

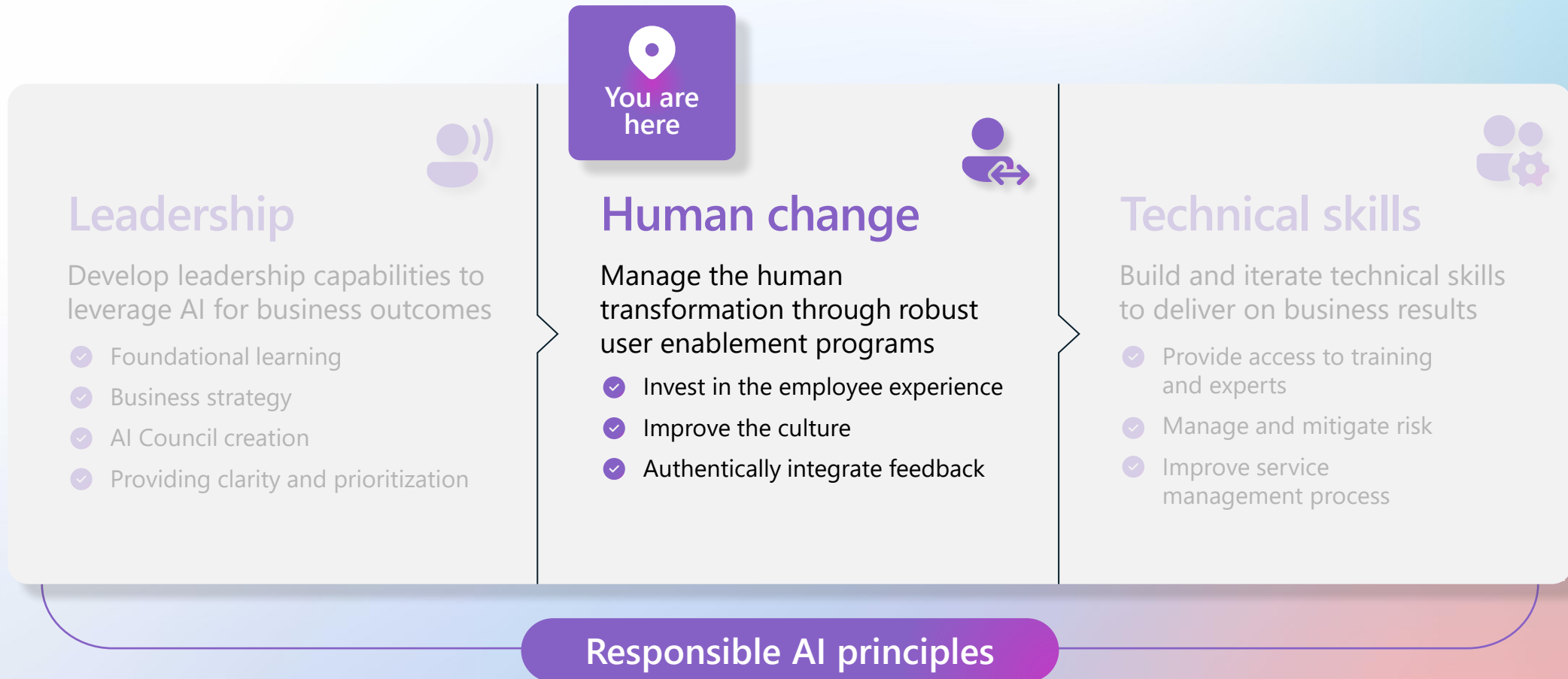
Drive Microsoft 365 Copilot user enablement with proven adoption tactics

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Cloud Solution Architects,
Microsoft 365 Modern Work Customer Success Unit

Breaking Boundaries: the AI powered organisation

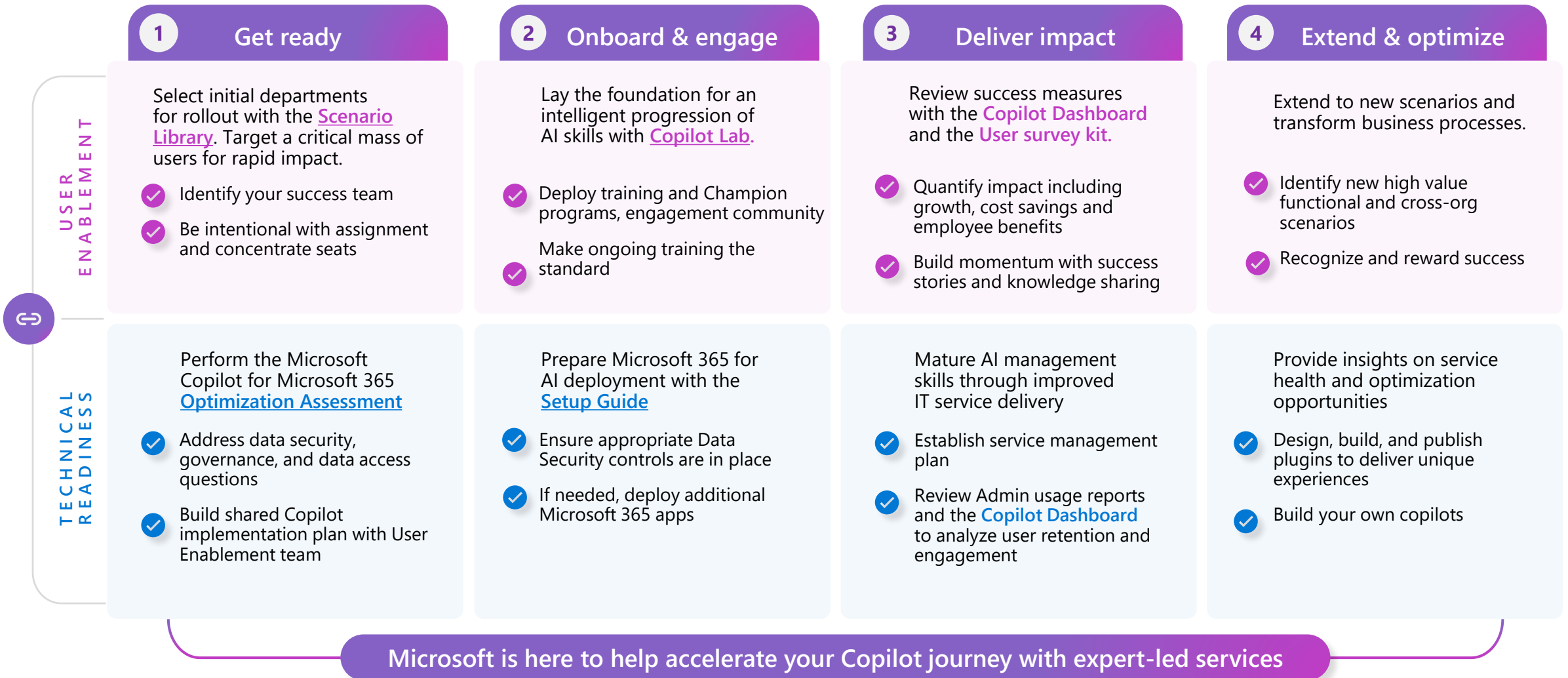
April 4, 2024

The journey to becoming AI powered



Copilot for Microsoft 365

Implementation executive summary



Get ready

Foundational tasks

- Build the right team
- Identify scenarios
- Review Microsoft provided materials
- Onboard supporting resources (as needed)
- Identify communication channels and initial rhythm
- Build relationships with technical leaders

Copilot specific tactics

- Understand Copilot for Microsoft 365 capabilities
- Review Responsible AI Principles
- Identify early adopters and scale onboarding cohorts
- Target AI-ready scenarios
- Build prompt and natural language skills
- Embrace rapid feedback cycles

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/AICouncilGuide

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/copilot/ScenarioLibrary

Scenarios by persona

Unlock productivity, unleash creativity,
create more value



HR



Sales



Marketing



Finance



IT

Foundational tasks

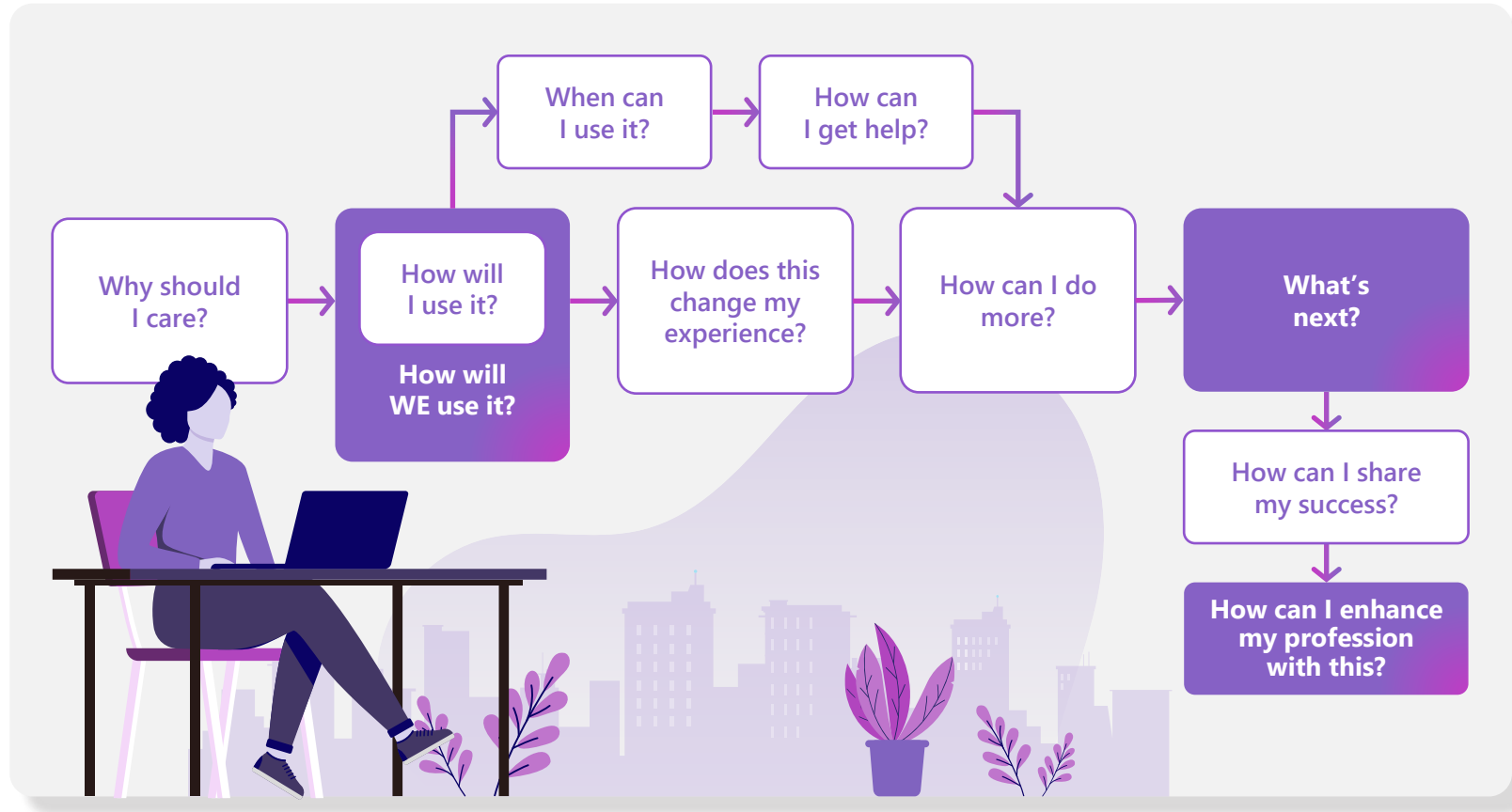
- Complete User Enablement Strategy training and template
- Define user experience and feedback strategy
- Launch employee communications and Champion program
- Onboard executives and user cohorts
- Deliver user Champions and support staff training

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

Understanding the user journey

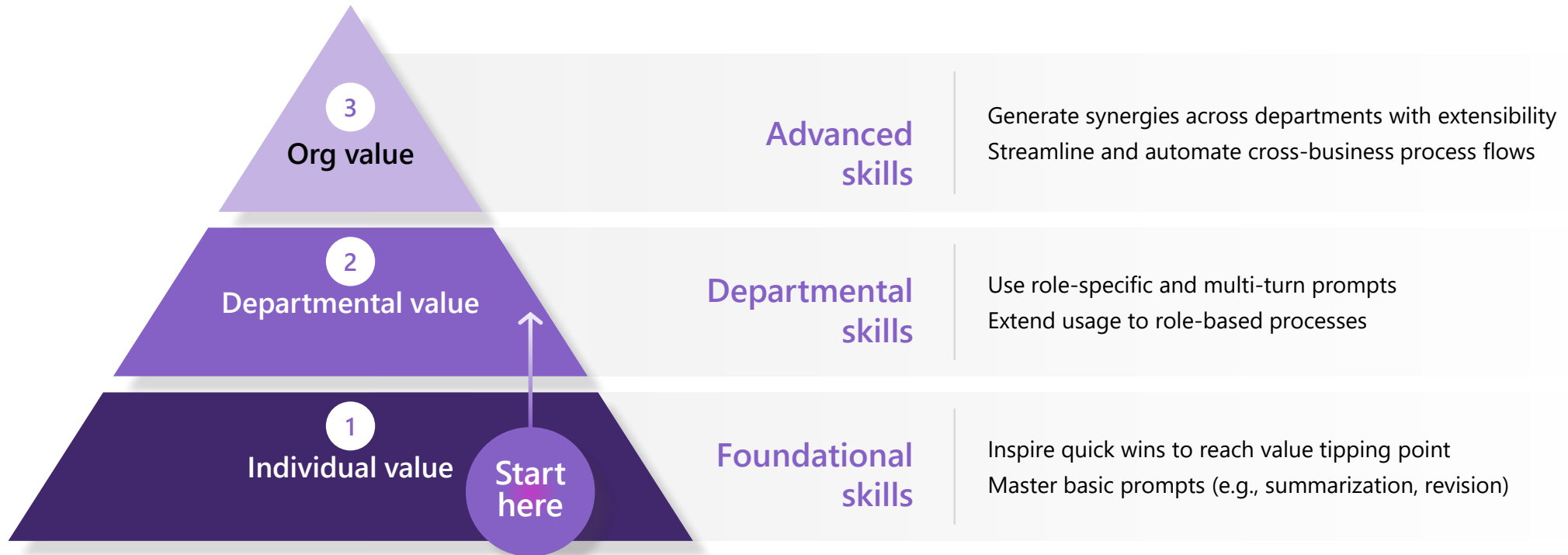
Getting to “Aha!”



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

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 tasks for new users



Summarize 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.

1



Summarize an email thread

– there's no need to read through an entire email thread when you join in the middle.

2



Tell me my agenda for the day

– start the day off on the right track with a clear picture of your activities and action items.

3



Summarize a document

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

4



Tell me about a topic/project

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

5



Give me some ideas for ...

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

6



Create a to do list for me

– avoid downtime by generating a list of tasks at any point in the day.

7



Write an email about ...

– end procrastination on those difficult emails by getting a first draft in seconds.

8



Tell me how to plan for ...

– get an idea of a project plan for nearly any task and then adapt it to your needs.

9



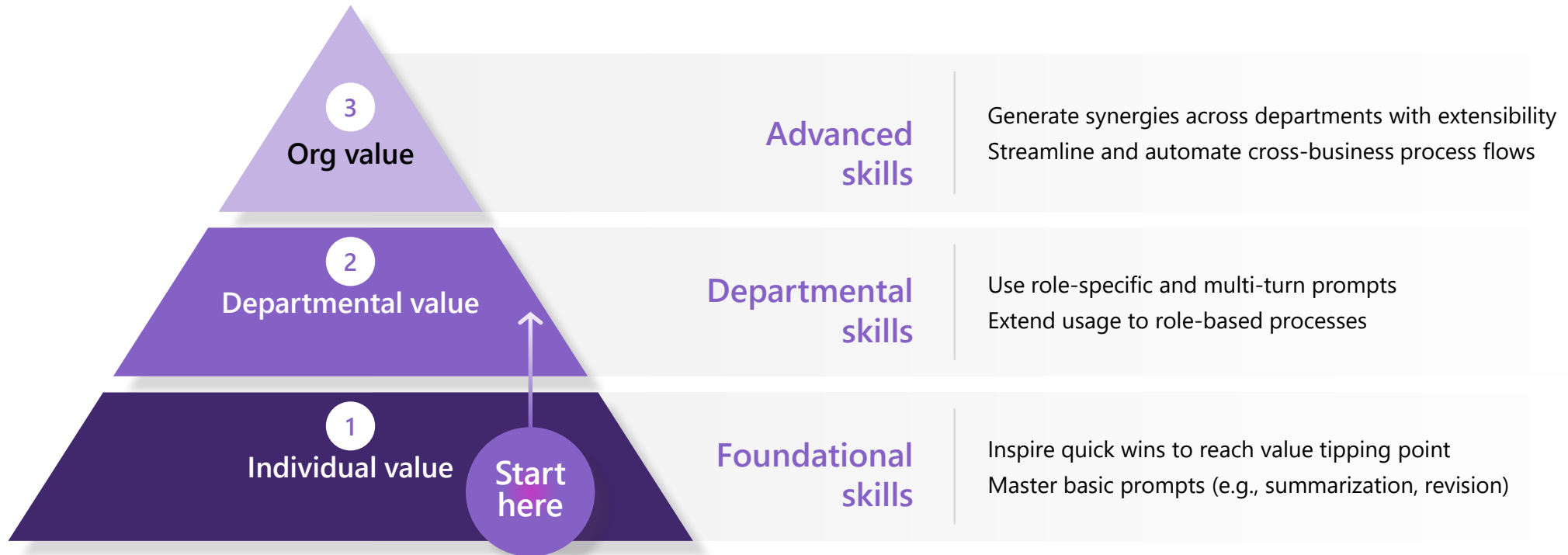
Revise this content

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

10

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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

- Improve meetings
- Content creation
- Manage daily agenda
- Summarize information
- Generate ideas

HR

- Cost per hire
- Employee turnover
- Compliance risk reduction
- Benefit usage
- Onboarding time

Marketing

- Leads created
- Brand value
- Cost per lead

Operations

- Customer retention
- Product time to market
- Supply chain efficiencies

IT

- Outstanding support tickets
- Application downtime
- Departmental spending

Sales

- Number of opportunities
- Close rate
- Revenue per sale
- Customer retention
- Time to close

Finance

- Accelerate cash flow
- Spend on ERP system
- Risk reduction
- Departmental spending

Foundational tasks

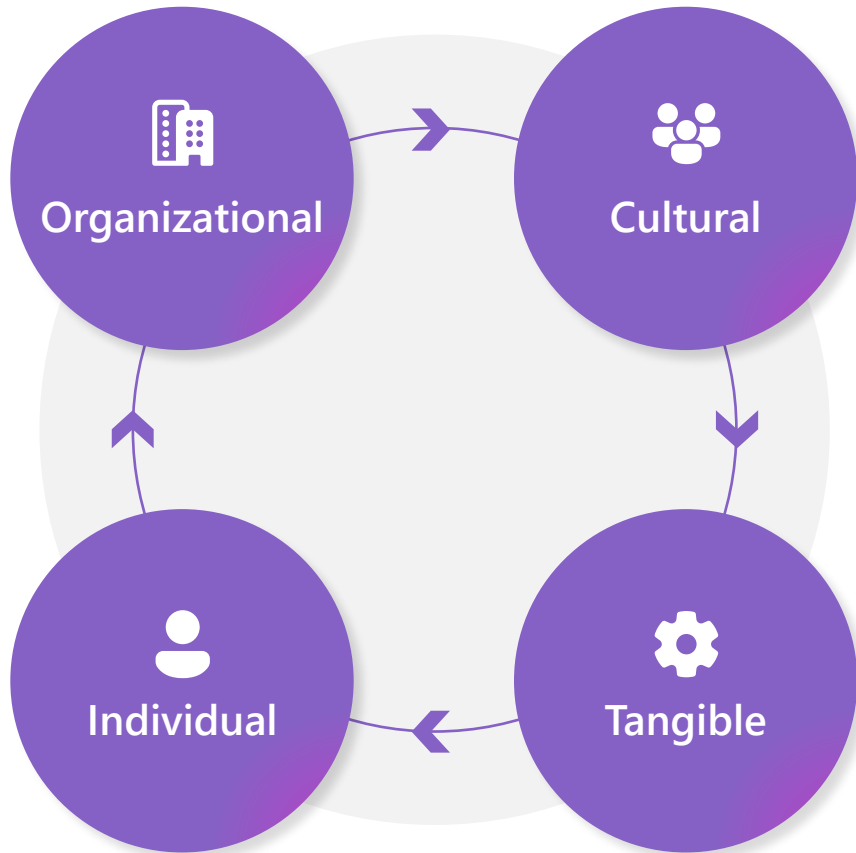
- Review success measures and user survey results
- Conduct feedback and reporting analysis
- Deliver extended training and adoption support
- Iterate user experience strategy
- Gather and amplify success stories

Copilot specific tactics

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

Review your progress

The enablement outcomes matrix



$$\frac{\text{Tangible measures}}{\text{Individual sentiment}} = \text{Change quotient}$$

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

Simplify your investment strategy in adoption activity against these outcome segments

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

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.



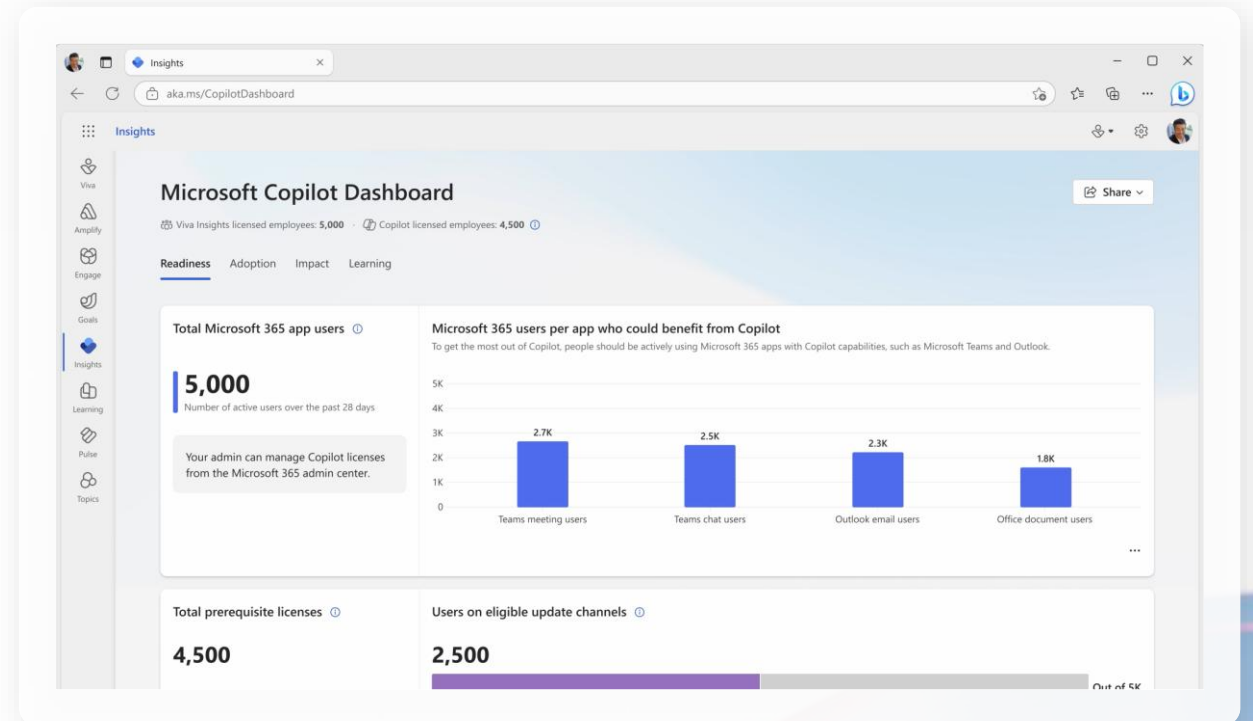
Measure the impact of your Copilot investment

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



Extend & optimize

Explore



Identify new high value scenarios

- Gather data from service health reviews
- Prioritize via AI Counsel 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

Customer story: Van Lanschot Kempen



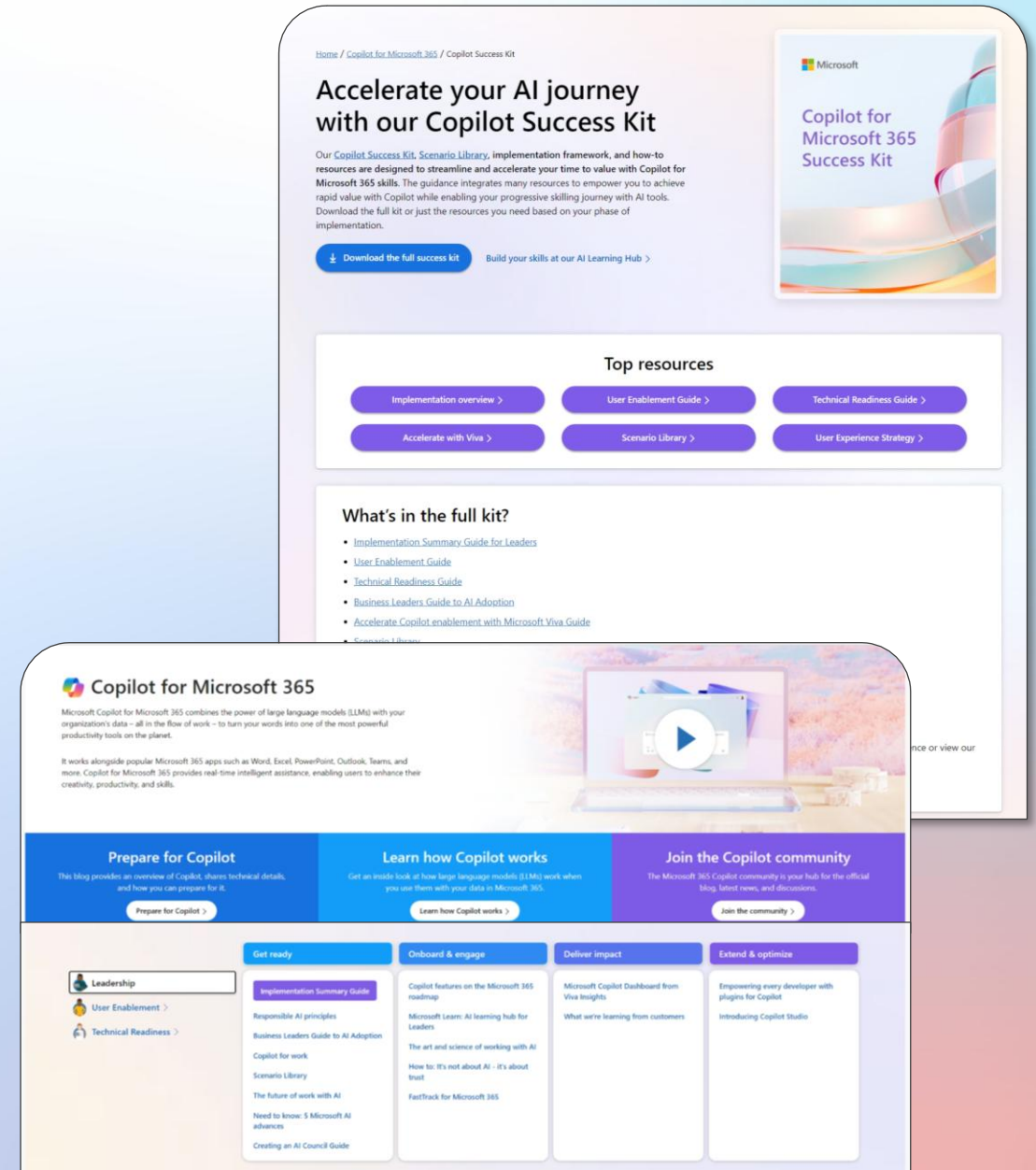
Bas Rapati
Chief Analytics Officer

Copilot Resources on Microsoft Adoption

One site for all your Copilot needs

<https://adoption.microsoft.com/copilot>

- Copilot Success Kit
- Interactive Scenario Library
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Small/Medium business, Copilot in Sales, Microsoft Viva, and more



Q&A



Thank you.