Copilot adoption guide

July 2024

The top AI blockers you'll face

Congratulations on taking the first steps to building an AI strategy. This new era brings with it a new way of working for everyone. To help you take advantage of this immense opportunity, we're providing you with information for how to address the hurdles around AI user adoption.

Lack of visibility

58%

of organizations are concerned about the lack of visability into the unsanctioned use of GenAI[2].

Lack of protection

97%

of organizations have concerns about implementing AI dut to the lack of controls to mitigate risks of data leakage[3].

Increased AI regulations

By 2027

at least one global company will see its AI deployment banned by a regulator for noncompliance with data protection or AI governance legislation[4].

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Be inspired by others like you

Links to other partners and other resources already published.

Sourcepass:

https://www.pax8.com/blog/sourcepass-talks-copilot-adoption-and-security-within-the-smb-world/

Why is adoption so important?

After three months of using Copilot:

70%

of users said they
were more productive

68%

Felt it improved the
quality of their work

Top users saved
more than

10

hours

per month

Microsoft.com, "What Can Copilot's Earliest Users Teach Us About Generative AI at Work?" Nov. 15, 2023.

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Copilot for the web and how it's used

with commercial data protection

Generally available

When signed in with Entra ID:

Chat data is not saved

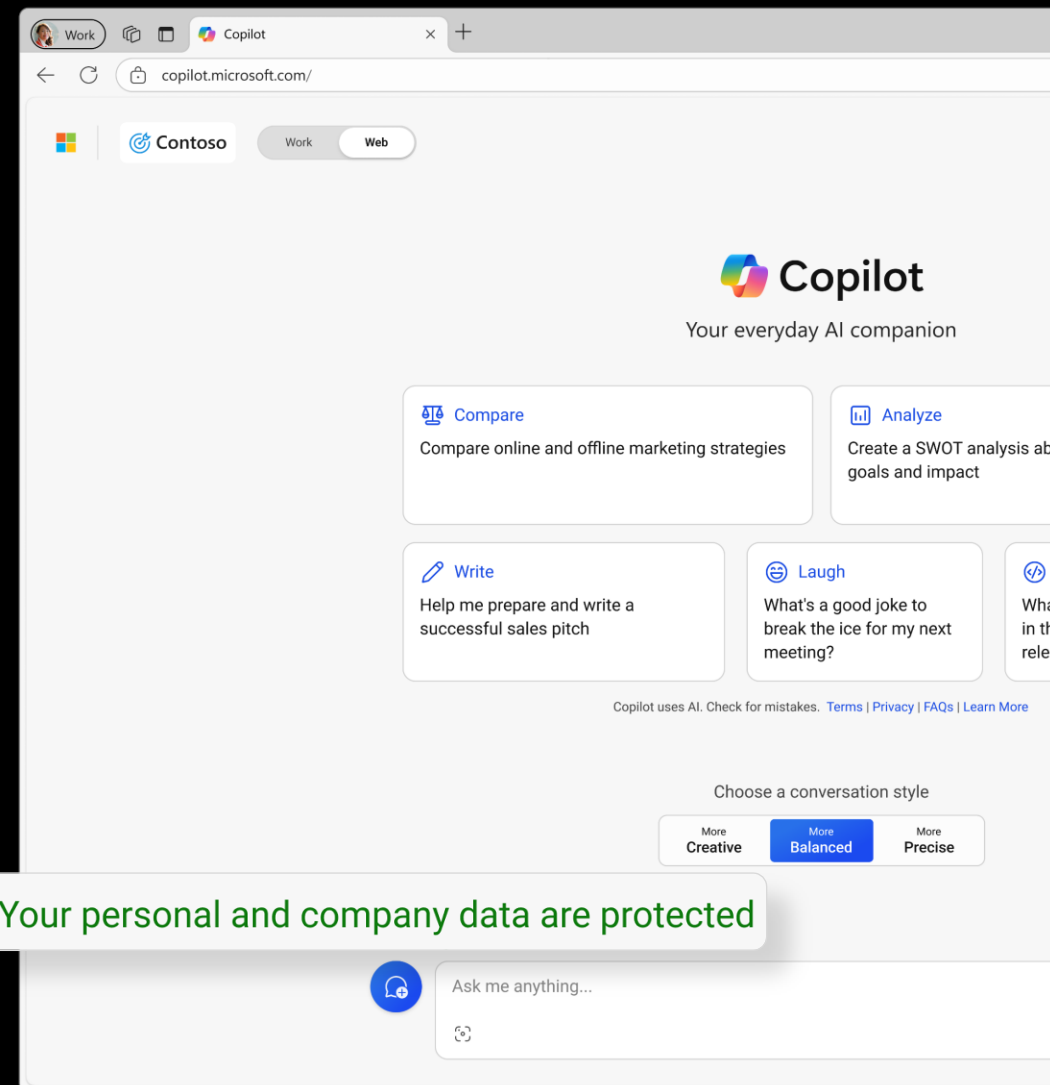Chat prompts and responses are discarded.

No eyes-on access

No one at Microsoft can view your data.

Data is not used to train the model

Chat data is not used to train the large language models used by AI.

As of Dec. 2023, Copilot is generally available. For more information about product terms, check out aka.ms/Copilot/Universal

Adoption roadmap

Assess

Build your plan and review

- Security requirements
- Data accessibility
- Outline objectives

Activate

Deploy pilot project

- Identify users
- Define and measure goals
- Set up training sessions

Adopt

Drive adoption and change

- Encourage peer groups for knowledge sharing
- Share successes and communicate across the organization

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Step 1: **Assess**

Prepare your customers' environment for Microsoft Copilot for M365

- Verify that your Microsoft 365 subscription is modernized to an eligible version for Copilot use. See requirements here.

- Update your devices and apps to the latest versions in the Microsoft 365 admin center.

- Enable Microsoft Graph API (admin center or Azure portal) to connect your data across Microsoft apps and services.

- Configure privacy and security settings based on customer needs and preferences (access, usage, communication) in the Microsoft 365 admin center, Copilot for M365 app, or individual app settings.

- Train your customers in ethical and legal standards and responsible AI use. See ethical principles here.

The importance of security

Security is a key prep step for AI adoption. As Copilot inherits all your existing Microsoft 365 security and compliance requirements, only people with the right permissions can access the content it reasons over.

Adoption might seem overwhelming, but you can start testing Copilot gradually. Begin by limiting access to SharePoint.

Review tips for <u>AI-readiness in the playbook</u> before starting.

? Did you know there are different assessments available for you and your client to take advantage of?

For more information, contact: <u>Support@pax8.com</u>

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Baseline and restricted SharePoint search

Considerations

Does **NOT** remove access for a user's OneDrive, files, and calendars with existing access, or chats and emails users send or receive.

Does **NOT** change permissions for what a user has access to. It reduces the risk of oversharing.

Does affect SharePoint search for **non-Copilot users.**

Copilot will likely have **less information available** to reference so this may impact how accurate or comprehensive some responses are.

Examples of such use cases/prompts that may be ineffective:

If the user has not been provided specific access and the files are stored in a restricted SharePoint site

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?

5

What is our policy on

– Provide employees the means to find useful information quickly

→ What is our policy for annual leave?

Restricted SharePoint search

This is intended as a temporary solution to give you time to review and audit site permissions while implementing robust data security solutions from Microsoft Purview and content management with SharePoint Advanced Management.

- **Restricted SharePoint Search** is designed for organizations particularly concerned about unintentional oversharing of content.

- When enabled, Copilot experiences and the organization-wide search are limited to a select set of SharePoint sites, as well as the individual user's files and content.

Pre-requisites

- Available to tenants with Copilot for Microsoft 365 subscriptions.
- Activation requires Global/Tenant/SharePoint admin rights.

Impact

Restricted SharePoint Search disables organization-wide search, while allowing you to select sites that you trust. This means users in your organization can use Copilot to reason over:

- An allowed list of curated SharePoint sites set up by admins (up to 100 SharePoint sites), honoring existing permissions on a site.
- Users' OneDrive, chats they are part of, emails they send and receive, calendars they have access to, etc.
- Files that are shared with and accessed by users.
- Content from users' frequently visited sites.

Access this blog for more info

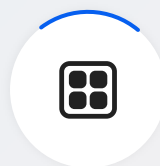# Secure and govern Copilot with unified Microsoft Security

Baseline
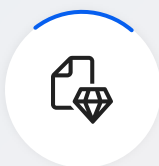
Copilot for Microsoft 365
+ Microsoft 365 Business Premium
+ Restricted SharePoint Search

- Multi-factor authentication
- Conditional access
- Manual sensitivity labels
- Data loss prevention policies

Better

Copilot for Microsoft 365
+ Microsoft 365 Business Premium
or higher
+ SharePoint Advanced Management

- All the benefits of Baseline +
- Advanced SharePoint sitewide access controls and reporting

Best-in-class
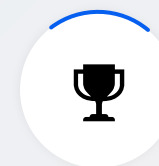
Copilot for Microsoft 365
+ Microsoft 365 E5
+ SharePoint Advanced Management

- Conditional access based on identity risk
- Automatically apply sensitivity labels
- Automatically remove inactive content
- Prevent data leak on endpoint devices
- Detect non-compliant usage

List of resources to help

AI Readiness Playbook

Learn how to prepare your clients for Copilot adoption and success with a Copilot for every Microsoft Cloud experience with step-by-step guidance

Read it

Enabling Copilot for Microsoft 365: critical security measures to take

Learn how you can leverage the built-in and add-on AI features of Microsoft 365 while protecting your clients' data, devices, and users. from cyber threats.

Check it out

FAQs around security

Learn how Copilot treats your data in the latest AI blog.

Read it

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Step 2: **Activate**

Start small

Planning is key. This is not just adding a product to your stack, this is a technological shift in your organization. Learn more.

Not everyone needs a full Copilot license on Day 1.

Start with a pilot project that includes Copilot champions from a specific user group or groups, allowing you to report and repeat on your pilot user progress as further adoption plans are made.

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Tips for a successful pilot project

Onboarding

Champions will be engaged in a guided training session for real-world Copilot use.

Communication

Establish a Teams Channel for collaboration and sharing across champions.

Regular usage

Allocate time for initial discovery and exploration. Share experiences (including wider teams)

Feedback/Review

Formal review of usage and use-cases to ensure impact.

Who are your ideal pilot members?

Tips when thinking about who should you include on your pilot project:

Look at current usage trends

Define use cases for each business function or team

Allocate Copilot to entire teams within a specific business function

Case study example:

Discover how Copilot helped Lumen technologies improve their customer experiences **here**.

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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

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Use cases across different departments

🛒 **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.

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🏪 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

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Use cases across different departments

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

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Use cases across different departments

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

Additional considerations for your pilot program

Recruiting the first users is a crucial step, as they provide feedback and drive further adoption within the organization. Other key needs you should consider:

In small organizations, there may not be separate roles for each of these needs, which can be normal. It's important that partners be aware of these needs without solely looking for stakeholders to create this support.

- **Deployment:** Ensure the organization implements Copilot seamlessly from a technical standpoint.

- **Change management:** Support in monitoring the adoption progress, gathering feedback, and fostering a collaborative environment.

- **Executive sponsorship:** Drive adoption and infuse confidence among employees with an executive sponsor that's also a Copilot champion.

- **Risk management:** Represent your clients' best interest by ensuring compliance to relevant AI regulations and ethical standards.

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Top 10 tips to try first with Copilot for Microsoft 365

Foundational skills for pilot 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 adoption lessons keep reading, or visit Copilot Lab at: aka.ms/CopilotLab

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Step 3: **Adopt**

Ongoing training is your key to success

Your Copilot activation can turn into full adoption with consistent communication and skilling support.

The way each user personalizes their Copilot usage will evolve dramatically over a six to 12-month period, so providing ongoing training is important for optimizing their Copilot usage and experience.

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Ongoing training pro tips

Get employees to amplify their usage by encouraging them to:

- Build a daily habit — Find day-to-day tasks where they use Copilot.

- Think like a manager — Know how to delegate tasks to Copilot with concise prompts and defined parameters.

- Make the most of reclaimed time — Focus on doing things that drive the most value instead of just trying to do "more."

- Provide feedback — Give feedback to Copilot when prompted to better refine their experience.

Microsoft's advice for Copilot growth

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 and 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 and execs	HR	Marketing	Operations	IT	Sales	Finance
Improve meetings	Cost per hire	Leads created	Customer retention	Outstanding support tickets	Number of opportunities	Accelerate cash flow
Content creation	Employee turnover	Brand value	Product time to market	Application downtime	Close rate	Spend on ERP system
Manage daily agenda	Compliance risk reduction	Cost per lead	Supply chain efficiencies	Departmental spending	Revenue per sale	Risk reduction

Create champions for Microsoft 365 Copilot

Accelerate adoption through skilling support

Microsoft 365 Copilot is integrated into the apps that you use every day,
working alongside you to unleash your creativity and help you perform tasks faster.

Copilot in Teams

Catch up on meetings you missed in a fraction of the time

What were the key points discussed?

Create a table with the key ideas and their pros and cons.

For each participant, what was the biggest concern? What were they most excited about?

Summarize a meeting and identify next steps

Draft an email to the meeting participants that summarizes the meeting and includes action items.

Copilot in Word

Quickly catch up on the key points of a document

What are the effects of implementing a new flexible work policy based on this [Document] ?

Summarize this [Document] into three bullets.

Find specific insights and information in a long document

What were the critical project challenges?

What's missing from the [Document] ? Are there any inconsistencies?

Copilot in Outlook

Draft email replies and personalize the tone and length – even on the go

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

Quickly summarize a long email thread

Select Summary by Copilot to quickly scan the thread and identify key points.

Copilot in PowerPoint

Summarize a long slide deck

Summarize [Deck X] and identify action items.

Answer specific questions to better understand a presentation

What are we trying to accomplish with this new event?

Who are the speakers for the conference, and what are they presenting?

Microsoft 365 Copilot:
Prompting Do's and Don'ts

DOs

Be clear and specific.
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

Keep it conversational.
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.

Give examples.
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

Ask for feedback.
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.

Write legibly.
Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.

Check for accuracy.
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

Provide details.
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

Be polite.
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

DON'Ts

Be vague.
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.

Request inappropriate or unethical content.
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.

Use slang, jargon, or informal language.
This may cause Copilot to give low-quality, inappropriate or unprofessional responses.

Give conflicting instructions.
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.

Interrupt or change topics abruptly.
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

Microsoft 365 Copilot:
The art and science of prompting

1. Tell Copilot what you need

✓ **Learn** about projects and concepts:
"What is [Project X] and who are the key stakeholders working on it?"

✓ **Edit text:**
"Check this product launch rationale for inconsistencies."

✓ **Transform** documents:
"Transform this FAQ doc into a 10-slide onboarding guide."

✓ **Summarize** information:
"Write a session abstract of this [presentation]."

✓ **Create** engaging content:
"Create a value proposition for [Product X]."

✓ **Catch-up** on missed items:
"Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

What response do you want from Copilot?

Goal

Why do you need it and who is involved?

Context

Generate 3-5 bullet points **to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign.** **Focus on Email and Teams chats since June.** **Please use simple language so I can get up to speed quickly.**

Source

Which information sources or samples should Copilot use?

Expectations

How should Copilot respond to best meet your expectations?

Microsoft 365 Copilot:
The art and science of prompting (cont'd)

1. Tell Copilot what you need

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.

Generating content ideas
Lead with broader requests, then give specific details about the content.

Enabling insightful meetings
Request a meeting recap, then ask for more information about what you should know.

Storytelling assistance
Ask Copilot to write a story, then guide it by giving more specific, relevant details.

Gaining insights
Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.

Translating languages
Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.

Solving technical problems
Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations.
Copilot is limited to your current conversation, so give lots of details.

Be professional.
Using polite language improves Copilot's response.

Communicate clearly.
Pay attention to punctuation, grammar, and capitalization.

Use quotation marks.
This helps Copilot know what to write, modify, or replace for you.

Start fresh.
Avoid interrupting and type "new topic" when switching tasks.

Learn more about Microsoft 365 Copilot on our support page.

Copilot for Microsoft 365
Training and documentation by phase

User enablement

Technical readiness

Get ready

- ✓ **Docs:** User Experience Strategy template (coming soon)
- ✓ **Video**: Copilot Experiences Explained

- ✓ **Course:** Get started with Copilot for Microsoft 365 (2 hours)
- ✓ **Video**: How Microsoft 365 Copilot works (10 minutes)
- ✓ **Video**: How to get ready for Microsoft 365 Copilot (9 minutes)
- ✓ **Docs**: Data, Privacy, and security for Microsoft Copilot for Microsoft 365
- ✓ **Docs**: Microsoft Copilot for Microsoft 365 requirements

Onboard and engage

- ✓ **Course:** Copilot for Microsoft 365 User Enablement Specialist (coming soon)
- ✓ **Tool:** Copilot Lab (including app specific guidance)
- ✓ **Video**: Creating a User Experience Strategy (coming soon)
- ✓ **Docs**: User Experience Strategy template (coming soon)

- ✓ **Course:** Prepare your organization for Copilot for Microsoft 365 (1.5 hours)
- ✓ **Video**: Admin steps to get ready for Microsoft 365 Copilot
- ✓ **Docs**: Apply principles of Zero Trust to Microsoft Copilot for Microsoft 365
- ✓ **Docs:** Enable users for Microsoft Copilot for Microsoft 365

Deliver impact

- ✓ **Course:** Empower your workforce with Copilot for Microsoft 365 Use Cases (7 business group use cases)
- ✓ **Course:** Craft effective prompts for Copilot for M365 (2 hours)
- ✓ **Article**: Learn about Copilot prompts
- ✓ **Article**: Get better results with Copilot Prompts
- ✓ **Article**: Edit a Copilot prompt to make it your own
- ✓ **Article**: Share your best prompts

- ✓ **Docs**: Copilot for Microsoft 365 Documentation
- ✓ **Docs**: Copilot Dashboard implementation

Extend and optimize

- ✓ **Docs**: Modern Collaboration Architecture people-centric scenario guidance
- ✓ **Course**: Craft effective prompts for Copilot for Microsoft 365 (2 hours)

- ✓ **Docs**: Extend Microsoft Copilot for Microsoft 365
- ✓ **Course:** Optimize and extend Copilot for Microsoft 365 (1 hour)
- ✓ **Course:** Create copilots with Microsoft Copilot Studio (4 hours)
- ✓ **Course:** Extend and manage Microsoft Copilot Studio copilots (2 hours)

Resources

- Copilot for Microsoft 365 Adoption Playbook
- Copilot for Microsoft 365 U.S. webpage
- Copilot for Microsoft 365 French Canadian webpage
- Pax8 blog: How to harness this revolutionary AI tool