



Copilot for Microsoft 365 implementation framework

Overview guidance



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The journey to becoming AI powered



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Foundational learning
- ✓ Business strategy
- ✓ AI Council creation
- ✓ Providing clarity and prioritization



Human change

Manage the human transformation through robust user enablement programs

- ✓ Invest in the employee experience
- ✓ Improve the culture
- ✓ Authentically integrate feedback



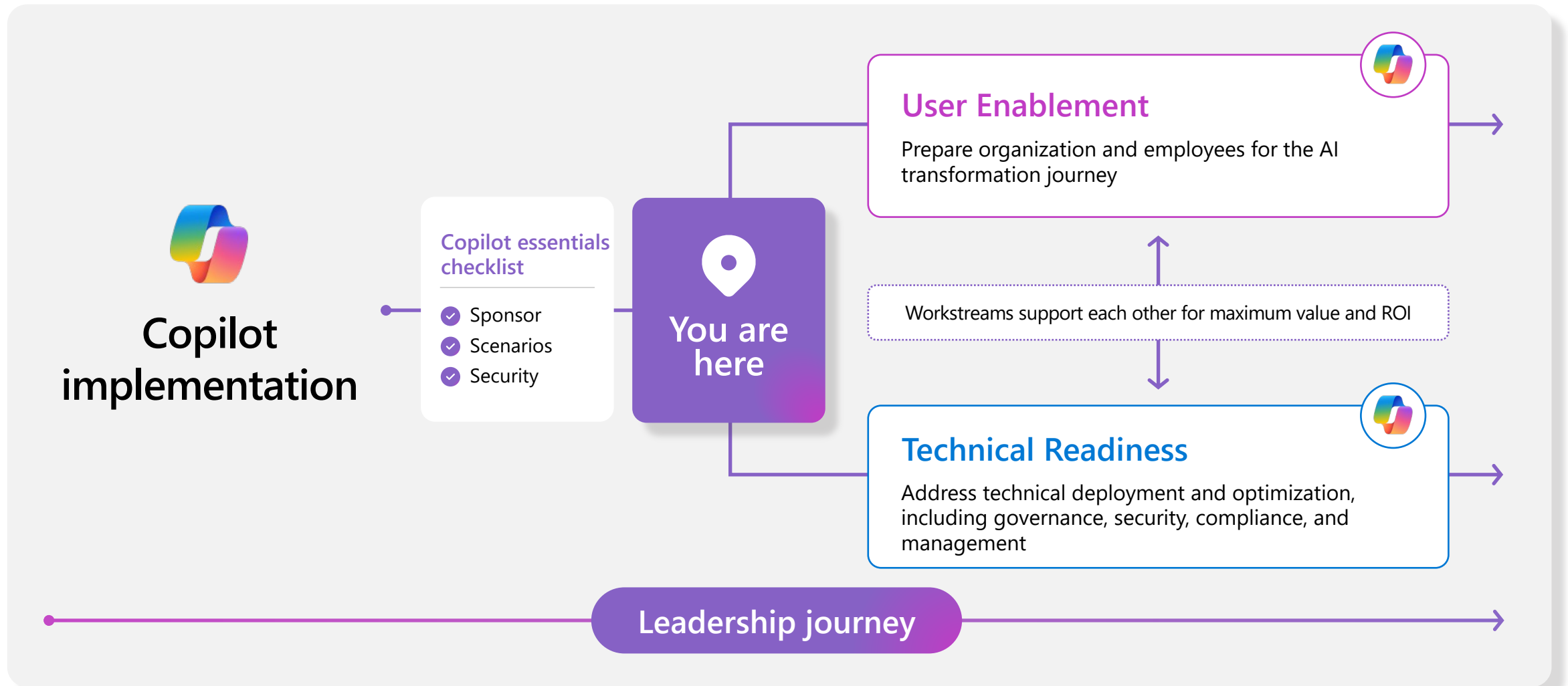
Technical skills

Build and iterate technical skills to deliver on business results

- ✓ Provide access to training and experts
- ✓ Manage and mitigate risk
- ✓ Improve service management process

Responsible AI principles

Copilot for Microsoft 365 implementation



Essentials for Copilot success



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



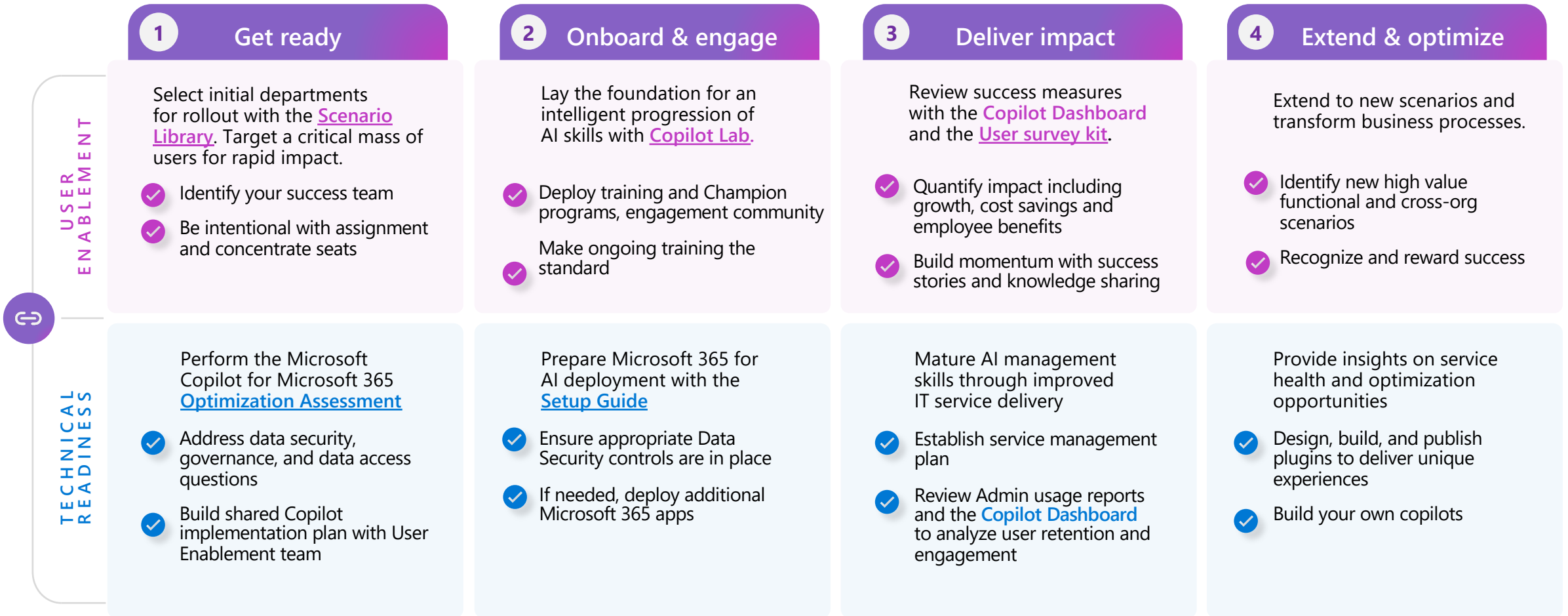
Define initial high value **scenarios** and target a critical mass of users for rapid value



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

Copilot for Microsoft 365

Implementation executive summary



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

Get ready

Be intentional with seat assignments and define success criteria



Copilot brings AI value across lines of business



Review which teams have high Microsoft 365 usage, including Teams Meetings and PowerPoint.



Target a critical mass of users & concentrate licenses across entire teams for rapid value.



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

All roles & execs

Improve meetings
Content creation
Manage daily agenda

HR

Cost per hire
Employee turnover
Compliance risk reduction

Marketing

Leads created
Brand value
Cost per lead

Operations

Customer retention
Product time to market
Supply chain efficiencies

IT

Outstanding support tickets
Application downtime
Departmental spending

Sales

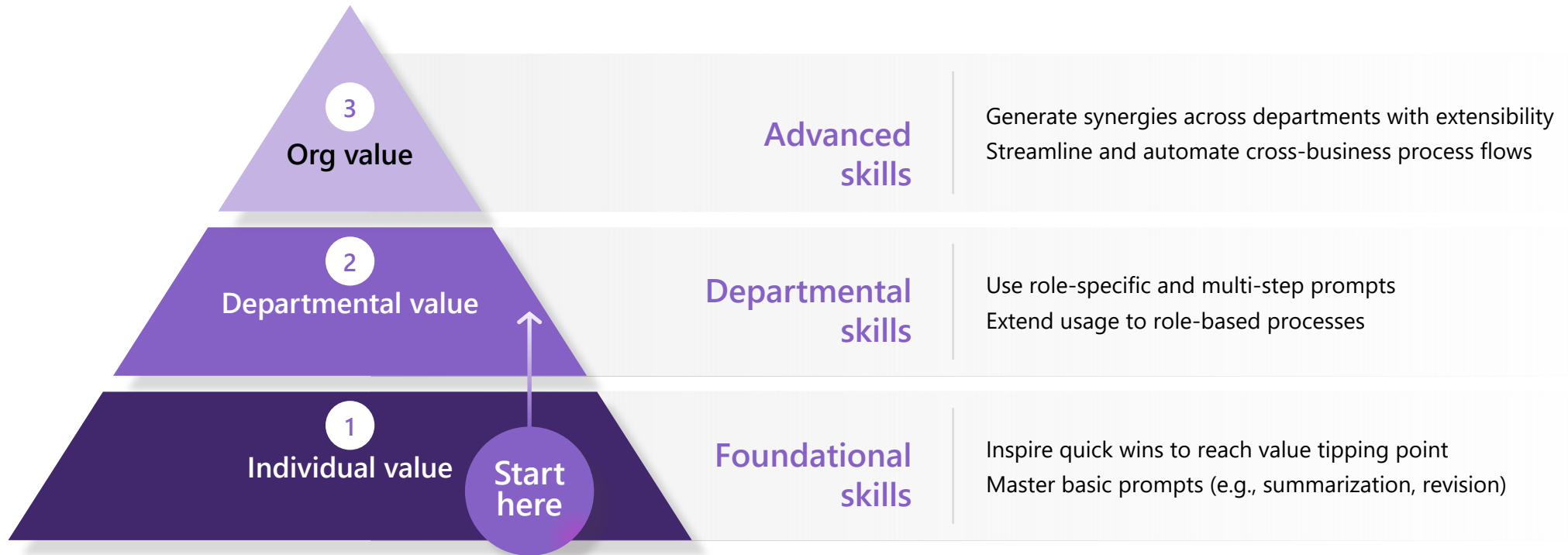
Number of opportunities
Close rate
Revenue per sale

Finance

Accelerate cash flow
Spend on ERP system
Risk reduction

Onboard & engage

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



1 Start with top 10 generic skills from [Copilot Lab](#) that deliver immediate success (e.g., summarize a meeting, email thread).

2 Use the [Copilot Scenario Library](#) to train users on new departmental use cases and process improvement to impact departmental KPIs.

3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Prioritize peer-to-peer learning through community engagement and knowledge sharing.

Top 10 to try first with Copilot for Microsoft 365

▲ Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from **meeting**



2

Summarize an email thread

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

→ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

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

→ Give me a bulleted list of key points from **file**



5

Tell me about a topic/project

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

→ Tell me what's new about **topic** organized by emails, chats, and files?



6

Give me some ideas for ...

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

→ Suggest 10 compelling taglines based on **file**



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

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

→ What did **person** say about **topic**



9

Revise this content

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

→ Rewrite with Copilot



10

Translate a message

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

→ Translate the following text into French:

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

Deliver impact

Measure the impact of your Copilot investment

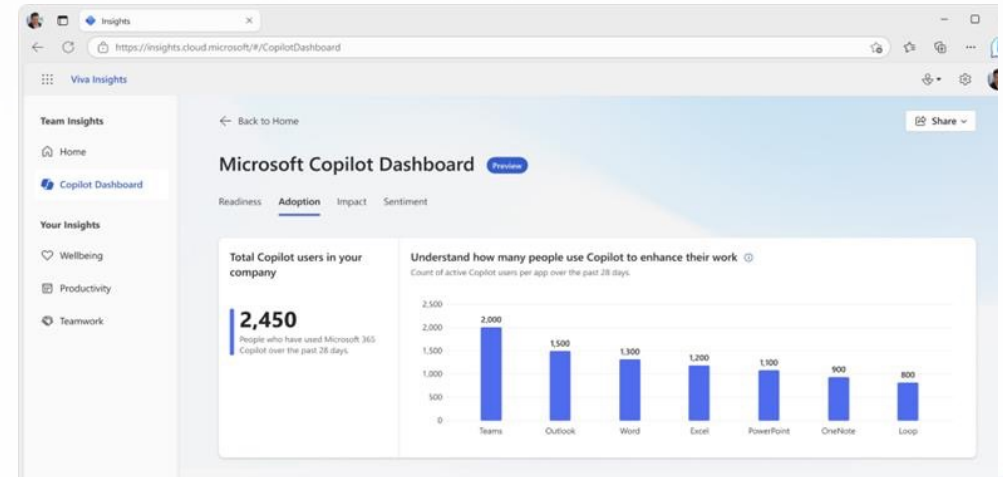
Microsoft Copilot Dashboard powered by Microsoft Viva

Business and IT leaders can plan their AI readiness, drive user enablement, and measure the impact of their Copilot investment.

- **Evaluate Copilot usage** 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
- **Learn about the latest research and findings** about AI

Copilot user survey kit

Survey your users to keep a pulse on how Copilot is impacting their day-to-day and gather sentiment and impact learnings.



Extend & optimize



Explore

Identify new high value scenarios

- ✓ Gather data from service health reviews
- ✓ Prioritize via AI Council and leadership engagement
- ✓ Skill/acquire talent for extensibility opportunities



Expand

Understand Copilot Studio capabilities

- ✓ Build, automate, and administer copilots
- ✓ Select extensibility scenarios



Extend

Scale Copilot users and skills

- ✓ Extend throughout organization
- ✓ Identify high value user cohorts for advanced skill building
- ✓ Optimize usage patterns

Microsoft investments to accelerate your time to value



Customers that buy more than 150 Copilot seats are eligible for Microsoft co-investment in [partner deployment and adoption services](#) through eligible Microsoft Partners.



Eligible customers can request technical and deployment assistance from [Microsoft FastTrack](#).



Get started on your Copilot journey with expert-led services through [Microsoft Unified](#).

Next steps



Leadership

- ✓ Form your AI Council
- ✓ Participate in Microsoft Executive AI Learning Series
- ✓ Prioritize competitive advantages
- ✓ Conduct talent and resource review



Human change

- ✓ Identify User Enablement Leader
- ✓ Engage with legal, security, and business leaders
- ✓ Plan for Works Council engagement*
- ✓ Onboard user enablement partners



Technical skills

- ✓ Identify technical leaders
- ✓ Onboard technical partners
- ✓ Prepare for policy review

Copilot Success Kit

Accelerate your path to value

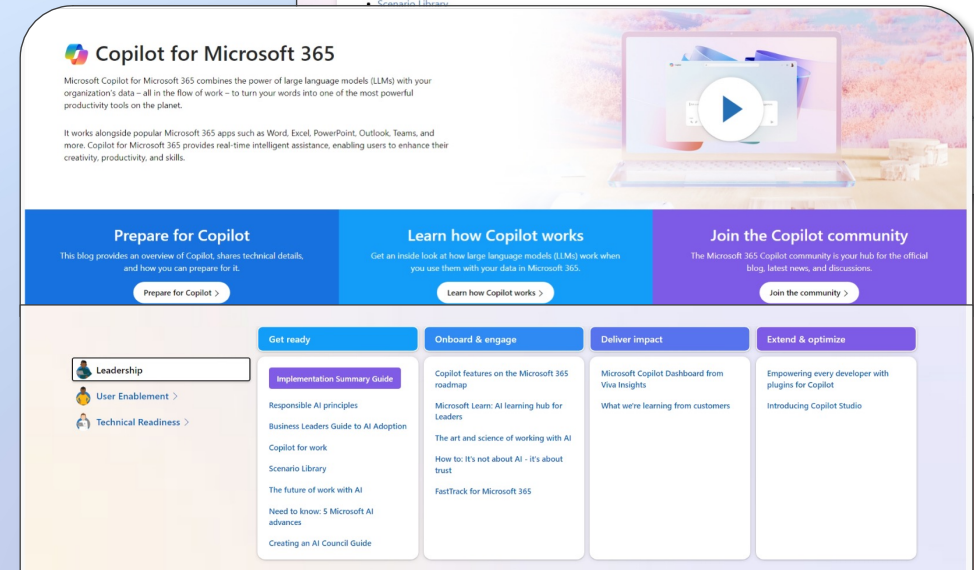
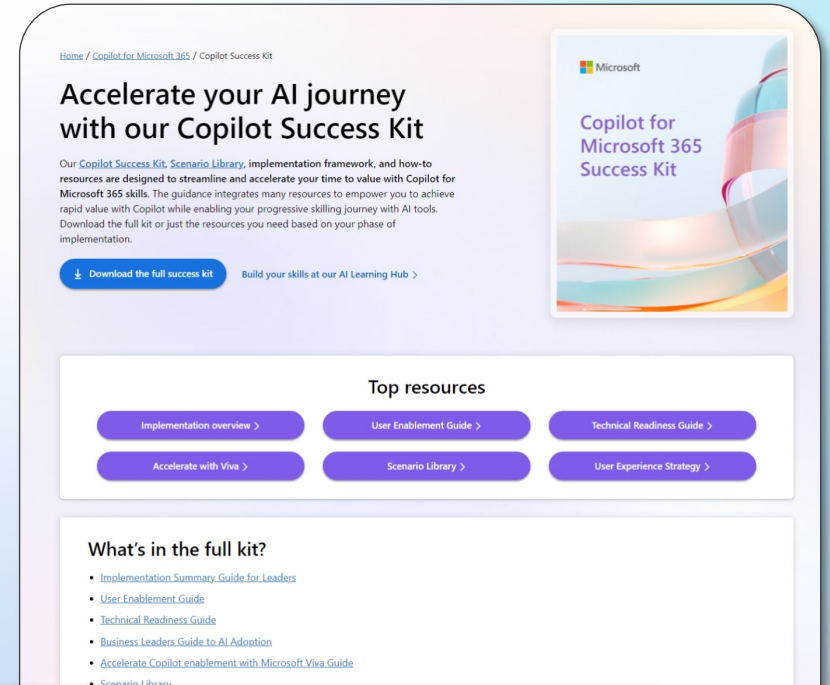
- Implementation Summary Guide for Leaders
- User Enablement Guide
- Technical Readiness Guide
- Business Leaders Guide to AI Adoption
- Accelerating Copilot enablement with Microsoft Viva
- *Additional resources and templates:*
 - **Get ready** – Scenario Library, Optimization Assessment, implementation plan template
 - **Onboard & engage** – Community and Champion guide, onboarding email kit with onboarding and training email templates, approved graphics and usage guidance, Business User one-pagers
 - **Deliver impact** – Copilot Dashboard guidance

Copilot resources on Microsoft Adoption

One site for all your Copilot needs

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

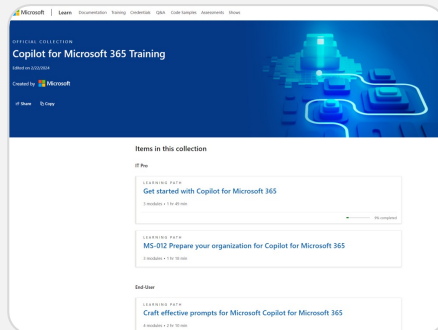
- Resources by role
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Small/Medium business, Copilot in Sales, Microsoft Viva, and more



Copilot for Microsoft 365 training platforms

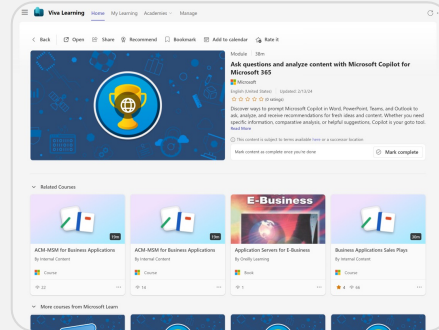
Microsoft Learn

- Free, on-demand training content for developing skills through interactive modules and learning paths
- Master core concepts at your speed and on your schedule
- Track your training progress and completions, earn achievements
- Step-by-step exercises guiding learners through common Copilot prompts and use cases
- Learner knowledge checks included throughout training content



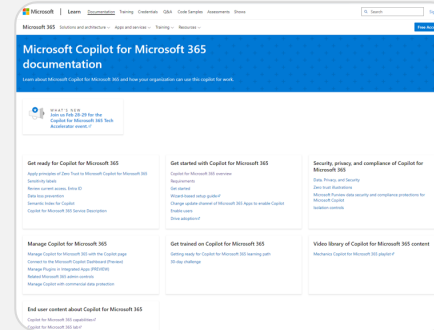
Viva Learning

- Requires additional licensing
- Employee learning in the flow of work with Teams integration
- Recommend and share content, and track completion
- Enable social learning
- Content includes pre-made playlists of how-to articles and videos
- Regularly updated with latest content



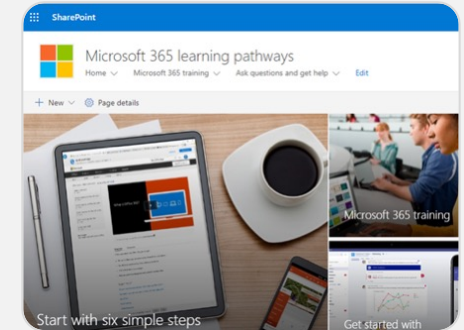
Technical Documentation

- Official and authoritative technical guidance from Microsoft
- Regularly updated with the latest information
- Topics include planning and readiness, getting started, security, privacy, and compliance, and more



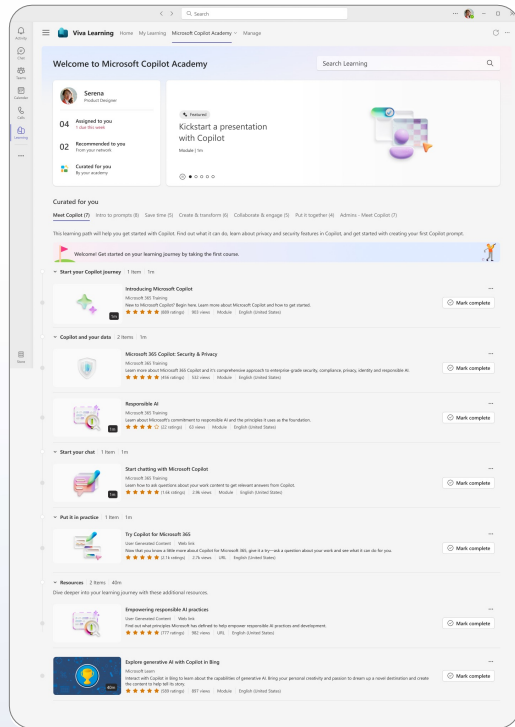
Microsoft 365 Learning Pathways

- Free, customizable, and on-demand learning solution built on SharePoint and integrated into Teams
- Easy to provision from the SharePoint Online Provisioning Service
- Create your own training playlists to meet the unique needs of your organization
- Content is provided through a Microsoft online content catalog so the content on your site is automatically updated



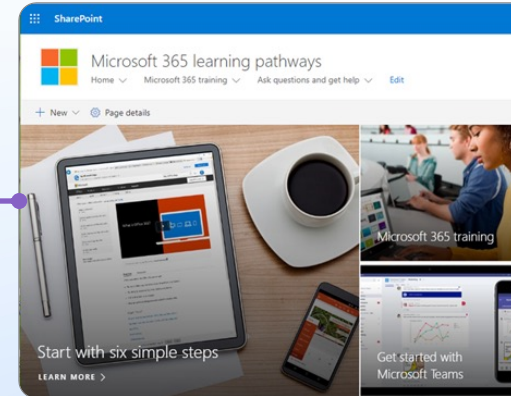
Downloadable assets for customization available at adoption.microsoft.com/copilot

Copilot for Microsoft 365 skilling experiences



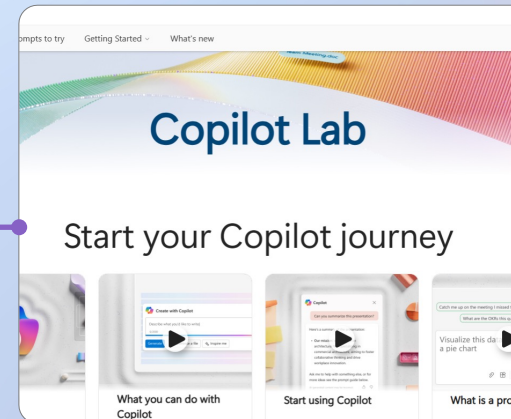
Microsoft Copilot Academy

- Centralized location to help with the basics of Copilot learning and upskilling, pulling the best content from available free Microsoft sources
- Structured content in easily consumable learning paths curated by Microsoft experts
- Develop your AI interaction skills from your Viva Learning app in Teams or webapp



Microsoft Learn

- Free, on-demand training content for skill development
- Step-by-step exercises guiding learners through common Copilot prompts and use cases

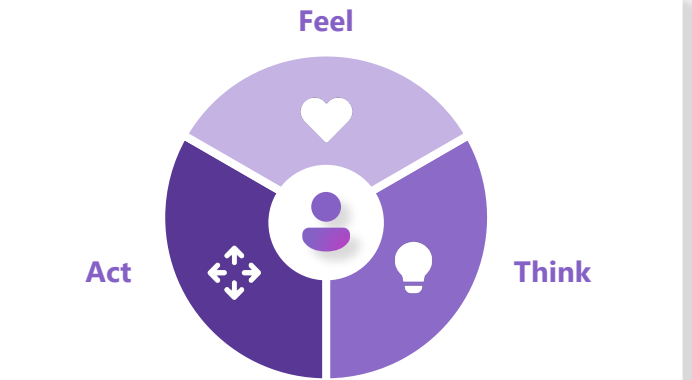


Copilot Lab

- Free location to meet, learn about, and test the capabilities of Copilot
- Improve your prompt engineering skills in an interactive hands-on environment

Understanding the User Journey

Getting to "Aha!"



The Think-Act-Feel framework is grounded in decades of research showing a whole human understanding – including feelings – is critical to business outcomes.

Building on this framework we understand that **delivering accelerated change is based on trust.**

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