

# Copilot for Microsoft 365 Adoption Playbook

A step-by-step guide for  
business leaders



## INTRODUCTION

# Welcome to Copilot for Microsoft 365

Organizations across industries have gone from talking about AI to deploying it at scale. After just three months of using Copilot, 70% of users said they were more productive and 68% felt it improved the quality of their work. And the best Copilot users? They saved more than 10 hours per month.<sup>1</sup>

This playbook, informed by insights from the Copilot for Microsoft 365 Early Access Program, gives you actionable steps to become an AI-powered organization quickly, accelerate usage and engagement, and track progress and impact. It answers key questions, including:

- **Who** do I give the first Copilot seats to?
- **Where** can my organization get the most productivity gains?
- **How** do I get employees up and running quickly?
- **Why** is it important to build early momentum with Copilot?
- **When** will I start seeing business results?
- **What** are the ways to measure impact?

<sup>1</sup>[What Can Copilot's Earliest Users Teach Us About AI at Work?](#), Work Trend Index Special Report, Microsoft, November 2023.



# Your Copilot adoption roadmap

PHASE 1:

## Get ready

Preparing your business for AI

**Step 1**

Review your security and data settings.

**Step 2**

Be intentional with seat assignments.

**Step 3**

Create an AI council.

**Step 4**

Help people build new work habits.

PHASE 2:

## Onboard and engage

Accelerating usage and engagement

**Step 5**

Create a Copilot user community.

**Step 6**

Identify Copilot champions and early adopters.

**Step 7**

Make ongoing training the standard.

PHASE 3:

## Deliver impact

Tracking progress and business results

**Step 8**

Quantify impact with the Microsoft Copilot Dashboard.

**Step 9**

Meet with your AI council regularly.

**Step 10**

Publicly celebrate successes.

PHASE 4:

## Extend and optimize

Building copilots into your business

**Step 11**

Tailor Copilot to your business.

**Step 12**

Build your own copilots.

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This new generation of AI will remove the drudgery of work and unleash creativity. There's an enormous opportunity for AI-powered tools to help alleviate digital debt, build AI aptitude, and empower employees.”

Satya Nadella

Chairman and CEO  
Microsoft<sup>2</sup>

<sup>2</sup>[Will AI Fix Work?](#), Work Trend Index Annual Report, Microsoft, May 2023.

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**Step 1**

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**Step 2**

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**Step 3**

Create an AI council.

**Step 4**

Prepare employees for a new way of working.

PHASE 2:

**Onboard and engage**

PHASE 3:

**Deliver impact**

PHASE 4:

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## Step 1

# Review your security and data settings.

Copilot for Microsoft 365 is built on a comprehensive approach to enterprise-grade security, compliance, privacy, identity, and responsible AI. Because Copilot automatically inherits your existing Microsoft 365 data and security permissions, it makes setup straightforward. It also highlights the importance of having established content management practices and data governance in place before rollout begins.

For secure collaboration with Copilot, work with your IT leads to review current policies. It's also important to reassure employees that their private content and data remain protected. In this respect, Copilot is very similar to cloud-connected services like email and search that they use today. Encourage teams to continue following your organization's existing best practices, established by your IT department. This includes using SharePoint sites, managing permissions, and using sensitivity labels. For more information on security and data for Copilot, see our [technical documentation](#) site.



## Frequently asked questions about data, privacy, and security

Keeping your proprietary data confidential is important, and Copilot has built-in safeguards to help ensure it stays that way. Here are some common questions customers are asking about data security in an era of AI-powered work.

### How can I control access to data and prevent oversharing?

Because Copilot inherits all your existing Microsoft 365 security and compliance requirements, only people with the right permissions can access the content it generates. Before rolling out Copilot, it's important to audit the data access conditions, retention controls, and sensitivity labels you already have set up. These policies and settings can be managed centrally and applied across all your apps.

### Are there other safeguards to consider for meeting transcripts?

The meeting owner controls who has access to transcripts. Everyone in a meeting will see an alert that the meeting is being recorded, and the transcript is subject to retention policies your admins set and enforce. If you want to use Copilot in a meeting but not create a recording, you now have the option to enable it without a transcription. When you enable Copilot without a transcription, Copilot can answer questions and provide information during the meeting, but no record of those interactions will be retained afterward.

### Where is Copilot data stored and processed?

Because Copilot is a core Microsoft 365 service, the data it uses resides in your geographical region. That means it complies with Microsoft processing commitments for that region. For example, if your organization is in Europe, be assured that Copilot complies with our processing commitments under the EU Data Boundary.

### What about eDiscovery and legal holds?

Copilot prompts and responses are considered your data. You can query with eDiscovery or apply legal hold just like any other content. Copilot activities are always available in your audit log should you need to refer to them.

### Are there copyright risks in using content generated by Copilot?

The Microsoft Copilot Copyright Commitment protects your intellectual property, as well as the intellectual property of others. If you use Copilot to generate content for your business and a third party sues your organization for copyright infringement, Microsoft will defend you and pay the amount of any adverse judgments or settlements as long as you used the guardrails and content filters built into Copilot.

## Step 2

# Be intentional with seat assignments.

To maximize business impact, you'll need to determine your overall licensing deployment strategy, concentrating seats in two or three key areas of the business. Consider the following factors as you decide on an approach.

### Look at current usage trends

Your heaviest users of Microsoft 365 products will be well positioned to reap the benefits of a Copilot license. One way to evaluate who uses them the most is with the Microsoft Copilot Dashboard—powered by Microsoft Viva. Navigate to the Readiness tab to see technical eligibility and your total number of Microsoft 365 users.

### Define use cases for each business function or team

Each team should have a clearly defined goal or specific use case for how they'll implement Copilot. This extra layer of specificity ensures it's effectively integrated into workflows across various roles and levels.

Microsoft, for example, reimagined the tiered support model to improve customer service. We defined the use case metrics as:

- Reducing onboarding time for new agents.
- Streamlining access to knowledge.
- Eliminating repetitive administrative tasks.
- Reducing ticket volume.

By focusing on specific use cases and high-impact areas first, you'll maximize the ROI of Copilot and prepare your organization to scale up its adoption.

### Allocate Copilot to entire teams within a specific business function

Avoid distributing licenses thinly. When entire teams have access, they can share insights and learn from each other. And as more employees use Copilot consistently and effectively, the impact that Copilot brings to your organization multiplies.

To choose what business area to start in, think about your biggest opportunities or pain points. Many early access customers started in customer service and sales—but there's not a one-size-fits-all approach to determine where Copilot will add the most value.

Microsoft, for example, began in Marketing, Sales, and Customer Service; Human Resources; and Finance—the business functions where teams spent a lot of time in meetings, writing emails, doing repetitive tasks, and searching through large amounts of data and information.

Lumen Technologies, a customer in the Early Access Program, began with their customer service, sales, and customer experience teams. The service team is using Copilot to surface relevant policies, summarize tickets, and access step-by-step repair instructions from manuals. The sales and customer experience teams are using Copilot to enrich customer interactions with additional depth and context, and summarize actions and next steps.<sup>3</sup>

<sup>3</sup>[Lumen Technologies dives into Microsoft 365 Copilot to help enhance employee efficiency and customer relationships](#), Microsoft News Center, Microsoft, August 30, 2023.



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I depend on Copilot to help me with a first draft of an announcement or employee message, saving me around 30 to 60 minutes each time. We're a 72,000-person organization. Think about the adaptability of those time savings for everybody—it's potentially a huge resource savings.”

Emma Land

Global Head of Employee Communications  
dentsu

## PRO TIP

Show the value of Copilot in specific roles to drive greater usage. For example:

## Impact by function

## Human Resources


**Create a more efficient hiring process**

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.

Conduct a group interview in Microsoft Teams and ask Copilot to summarize the contributions of each candidate.

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

## Marketing


**Create a marketing pitch in record time**

Discover trends and outliers in the latest market research with Copilot in Excel to identify which markets to target with promotions.

Draft a targeted promotion plan with suggested taglines using Copilot in Word.

Transform the engineering team's design documentation from a Word doc into a pitch deck in PowerPoint with Copilot.

## Sales


**Drive better sales presentations with an AI assistant**

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Give the customer your full attention in a meeting by relying on Copilot to handle the meeting notes.

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

## IT


**Deploy a critical update with the help of Copilot**

Create a project plan for the upcoming rollout based on a previous project plan and product documentation.

Meet on Teams to discuss the plan and use Copilot to keep track of unanswered questions.

Create a presentation on the rollout by using Copilot to create slides based on the project plan Word doc.

## Finance


**Focus on the high-value tasks to complete an acquisition**

Summarize the due-diligence information from the operations and legal team.

Use Copilot to add a section to the offer sheet discussing some conditions for the deal based on a previous meeting transcript.

Use Copilot in Excel to refine the deal analysis based on negotiations and changes in the economic environment.

Learn more about role-specific ways to use Copilot in the [Copilot Lab](#).



## Step 3

# Create an AI council.

Recruiting a deployment team of influential advocates is a crucial step, as they'll be key feedback sources and drivers of adoption. While your AI council will be unique to your company needs, it should include representatives from the following teams:

**IT enablement team:** Ensures your organization implements Copilot seamlessly from a technical standpoint. This team is responsible for preparedness and rollout, providing onboarding support, as well as managing feedback and compliance.

**Change management team:** Acts as a bridge between the AI council and employees, helping to monitor adoption progress, gather feedback, and foster a collaborative environment where Copilot becomes an integral part of how people work every day.

**Executive sponsor:** Drives adoption and infuses confidence in the technology among employees. An executive sponsor that's an active champion (showing how they're using Copilot and talking about its benefits) signals that embracing and integrating generative AI into day-to-day processes isn't just accepted, it's encouraged.

**Risk management:** Represents the company's best interests by ensuring overall compliance to relevant AI regulations and ethical standards. They also help ensure your organization's AI initiatives are transparent, accountable, and trustworthy.





## Step 4

# Help people build new work habits.

Effective change management is vital for implementing an AI tool like Copilot, as it ensures your organization views it as not just new technology, but a new way of working. It requires leaders to measure attitudes and manage expectations.

### Measure attitudes and interest

A key part of change management is simply recognizing that diverse perspectives around AI exist—and knowing that you'll likely see a combination of enthusiasm and skepticism. An effective adoption strategy must cater to these diverse attitudes, providing support, training, and clear communication to transition workflows and mindsets into an AI-powered future of work.

### Manage expectations

As part of this training and communication, it's important users have a clear understanding of what Copilot can and can't do. Equally important is knowing when to use AI capabilities and when to rely on human expertise. Emphasizing that the user is in the driver's seat—or the pilot, if you will—is a great way to communicate the limitations and strengths of AI overall.

### PRO TIP

Highlight the capabilities of Copilot to help promote transparency and user satisfaction, while minimizing potential misconceptions. For example:

Copilot is not like a search bar. Don't ask it how many miles the earth is from the sun (it knows, but Bing is faster). Instead, use it to search across your content and prepare for meetings.

**Ask Copilot:** *What's the latest from [person], organized by emails, chats, and files?*

Copilot is not prescriptive where you have to get exactly the right words in exactly the right order to get exactly the right result. Instead, guide the response using cue words and context—then revise your prompt if you're not happy with the initial results.

**Ask Copilot:** *Write an article about [cybersecurity tips]. Include: [secure home networks, multifactor authentication].*

Copilot is not about delivering highly standardized, repeatable outputs. Instead, use it to create a first draft—and regenerate the content until you find the text you want to work with.

**Ask Copilot:** *Write an intro paragraph for this document and make it sound [professional].*

Copilot is not always right—and it's good to embrace how it's usefully wrong. Instead, use it to generate ideas to jump-start creativity.

**Ask Copilot:** *Create a list of titles for [this presentation].*



PHASE 1:

**Get ready**

PHASE 2:

# Onboard and engage

Accelerating usage and engagement

**Step 5**  
Create a Copilot user community.

**Step 6**  
Identify Copilot champions and early adopters.

**Step 7**  
Make ongoing training the standard.

PHASE 3:

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PHASE 4:

**Extend and optimize**

## Step 5

# Create a Copilot user community.

One of the best ways to drive AI adoption is through peer learning, which creates a dynamic knowledge-sharing ecosystem. It creates buzz for this new way of working, allows individuals to learn from those who've successfully implemented Copilot, and surfaces practical tips for specific roles.

Creating virtual spaces for people to connect and discuss their experiences is a great place to start building this momentum. Any means of sharing is worthwhile, as it gives users a sense of ownership in the learning process.

### To build your organization's Copilot user community:

- ✓ Create a Teams group chat for your AI council to discuss goals and best practices.
- ✓ Use Viva Engage to give employees a place to share tips, ask questions, and upvote answers.
- ✓ Use Microsoft Forms to log what's working well (or even what isn't). Your AI council can use these insights to improve your rollout, inform training sessions, and find the best use cases for your business.
- ✓ Download our [onboarding toolkit](#) for prepopulated and designed posts that encourage usage across apps.

## Step 6

# Identify champions to lead the way.

Similar to your AI council, your Copilot champions and early adopters are a key team in driving wider adoption. This group will lead by example, helping showcase the practical benefits of Copilot in their daily work. Plus, their positive experiences will naturally inspire curiosity and interest among their colleagues—encouraging broader usage.

To identify Copilot champions and early adopters:

- ✓ **Lean on your AI council** to help determine your power users.
- ✓ **Look at your Copilot user community** to see who's sharing tips or giving feedback.
- ✓ **Reach out to managers** and ask them to identify a team representative.
- ✓ **Use the Copilot Dashboard** to measure usage (more on this in a moment).





The promise of AI has never been more real—but becoming an AI-powered organization doesn't happen with the flip of a switch. It requires an intentional approach, with employee skilling at the core. Organizations that prioritize this kind of investment in their people are going to be the ones that reap AI's benefits."

Jared Spataro

CVP, Modern Work  
Microsoft<sup>4</sup>

<sup>4</sup>[Why boomers are catching up with AI faster than Gen Zers, according to Microsoft's modern work lead](#), Fortune, October 20, 2023.

## Step 7

# Make ongoing training the standard.

Employees will see productivity gains immediately with Copilot. But how each user personalizes their Copilot usage will evolve dramatically over a 6 to 12-month period, so providing ongoing training is critical to optimizing that journey.

Prompting—the process of giving clear commands to get the right results with an AI tool—is likely a new skill for many employees. Better inputs lead to better outputs, and this requires consistent practice so Copilot becomes a natural extension of the work process.

Business leaders should publicize a variety of resources and guidance, and promote collaborative sharing of best practices. This way, Copilot users can stay updated on new features, troubleshoot issues, and learn from each other's experiences. A culture of continuous learning can also increase user engagement, satisfaction, and productivity with Copilot.

Here are some top training resources to help your organization get started:

- ➔ **Prompt guidance:** Understand the ingredients for a great prompt.
- ➔ **Copilot adoption:** Get resources for deploying, using, and scaling Copilot at your organization.
- ➔ **Copilot capabilities:** Discover learning materials for users, admins, and business leaders.
- ➔ **Copilot Lab:** Find tips for better prompts, and explore prompts to try in different apps.
- ➔ **Copilot for Work:** Discover work scenarios and how Copilot can become your AI assistant.
- ➔ **Viva Learning:** Use the course catalog to learn new skills for the world of AI.

### PRO TIP

Those who view Copilot as a way to amplify what they're already doing—not just as a search engine—will gain value the fastest. Encourage employees to:

#### Build a daily habit.

Regular use with Copilot helps employees quickly learn how to get better responses—and take full advantage of the AI capabilities in their everyday routine.

#### Think like a manager.

Knowing how to delegate tasks to Copilot as if it's an eager intern is essential. To do this, users must be able to create clear, concise prompts with defined parameters, evaluate the results, and decide what do next with the content Copilot generates.

#### Make the most of reclaimed time.

Guide employees to be intentional with the time they save with Copilot. Remind teams it's not about doing more—it's doing more of the things that drive value at both the individual and organizational level.

#### Provide feedback.

Encourage employees to give feedback when Copilot prompts them to. This will continue to improve and refine their experience.

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## Step 8

# Quantify impact with the Microsoft Copilot Dashboard.

The Microsoft Copilot Dashboard helps organizations measure usage and adoption at every phase of the rollout with real-time data and insights. The dashboard provides insights to help leaders understand where Copilot is adding value and where enablement strategies could see even greater benefits, including the number of active Copilot users per app and the number of times key Copilot features have been used in those apps.

With a Microsoft Viva subscription, you can get additional reporting and deeper functionality.

## Step 9

# Meet with your AI council regularly.

Meeting regularly with your AI council will help you understand how you can support their efforts. Based on the experiences of Early Access Program users, change happens quickly with a Copilot implementation. Discuss what's working well, potential areas of opportunity, and any challenges related to the new way of working.

To maximize your organization's experience with Copilot, make AI council meetings an ongoing priority well after the initial two-month period has elapsed. You're likely to see significant gains in productivity and business value by that time. You'll probably be ready to shift your focus to longer-term goals for using generative AI.

## Step 10

# Publicly celebrate successes.

Implementing any new tool takes coordinated effort across multiple disciplines, so be sure to take a step back and celebrate milestones you've reached in your Copilot adoption strategy. Acknowledge the efforts of teams who've contributed to the rollout's success and identify your power users, as these stories serve as strong sources of inspiration and showcase how Copilot can deliver tangible benefits within your organization.

Success stories also play a pivotal role in driving adoption, engaging stakeholders, and ensuring that your organization maximizes the impact of Copilot while maintaining transparency and realistic expectations.

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Our people are seeing immediate productivity improvements with Copilot, allowing them to focus on more value-added activities each day.”

Kate Johnson

President and CEO  
Lumen Technologies



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Tailor Copilot to your business.

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Build your own copilots.

## Step 11

# Tailor Copilot to your business.

As your teams begin to master using Copilot, they'll likely see opportunities to refine what it generates and find new ways to reengineer processes across your business. Copilot can help you explore those possibilities with a built-in extensibility tool: Microsoft Copilot Studio. It's included with your subscription to help you to customize Copilot to your organization's unique needs with plugins.

Copilot Studio is a low-code tool that enables you to:

### **Connect Copilot to your data everywhere.**

Copilot Studio comes with more than 1,200 connectors, which can be used to build plugins for Copilot. This allows it to tap into data outside Microsoft 365 and the Microsoft Graph. Connect Copilot to your other systems of record—including databases, custom backends, and even on-premises legacy systems. Consider those that are core to your business, such as customer

relationship management, enterprise resource planning, finance, or human resources. It can also connect to your custom line-of-business solutions and non-Microsoft systems such as Adobe, SAP, SharePoint, Google Cloud Platform, Oracle, Salesforce, SQL, Slack, or Zendesk—plus all Azure data services.

**Customize Copilot to your unique business needs and workflows.** Once Copilot is connected to your data and apps, extend it to your business processes and the systems you use every day. With Microsoft Power Automate capabilities in Copilot Studio, you can create ways for Copilot to help with functions such as expense management, HR onboarding, and IT management.

Copilot Studio is also where you can design plugins for tailored responses within Copilot. These custom copilot chats could be for nuanced topics such as legal requests, sensitive

HR subjects, or finance and compliance inquiries. For example, if you were to give Copilot access to your travel policy in SharePoint and your ongoing expense budgets in SAP, it could give an accurate, self-service answer to an employee question such as, "How much of my team's travel budget is left in this quarter?"

**Control and manage customizations easily.** Your organization only needs to build customizations once. Once built, plugins can be centrally managed by IT and secured with the right access, user controls, and analytics. IT remains in control.

## Step 12

# Build your own copilots.

If you're interested in building your own custom copilots to provide generative AI experiences that Copilot for Microsoft 365 isn't designed for, there is a separate Copilot Studio license available. With it, you can embed a conversational copilot into your website to serve customers, build a copilot to assist employees with HR or IT inquiries on a SharePoint page, or even create copilots for frontline workers who don't use Microsoft 365. And those are just a few possibilities.





## NEXT STEPS

# The road ahead with Copilot

By embracing this momentous shift to AI, you're empowering more than productivity. You've opened the door to tremendous potential for business transformation. And the pace of innovation with copilots is only going to accelerate.

If you follow the steps in this playbook, you'll ensure your organization adopts its path to AI transformation intentionally. You'll have a framework to invest in the most impactful areas upfront, maximize your time to value, manage change, and scale when the time is right. This will also help you generate buy-in at every level of your organization so you can build an AI-centric culture—which is the true secret to gaining a competitive edge with this technology.

You can expect new Copilot tools to continue rolling out from Microsoft, providing invaluable capabilities for people across industries. Copilot for Microsoft 365 is designed to operate seamlessly with other copilots, such as Copilot for Microsoft Dynamics 365—so consider extending the efficiencies you gain across business processes. We'll also be releasing more role-based copilots tailored to specific tasks and functions. As the people in your organization learn new skills to use generative AI and you chart a path forward for your business, we're here to support you.



**For extra guidance on how to optimize work and seize new opportunities for business growth, be sure to check out our [Microsoft Copilot adoption site](#).**

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