

# Microsoft 365 Copilot Checklist



## Planning to test Microsoft 365 Copilot?

Here's your guide to understanding the tool

Done right, Microsoft 365 Copilot can help your business work smarter, faster and more efficiently to deliver on your customers' expectations. But it's not a one-size-fits-all solution for success. If you're getting ready for deployment, you'll gain the greatest value – and reduce your risks – by starting with a foundation that's tailor-made for your organization's needs, capabilities and business strategy.

The following checklist sums up what every business needs to think about before preparing to deploy Microsoft 365 Copilot. Those considerations go far beyond just data and technology. It's about making sure you have all the right elements in place, from change management and employee training to business strategy alignment and laser focus on user's needs and goals.

## Prepare to maximize the benefits and minimize the pitfalls

Building an effective roadmap to Microsoft 365 Copilot success requires you to have clear and accurate answers to questions like:

- **What kinds of licenses do I need?** Microsoft 365 Copilot is an add-on license, which means you need a qualifying existing Microsoft license. The type of existing license will determine the level of security you'll get with Microsoft 365 Copilot, so clearly identify your security needs first and adjust your licensing accordingly.
- **What are my biggest pain points?** organizations that focus their Microsoft 365 Copilot deployments on specific use cases are more likely to succeed than those pursuing more general strategies, a [Gartner survey](#) found. So, carefully assess the needs across every part of your business and look for areas where Microsoft 365 Copilot has been shown to deliver the greatest benefits. You can then target your top priorities in phases.
- **Will this support my business strategy?** Identify and focus on use cases where Microsoft 365 Copilot best aligns with your organizational strategy and goals. This not only benefits your business but makes it easier to win support from the C-suite for investing in Microsoft 365 Copilot technology, training and change management.
- **Where is the greatest potential for ROI?** Employees across many different kinds of organizations report that they find Microsoft 365 Copilot useful, but that enthusiasm doesn't always translate to ROI, Gartner has found. You'll increase your potential for positive returns by basing your deployment plans on real and relevant data—current time spent on tasks, actual costs, customer satisfaction metrics and so on—and using those to support KPIs to measure success.
- **Do I have the right data foundation?** Getting your [data and data policies](#) right is essential for getting the most out of Microsoft 365 Copilot. Be prepared to invest the necessary time and effort up front before rolling out any pilot programme. This means verifying that your data is accurate and up to date and ensuring strong data security—including identity and access management, data residency compliance and protection against data oversharing.



## How SoftwareOne can help?

We can provide critical guidance and support if you're preparing to take Microsoft 365 Copilot for a test drive:



**Copilot Lab:** Delivered online using Microsoft Teams, this lab enables you to explore different use cases and provides recommended next steps.



**Inspiration Prompting Session:** This workshop is designed to help you understand the productivity benefits of Microsoft 365 Copilot and how it can help your business.



**Vision and Value:** In these remote workshops, you'll learn how to create simple use cases, an AI transformation roadmap and a robust financial business case for investing in Microsoft 365 Copilot.



**Technology Module:** Our consultants will provide you with a comprehensive overview of the technical aspects and details of Microsoft 365 Copilot. You'll come away with recommendations based on your organizations technology readiness, licensing readiness, and data, privacy and security needs.



**Use Cases Module:** These interactive workshops for up to 24 members of your team enable you to explore the most impactful use cases for Microsoft 365 Copilot across different parts of your organization.



**Adoption Readiness Module:** Designed to help you prepare for smooth deployment of Microsoft 365 Copilot, this workshop includes an adoption roadmap and recommendations.



**Proof of Value:** Aimed at organizations with 100 or more Microsoft 365 Copilot users, this service helps you to evaluate your high-value use cases, activate a community of champions and understand user engagement through Microsoft 365 Copilot dashboard data and usage reports.



**Licenses Promotion:** This enables you to save 15% on the purchase of 10 to 300 licenses for Microsoft 365 Copilot when you have a qualifying new subscription to Microsoft 365. (Offer Available until April 1, 2025)

To learn more about how SoftwareOne Services for Microsoft 365 Copilot, can pave the way for Microsoft 365 Copilot success, get in touch with us today.

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