaborative learning</li><li>Share best practices &amp; ideas</li><li>Grand prize <i>[insert date]</i></li></ul></div> <div><b>Kickoff Copilot Challenge:</b><ul style="list-style-type: none"><li>Write your Sales Copilot story</li><li>Share Stories on MS Teams</li><li>Due Friday <i>[insert time/date]</i></li></ul></div> <div><b>Grand Hunt – Best Practices:</b><ul style="list-style-type: none"><li>Unified team participation</li><li>Min. 2+ posts per seller</li><li>Due Friday <i>[insert time/date]</i></li></ul></div>	<div><b><i>[Local Site]</i> Scavenger Hunt</b><p>Refresh employees on Copilot capabilities with targeted actions pushing them to explore key features aligned to Hero Scenarios.</p><p><i>Highlight Sales Copilot capabilities/features aligned to Hero Scenarios.</i></p><ul style="list-style-type: none"><li><i>Spread awareness</i></li><li><i>Provide sellers with light first-hand education on how to unlock use cases in their workflow.</i></li></ul></div>	<div><b>Copilot Best Practice Hack</b><p>Using 3 Hack Categories, teams will submit their best of the best entry for each category.</p><ul style="list-style-type: none"><li><i>Encourage light competition and community engagement.</i></li><li><i>Leverage Change Influencers to generate excitement.</i></li><li><i>Get people talking about how Sales Copilot can simplify their sales process and workflow.</i></li><li><i>Generate future feature ideas.</i></li></ul></div>	<div><b>Manager Adoption Leaderboard</b><p>No Employee left behind! Drive activity to 100% team adoption! Make people invested in Sales Copilot evangelism and success.</p><ul style="list-style-type: none"><li><i>Spur healthy competition with a chance to win prizes for the teams that reach 100% adoption.</i></li><li><i>Build excitement for the New Year and the next round of capabilities.</i></li></ul></div>	<div><b>Copilot Prompt Trivia</b><p>Prompting is key to Copilot, and we'll send out daily questions/activities this week to keep the momentum going!</p><ul style="list-style-type: none"><li><i>Keep Sales Copilot top of mind for sellers during the workday.</i></li><li><i>Progressively build engagement using repetition and recency bias.</i></li><li><i>Provide low stakes way for sellers – even those not using Sales Copilot – to stay connected on product capabilities and internal announcements.</i></li></ul></div>	<ul style="list-style-type: none"><li>Track adoption metrics Dashboard (MAU, WAU, &amp; DAU) to inform gamification strategy.</li><li>Curate gamification best practices into “Adoption in a Box” playbook.</li></ul>
<div><div><div><div></div><div>Enhances Motivation</div></div><div>Builds on the intrinsic motivation that the sellers already have by adding competition and rewards.</div></div><div><div></div><div>Build Confidence</div></div><div>Allows sellers to be proud of the work they are doing and highlights their accomplishments.</div></div> <div><div></div><div>Boosts Persistence</div></div> <div>Encourages and drives continuous activity and engagement from the seller community.</div> <div><div></div><div>Short Term Boost <i>(use with caution)</i></div></div> <div>Generates excitement and usage in the short term when paired with long-term Change Influencer networks and adoption plan.</div>					

# Contest: Copilot for M365 Bingo

## Bingo anyone?

Try some scenarios and cover your card!

**Bingo for the win!** This week we want you to get in there and try key scenarios for a chance to win a cool prize.

Draft an email in Outlook	Summarize a document in Word	Highlight data in Excel	Add a slide in PowerPoint
Generate ideas in Whiteboard	Brainstorm strategies in Loop	Create a project plan in OneNote	Find action items for a meeting in Teams
Write a query in Copilot for Microsoft 365	Get a schedule in Teams	Create a presentation in PowerPoint	Rewrite text in Word

## How to Play

- Individuals try a scenario on the card **<download location>** to cover a spot and those that finish a row earn a chance to win a cool prize!
- Cover your card and earn 5 chances!
- Submit a picture of your card via **<a form>**.
- Bonus entry if YOU are in the picture!!

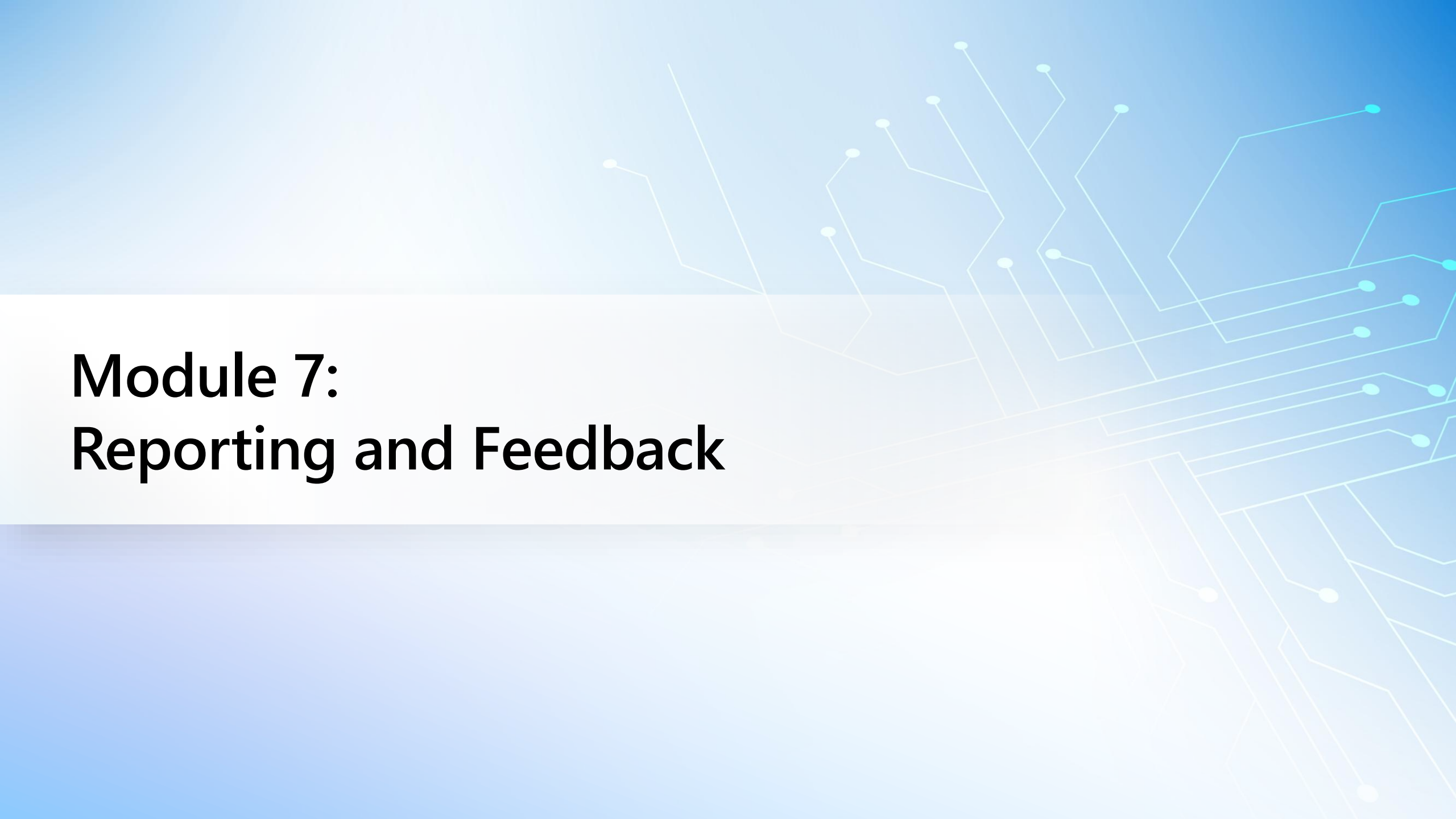
## Administration

- Challenge posted on **XX Date** with entries due by **XX Date**.
- Provide a card to download.
- Individuals submit their completed card via **this form**.
- 1 entry for a Row/5 Entries for full cards/Bonus entry for being in the picture.
- Random selection from submissions for a prize.
- Total Prizes = **<Prize Number>**



# Gamification Administration Guidelines

- 1 Review [rule guidelines and instructions](#) to understand compliance guidelines before initiating games.
- 2 Identify the **Gamification Lead for your Local v-team** (this may be the same person as the AI Influencer Lead or an influential community member) and ensure alignment with planned Influencer strategy.
- 3 **You know your audience best.** Tailor gamification elements to suit your community's preferences, interests, and motivations. Consider what communication style and messaging is best depending on the demographics of your organization, roles and individual preferences to make the gamified experience relevant and appealing. See sample Comms samples in Facilitation Collateral section.
- 4 **Align your Gamification timeline to overall adoption strategy** and determine the cadence/frequency for posting challenges. Consistency is key while ensuring your audience time to review and complete the tasks.
- 5 **Observe and assess participant engagement** and adapt your approach accordingly.
- 6 **Review the Gamification Overview** and begin to use guidance, templates, and samples to drive adoption in your Region/Area.
- 7 ***Reminder:*** Please stay connected with Global Adoption team to make sure you have the latest field engagement, AI Influencer, and gamification guidance.



# **Module 7: Reporting and Feedback**

# M7 | Goals, Objectives and Pro Tips!

The goals of Module 7 are to enable you to effectively measure the adoption of Copilot across your organization, identify areas of resistance and potential reinforcement needs, and capture targeted feedback for continuous product improvement.



## Measure and Communicate

- Utilize analytics tools to track/report on Copilot usage statistics.
- Schedule and execute periodic assessments to evaluate user satisfaction and resistance levels.
- Analyze feedback trends to identify common themes and areas for product refinement.



## Reinforce

- Utilize survey results and focus groups to pinpoint resistance areas, whether due to technical challenges, lack of awareness, or workflow integration issues.
- Develop and deploy reinforcement strategies to address identified resistance areas to promote broader Copilot adoption.



## Listen and Improve

- Establish a robust feedback loop that encourages users to share their experiences, suggestions, and concerns regarding Copilot.
- Utilize feedback to inform the product development team, enabling data-driven enhancements and feature additions.

### Pro Tips



#### Measure

You can't manage what you don't measure!



#### Engagement

Look at DAU, WAU, and MAU to tell the adoption evolution.



#### Surveys

Promote survey participation early & often to gain insights on the most effective adoption activities.



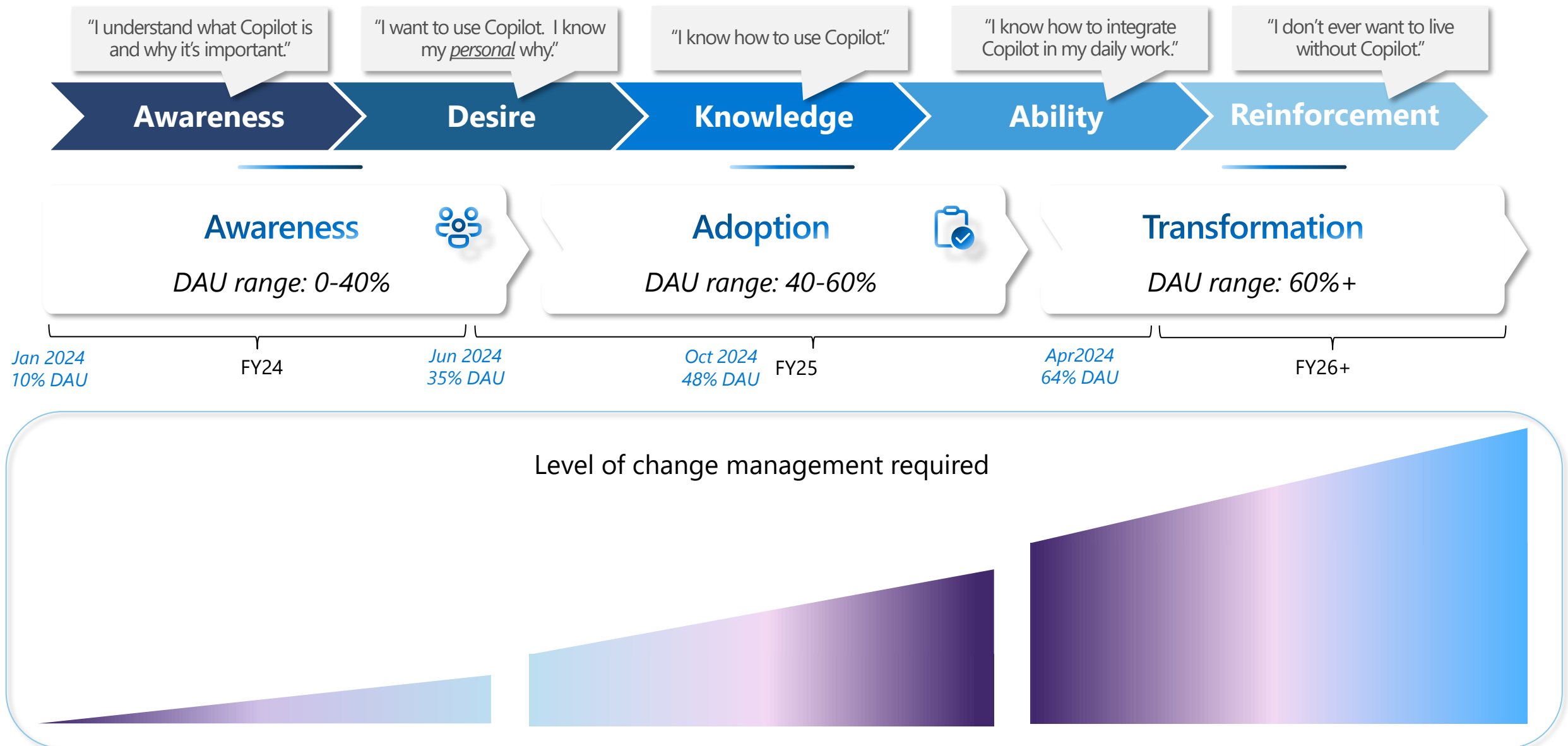
#### Collaboration

Collaborate with peers to share best practices boosting adoption rates.

DAU=Daily Active Usage, WAU=Weekly Active Usage, MAU=Monthly Active Usage

Approved for external use

# Copilot: Progression to transformation

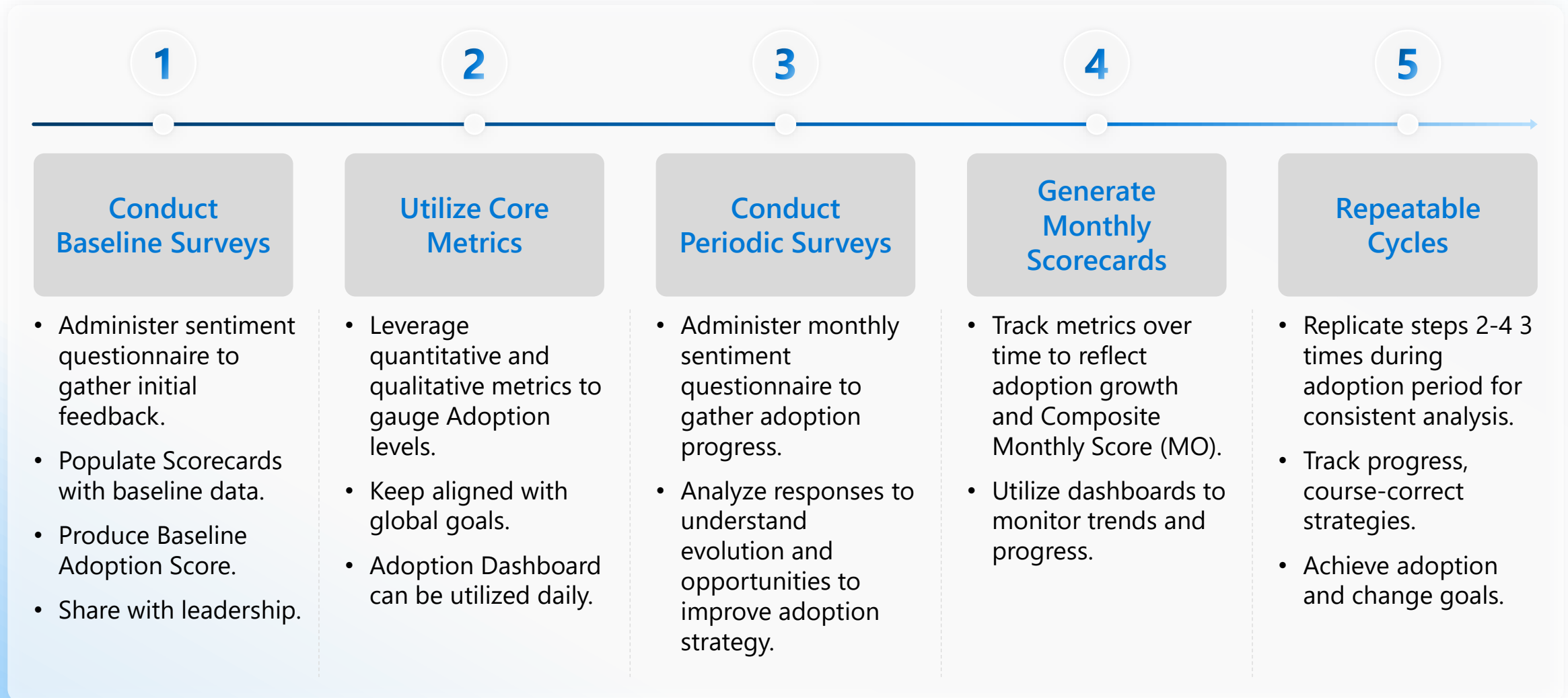


DAU=Daily Active Usage

ADKAR® is a registered and unregistered trademark of Prosci, Inc., used with permission.

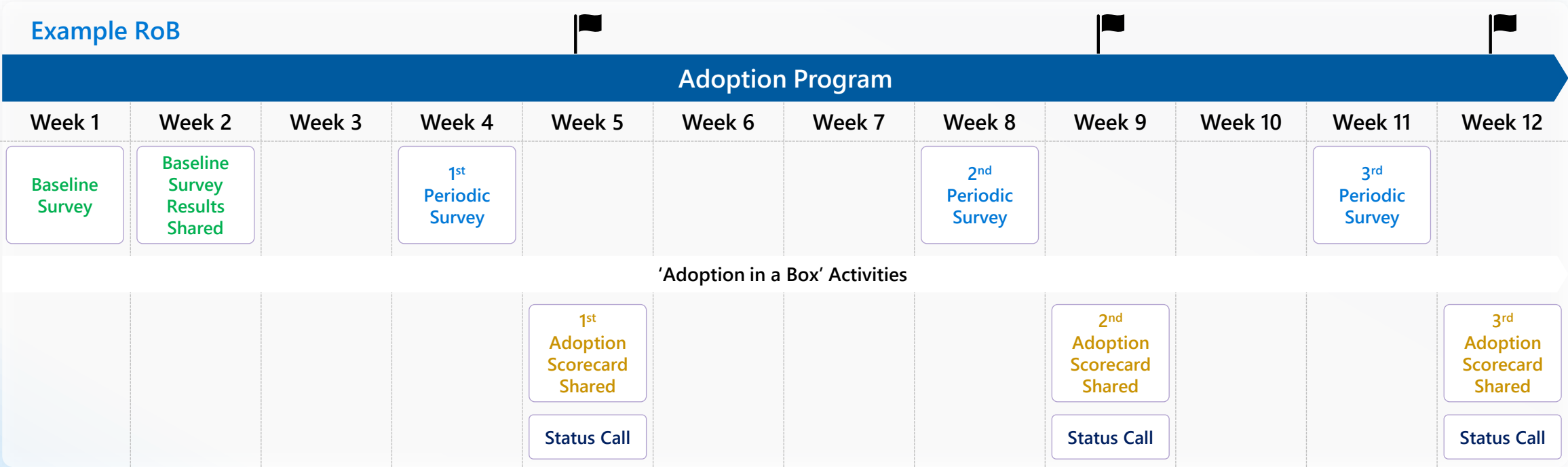
# Adoption Measurement Approach

Minimizing obstacles to adoption through data-driven decision making and continuous stakeholder feedback.



# Program Rhythm of Business (RoB)

Copilot Program Rhythm: the 12-week cadence for receiving surveys, delivering Adoption in a Box activities, receiving published Adoption Scorecards, and attending Status Update Calls.





# Gathering Feedback & Next Steps

**Give employees a chance to provide feedback and share ideas for what Copilot could be!**

Provide opportunities for employees to share feedback and ideas on other things that Copilot could do. We are just getting started with Copilot and what better way to improve it than through feedback and ideas of our own people!

*Please note that these examples serve as a guide. The local adoption v-team will have the flexibility to choose and incorporate activities that align best with their specific needs and goals. The aim is to provide a framework, allowing customization to suit the unique requirements of the local communities.*

## Listening Sessions and Round Tables

In-Person or virtual sessions to collect a large amount of feedback in a short time! Use energy in the room to brainstorm and share ideas.

## Mini-Hackathons!

Set up small groups where they come up with ideas around what Copilot could do next and add in a little competition by gamifying the experience where you can offer prizes or incentives.

## Viva Engage/Teams Channels Advocacy

Use comms vehicles to advocate for Copilot, sharing tips, success stories, and updates to create buzz and interest within their communities.

## Product Feedback

All product feedback should be provided within the Copilot experience using the thumbs up/thumbs down method.

## Feedback Collection Campaigns

Initiate focused feedback campaigns to gather suggestions, concerns, and feedback about Copilot within their communities.