

# Microsoft 365 Copilot Implementation Checklist



**Implementing Microsoft 365 Copilot is more than just flipping a switch on licenses. Having strong organisational collaboration, a clear understanding of your customer's specific business needs, and planning will set you up for success.**

At Giacom, we know a successful rollout starts with engaging groups who can provide invaluable feedback. By centering your approach on the right people, you lay the groundwork for a smooth and effective

implementation, ensuring that Copilot truly meets the needs of your customer's organisation.

Let's run through this handy checklist and make sure you have everything covered to get started.

## Getting ready for Copilot

1. Perform one of the Microsoft 365 Copilot assessments. [Click here to view your options.](#)
2. Identify key implementation phases and groups.
3. Secure leadership involvement.
4. Build out your implementation plan and map it to a licensing strategy.

## Onboard and engage

1. Assemble groups and assign responsibilities.
2. Assign Champions to empower their teams with the use of Copilot.
3. Assign licenses and configure them using the setup guide.
4. Adopt Copilot through guided support and Microsoft adoption hub.
5. Evaluate pilot data: Review reports for usage/activity with Copilot dashboard and run a copilot satisfaction survey.
6. Assess impact and optimise use.
7. Host feedback sessions and share copilot real life use scenarios via Teams group chat/channel/Viva Engage.
8. Analyse usage reports again.
9. Deploy communications: For strategy around this element, see the next section.



## How does that sound?

If you're not sure, then we've got internal expertise that can help with all things Copilot! Reach out to our Copilot Specialist today!

Get in touch

