

# Microsoft 365 Copilot Adoption Checklist

Let's drive adoption

Microsoft 365 Copilot might be the best thing since sliced bread but fully embracing it within your company takes a little bit of work. We've found strategic and coordinated change management is the best way to set up your Copilot adoption for success.

Introducing Copilot at the right time to your customers and their employees and in a way that empowers them, while providing necessary guidelines is a great place to start. Consider segmenting your adoption strategy into cohorts based on internal teams, like legal or sales. Each cohort will

have unique priorities, but a unified strategy will guide their journey towards empowerment.

Let's dive into our adoption checklist to ensure you have everything in place.

## Getting ready for Copilot

1. Identify and ramp up the person who will lead adoption for your organisation.
2. Create an adoption team and identify who will lead each workstream within each cohort, including:
  - **Change Management Lead:** A member of the team who focuses on managing the change process, including communication, training, and support to ensure a smooth transition.
  - **Executive sponsors:** This member of the team could be a communications lead who manages internal and external communications related to the adoption project, ensuring that all stakeholders are informed and engaged.
  - **Employee champions:** A team leader or project manager who encourages the usage of Copilot and helps with best practices.
3. Conduct a kickoff meeting with your adoption team and set up a meeting cadence and workflow.
4. Create an AI council to guide how you use AI: [Here's how Microsoft did it](#)
5. Define your responsible AI principles: For inspiration, review [Microsoft's Responsible AI Standards](#).
6. Identify users and usage within your cohorts:
  - Pinpoint key usage scenarios, for example CRM-connected email communication for salespeople or customer-facing copy support for marketers.
  - Identify cohort-specific personas, for example software engineers, customer support specialists, and business operations project managers.
  - Determine communication preferences for each cohort and their personas and optimise messaging for each.



7. Define success criteria with KPIs and a success measurement plan.
  - Examples include usage by app or feature and user sentiment.
8. Complete user enablement strategy training.
9. Define a user experience and feedback strategy.
10. Build deployment communications and an enablement asset library:

## Onboard and engage

1. Deploy readiness communications with onboarding content:
  - Led by cohort adoption team.
  - Led and amplified by leadership sponsors.
2. Launch champion communities.
3. Deploy launch communications:
  - Led by cohort adoption team.
  - Led and amplified by leadership sponsors.
4. Socialise employee engagement communities, through Microsoft Viva.
5. Run live learning sessions.
6. Provide self-learning opportunities.
7. Upscale the working environment with digital banners, posters, and other promotional materials to help employees visualise Copilot.

## Deliver impact

1. Promote usage through internal cohort channels:
  - Follow-up communications.
  - Viva Engage champion posts.
2. Report on KPI success at predetermined intervals.
3. Facilitate listening:
  - Satisfaction surveys.
  - Listening sessions .
4. Gather and amplify success stories.
5. Apply learnings to further adoption activities.
6. Nurture existing champions through a technical training track.
7. Develop reinforcement, resistance, and maintenance plans.

## Extend and optimise

1. Explore new high-value scenarios.
2. Investigate business process transformation via Copilot Studio, plugins, and connectors.
3. Source custom line-of-business opportunities.



## Hey, change management isn't a walk in the park!

We know it can be challenging getting your customers to use new technologies but that's why we've got experts here to support you.

Our Copilot Specialistt has lots of tricks up their sleeve to help you inspire and engage your customers.

Get in touch



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what we can do together