

Microsoft 365 Copilot Checklist



Adopting Microsoft 365 Copilot: Are the use cases you've chosen holding you back?

After your organisation has laid the groundwork to experiment with Microsoft 365 Copilot, it's critical to begin with targeted use cases that offer the greatest potential benefits. The sharper your focus on use cases that are aligned with your business priorities and needs, the better your odds for adoption success.

In its 2024 survey, [The State of Microsoft 365 Copilot](#), Gartner found that organisations that base their implementations on well-defined and properly targeted use cases “[consistently deliver measurable results](#)”. So if you're currently building your Microsoft 365 Copilot programme, avoid the temptation for broad deployment and think specifics instead. Use the following checklist to guide your strategy.

Dive deep into your use case possibilities

Before you begin any pilot programme, ask yourself these questions and let the answers help you fine-tune your Microsoft 365 Copilot use cases. And ask others across your organisation for their ideas too – especially your AI Council and Copilot Champions.

- **What are the biggest pain points for employees in my organisation?** Does it involve having to read and analyse large volumes of data for business reports or company audits? Or is the burden greatest on sales teams that need to dig into multiple databases to understand customer behaviour and needs?
- **In which of these pain points could Microsoft 365 Copilot produce the greatest value for my business?** The Gartner report noted that there can be a distinction between benefits to individual employees and benefits to the business overall. Use cases that make tasks quicker and easier for individuals generate a return on employee (ROE), rather than a return on investment (ROI) for the organisation in general. Consider the implications of this before deciding on which use cases are likely to produce the greatest overall benefits.
- **What key performance indicators do I most want to improve?** Is it time to market for new products? Customer conversion rates? Support ticket resolution times? Evaluate KPIs across every part of your business to help decide where Microsoft 365 Copilot could help the most.
- **Which resources can help me choose the best use cases?** Microsoft offers a wealth of online learning tools and other resources to support Copilot users. Explore the [Microsoft Copilot Scenario Library](#) to browse use cases by functional area or industry.
- **Do I have enough input from across the organisation to choose the best use cases?** In addition to designating an AI Council and Copilot Champions, create and promote an active Copilot user community in your organisation. This should encourage employee knowledge-sharing and conversations in group chats and other virtual spaces, providing places where you can seek input whenever needed.



How SoftwareOne can help?

As you work to identify and develop your first use cases for Microsoft 365 Copilot, SoftwareOne offers a variety of ways to support you:



Evaluation accelerator: This service for organisations with 300 or more Microsoft 365 users helps you to identify high-value use cases for Copilot. You'll also learn how to activate a community of champions and understand Microsoft 365 Copilot dashboard data and usage reports.



Adoption and change management: Using our change management expertise and guidance, you'll be better able to embrace data-driven working, improve usability and accessibility and optimise Microsoft 365 Copilot user satisfaction. SoftwareOne Managed Services for Microsoft 365 Copilot is designed to help you continue to derive the most from your Copilot investment, and includes engaging content to enhance user understanding and inspire exploration of new features.



Licences promotion: Taking advantage of SoftwareOne's support lets you save up to 15% on the purchase of 10 or more licences for Microsoft 365 Copilot when you have a qualifying new subscription to Microsoft 365. Check the [full list of Microsoft promotions and savings](#).



Pilot advisory services: SoftwareOne can guide your organisation on upskilling, results tracking and organisation-wide Copilot deployment.



Customisation: Using Copilot Studio, SoftwareOne can help you to customise Microsoft 365 Copilot to your specific business needs and boost productivity through support for continuous learning. Where standard Copilot tooling can't address pain points, we can create a solution and increase your ROI by building a customised agent using Copilot Studio.

Want to learn more about how SoftwareOne can help your business choose the Microsoft 365 Copilot use cases with the greatest potential for success? Get in touch with us today.

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