software one

Implementing Microsoft 365 Copilot

The path from pilot to full deployment

Contents

Introduction

Organizations need more than just access to Copilot to unlock its potential—they need a clear strategy, a strong data foundation, and a thoughtful approach to change.

The most successful Copilot deployments start with focused use cases, aligned to real business needs. With the right preparation, these pilots become powerful proof points—driving productivity, improving employee experience, and delivering meaningful ROI.

Additionally, governance, user engagement, training, and community support all play a critical role in scaling successfully.

This guide walks you through every phase of the journey—from building a compelling business case to expanding Copilot across your organization—so you can move confidently from pilot to full deployment.

Preparing for a pilot project

Clarify your expectations and objectives

Before kicking off your Microsoft 365 Copilot project, it's important to start with a clear understanding of what success looks like for your organization. By identifying specific business challenges and setting measurable goals, you'll ensure Copilot is integrated meaningfully into daily workflows—across roles, teams, and departments.

An informed approach helps you get the most from your investment. Beyond licensing costs, consider training, support, and the time needed to build new habits. These upfront considerations don't just help you manage risk, they open the door to smoother adoption and greater impact.

A [Forrester study commissioned by Microsoft](#) found that organizations implementing effective change management programs saw significantly reduced support costs, and realized a return on investment ranging from 132% to 353%.

By grounding your project in clear objectives and a realistic plan, you'll set the stage for long-term success.

Choose use cases that target your greatest pain points

Copilot can deliver value across [many different tasks, functions and departments](#). By focusing on areas of your business with the greatest potential to benefit from Microsoft 365 Copilot, you can improve your odds of success and your potential for meaningful ROI.

Start by identifying areas of your current operations with the biggest pain points. Then assess the possible impacts of a Copilot implementation and quantify the potential benefits. Look for opportunities that align closely with your strategic business objectives.

For example, if your human resources team is urgently reviewing job applications to fill a large number of vacant positions, you might benefit from using Copilot to quickly produce job descriptions or to summarize and compare applicants' resumes. On the other hand, the sales team might be able to use Copilot-extracted insights from notes and market research to win a new, high-value client.

Finally, consider limiting an initial Copilot deployment to users in just one or two areas. That helps to multiply the potential benefits, because users working on the same tasks can better share ideas, tips and learnings with one another.
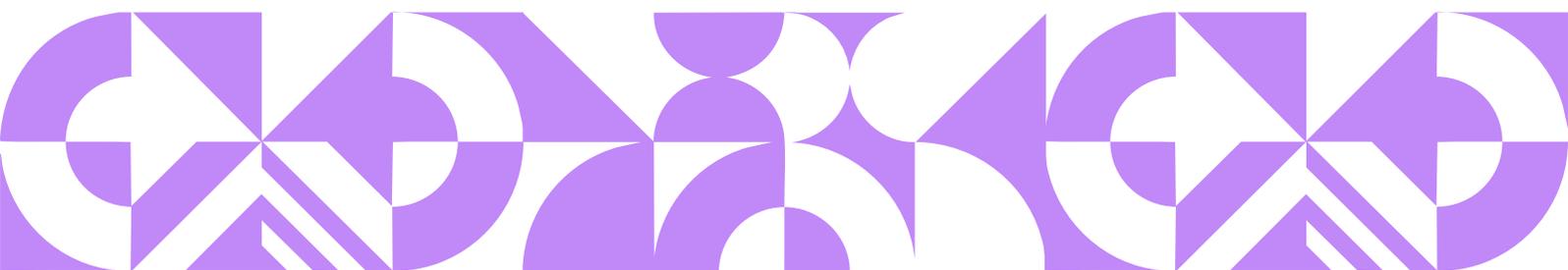
Build a strong data and security foundation

Copilot draws insights from your existing Microsoft 365 data, whether that's in emails, Word documents, SharePoint files or elsewhere. This means that information needs to be up to date, accurate and complete for Copilot to produce the best, most relevant results.

It's also crucial to establish the proper authorizations and security settings to ensure that Copilot can access only the data that individual users have permission for. Copilot uses the settings that you established for Microsoft 365 – which is why you need to make sure that these are up to date. You also have the option of using privacy controls to turn off Copilot access to certain apps such as Excel, Outlook or Word as needed.

Training is another essential element for maintaining security. Copilot users should understand your organization's policies and best practices for data security, and they should receive regular refreshers on the importance of following these.

Create an AI Center of Excellence to guide you

The purpose of an AI Center of Excellence is to oversee your organization's adoption of AI and keep it aligned with your business goals. Members should include people from different parts of the business, as well as executive leaders who are responsible for steering your AI program. The centere of excellence should also be able to draw on advice from internal or external experts with knowledge about specific issues related to AI: legal, technical, finance and operations, for example.

An AI Center of Excellence can help to guide your entire adoption effort, from planning to pilot to full deployment and beyond. Monitoring risks, promoting adoption, supporting training, gathering feedback from users and tracking progress, are all part of this journey, as are communicating lessons learned and building a culture of trust and collaboration across the organization.

As you mature your AI capabilities, the center of excellence also helps to identify new opportunities to use the technology and keeps up with AI developments, helping your organization stay up to date and competitive over time.

Identify the Copilot option that's best for you

Microsoft 365 Copilot is available as a $30 per user per month add-on for Microsoft 365 Business Standard, Business Premium, and Enterprise plans (E3, E5, F3). It brings AI-powered productivity to the tools people use every day—Word, Excel, Outlook, Teams, and more. If you're not ready to commit to full deployment, Copilot Chat provides a more flexible, web-based entry point. While the public version is free, full integration with business data requires a Copilot license.

To meet more specific needs, Microsoft has introduced Copilot Agents—customizable AI assistants that can automate tasks, retrieve data, and support users in tailored workflows across departments. While Microsoft still offers specialized Copilots for Sales, Service, and Finance, the focus is shifting toward flexible, reusable agents that can be deployed across "rooms" of your business. With the right mix of Copilot tools and planning, your organization can unlock powerful efficiencies across your entire workforce.

Guiding a pilot to success

Engage Copilot champions and a user community

After you've established a solid data, governance and use case foundation for your pilot project, your designated group of early adopters is ready to begin using Microsoft 365 Copilot for their work.

One way to do this is to engage the help of select Copilot champions in the workforce. How do you choose your champions? Look for people who are the most enthusiastic about Copilot, who are quickly becoming power users and are eager to share tips and lessons learned with their coworkers. Your AI Center of Excellence can help to identify potential champions and encourage them to promote Copilot usage among their peers.

This approach is effective because people in your organization will discover many different ways to use Copilot depending on their specific tasks and roles. And they understand their team's existing culture and ways of working. When they become Copilot champions and advocates, they'll know how best to share their knowledge, have conversations with coworkers and help to develop a broader community of Copilot users over time.

Use all of the tools at your disposal

Organizations that use Microsoft 365 have a wealth of tools at their fingertips to promote and expand Copilot adoption. For example, they can use Teams to create group chats for different Copilot user communities, whether that's AI Center of Excellence members, the finance or marketing departments, or other groups within the organization. Other tools include Microsoft Forms, which can be used to gather ideas and comments from Copilot users across the business, and Viva Engage, which provides employees with a place for questions, back-and-forth conversations and tip sharing. Viva Learning is another resource to help people build their Copilot skills in an individualised way.

Online or off, there are many other ways in which you can build enthusiasm for, and knowledge about, Copilot across the business. You can host lunch-and-learn sessions for specific users in different departments. You can highlight employee success stories through emails, newsletters or events. And you can organize contests to encourage innovative thinking and novel uses of Copilot.

Listen to feedback from employees

Employee buy-in is essential for any change to take root and grow in an organization. This requires providing employees with multiple opportunities – and multiple methods – for asking questions, sharing feedback and offering suggestions. But it also requires listening and responding. Users will quickly lose enthusiasm for a project they don't feel a part of.

Encourage collaboration and active participation in your Copilot project. Work with your center of excellence and Copilot champions to do this, and to take advantage of the many different Microsoft 365 tools to support these efforts.

Adapt as needed based on metrics and user input

To maximize the benefits of Microsoft 365 Copilot, it's essential to continuously adapt your program based on evolving usage patterns, performance metrics, and ROI. Helpful tools exist to assist in ongoing optimization:

Microsoft Copilot Dashboard: Integrated within Viva Insights. Offers actionable insights into Copilot readiness, adoption, impact, and user sentiment. Accessible to customers with Microsoft 365 or Office 365 business or enterprise subscriptions and an active Exchange Online account. While a paid Viva Insights license isn't required, tenants with at least 50 Copilot or Viva Insights licenses gain access to full capabilities, including advanced metrics and filters.

Copilot Analytics: Advanced reporting feature that enables IT administrators and analysts to delve deeper into Copilot usage and its business impact. Organizations can analyze over 100 Copilot metrics, tailor filters to specific questions, and upload business outcome data to correlate Copilot usage with KPIs across various departments.

You can leverage these tools to make data-driven decisions, refine Copilot deployment, enhance user engagement, and achieve desired business outcomes.

Making the move from pilot to full deployment

Provide adequate training and support for employees

In any organization, community support and peer-to-peer learning is critical for Copilot adoption success. Business leadership must demonstrate its support for employee education by clearly communicating what resources are available and promoting new resources as needed, based on employee feedback. They must also build time into employees' schedules so that workers can take advantage of those resources.

Microsoft 365 provides a number of tools for training and support as well. For example, Microsoft Copilot Academy, part of Viva Learning, lets users explore structured learning content to build their skills and is available to all Microsoft 365 users. Available in eight languages, the academy is continually updated, helping people stay current on Copilot's capabilities. There's also Viva Engage, which enables organizations to create employee communities for sharing success stories and prompt ideas.

Another way to promote the development of Copilot skills is through SoftwareOne's ROSE Compass methodology. This is designed to help people fine-tune Copilot prompts by thinking about their specific roles, objectives, sources and expectations. For instance, if they are asking Copilot to generate an email, they need to specify:
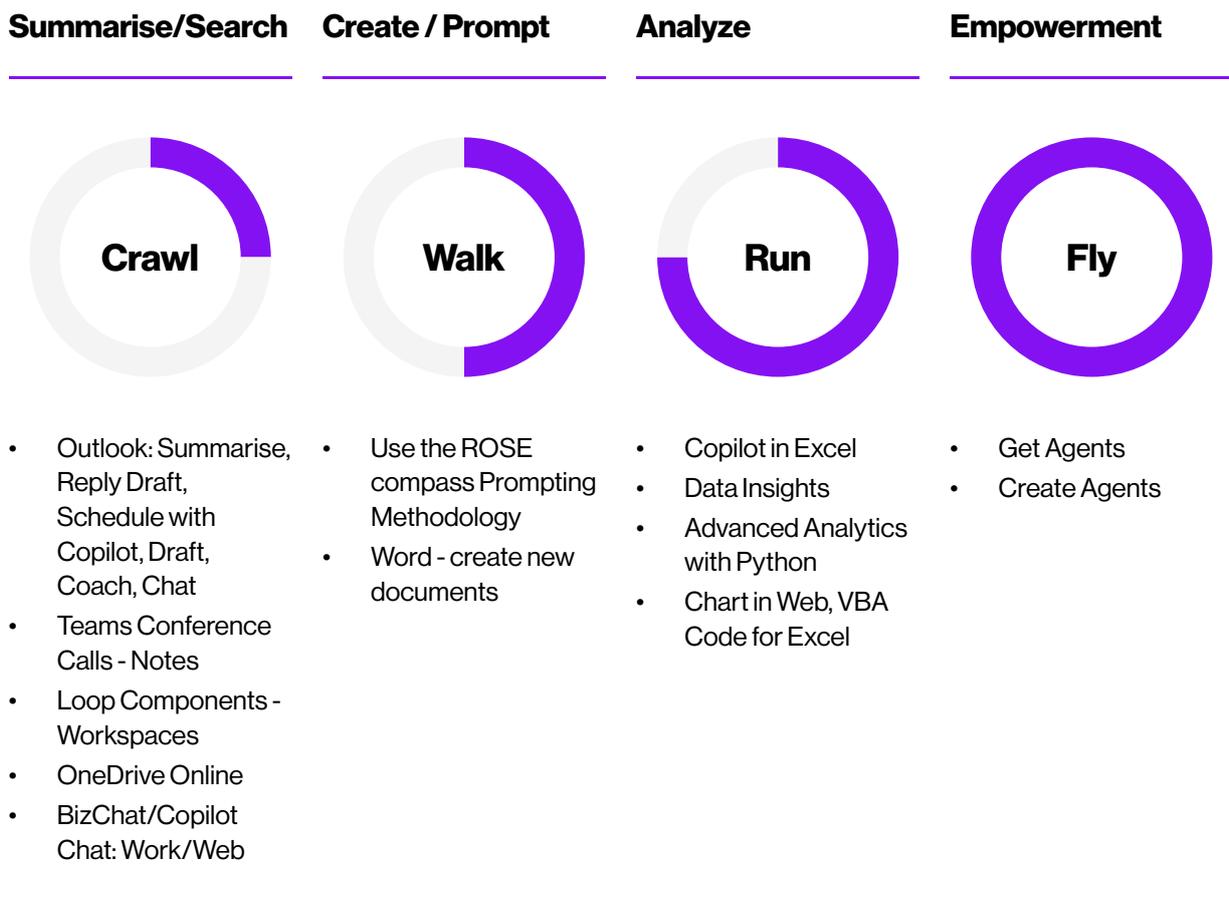
1. The roles of the email sender and intended recipient

2. The desired outcome or objective of the email

3. The documents or other sources that Copilot should use to generate its output

4. The expected qualities of the output (such as "professional English," "professional Spanish," or "casual and friendly").

Manage change effectively across the organization

Remember that effective change management is critical for the success of any Copilot adoption program. So always look for opportunities to promote adoption through communication, training, experience-building and celebrating wins.

It's useful to manage Copilot adoption using the SoftwareOne Copilot Productivity Loop methodology. This involves applying Copilot to the simplest tasks first – search/summarize or prompt/create – and gradually moving on to more complex applications – such as analysis and empowerment – as your organization becomes increasingly comfortable using it.

Summarise/Search	Create / Prompt	Analyze	Empowerment
Crawl	**Walk**	**Run**	**Fly**
• Outlook: Summarise, Reply Draft, Schedule with Copilot, Draft, Coach, Chat	• Use the ROSE compass Prompting Methodology	• Copilot in Excel	• Get Agents
• Teams Conference Calls - Notes	• Word - create new documents	• Data Insights	• Create Agents
• Loop Components - Workspaces		• Advanced Analytics with Python	
• OneDrive Online		• Chart in Web, VBA Code for Excel	
• BizChat/Copilot Chat: Work/Web			

For example, you might choose to first use Copilot to summarize emails or conference calls in Teams, or to conduct enterprise searches. From there, you can prompt Copilot to create documents, or to generate and respond to emails. Your next step might be to use Microsoft 365 Copilot to analyze, understand and visualise large volumes of data held in Microsoft Excel sheets. As your understanding of Copilot matures, you can achieve new levels of empowerment using agents to automate and accelerate all kinds of tasks, from extracting insights from financial documents to providing self-help support for IT issues.

You can also think about the ADKAR approach to change management, which focuses on promoting change through awareness, desire, knowledge, ability and reinforcement. Without these elements, employees are likely to lack enthusiasm for adoption.

## Have measurable objectives and track your progress

Organizations have the greatest chances of Copilot adoption success when they begin with specific and highly targeted use cases and establish clear objectives, according to Gartner's recent survey, The State of Microsoft 365 Copilot. Also critical to success is measuring, monitoring and acting on key performance indicators. Earlier in this ebook, we identified several tools to help do that, including Microsoft Copilot Dashboard, Microsoft Viva and Copilot Analytics.

The Gartner survey also noted that your organization's ROI might not provide a complete picture of the benefits that Copilot can deliver. With 77% of users in the survey reporting that they strongly agreed they were excited to try and be involved in a pilot program, and another 22% saying they somewhat agreed, there's strong evidence of a significant qualitative "return on employee." Those employees want AI at work, are using it to up-skill, are becoming "power users," and are transforming their workplaces.

How SoftwareOne can help

SoftwareOne provides services, workshops and modules designed to help your organization succeed with your Microsoft 365 Copilot adoption program and maximise ROI.

The starting point is an Inspiration Prompting Session that explores Copilot use cases and productivity impact. We also offer a remotely delivered Copilot Lab to explore use cases, value discovery workshops for developing an AI transformation roadmap, an evaluation accelerator to build a foundation for a pilot program with a community of champions, and a proof of value workshop to help you measure ROI and demonstrate the value of Copilot within your business. SoftwareOne also has exclusive Microsoft 365 Copilot licenses promotions. To learn more, contact SoftwareOne today.
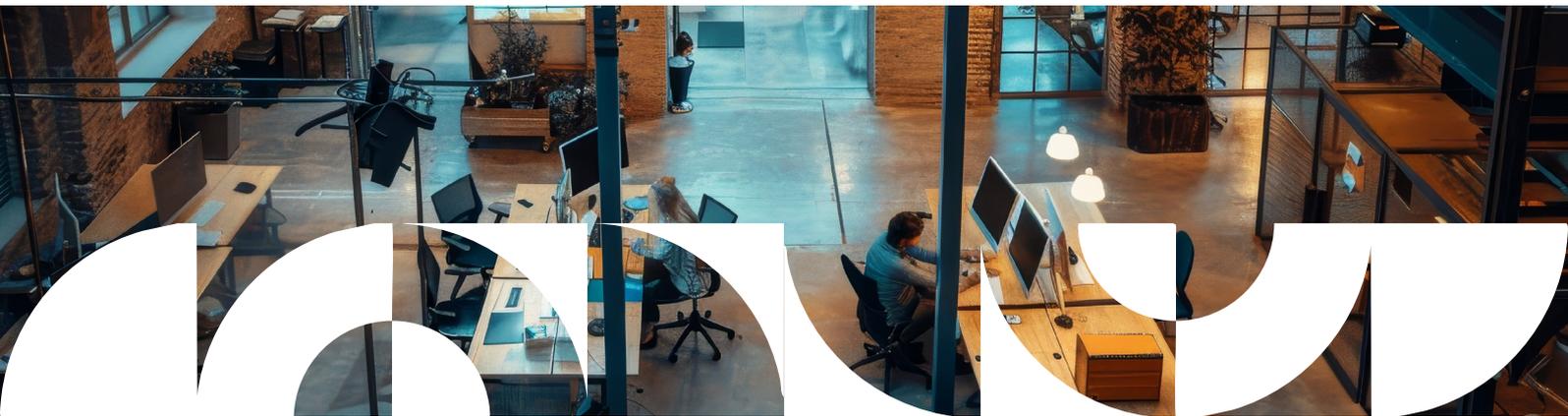
CONTACT US TODAY

Find out more at
www.softwareone.com

SoftwareOne, Inc. | US Headquarters
T. +1 800 444 9890
E. connect.us@softwareone.com