



Microsoft 365 Copilot Adoption Guide

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In this document **Copilot** refers to **Microsoft 365 Copilot**, unless specified otherwise.

1. Objectives

1. Drive maximum business value using Microsoft 365
2. Map Copilot capabilities to business needs
3. Establish a method of delivering incremental value
4. Quantify the business value
5. Maximize ROI from Copilot investments

2. Key players

1. Led by leaders
2. Driven by champions
3. Powered by IT, Security, and Compliance teams
4. Utilized by all Copilot users

3. Preparation

3.1 Deploy free Copilot for all users

Free version of Copilot provides Enterprise Data Protection when users login using Office 365 ID (Entra / Azure AD). Ensure that you have enabled this feature for all users. This way, everyone gets the benefits of Copilot (Gen AI), with data security.

3.2 E3 (Biz Standard) or above

To derive maximum benefit from Copilot, it is necessary to have Office Pro Plus (M365 Apps for Biz / Enterprise) installed on desktops. If you use the web-only versions of Office, the feature set of base apps itself is limited. This will reduce the potential value of Copilot as well (even though Copilot works on web versions).

3.3 Data Governance

Use the [Data Security Posture Management](#) module from Microsoft Purview (or equivalent third party system) to get understand the current state of data governance and add requisite policies to prevent oversharing and misuse of data.

3.4 Procure Copilot licenses

To maximize value from the initial Copilot investments, procure licenses for 5 to 10% of users.

Trying out Copilot in pockets with few licenses does NOT yield desirable results. This is because, Copilot needs to work in a cohesive manner in a team, department, unit or business process.

3.5 Allocate licenses

Allocate licenses to users who are utilizing M365 effectively. This applies even to business leaders. If there is no usage of M365 (OneDrive, SharePoint, Teams), the Copilot license will be wasted because it has no data to work upon.

Allocate licenses to one or more cohesive group – which could be a specific group, project team, department, role, or key business process.

In each group, the entire chain from top to bottom should have Copilot licenses. This ensures maximum efficiency transformation in the quickest possible manner.

4. Adoption Steps

4.1 Leadership engagement

1. Awareness Training
2. Identify champions
3. Authorize champions to learn
4. Agree upon business value conversion
5. Agree to participate in best practices dissemination

4.2 Champions program

- Champions come from different departments, including IT and Learning & Development
- Each departmental head nominates few persons as champions
- Allow champions to spend eight hours per month to learn Copilot
- Champions divide the work of learning across multiple Copilot apps (Chat, Teams, Word, etc.)
- Champions learn Copilot capabilities, map them to relevant business processes and test it out
- Based upon this learning, champions suggest new ways of working as Best Practices
- Champions submit best practices to leadership team
- Leaders approve best practices
- Leaders send best practices periodically to all Copilot users reporting to them

4.3 Create awareness for all users

- Conduct a short (two-hour) session for all Copilot users
- Conduct this session as soon as Copilot licenses are assigned
- This session should be inaugurated by a business leader
- This session should cover few, common scenarios for all Copilot apps
- After the session, ask all attendees to submit a list of use cases where Copilot can potentially add value
- Champions should prioritize key use cases and create best practices on a priority basis

4.4 Learning and business use case mapping

1. All champions go through (read) all prompts listed in Copilot Prompt Library and all use cases in Scenario Library
2. Champions shortlist relevant items in a central list
3. Champions sit together and divide the work of trying out relevant prompts
4. Useful applied prompts become best practices

4.5 Coverage

Ensure coverage of all apps where Copilot is available. At the time of writing this document, Copilot is available in the following places within Microsoft 365

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|-----------------------|--------------------|--------------------|
| 1. Biz chat | 8. PowerPoint | 15. Help me Create |
| 2. Teams Biz Chat | 9. Outlook | 16. Whiteboard |
| 3. Teams Chat Copilot | 10. OneNote | 17. SharePoint |
| 4. Teams meeting | 11. Forms | 18. Planner |
| 5. OneDrive | 12. Power Automate | 19. Loop |
| 6. Word | 13. Power Apps | 20. Engage |
| 7. Excel | 14. Copilot Studio | |

4.6 Continuous improvement

- In the first year of Copilot, 220+ features were added
- Champions must check the Microsoft roadmap on a weekly basis
- Identify features that are recently rolled out
- Convert these to use case based best practices
- Leaders should disseminate the best practices down-the-line

5. Value Quantification

- For each use case, identify the following numbers: Time saved per use, Intangible benefits time equivalent, frequency of use per month, number of potential beneficiaries (across all Copilot users).
- Use this to calculate total time saved per month.
- Multiply the time saved by the monetary conversion factor.
- Typically, we use per employee contribution as the conversion factor.
- $\text{Employee contribution} = \text{Turnover} / \text{Number of staff} / 12 \text{ (months)}$

6. Best Practices Library

- Using this approach, best practices get created on a continuous basis
- Create a central list of these best practices
- Suggested columns: Use case, Best Practice, Prompt, Video link (if available)
- All users should be made aware about this list
- Anytime a user wants to conduct a business activity, she should check if the use case is listed in the library
- If listed, follow the best practice
- If not listed, you can request the champions team to check if a best practice can be created

7. Gamification and Recognition

- Mapping of technical features to business benefits is the key skill
- Anyone who contributes to this activity must be recognized and rewarded
- Exact modality can be customized to your environment
- However, it is important to ensure that the rewards program is ongoing (not time limited)
- This way, all users are encouraged to explore and suggest process improvements

8. The roles Copilot can play

Most of us restrict our Copilot usage to routine use cases where it is acting as your assistant. Some of us also extend the Copilot using connectors and agents.

However, Copilot has the dual power of Gen AI + understanding your data. In order to exploit this power fully, consider the following additional roles as well.

1. Coach
2. Mentor
3. Career guide
4. Analyst
5. Creative assistant
6. Decision support guide
7. Investigator
8. Sounding board
9. Cross-functional tutor
10. Counsellor
11. Friend
12. Devil's advocate
13. Interviewer
14. Critic

9. Use case prioritization

- First level is to focus on use cases which are applicable to maximum number of users
- Second level is to look at persona specific or departmental use cases
- Third level is to focus on Copilot extensibility using Agents and Connectors

10. Resources

1. [Copilot Prompt Gallery](#)
 2. [Scenario Library](#)
 3. [Copilot success kit](#)
 4. [Copilot YouTube Playlist by Dr Nitin](#)
 5. [Microsoft Learn](#)
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