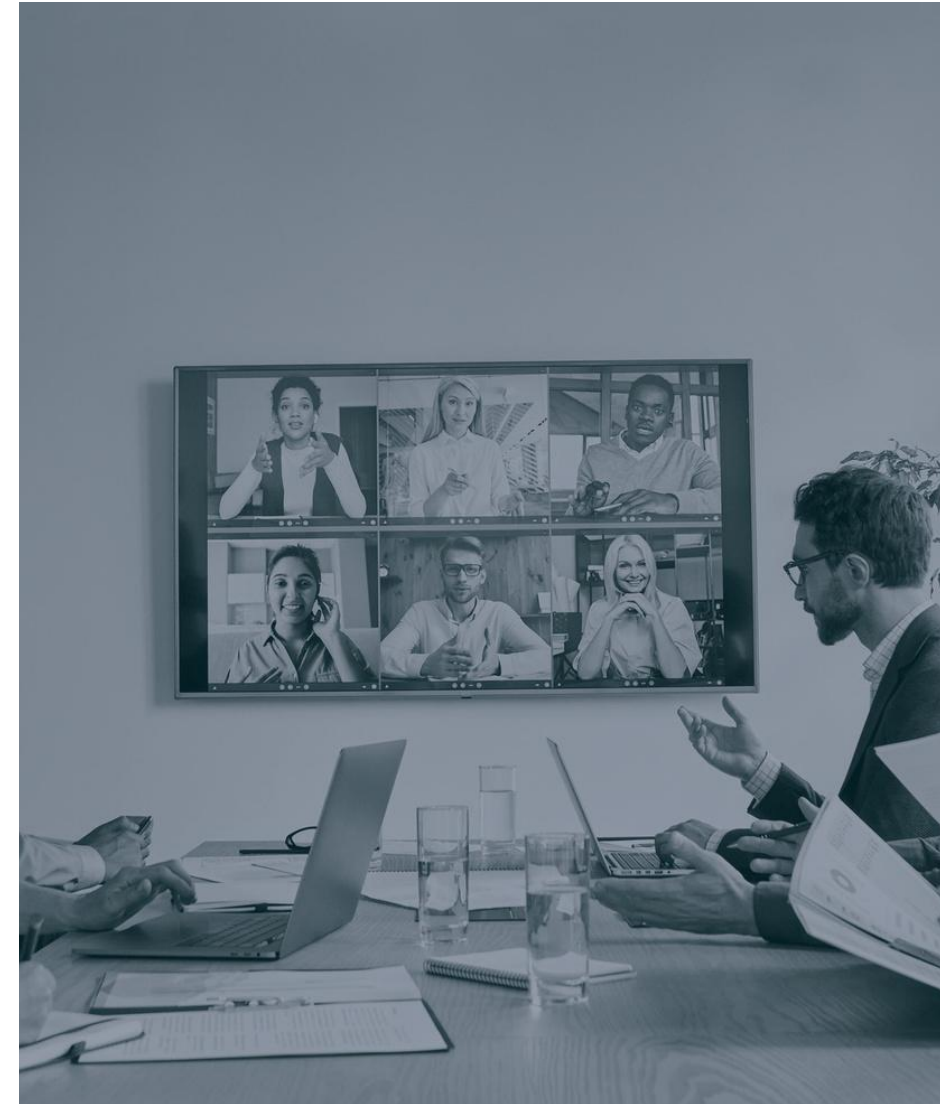


M365 Copilot: Readiness Assessment

Findings & Recommendations



What to Expect



Goal

Our aim is to share the results and suggestions from our workshops, including an overview of your data environment and recommendations for mitigating any identified risks. We will also present the end user Copilot charter, guidance on establishing a Copilot Center of Excellence, and recommended business use cases with corresponding success criteria. We'll wrap with some quick wins to implement immediately and detailed next steps.



Agenda

- 01 Findings Review
- 02 Recommendations
- 03 Q&A and Next Steps

01

Technical Assessment Findings and Recommendations



High Level Evaluation Details

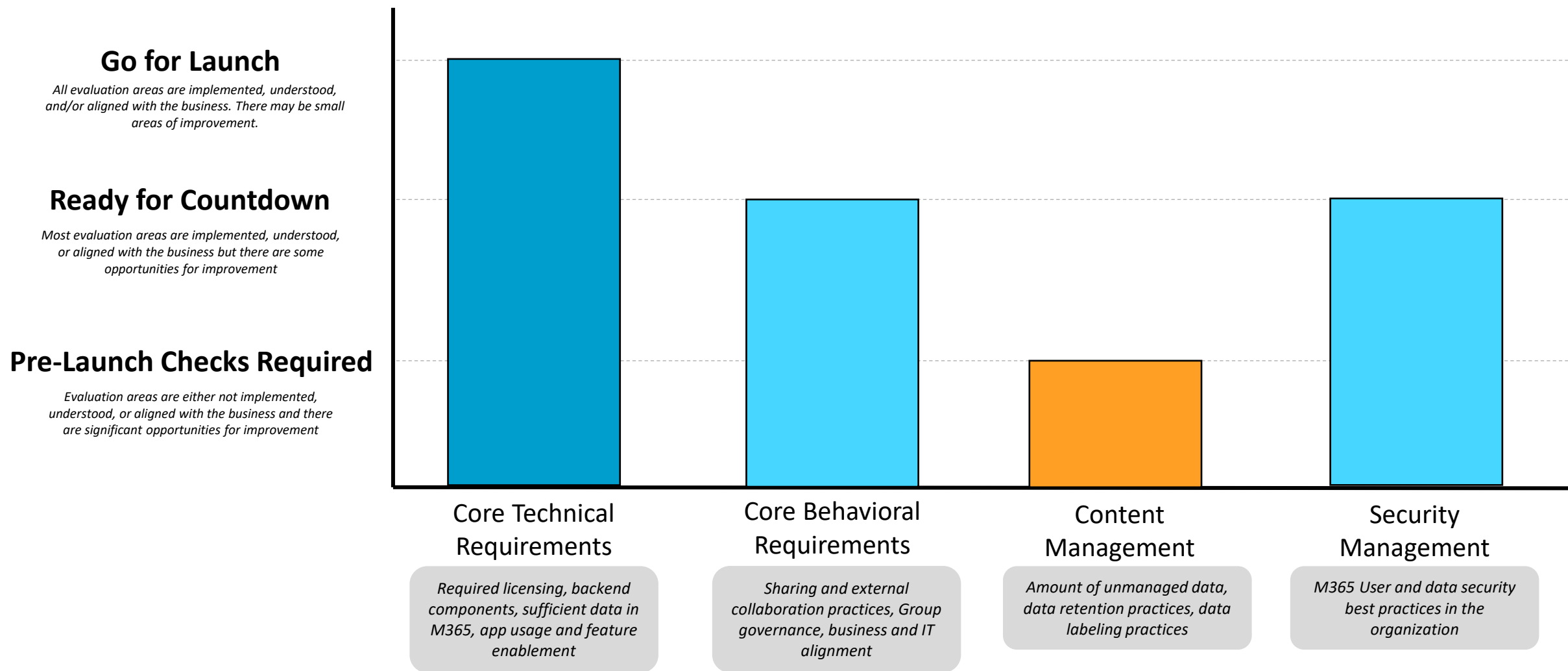


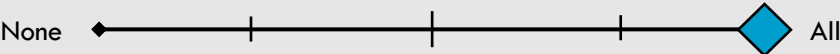
Chart is a relative graphical representation and not intended to be quantitative in nature.

Core Technical Requirements

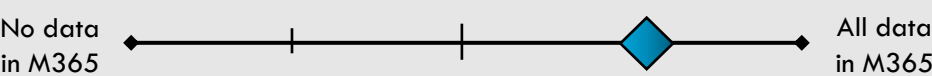


Evaluation

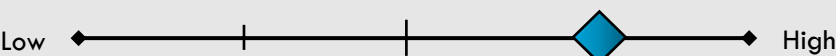
Required Prerequisites



Sufficient Data in M365



Modern Apps and App Features



Category Details

- ✓ Have necessary pre-requisite licensing (Microsoft 365 E3/E5)
 - ✓ Use the required backend pieces (Exchange Online, Entra ID)
 - ✓ Actively use SharePoint Online, OneDrive, and Teams
 - ✓ **Update Channel:** Monthly
 - *Note:* Copilot will not work with users that are placed in the Semi-Annual Office update channel. Users that are targeted for Copilot licensing, will need to be placed on either Current or Monthly Enterprise update channels.
-
- ✓ Useful amount of organizational unstructured data resides in the M365 environment
 - Not all data dependencies reside within M365, but this is quite normal
 - ❖ **Recommendations:**
 - 🚀 Review/Discuss internally what departments/individuals have what data set dependencies, in order to see where to roll out Copilot to first and which ones may need to wait until more data is accessible in M365 and thus Copilot.
-
- ✓ Loop and Whiteboard enabled
 - ✓ Microsoft Edge browser utilized (Edge is recommended for the most seamless experience w/ Copilot)
 - Recording and Transcriptions are disabled due to internal policies
 - ❖ *Note:* Copilot can be set within the Outlook Meeting Options to allow Copilot to work during only or during and after a meeting as concluded, even without a Teams recording. Review instructions and more info [here](#).

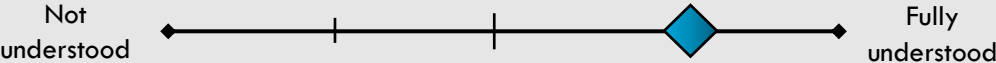
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Core Behavioral Requirements

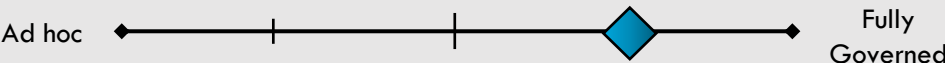


Evaluation

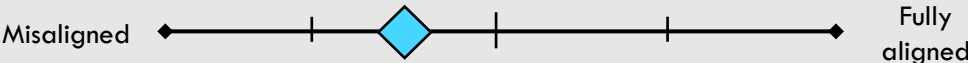
Sharing and External Collaboration



Group and Site Governance



Business and IT Alignment



Key Considerations: Communication channels, joint decision-making processes, support structure for technology initiatives.

Category Details

- SharePoint and OneDrive external sharing policies are set to most permissive with anonymous links enabled (links expire at 90 days)
 - Recommendation:** Discuss about getting the default sharing policies for the organization be set to New and Existing Guests. This will cause Anonymous Links to be disabled from being used, but this is for better data security.
 - Hard attachment use is mainly utilized in the organization (*common*)
 - Sharing of links is not commonly utilized and there is no current communication on this
-
- ✓ SPO Sites: Centrally Governed
 - Teams and Groups: Self-Service
 - Recommendation:** For any self-service practices, having good auditing of those resources will help combat SPO resources based sprawl
 - Good understanding and process for overall governance in the organization, but known improvements are being looked at
-
- Definition:** Assessing the level of alignment and cooperation between the business units and IT departments regarding technology adoption and usage.
 - No general level of understanding and comfort with the Sharing of Links best practice
 - No formal Change Management process in place with IT
 - Not much communication (only general) information on sharing of links vs. hard attachments
 - Recommendation:** Have quarterly or at least bi-annual (twice a year) training or communications on sharing best practices to help with adoption in this area.

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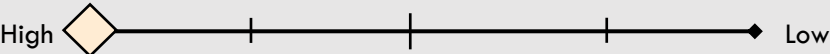
Content Management

- ***Structured Data** – Databases, HRIS, etc.
- ***Unstructured Data** – Emails, OD/SPO documents, Teams chats
- ***Data Sprawl** – Data in the org that is constantly growing and changing every day

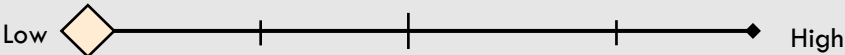


Evaluation

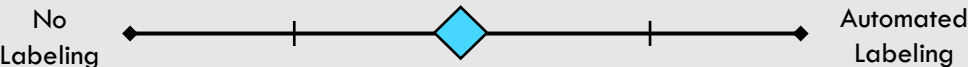
Amount of Unmanaged or ROT Data




Data Volume and Retention Management




Labeling Practices



Category Details

- No current/good practices in place for data clean up in the organization
- Customer recognizes they have an issue with the data estate
- ❖ **Special Note:**
 - Data that exists in your 365 environment that is ungoverned, unclassified, or generally unmanaged poses a risk to the effectiveness of Copilot's knowledge and responses. If there is more ROT (redundant, outdated, and trivial) data in your environment than there is useful data, your Copilot experience will be suboptimal.
- No current retention policies in place for the general content in M365 (OneDrive, SPO, Teams)
- **Recommendation:**
 -  Look into the SharePoint Advanced Management when it comes available for your tenant (Spring/Summer '25), that will help with reviewing and managing content in the organization with reporting and content policies, [here](#).
 - Discuss internally about the importance of Retention Policies and who would be responsible for setting which content will have what policy on it.
- ✓ Some sensitivity labels deployed in the org
- Better labeling practices are recognized in the organization
- Auto-Labeling is not utilized
 - **Recommendation:** Start Labeling and Auto-Labeling policies soon and configure it in Simulation Mode, so you can view/audit where Purview will automatically label content. You can then adjust the auto-labeling policy to configure it just right. (Run in Sim mode for 1-3 months)

Sliders are relative graphical representations and not intended to be quantitative in nature.

 = High-impact recommendation

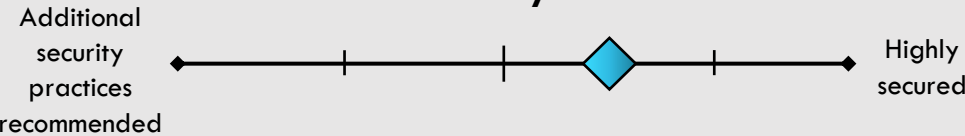
Security Practices



Evaluation

Category Details

M365 Security Practices

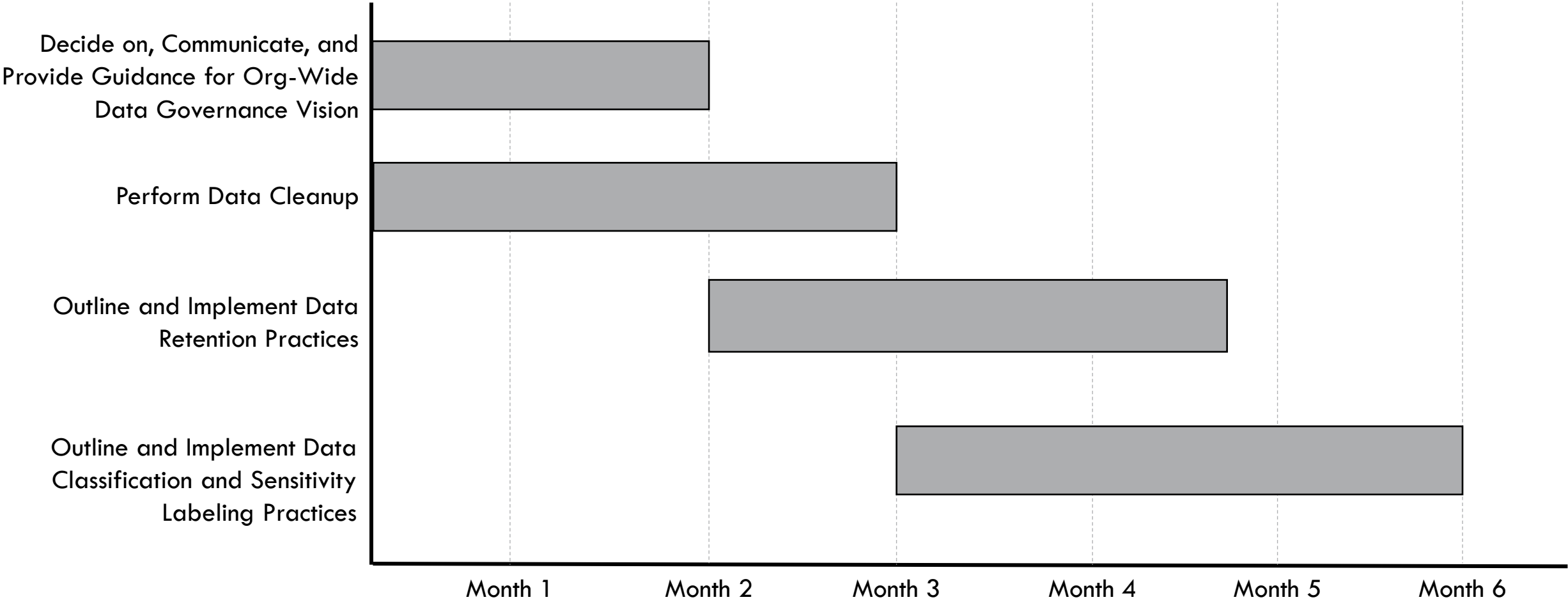


- ✓ MFA is enabled and enforced
 - ✓ Email Protection in place with Barracuda and Defender
 - ✓ Endpoint Security in place with Sentinel One/Artic Wolf/Kaseya
 - ✓ RBAC is in place
 - ✓ Content Audit/Access Review – In Place with monthly reviews
 - Cloud App Restriction – No current policies or enforcement
 - Advanced Data Security practices – Immutable back up and some email encryption policies
 - ✓ Conditional Access Policies in place with some Geo based policies
- ❖ **Note:** Microsoft 365 Copilot will inherit any compliance and security policies set in the Microsoft 365 environment. So, any application, data, time based, and/or location-based policies will be utilized.
- ❖ **Example Scenario:** If a Conditional Access policy is set that users can only access M365 resources from 7am to 7pm, Copilot will not retrieve information from M365 sources before or after those time frames.

Sliders are relative graphical representations and not intended to be quantitative in nature.

= High-impact recommendation

High Level Technical Strategic Roadmap



1. Roadmap items do not have an explicit order or level of priority
2. Items listed here may or may not be within the scope of engagement but are representative of the recommendations from previous slides

Some of these initiatives may already be in progress

02 Charter, AI Readiness, Use Cases, ROI and Success Criteria



AI Charter



Key areas addressed:

- Data & Security
- AI Governance
- Company Efficiency

Next areas to address:

- AI Monitoring & Evaluation
- AI Review Process
- Training and Resources

This session is not intended to finish a complete AI Charter. It is highly recommended to continue discussions with your AI/Copilot Center of Excellence Team to address all needed areas of consideration.

[Link to AI Charter Draft](#)

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TECHNOLOGIES
together we make IT happen

Microsoft 365 Copilot Readiness Assessment

Initial AI Charter Draft Exercise

*****Disclaimer:** This document is provided solely as a draft and is not intended to represent a final version of your AI charter. It is imperative that all stakeholders engage in thorough review and collaboration with the AI governing committee to ensure alignment with your organization's values, priorities, and commitments. Only through collective input and consensus can you accurately reflect the principles and objectives guiding your approach to AI. Your active participation and feedback are essential to developing a comprehensive and effective AI charter that reflects your organization's diverse perspectives and interests.***

At [Client name] we are committed to leveraging cutting-edge technologies to enhance our service delivery and operational efficiency. As part of our dedication to continuous improvement, we recognize the transformative potential of Artificial Intelligence (AI) in supporting our mission to provide exceptional emergency and support services. This AI Charter outlines our strategic approach to integrating AI into our operations, ensuring that it aligns with our core values of trust, empowerment, and a relentless pursuit of excellence.

OUR MISSION

We proudly serve the changing needs of our communities by providing exceptional emergency and support services. We pledge a commitment to preserving the quality of life.

AI Proficiency Assessment Review



AI Proficiency scores and contributing factors. See complete assessment score [here](#).

Understand employee readiness, perception, engagement, and skills as they relate to AI integration.

Assessment 1: Potential Impact of AI

Score
17

- [Client] expects a low to moderate impact on the organization.
- Users may struggle to integrate AI into daily work tasks and organizational practices.
- [Client] is moderately prepared to provide training and ongoing support.

Assessment 2: AI Readiness - Skills

Score
13

- There is currently moderate use of AI on work related tasks and projects.
- Users are in high need of support and training to build the necessary skills to use AI effectively.
- Users will need education and training to increase their confidence in using AI to increase productivity.

Assessment 3: AI Readiness - Attitudes

Score
21

- There is excitement towards implementing AI in the workplace.
- Users are receptive to education and training opportunities.
- Users are currently not informed of organizational goals pertaining to AI implementation

AI Proficiency Score

51

Scale of 24 – 120

[See the full scoring index.](#)

- Employees in this range have limited awareness or understanding of AI and its potential in the workplace.
- They might be resistant to change or lack the necessary skills and knowledge to work effectively with AI technologies.
- Additional training and awareness-building efforts are likely needed to raise their readiness levels prior to implementation.

Risks & Remediation Strategies - OCM



RISK: Minimal resources for launch and continued support of Copilot.

Insufficient staff to support the launch and continued growth of Copilot risks the user experience, reduces knowledge sharing, and missed opportunities for efficiency. M365 Copilot is not a 'set it and forget it' technology.

- Form strategic partnerships with vendors, consultants, or other organizations to assist with support.
- Encourage community engagement and knowledge sharing. Give users a space to crowdsource and share best practices.
- Host open forums or office hours for those wanting guidance on using Copilot in the early days.
- Create repositories of Microsoft resources for users to easily access.

RISK: Inadequate Post-Implementation Support.

Post-launch, the absence of support and feedback mechanisms can lead to user frustration, self-troubleshooting, resistance to change, and adoption challenges, hindering users' ability to adapt to new tools

- Provide ongoing training resources, including videos, blogs, and FAQs. Update as new functionality is available.
- Establish and maintain regular communication channels and a feedback loop and ensure timely responses.
- Designate responsibility for monitoring the Ask Us Anything channel to address questions and concerns.
- Make sure users know where to come for help, and have staff prepared to support and assist

RISK: Unrealistic expectations of Copilot's performance.

If an organization sets unrealistic expectations about the capabilities and benefits of Copilot, even through informal interactions or channels, it can lead to disappointment and skepticism when the tool fails to meet those expectations.

- Develop a comprehensive communication strategy, including transparent documentation and user-friendly guides and tutorials. Ensure expectations are appropriately set as part of this strategy.
- Leverage influential voices to communicate realistic expectations to the broader audience.
- Encourage users to provide feedback on their experiences and use that to manage expectations based on real-world usage.

Persona-Based ROI and Success Criteria

Criteria in black were set by the [Client] team.
Those in white are suggested options.



Quantitative

- 20% of licensed employees indicate Copilot increases their job satisfaction. (Measure via user survey.)
- Copilot usage increases by 30% when comparing 7 days to 28 days post-licensing. (Measure via Copilot PowerBI Dashboard.)
- Within 14 days of launch, 50% of users have used a Copilot function in at least one M365 app. (Measured via Copilot PowerBI Dashboard.)
- The AI Assistance category in the Adoption Score has increased by 30% within 28 days of licensing. (Measured in the Adoption Score Report in the M365 Admin Center.)

Qualitative

- 10-20% increase in productivity for end-users
- 70% or more agree they are more productive when using Copilot.
- 73% or more agree that using Copilot allows them to complete tasks faster.
- 68% or more agree that using Copilot helps improve the quality of their work or output.
- 71% or more say using Copilot helps them spent less mental effort on mundane or repetitive steps.
- 67%+ say Copilot saves them time so they can focus on more important work
- 75%+ say if offered the choice between a bimonthly free lunch and access to Copilot, which would you choose?
- At 30 days and at 90 days, users indicate they are saving at least 15 minutes per week by using Copilot. (15 minutes/week is the average time saved to break even financially in year one.)
- On the next employee engagement survey, add a question "Copilot has increased my employee engagement or satisfaction" and look for 20% of respondents to agree or strongly agree. (Measured via annual employee engagement survey.)

Copilot in Outlook



Prompts of Focus:

- ✓ Draft or reply to an email, with or without tone and length designations
- ✓ Coaching by Copilot – get suggestions to write better emails
- ✓ Summarize an email chain



Non-Financial ROI:

- ✓ Improved brand or perception from more well-worded, succinct, or otherwise improved writing.
- ✓ Less stress associated with fine tuning an email or determining how to word a difficult message.
- ✓ Less effort required for grammar review.



Related Success Criteria and ROI:

- ✓ 70% or more agree they are more productive when using Copilot.
- ✓ 73% or more agree that using Copilot allows them to complete tasks faster.
- ✓ 68% or more agree that using Copilot helps improve the quality of their work or output.
- ✓ Copilot usage increases by 30% when comparing 7 days to 28 days post-licensing. (Measure via Copilot PowerBI Dashboard.)



Impacted Personas:

- ✓ Anyone who uses email
- ✓ Knowledge workers
- ✓ Executives
- ✓ Managers
- ✓ Developers
- ✓ Analysts
- ✓ Legal

Copilot in Teams



Prompts of Focus:

- ✓ Summarize a Teams meeting
- ✓ Find action items from a Teams Meeting
- ✓ Recap meeting so far
- ✓ Generate meeting notes
- ✓ Summarize a chat thread
- ✓ Rewrite or adjust a chat or channel message



Non-Financial ROI:

- ✓ Confidence in clearly knowing your action items coming from a meeting.
- ✓ Less anxiety knowing if you are double booked, you don't have to rely on someone else to update you or provide action items.
- ✓ Increased self-esteem from expressing your thoughts in a well-crafted, professional way.



Related Success Criteria and ROI:

- ✓ 70% or more agree they are more productive when using Copilot.
- ✓ At 30 days, users indicate they are saving at least 30 minutes per week by using Copilot. 68% or more agree that using Copilot helps improve the quality of their work or output.
- ✓ 67% say Copilot saves them time so they can focus on more important work.
- ✓ 86% say Copilot makes it easier to catch up on what they missed.



Impacted Personas:

- ✓ Administrative or Executive assistants
- ✓ Project managers
- ✓ Legal professionals
- ✓ IT Professionals
- ✓ Anyone who attends meetings

Copilot in M365 Chat



Prompts of Focus:

- ✓ Provide a detailed summary of my recent emails about [topic].
- ✓ List key points from [file].
- ✓ What's the latest from [person] organized by emails, chats, and files?
- ✓ Find my documents related to [topic].
- ✓ Propose a new introduction to [file].



Non-Financial ROI:

- ✓ Increased retention of information after it's presented in a condensed format.
- ✓ Reduced stress associated with trying to locate specific information in a hurry.
- ✓ The opportunity for a fresh perspective or new ideas on how to communicate the desired message.



Related Success Criteria and ROI:

- ✓ 70% or more agree they are more productive when using Copilot.
- ✓ 73% or more agree that using Copilot allows them to complete tasks faster.
- ✓ 68% or more agree that using Copilot helps improve the quality of their work or output.
- ✓ Copilot usage increases by 30% when comparing 7 days to 28 days post-licensing. (Measure via Copilot PowerBI Dashboard.)



Impacted Personas:

- ✓ Project managers
- ✓ HR professionals
- ✓ Legal professionals
- ✓ Business leaders

Copilot in Word



Prompts of Focus:

- ✓ Rewrite a Word document
- ✓ Draft a Word document
- ✓ Summarize this document
- ✓ Ask a question about this document



Non-Financial ROI:

- ✓ The opportunity to gain insights into effective writing techniques and strategies that can be applied to future documents.
- ✓ Enhanced creativity that comes from seeing Copilot's suggestions, potentially enriching the document's content.
- ✓ Increased likelihood of making a positive impression on the reader due to improved professionalism, clarity, and readability.



Related Success Criteria and ROI:

- ✓ 85% say Copilot makes it easier to get to a good first draft faster.
- ✓ 68% said Copilot helped them jump-start the creative process.
- ✓ 68% or more agree that using Copilot helps improve the quality of their work or output.
- ✓ Copilot usage increases by 30% when comparing 7 days to 28 days post-licensing. (Measure via Copilot PowerBI Dashboard.)



Impacted Personas:

- ✓ Legal professionals
- ✓ Marketing and communication specialists
- ✓ Contract writers
- ✓ Content creators
- ✓ Business leaders

Copilot in PowerPoint



Prompts of Focus:

- ✓ Create a presentation (from a Word document, must paste the link)
- ✓ Add a slide about _____.
- ✓ Create a presentation about _____ (general topic).



Non-Financial ROI:

- ✓ Copilot presentations can spark creativity by offering new ideas or perspectives based on prompts.
- ✓ Users may discover new ways to structure presentation, incorporate multimedia elements or communicate their message more effectively, leading to more engaging and impactful presentations.



Related Success Criteria and ROI:

- ✓ 68% say Copilot helps them jumpstart the creative process.
- ✓ 85% say Copilot helps them get to a good draft faster.
- ✓ 57% say Copilot has made them more creative.
- ✓ 72% say Copilot helps them generate ideas while writing.



Impacted Personas:

- ✓ Project Managers
- ✓ Public Relations Managers
- ✓ Customer Experience Managers
- ✓ Facilities Manager
- ✓ Compliance Officers

03

Start Planning Your Copilot Center of Excellence



Center of Excellence – Key Characteristics



Strategic Alignment	Aligns AI initiatives with the overall strategic goals and objectives of the organization. Ensures AI deployments contribute to outcomes and address specific organizational goals.
Clear Objectives and Scope	Defines clear and measurable objectives for the CoE. Clearly outlines the scope of AI deployments and opportunities the CoE will address.
Cross-Functional Expertise	Consists of a multidisciplinary team with diverse skills and knowledge.
Governance and Leadership	Establishes strong governance mechanisms for AI projects and initiatives. Clearly defined leadership and accountability within the CoE.
Data Governance and Ethics	Implements robust data governance practices to ensure data quality, security, and compliance. Adheres to ethical considerations in AI deployments and addresses biases.
Security Compliance	Prioritizes cybersecurity measures to protect AI models and data while ensuring compliance with relevant regulations and standards.
Performance Measurement	Defines KPIs to measure the success of AI deployments. Regularly assesses and reports on the performance of deployed AI tools.
Scalability and Flexibility	Explores, selects, and/or designs AI solutions with scalability in mind to accommodate future growth. Adapts to changing requirements and emerging technologies.

Center of Excellence – Key Characteristics



Innovation Culture	Fosters a culture of innovation and continuous improvement. Encourages creative thinking, experimentation, and exploration of AI opportunities.
Training and Skill Development	Invests in training programs to enhance the skills of CoE members, including Champions, to best equip end users with the adopted tools.
Collaboration and Communication	Facilitates collaboration between technical and non-technical teams. Establishes communications channels to keep stakeholders informed.
Continuous Improvement	Establishes mechanisms for ongoing evaluation and improvement of AI solutions. Learns from successes and failures, adapting strategies accordingly.
User-Centric Approach	Prioritizes the user experience and ensures the AI tools and preparation meet end-user needs. Actively seeks feedback from end-users and incorporates it into the deployment process.
Community Building	Builds a sense of community within the CoE and across the organization. Encourages knowledge sharing, collaboration and a collective commitment to AI excellence.
Center of Support	Serves as a support system for the user community. Staffed with early adopters, champions, SMEs, new users can get answers, updates, information, and support through their Copilot adoption journey.

Building a Copilot Center of Excellence



Copilot Center of Excellence Team

The Governing Body

- Consults AI Charter and regulations
- Sets rules, guidelines, principles and makes decisions rooted in compliance
- Prioritizes next steps and timelines
- Considers overall organizational value of any new area of focus
- Made of stakeholders, sponsors, and those who will execute on decisions

The Nurturing Body

- Helps facilitate collaboration and communication
- Seeks feedback and integrates into deployment and preparation plans
- Change Champions help evangelize new technology and benefits and support user community
- Prioritizes user experience and knowledge sharing

What is the purpose of *your* Center of Excellence?

Executive Sponsor – Activities



Though some successes can be achieved by a few motivated individuals, you will be in a better position when a senior leader is engaged, supportive, informed, and available to assist.

Successful leadership within a CoE demands more than a title. An effective executive sponsor must be prepared, enthusiastic, and equipped to guide the CoE toward success.

Here are key activities an executive sponsor should be ready, willing, and capable of providing:

- Ensure the CoE's initiatives align with the overall strategic goals and vision of the organization.
- Advocate for and secure the necessary resources, including budget, personnel, and technology to support CoE initiatives.
- Engage with stakeholders across the organization to build support for the CoE's objectives.
- Act as a champion for the CoE at the executive level, advocating for its importance and value.
- Identify and mitigate risks associated with CoE initiatives, while providing guidance on how to navigate challenges and obstacles.
- Communicate effectively with executives, stakeholders, and the user community while maintaining transparency regarding the CoE's goals, progress, and challenges.
- Gather feedback from stakeholders and team members and use it to drive continuous improvement.



Center of Excellence – Targeted Members

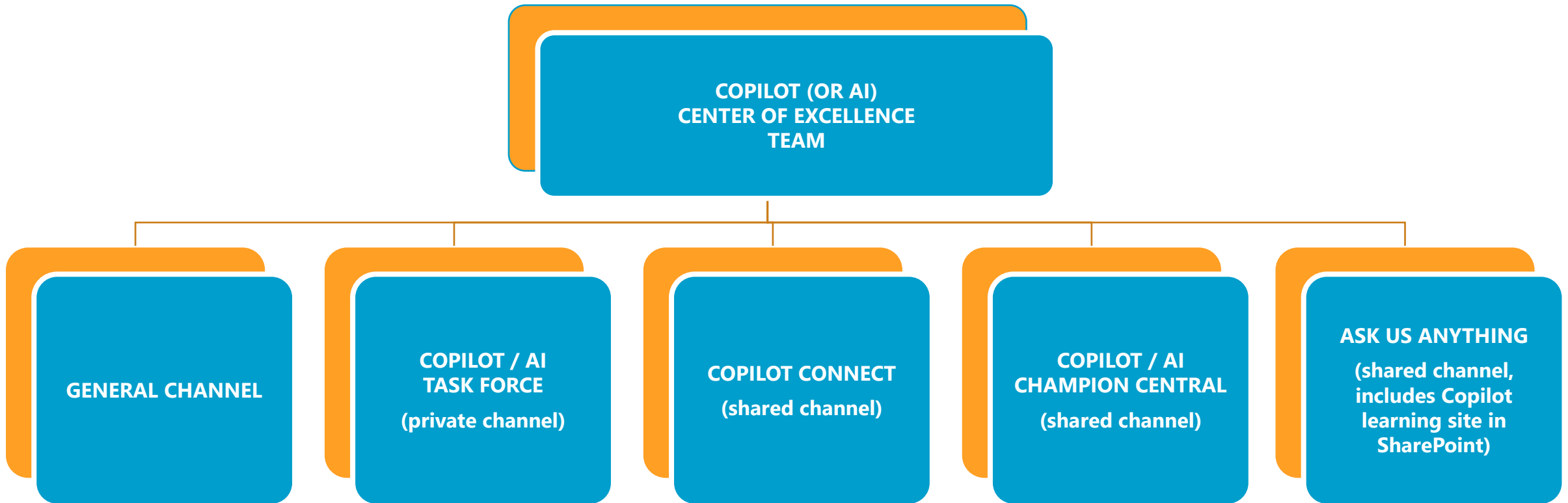


Forming a multidisciplinary team is crucial for a CoE as it brings together diverse expertise and perspectives, fostering innovation and holistic problem-solving. This diversity not only enhances the quality of decision making but also promotes a culture of continuous learning, adaptability, and success in addressing complex challenges within the organization.

The collaboration of individuals with varied skills, including business, technical, and change management, ensures comprehensive coverage and effective execution of the CoE’s initiatives.

CoE Director / Manager	Executive Leadership	Steering Committee
Project Manager	IT Integration Specialist	Data Governance Specialist / Team
Technical Experts	Business Representatives	Business Analyst
Financial Analyst	Security and Compliance Officer	Help Desk Support
Change Management Specialist	User Adoption Specialist	Communication Specialist
Training Specialist	User Experience (UX) Specialist	Training Coordinator
Champion Representative for End-Users	Subject Matter Experts	Quality Assurance Specialist

Center of Excellence: Recommended Framework



Channel Purpose & Membership



General Channel

- Announcements
- News & Updates
- Anything appropriate for all team members to view
- **Membership:**
 - All members of the team

Copilot / AI Task Force (private channel)

- Intended discussions and decision making about AI in the organization. Use this space for general discussion, launch information and planning, user preparation discussions. Etc.
- Capture status call notes and store here.
- **Membership:**
 - All members of the Everyday AI project team, decision makers, stakeholders
 - Members of IT, OCM, Employee Experience, Project leaders
 - **Excludes** Champions and End Users

Copilot Connect (shared channel)

- Intended for members of the Copilot program teams to have a unique space for discussions as needed.
- Bring in your leader champions to keep them informed separately from Everyday AI discussions.
- **Membership:**
 - Members of the Copilot project team and primary Copilot champions and stakeholders in leadership.

Channel Purpose & Membership



Copilot / AI Champion Central (shared channel)

- Share tips & best practices to advance Champion knowledge.
- Share successes discovered when supporting users, ways to explain concepts, effective forms of encouragement, etc.
- A space for members of the CoE to communicate updates to Champions and get their impressions of user community reactions, challenges, etc.
- **Membership:**
 - CoE members supporting the user experience (OCM, Experience Enablement, etc.)
 - Everyday AI and Copilot Champions

Ask Us Anything (shared channel)

- The central location for licensed Copilot users to ask questions, provide feedback, share experiences, and learn from others.
- Feedback shared by users should be fed back to the CoE in the Copilot / AI Task Force channel.
- SharePoint site behind this channel serves as a learning resource with articles, links, etc., if no LMS exists.
- **Membership:**
 - CoE members to answer questions (instead of questions going to a mailbox)
 - OCM/Experience Enablement
 - Champions
 - Licensed Copilot Users

CoE Guidelines & Etiquette



Operating in a Center of Excellence requires a combination of expertise, collaboration, and professionalism. Here are some guidelines to establish and commit to:

- **Respect Knowledge** – Be open to learning from your peers and share your expertise when appropriate.
- **Collaborate** – Work closely with your colleagues, share insights, and contribute to group projects and discussions.
- **Communicate Effectively** – Be concise yet thorough. Ensure all are on the same page.
- **Maintain Professionalism** – Conduct yourself professionally both within the CoE and when interacting with external parties. Respect deadlines, attend meetings punctually, and follow through on commitments.
- **Provide Constructive Feedback** – Offer feedback in a constructive manner, focusing on specific actions or behaviors rather than personal attributes. Be open to receiving feedback yourself and use it as an opportunity for growth.
- **Respect Confidentiality** – CoEs may deal with sensitive or proprietary knowledge. Honor confidentiality agreements and protocols to maintain trust within the team and with external stakeholders.
- **Embrace Diversity** – CoEs bring together people with diverse backgrounds. Embrace and leverage the diversity to foster creativity and innovation.

04 Next Steps in Your Copilot Readiness Journey



OCM Strategic Roadmap



Phase 1: Initiate Launch Strategy

- **Establish Stakeholders and Project Team Members:** Identify and engage key stakeholders from various departments.
- **Define Objectives:** Clearly articulate the objectives of deploying M365 Copilot.
- **Evaluate the Organization's Technical Readiness:** Assess the tenant, discuss governance and the data ecosystem. Review current security and administration protocols and create a risk register.
- **Ensure Appropriate Licenses are Secured and Assigned**
- **Complete First Version of the Organization's AI Charter:** Regular reviews and updates will likely be needed.
- **Set Clear Goals and Success Criteria:** Establish and define measurable goals, timeframes, and accountability.
- **Select Most Valuable Business Use Cases for Initial Deployment**

Phase 2: Lift-off Preparations

- **Document and Align on Scope for Pilot Deployment**
- **Identify Copilot Launch (Pilot) Users**
- **Review Risk Register:** Remediate risks where possible and validate that remediation.
- **Validate Pre-Selected Business Use Cases:** Ensure no new business use cases should be included in scope.
- **Validate Preset Success Criteria:** Update as needed.
- **Establish Center of Excellence:**
 - Create CoE Charter, roles, and responsibilities
 - Assign members
 - Define Copilot usage guidelines
 - Create Champion network and identify potential members
- **Develop Communication and Training Plans:** Create comprehensive plans to inform and prepare user community & stakeholders.

Not
Currently
in Scope

OCM Strategic Roadmap



Phase 3: Crew Preparation, Test Flight, and Protocol Refinement

- **Create Awareness:** Start communication campaigns to create awareness about the upcoming deployment.
- **User Training Kickoff:** Launch the training program for Champions and end users.
- **Establish Support Mechanisms:** Set up help desks and support channels for assistance.
- **Pilot Program Launch**
- **Run Adoption and Usage Reports and Review Help Desk Tickets for Trends**
- **Gather Feedback:** Collect feedback from users during the pilot phase.
- **Refine Communication and Training Programs:** Adjust materials based on pilot user feedback.

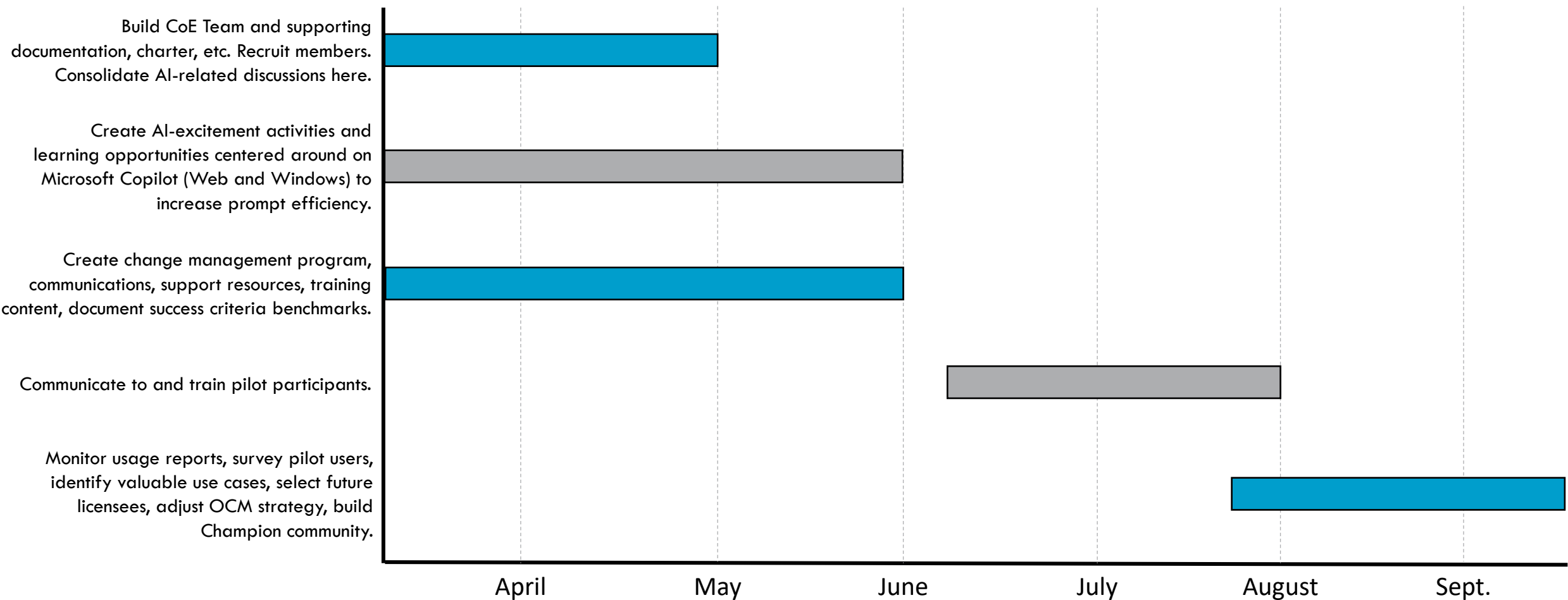
Not
Currently
in Scope

Phase 4: Universal Launch and Continuous Mission Support

- **Continue to engage and nurture champion network** with consistent communication and support.
- **Validate use cases and ROI measurement for the broader Copilot launch.**
- **Create Awareness:** Execute communication campaigns for each Copilot launch cohort.
- **User Training:** Execute the established training program for new champions and additional members of the user community.
- **Monitor Progress and Adjust as Needed:**
 - Run adoption and usage reports
 - Review Help Desk tickets for trends
 - Gather feedback from each cohort
- **Continuous Risk Register Review:** Follow reviews with adjustments to Copilot usage guidelines, best practices as needed
- **Build roadmap** for unique use cases and future rollout sequence
- **Continuous monitoring** of feedback loop from user community
- **Energetic Initiatives or Activities to Boost Adoption:**
 - Lunch & learns, Incentives, Summits to share experience

Not
Currently
in Scope

OCM Strategic Timeline



Next Steps – Change Management



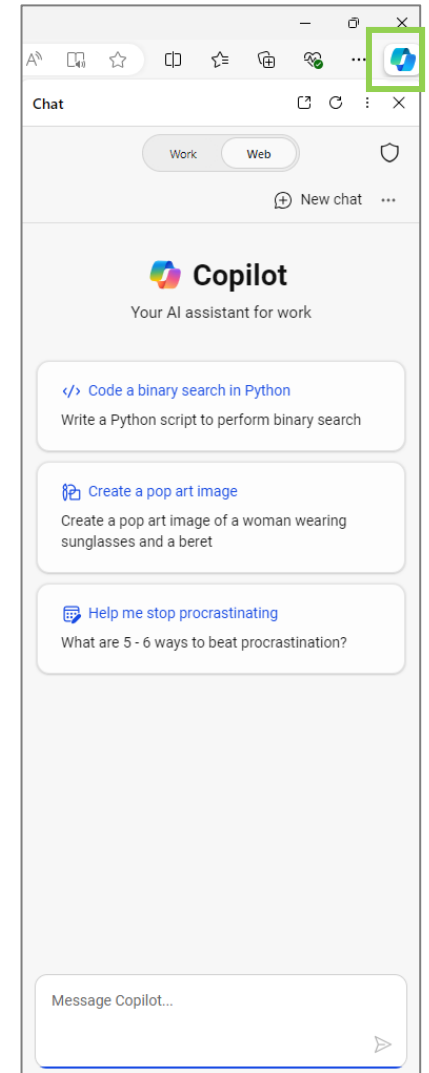
[Client Logo goes here]
Revisit the AI charter draft with your AI Governance Committee. Complete the initial version and establish a schedule to reexamine and review the document.
Initiate or continue discussions around Copilot usage guidelines and best practices.
Begin discussions to identify and/or select Executive Sponsor(s) using provided approaches, responsibilities, and selection criteria as a guide.
Identify members of the Copilot Center of Excellence Team , ensuring a diverse representation from all groups impacted by the Copilot launch, not just IT.
Define Center of Excellence objectives, scope, and cadence for communications.
Identify Copilot launch users (pilot and full deployment)
Involve internal OCM team (if applicable) to think about potential adoption incentive programs, proven communication channels and methods, and reinforcement activities that have been successfully used within the organization.
Discuss and review provided use cases, ROI, and success criteria. Be prepared to make adjustments if needed prior to POC launch.
Assess your needs for support during your Copilot launch, keeping in mind the criticality of involved, strategic change management for a technology such as Copilot. Copilot can't be taught with an email or a job aid.
Contact eGroup Enabling Technologies to schedule a discussion and scope for your POC and launch of M365 Copilot.

eGroup ENABLING TECHNOLOGIES
Prepare to support and guide [Client] through scoping for their POC and launch of M365 Copilot.

Quick Wins / User Preparation



- Begin promoting the use of Copilot in Microsoft Edge (formerly Bing Chat for Enterprise) so users start getting comfortable with formulating prompts and building resiliency when using AI.
 - This can be promoted across the organization, regardless of their eventual Copilot licensing status, giving everyone an opportunity to leverage Copilot.
 - Free for those with M365 E3/E5 licenses.
 - Accessed via any Edge browser, Chrome (with Copilot extension), bing.com/chat, or microsoft365.com/copilot.
 - Does not train LLMs, chat history/data is not stored, does not access organizational data.
 - Works similarly to ChatGPT for information, drafting, rewriting, etc. but includes commercial data protection.
- Inform employees that it's acceptable to utilize this resource, assuring them it's not considered cheating or squandering time. This will help prepare them for Copilot prompts in M365.
- Encourage employees to share their experiences and successes
- Begin an employee awareness campaign around sharing documents via link instead of email attachments, how to do set them appropriately and the benefits:
 - Less ROT data, increased security and control over documents when shared via link (can prevent downloads, shut down outdated links, etc.), and time saved over merging other versions.



Quick Wins / User Preparation



- Engage in discussion around transcription and recording of meetings:
 - Can it be allowed, at least for certain meetings
 - Can the option of “Copilot without transcription” be enabled as the default setting so meeting organizers don’t have to remember?
 - If “Copilot without transcription” is allowed, but not by default, include this topic in the same awareness campaign as the sharing links.
- Begin sharing information about M365 Copilot in advance of licensing and training. Setting accurate expectations and excitement now will help mitigate the risk of disappointment or lack of adoption at rollout.

THANK YOU

eGroup | **ENABLING**
TECHNOLOGIES



AI Proficiency Index: Scoring Details



Level of AI Impact on Employee Experience

To what extent do you anticipate AI will impact the overall employee experience in the organization?

1 = Minimal impact5 = Very high impact

2

How much do you expect AI to change the ways employees work and collaborate with each other?

1 = Minimal change5 = Significant change

2

What level of potential time savings or efficiency do you foresee AI bringing to employees' daily tasks and responsibilities?

1 = Minimal savings5 = Substantial savings

2

What percentage of employees' workday do you believe will be directly impacted by AI, leading to increased productivity and effectiveness?

1 = Less than 20%5 = 80% or higher

2

How well-prepared are employees to adjust to using AI in their daily work routines and responsibilities?

1 = Not prepared5 = Extremely prepared

1

To what extent do you expect AI to enhance employees' job satisfaction and reduce repetitive or mundane tasks?

1 = Minimal enhancement5 = Significant enhancement

2

How much do you anticipate employees will collaborate with AI technologies to improve decision-making processes?

1 = Limited collaboration5 = Extensive collaboration

3

How prepared is the organization to provide ongoing support and training to employees as AI integration evolves and new AI technologies are introduced?

1 = Not prepared5 = Extremely prepared

3

TOTAL

17

Level of AI Readiness Linked to Skills

Do employees actively use AI tools in their work tasks or projects?

1 = Unknown or very rarely5 = Very frequently

3

To what extent are employees actively seeking opportunities to learn and apply AI in their roles?

1 = Not actively seeking5 = Very high effort to seek

3

To what extent do employees possess the necessary skills to effectively use AI tools and technologies in their daily work?

1 = Very low or unproven proficiency5 = Highly proficient

1

How confident are employees in their ability to analyze and interpret data generated by AI systems?

1 = Very low confidence5 = Very high confidence

1

How effective are employees in leveraging AI to make data-driven decisions?

1 = Ineffective5 = Highly effective

2

Are employees actively engaged in discussions and knowledge-sharing related to AI within this organization?

1 = Not engaged5 = Very high engagement

1

How well do employees stay updated with the latest AI advancements and best practices?

1 = Not at all5 = Continuously stay updated

1

How well do employees understand the ethical considerations and potential biases associated with AI systems?

1 = Limited understanding5 = Comprehensive understanding

1

TOTAL

13

NOTES:

AI Readiness Index: Scoring Details



Level of AI Readiness Linked to Attitudes and Perceptions	
Do employees actively propose and experiment with AI-based solutions in their projects and tasks? 1 = Never propose 5 = Always propose	<input type="text" value="4"/>
How do employees perceive the value of AI in enhancing their work efficiency and productivity? 1 = Negative perception 5 = Highly positive value perception	<input type="text" value="4"/>
How receptive are employees to AI-related training and skill development programs offered by the organization? 1 = Highly resistant 5 = Highly receptive	<input type="text" value="4"/>
How well do you anticipate employees adapting to changes brought about by the integration of AI in their roles and workflows? 1 = Resistance to change 5 = Quick and smooth adaptation	<input type="text" value="1"/>
Are employees aware of the organization's AI goals, strategies, and roadmaps? 1 = Lacking awareness 5 = Fully informed	<input type="text" value="1"/>
To what extent do employees consider AI as a critical part of the organization's future success? 1 = Insignificant 5 = Extremely critical	<input type="text" value="3"/>
How actively do employees support and champion AI initiatives within the organization? 1 = Passive or detracting 5 = Active advocacy and support	<input type="text" value="3"/>
To what extent are employees recognized and valued for their AI-related skills and contributions within the organization? 1 = Not recognized 5 = Highly valued	<input type="text" value="1"/>
TOTAL	<input type="text" value="21"/>
NOTES:	

Low Readiness: (Score 24-85)

- Employees in this range have limited awareness or understanding of AI and its potential in the workplace.
- They might be resistant to change or lack the necessary skills and knowledge to work effectively with AI technologies.
- It's possible they simply do not have experience or exposure to AI tools up to this point.
- Additional training and awareness-building efforts are likely needed to raise their readiness levels prior to implementation.

Moderate Readiness: (Score 86-105)

- Employees in this range have some awareness and basic understanding of AI in the workplace.
- They are likely be moderately open to adopting AI technologies but would benefit from further training and support to become more proficient.
- These employees are generally receptive to AI integration but will likely need guidance and training to maximize **its potential**.

High Readiness: (Score 106 - 120)

- Employees in this range are well-prepared and highly receptive to AI adoption in the workplace.
- They have a strong understanding of AI technologies, their benefits, and how to effectively use them.
- These individuals are proactive (or have the potential to be proactive) in leveraging AI for productivity and are likely to be early adopters and champions of AI initiatives in the organization.
- These employees may need awareness about the availability of and light guidance on how to use specific AI functions but minimal ongoing support.