

Microsoft 365 Copilot Support Checklist

Set up your Copilot support system



To truly empower your employees, it's essential to ensure they have access to robust support channels - especially when navigating new technologies like Microsoft 365 Copilot. Given that Copilot integrates across a wide range of Microsoft 365 apps, this adds a layer of complexity to your support system.

We can help you set up a strong support network so your employees can embrace Copilot with confidence. Let's take a look at this checklist and make sure you have everything you need to be prepared.

Onboard and engage your support team

1. Start with a small set of support leaders:
 - General support.
 - Microsoft 365 product specialists.
2. Establish a Teams channel for communication and knowledge sharing:
 - Create a collaborative knowledge base foundation.
 - Widen access to the full Copilot support team.
3. Train your full support team:
 - Conduct information sessions.
 - Conduct role-playing exercises.
 - Establish your escalation process.
4. Engage your internal communications team:
 - Finalise your user-facing knowledge base.
 - Discuss the inclusion of knowledge base material and the support process in rollout communications.

Deliver impact for your users

1. Signal support availability in user communities on Viva Engage and other platforms.
2. Publish your user-facing knowledge base.
3. Establish self-service automations if applicable.



Extend and optimise your services

1. Review support issues and product feedback.
2. Calibrate the optimisation of your support workflows.

We know you might need help setting up your Copilot support system, and our Copilot Specialist is always on hand to help with whatever you need!

Get in touch

