

GET READY WITH Microsoft 365 Copilot



1 Do Your Research

Before deploying Microsoft Copilot, understand your customers motivation, their expected outcomes, and potential use-cases. This allows you to plan ahead and adjust deployment, training, and change management specifics.



2 Understand your customer's environment

Deploying Copilot is easy, but generating value requires you to tick some boxes. Conduct a technical readiness assessment to understand your customer's M365 usage and maturity. This helps to implement appropriate IT and data governance policies. Operate Copilot responsibly!



3 Define Success

Due to AI's intangible nature, it is important to define how success looks like. Identify use-cases you and your customer want to go after first. Identify internal champions and power users, that help you to lead by example and are willing to not only try out Copilot, but also change their common work habits to fully embrace the power of generative AI.



4 Deploy & Activate

Finally, the big day arrived! Now it's all about activating Copilot and helping your customer's user to discover the vast functionalities across the different Microsoft 365 systems. Start with a user training, but ensure you implement recurring touch points to help drive adoption and create tangible outcomes!



5 Copilot & Beyond

Once the users started to adopt Copilot, questions about increasing its addressable data and systems will follow soon. Identify use-cases for Copilot extensibility, and use Copilot Studio (Power Virtual Agents) to build and implement connectors and plug-ins, creating a custom and tailored Copilot experience for your customers!

