

WELCOME!

The event will start in five minutes. Please feel free to post questions in the chat



Partner as Customer Zero for Copilot for M365: Adoption and Change Management Considerations

7 November 2024

Anna Leyland, ACSM Consultant

Microsoft Industry Solutions Delivery Customer Experience and Design

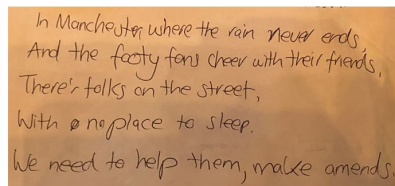
Anna Leyland: Senior Adoption, Change and Service Management Consultant



- 30 years' experience in Adoption, Change and Service Management consultancy, training and delivery
- Supports Microsoft partners and clients to maximise their investments
- Founder member of the Microsoft UK North West Social Impact team



Team Clippy - Pub Quiz winners 2024!



In Manchester where the rain never ends,
And the footy fans cheer with their friends,
There's folks on the street,
With no place to sleep,
We need to help them, make amends.



- **Copilot for M365 Achiever** - Fundamental
- **Microsoft 365** Certificated Fundamentals
- Microsoft Certified: **Azure** Fundamentals
- MCAPS Academy – **Copilot** program
- **M365 Copilot** – Technical Immersion
- **M365 Copilot Sales Champion**

- **ITIL v2 and v3** Expert
- **Service Integration and Management (SIAM)** Practitioner
- **Accessibility Fundamentals**
- **Prosci** Certified Change Practitioner
- **PRINCE 2** Practitioner
- **ISO/IEC 20000** Practitioner

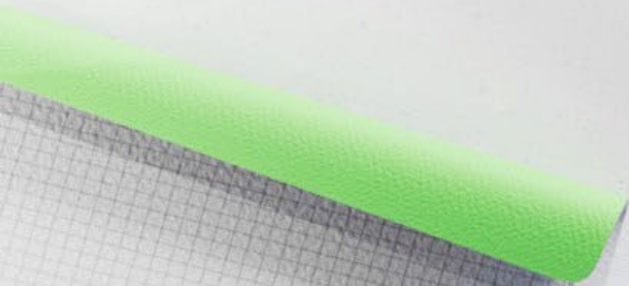


Agenda

- Background and Purpose
- Change Management Framework
- M365 Copilot Scenarios and Personas
- Adoption Resources
- Q&A



Background and Purpose



Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

of people have struggled with finding time and energy to get their work done

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

Purpose of this Session

- Microsoft would like our partners to act as '**Customer Zero**' for Copilot deployments
- Jumpstart qualifying criteria require partners to have vetted capabilities and internal Monthly Active Usage (MAU) of Copilot for M365
- Microsoft SMEs will support partners to develop implementation and adoption plans; this session provides advice and guidance for your internal projects

What we learned during the Microsoft Early Access Program



Deploy in groups, covering entire teams



Provide a way to share best practices and best prompts



Appoint an executive to lead and sponsor the roll-out



Set goals, measure data and collect feedback

What we've seen inside Microsoft

Internally, some of the first groups to receive Copilot were Sales and Support.

Microsoft sellers have:

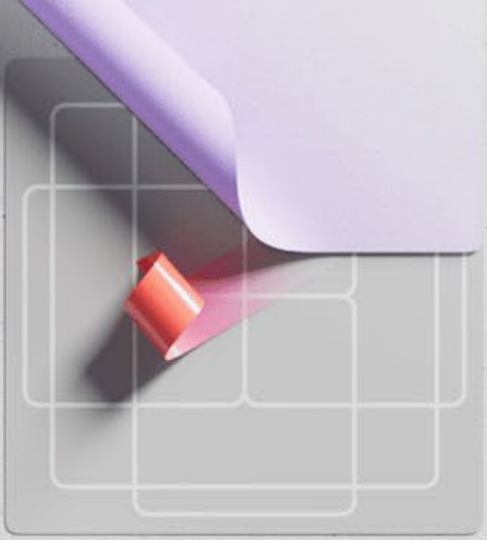
- 90 minutes' time savings per week
- 83% say they are more productive
- 67% spend more time with customers

Microsoft support agents:

- 12% reduction in case handling time
- 10% boost in case resolution



Copilot Planning Approach for Partner Adoption



Copilot for Microsoft 365 Implementation



Find a wizard in the admin center > Home > Setup page > Apps and Email > [Get ready for Microsoft 365 Copilot.](#)

Essentials for Copilot Success



Nominate and activate your Copilot executive **sponsors**, in partnership with your **AI Council**



Define initial high value **scenarios** and target a critical mass of users for rapid value



Define your path to **secure** your data for compliance and peace of mind

AI Council – Composition and Responsibilities

An **AI Council** is a cross-functional group tasked with evaluating, directing and overseeing the organisation's adoption of artificial intelligence (AI).

Purpose and Role

- Leveraging AI Potential
- Alignment with Business Objectives

Responsibilities

- Strategic Guidance
- Risk Mitigation
- Ethical Considerations

Membership

- Diverse Expertise
- Independent Perspectives

Focus Areas

- Public Perception
- Skills Development
- Data and Security Frameworks

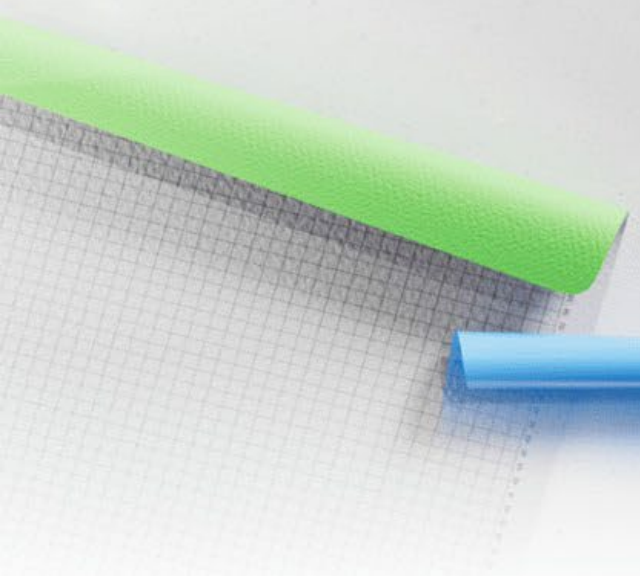
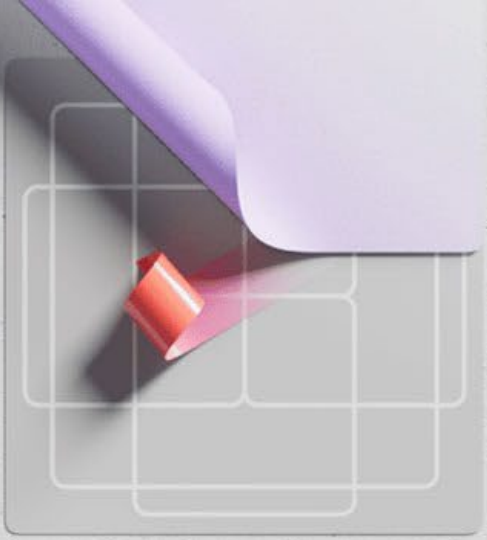
An effective AI Council guides responsible AI adoption, benefiting both the organisation and society



Have you considered governance requirements for your AI services?
What concerns do you have?



Adoption and Change Management Good Practice



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M365 Copilot Adoption Principles

Engage

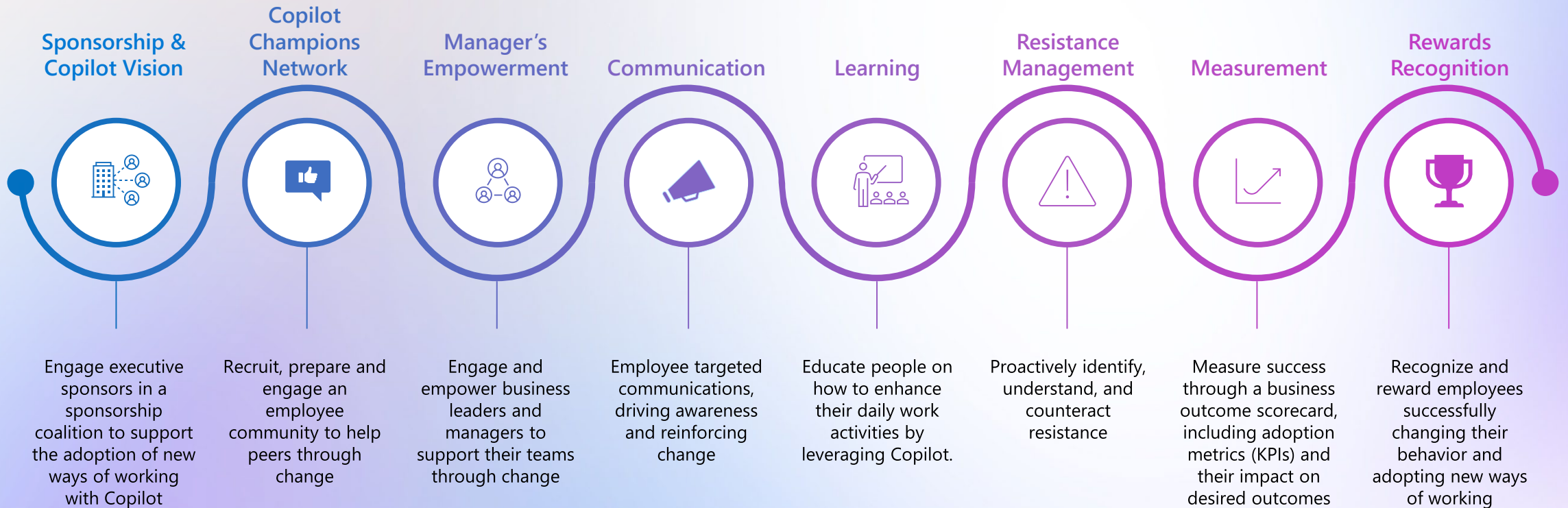
Do it with them, not to them.
Build belief and trust.
Drive changes for workforce and IT.

Scale

Prepare sponsors,
managers and champions
to lead the change.

Reinforce

Measure and celebrate success.
Recognize reuse.
Reward innovation.



General Change Framework – ADKAR; the people side of change



AWARENESS

of the need for change

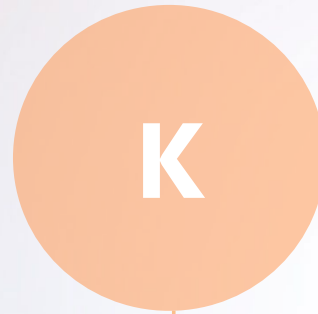
*"I understand why
....."*



DESIRE

to support the change

*"I have decided to
....."*



KNOWLEDGE

of how to change

*"I know how to
....."*



ABILITY

to apply skills and behaviours

*"I am able to
....."*



REINFORCEMENT

To make the change stick

*"I will continue
to"*

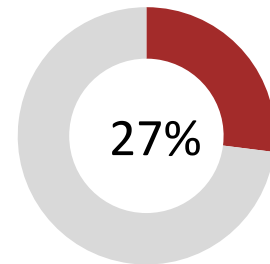
In all 12 of Prosci's studies, active and visible sponsorship was the #1 contributor to success

Sponsors Are Critically Important in Driving Success

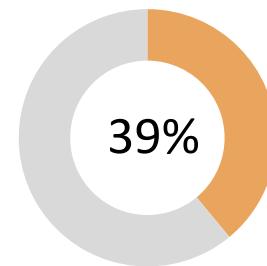


Sponsorship correlates with **project success**

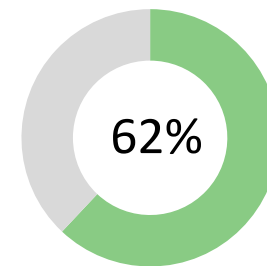
Percent of projects that met or exceeded objectives based on sponsor effectiveness



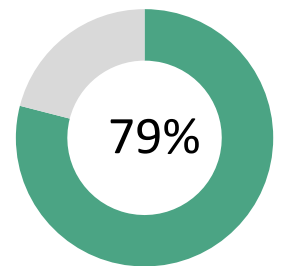
Very ineffective sponsors



Ineffective sponsors



Moderately effective sponsors



Extremely effective sponsors



Sponsor Role in Change: Fulfil the ABCs to Drive Success

It's not just signing cheques and charters



Actively and visibly participate throughout the project



Build a coalition of sponsorship with peers and managers



Communicate directly with employees



Have you identified Sponsors?
How engaged are they?

Champions

Champions provide nearby colleagues with a resource for guidance and answers.

You are promoters and coaches of the new ways of working, not technology trainers.



WHAT CHAMPIONS DO

- Enthusiastically **Promote New Ways of Working with Copilot.**
- Assist nearby colleagues on **Best Practice usage** and answering questions.
- Proactively **manage resistance.**
- **Collect and report Feedback** from end users to the Central team.



RESPONSIBILITIES

- Coach nearby colleagues and explain Copilot benefits (what's in it for me?)
- Provide guidance on where to find (technical) Copilot support.
- Gather feedback or resistance issues and report back to the Program.
- Engage with the M365 Copilot Champion community; ie Teams channel, Viva Engage, attend regular meetings.
- Share success stories.



EFFORT ESTIMATE

- Preparation and Delivery up to 4 hours per week,
- Sustain effort of up to 4 hours per month.



Why Champions are Important

Champions play a key role in building awareness, understanding, and engagement throughout the community as a trusted resource to their peers.



Open and positive mindset



Influencing and social skills



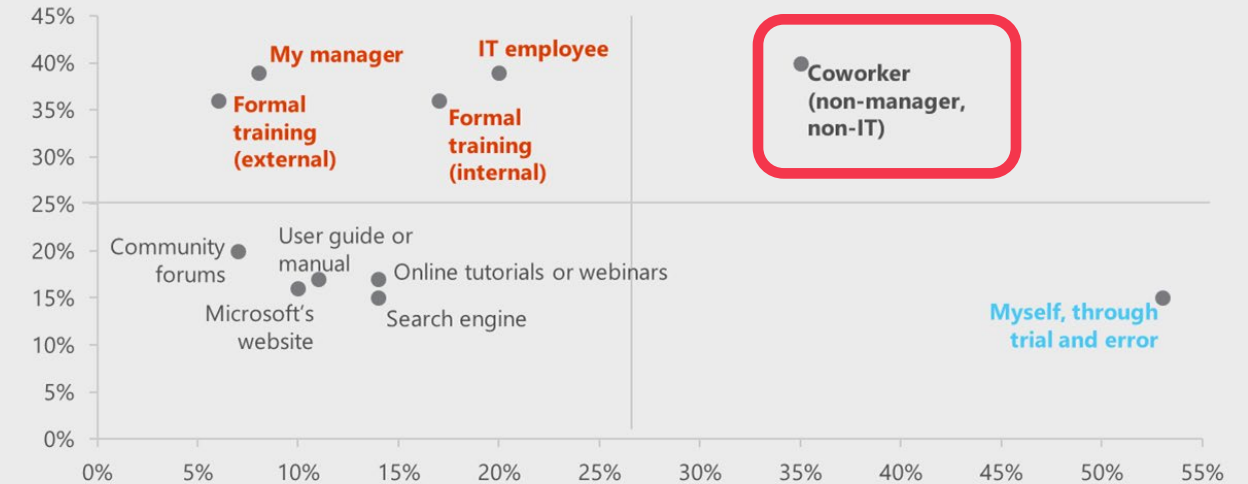
Trust in technology



Resilience and proactivity

% who said method was "very helpful"

Percent using learning method versus helpfulness

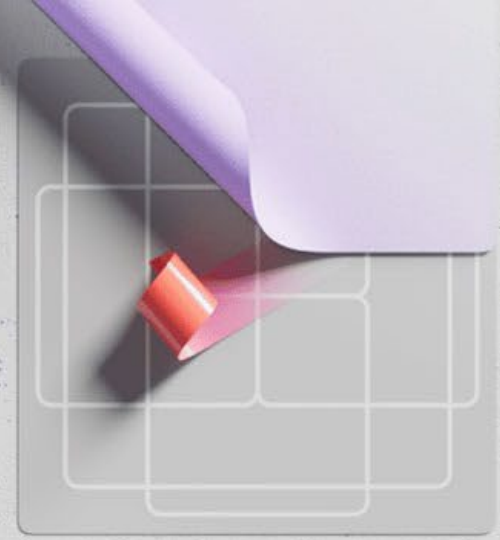


Peer-to-peer is among the most effective and most used method for learning

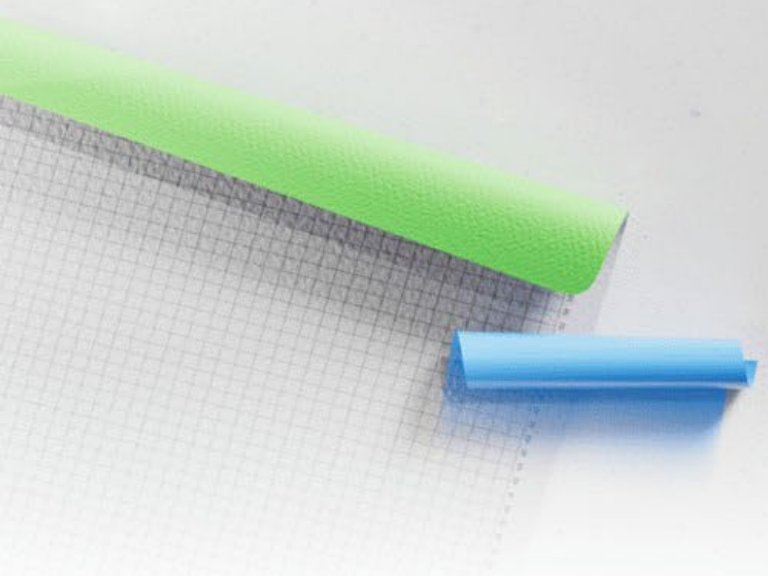
Drive awareness, adoption and best practice on the ground.

Promote new ways of working and be a role model.

Provide feedback, share learning and evolve the program.



M365 Copilot Personas and Scenarios



What are personas?

Personas are fictional characters representing a group of users who share a common set of usage behaviours, attitudes, skillsets and goals

What are scenarios?

A scenario is an end-to-end example of a new way of working

A scenario involves multiple applications and helps people to see the relevance of the technology to their roles more easily

Personal
Productivity

Content
Generation

Meeting
Collaboration

Why use scenarios?

Because my day looks like this...

8 AM	Plan my day
	Team standup
9 AM	
	Strategy Workshop
10 AM	
11 AM	
12 PM	
1 PM	1:1 with Mike
2 PM	Budget Meeting
3 PM	
	Data Project Demo
4 PM	

...not this...

8 AM	Planner + Outlook
	Microsoft Teams + Project + Excel
9 AM	
	Microsoft Teams + Whiteboard + PowerPoint
10 AM	
11 AM	
12 PM	
1 PM	OneNote
2 PM	Excel + Power BI
3 PM	
	PowerPoint + Power BI
4 PM	

It is easier for people to apply new technology to their work, when we speak in language they understand, not tool names and features

Scenario Examples

Our human-centric approach is designed to build adoption foundations consistently among most personas



Augmented Meeting & Collaboration

Automated agenda preparation	Recap a meeting or a chat
Meeting summary and notes	Live sentiment analysis
Next Step actions	Language translation
Ask questions about a meeting or chat	Collaborative brainstorming

Automated Content Generation

Transform existing text into presentation	Create first drafts
Edit content/formatting	Add more context
Summarize deck content	Summarize long texts
Extract next steps	Ask questions about document content

Augmented Personal Productivity

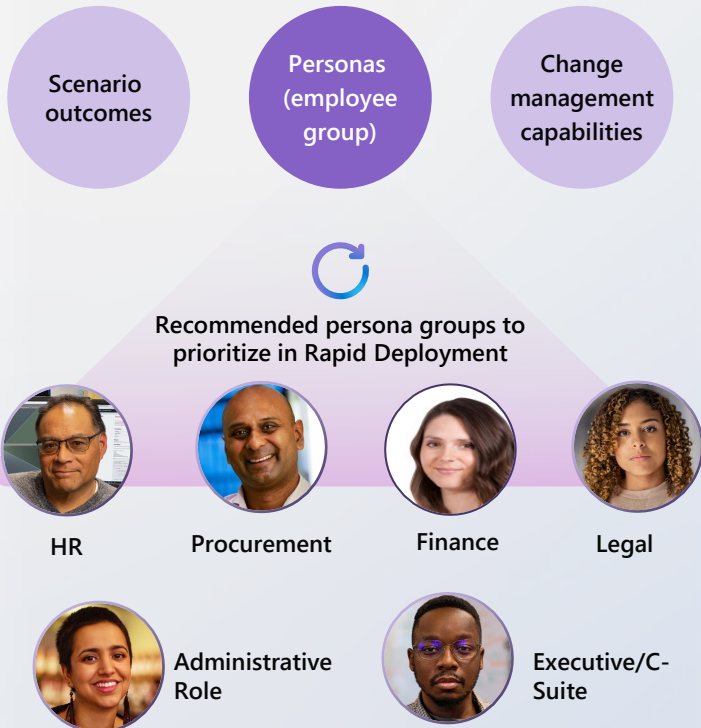
Author/get coaching on a new email	Q&A and ideas generation in chat
Suggested reply to threads	Summarize notes
Summarize long threads	Create to-do lists

Persona-led Scenario Development

Rapid deployment focuses on the recommended set of personas that will benefit most from Copilot

Recommended Persona groups

Each persona group has a distinct set of characteristics and requires a specific method to bring the workforce to life.



Priority Scenarios

Describes the way an activity can be executed in the future by targeted personas using technology.

Ask questions about document content	Summarize large information
Search through all available information	Generate meeting recap with actions
Insights on my data	Create presentations from text

Prioritization matrix

Identify patterns of needs and usage across personas and scenarios and prioritize for adoption.



Create presentations from text	●	●	●	●	●
Summarize large information	●	●	●	●	●
Insights on my data	●	●	●	●	●
Search through all available information	●	●	●	●	●
Generate meeting notes with actions	●	●	●	●	●

A day in the life of a Marketing Manager

EXAMPLE

8:00 AM

Daichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.



Copilot in Word

Prepare a brief outlining the advertising strategy from [Contoso widget marketing plan](#). Include sections on target market, pricing, tone, imagery, and taglines.

8:30 AM

Daichi meets with his team to brainstorm feature enhancements based on customer feedback. Copilot categorizes the ideas for easier discussion.



Copilot in Whiteboard

Categorize the ideas.

10:00 AM

Daichi must analyze the marketing data from the latest round of surveys. He uses Copilot in Excel to prepare charts so he can see the trends in the data.



Copilot in Excel

Show all data insights.

4:00 PM

Daichi needs to catch up on email before he heads out for the day. Copilot speeds the work by summarizing email threads and preparing draft responses.



Copilot in Outlook

Ask for more details.

2:00 PM

Daichi updates the roadmap deck to reflect the commitments from the engineering team meeting.



Copilot in PowerPoint

Add a slide based on [copy in bulleted list of roadmap updates]

11:00 AM

Daichi meets with the engineering team to plan the development of new features. During the meeting he uses Copilot to understand the prioritization of the features.



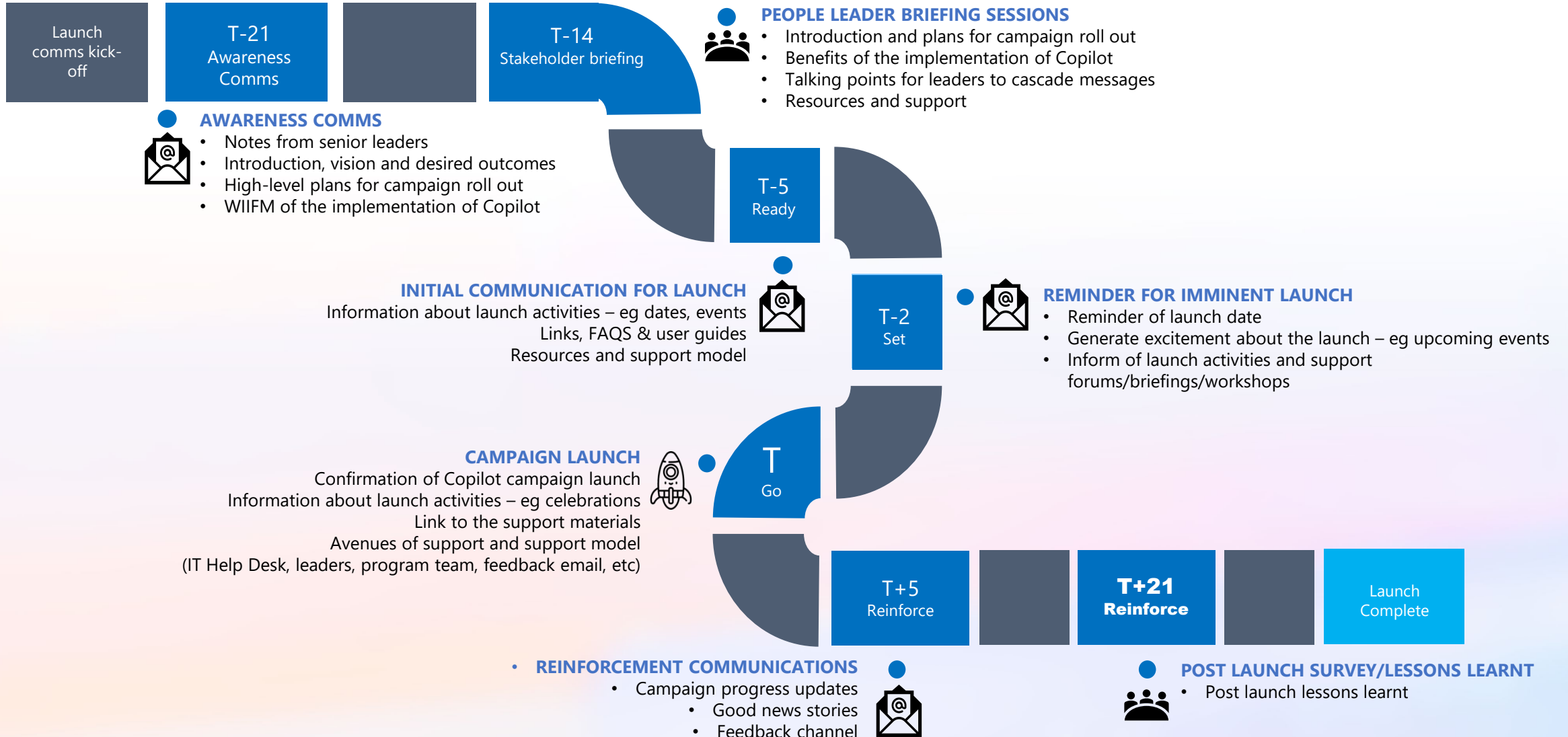
Copilot in Teams

Create a table to categorize the features discussed so far by priority.



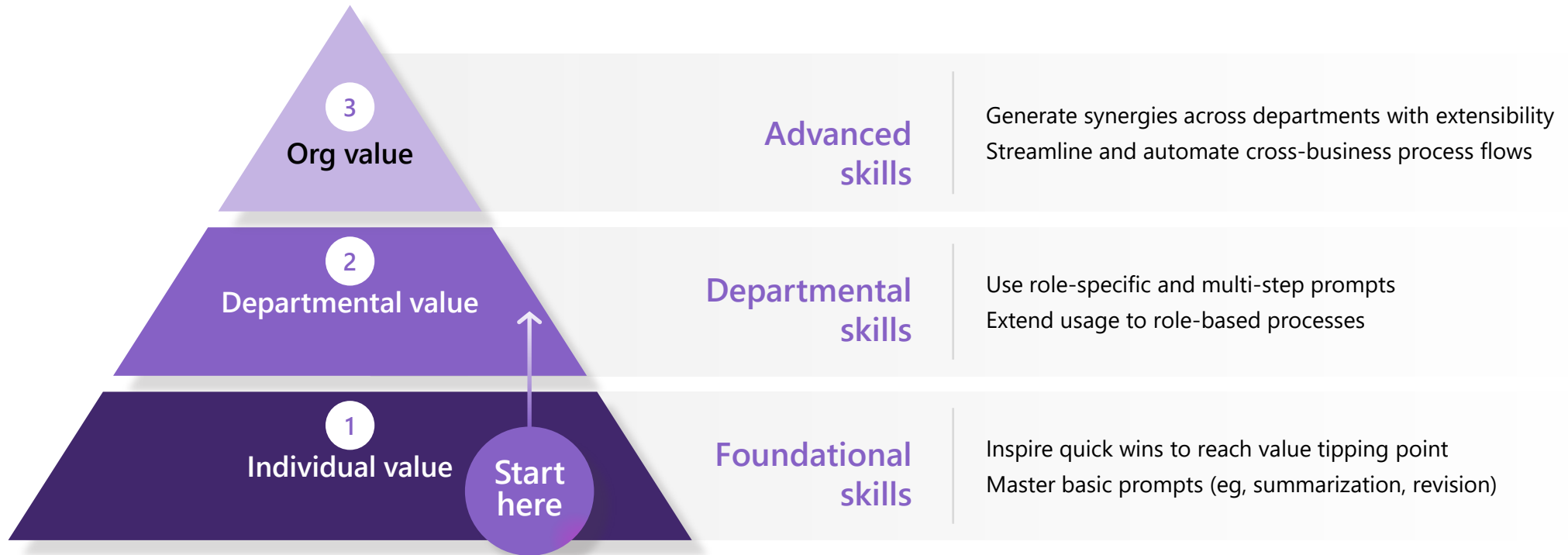
Daichi is a marketing manager at Contoso

Next Step: Copilot Roll-out Campaign Overview



Onboard and Engage

Lay the foundation for continuous learning and an intelligent progression of AI skills



1 Start with top 10 generic skills from [Copilot Lab](#) that deliver immediate success (eg, summarize a meeting, email thread).

2 Use the [Copilot Scenario Library](#) to train users on new departmental use cases and process improvement to impact departmental KPIs.

3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Prioritize peer-to-peer learning through community engagement and knowledge sharing.

Sample Rapid Deployment and Adoption for Copilot for M365

Summary Approach and Scope

Timeline	Project Timeline			
Approach	Planning	Readiness	Deployment & Enablement	Adoption & Plan to Scale
<p>Key Activities</p>	<ul style="list-style-type: none"> Engagement initiation introducing timeline, expectations and onboarding sponsors, champions and project team. 2-3 scenario envisioning workshops. Provide technical prerequisite guidance. Scenario & persona envisioning. Confirm end-users in scope for the adoption campaign. 	<ul style="list-style-type: none"> Define and build adoption campaign plan. Create and build campaign materials. Adoption team skilling and preparation for adoption sponsors and champions. 	<ul style="list-style-type: none"> Support adoption campaign implementation Identify, engage and train executive sponsors & managers within priority persona groups, and champions from the priority persona groups. Active communications across priority persona groups. Diagnose gaps & implement corrective actions and celebrate successes. 	<ul style="list-style-type: none"> Ongoing support to implement the adoption campaign Active communications across priority persona groups. Capture and track adoption/ utilization metrics for campaign target users. Capture and track value/business impact campaign users are receiving. Capture additional Copilot for M365 scenarios and target personas for the next adoption campaign (recommendations).
<p>Outcomes & Deliverables</p>	<ul style="list-style-type: none"> Scenario envisioning workshops). Copilot technical prerequisite list Deliver art of the possible presentation (educate, inspire, drive awareness). Targeted scenarios list. Scenario design document. Adoption measurement scorecard. 	<ul style="list-style-type: none"> Begin copilot activation for end users Adoption campaign plan. Adoption campaign materials. Adoption team preparation (train the trainers). 	<ul style="list-style-type: none"> Complete copilot activation for up to 1000 end users. Adoption campaign implementation. Executive sponsor, manager, persona group champion training. Diagnose gaps and manage resistance. 	<ul style="list-style-type: none"> Adoption campaign implementation continued. Adoption report describing support activities delivered to the customer during the build period and analysis of the scorecard implemented by customer. Follow-on adoption roadmap, next step recommendations, personas, scenarios.

Rapid Adoption Business Outcome Examples

Organizational

- Cultural transformation
- Employee retention
- Talent acquisition
- Social engagement
- Operational agility

Cultural

- Employee sentiment
- Employee recommendations
- Customer feedback
- Innovation measures, eg, idea forum contributions

Business process

- Customer experience impact
- Cost savings
- Revenue generation
- Data security
- Process simplification

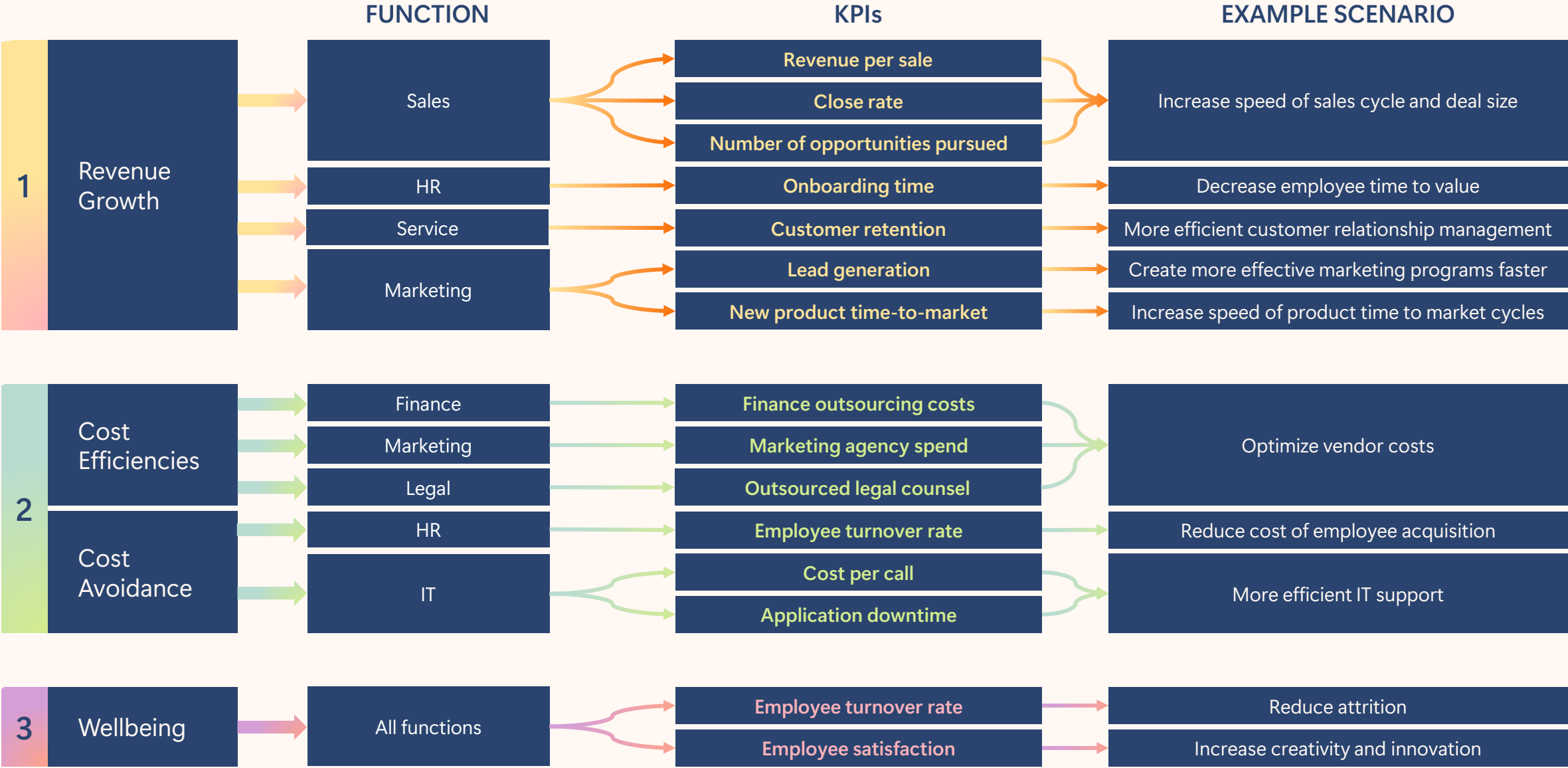
Individual

- Use of AI capabilities
- Employee morale
- Employee productivity
- Employee engagement
- Idea generation




Key Questions to answer

How is the customer's organization making progress on these measures?
What is their business process today so we can measure impact?

Measuring the effectiveness of AI transformation in your organization



Copilot Measure Scorecard Example

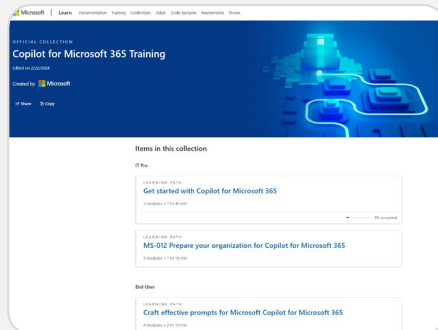
Focus Area (Scenario)	Quantitative KPIs Source: Microsoft Copilot Dashboard in Viva Insights Note: All quantitative KPIs are available for the prior 28 days	Qualitative / Quantitative KPIs Source: Survey
General adoption	<ul style="list-style-type: none"> # Copilot active users Active users rate: Copilot active users/enabled users 	<ul style="list-style-type: none"> Overall time saved thanks to Copilot (focus on value-adding activities) Satisfaction level of Copilot overall & NPS
Automated Content Generation 	<ul style="list-style-type: none"> # Copilot active users in Word # Copilot active users in PowerPoint (PPT) # of users who summarized a Word Document # of users who leveraged Copilot to create a new Word Document # of users who leveraged Copilot to rewrite text in a Word Document # of users who leveraged Copilot to create a new PPT Presentation Avg number of actions per active user for each of the features above 	<ul style="list-style-type: none"> Level of satisfaction with Copilot in PowerPoint and Word Time saved thanks to automated content generation Perception of increased ease of content generation Perception of increased quality of content generated
Augmented Personal Productivity 	<ul style="list-style-type: none"> # Copilot active users in Outlook # Copilot active users in OneNote # of users who used Copilot to summarize an Outlook email thread # of user who used Copilot to generate an email draft in Outlook Avg number of actions per active user for each of the features above 	<ul style="list-style-type: none"> Level of satisfaction with Copilot in Outlook, Copilot Chat (Teams), OneNote Time saved in email communication, retrieval of information and notes taking Perception of increased personal productivity
Augmented Meetings & Collaboration 	<ul style="list-style-type: none"> # Copilot active users in Teams # of users who used Copilot to summarize a Teams meeting # of user used Copilot to summarize a Teams conversation Avg number of actions per active user for each of the features above 	<ul style="list-style-type: none"> Level of satisfaction with Copilot in Teams calls Level of satisfaction with Copilot in Teams chat Time saved in collaboration and communication activities Perception of increased efficiency in collaboration and communication

Note: Active user = a user is considered active if they performed an intentional action for an AI-powered capability in a given app in the selected period.

Copilot for Microsoft 365 training platforms

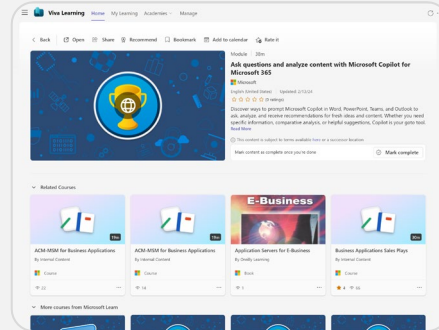
Microsoft Learn

- Free, on-demand training content for developing skills through interactive modules and learning paths
- Master core concepts at your speed and on your schedule
- Track your training progress and completions, earn achievements
- Step-by-step exercises guiding learners through common Copilot prompts and use cases
- Learner knowledge checks included throughout training content



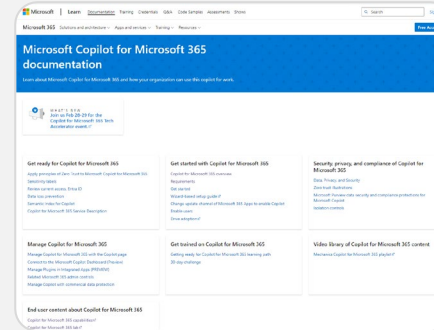
Viva Learning

- Requires additional licensing
- Employee learning in the flow of work with Teams integration
- Recommend and share content, and track completion
- Enable social learning
- Content includes pre-made playlists of how-to articles and videos
- Regularly updated with latest content



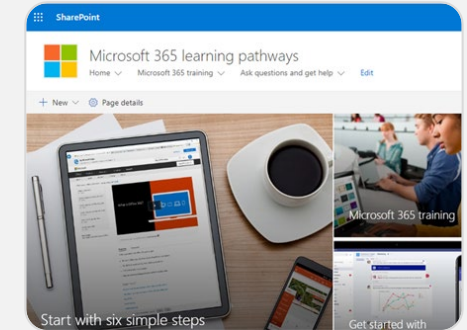
Technical Documentation

- Official and authoritative technical guidance from Microsoft
- Regularly updated with the latest information
- Topics include planning and readiness, getting started, security, privacy, and compliance, and more



Microsoft 365 Learning Pathways

- Free, customizable, and on-demand learning solution built on SharePoint and integrated into Teams
- Easy to provision from the SharePoint Online Provisioning Service
- Create your own training playlists to meet the unique needs of your organization
- Content is provided through a Microsoft online content catalog so the content on your site is automatically updated



Downloadable assets for customization available at adoption.microsoft.com/copilot

Copilot for Microsoft 365 Adoption: Summary

Prepare



Assemble your enablement team



Define adoption strategy and vision



Brainstorm adoption KPIs and success criteria



Plan to Copilot rollout and adoption



Establish champion/ CoE community



Create your training and communication plan



Define scenarios and personas



Define user feedback strategy

Get started



Prepare your champions/ CoE platform



Onboard champions and users



Conduct envisioning and art of possible session



Develop role-based scenarios

Value



Monitor success and adoption matrix



Capture and analyse user feedback



Identify and evangelize success stories



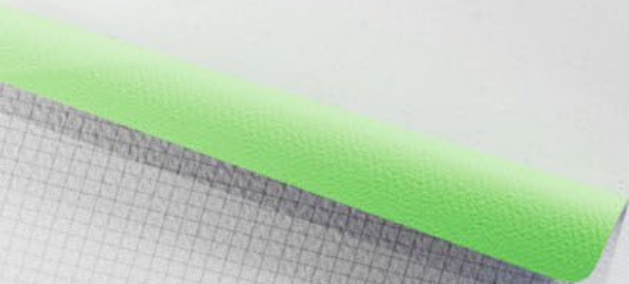
Communicate and adopt latest technology update



Onboard employees



Adoption and Change Management Resources



Copilot adoption project: support options

A range of adoption activities can be used to support Copilot roll out

Self-service materials

- Copilot in Word**
Copilot writes, edits, summarizes, & creates right alongside you.
Some example prompts:
 - Draft a two-page presentation on the data from [data source].
 - Make the third paragraph more casual.
 - Create a one-page rough outline.
- Copilot in PowerPoint**
Copilot helps you turn your ideas into stunning presentations.
Some example prompts you can ask Copilot:
 - Create a five-slide presentation on a Word document, include stock photos.
 - Consolidate this presentation into a three-slide summary.
 - Reformat these three bullets into three columns, each with a picture.
- Copilot in Outlook**
Copilot works with you in cleaning your inbox and messages.
Some example prompts you can ask Copilot:
 - Summarize the emails I missed while I was out. Flag important items.
 - Draft a response thanking them and asking for more details; shorten this draft and make the tone professional.
 - Invite everyone to a "lunch and learn" about new product launches next Thursday at noon.
- Copilot in Teams**
Copilot helps you run effective meetings; get up to speed, organize key discussion points, and summarize actions.
Some example prompts you can ask Copilot:
 - Summarize what I've missed in the meeting.
 - Create a table of pros and cons for [topic].
 - What decisions were made, and what are some suggested next steps?

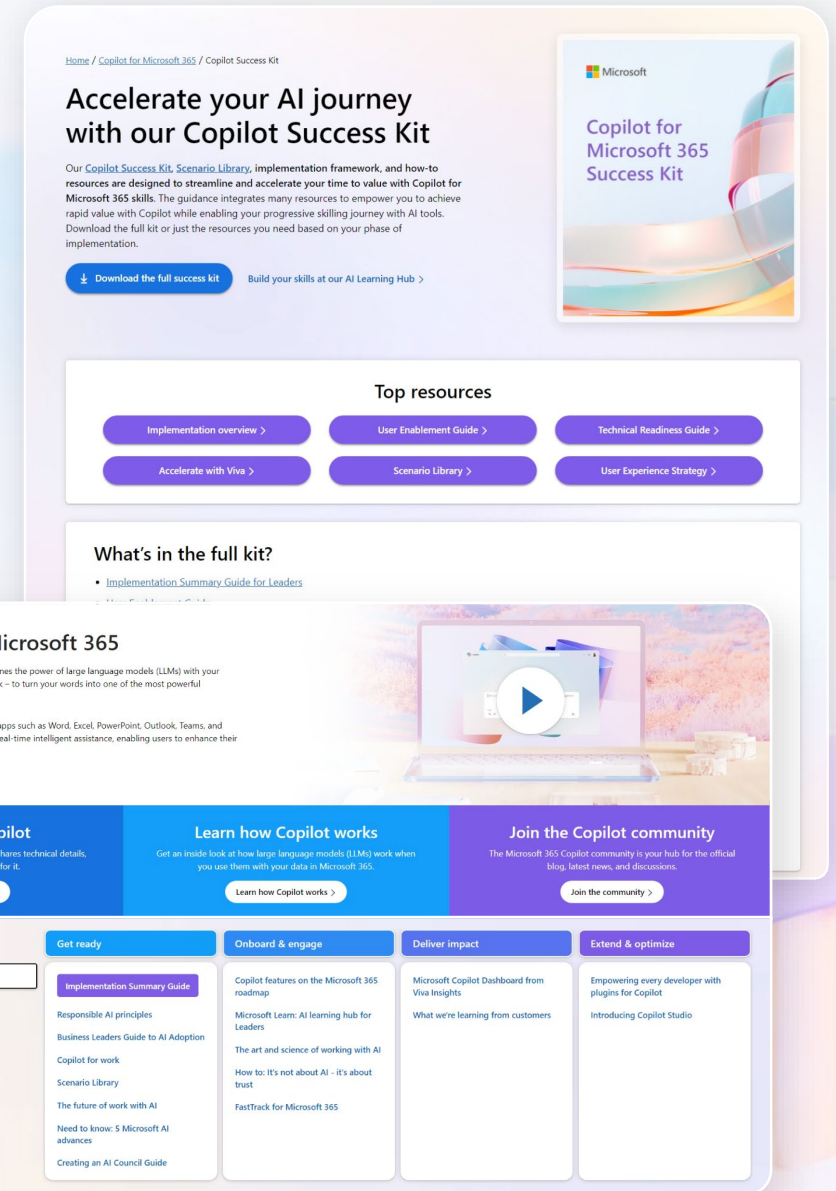


Copilot Resources on Microsoft Adoption

One site for all your Copilot needs

<https://adoption.microsoft.com/copilot>

- Resources by role
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Small/Medium businesses, Copilot in Sales, Microsoft Viva, and more
- **Copilot for Microsoft 365 Success Kit**
aka.ms/copilotsuccesskit
- **User Enablement Guide**
aka.ms/Copilot/UserEnablementGuide
- **Technical Readiness Guide**
aka.ms/Copilot/TechnicalReadinessGuide



Copilot Success Kit

Accelerate your path to value

<https://aka.ms/CopilotSuccessKit>

New offers and services were launched in July 2025 – keep in touch with your PSA to learn more

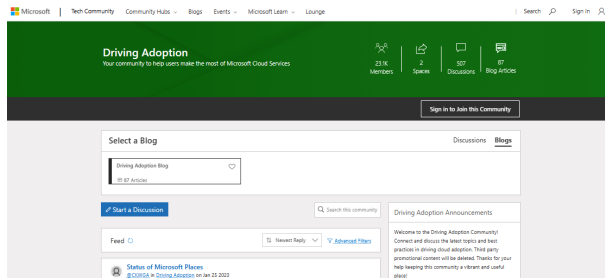
- [Implementation summary guide](#) (PPT)
- [Copilot adoption guide for business leaders](#) (eBook)
- [User Enablement Guide](#) (PPT)
- [Top 10 to try first with Copilot for Microsoft 365](#) (one pager)
- [Technical Implementation Guide](#)
- [Accelerate Copilot enablement with Microsoft Viva](#) (PPT)

Additional resources:

- **Get ready** – [Scenario Library](#)
- **Onboard & engage** – Onboarding [email campaign kit](#), Copilot graphics, community guide
- **Deliver impact** – [User survey kit](#), [Copilot Dashboard guidance](#)

Bookmark Microsoft Enablement Resources

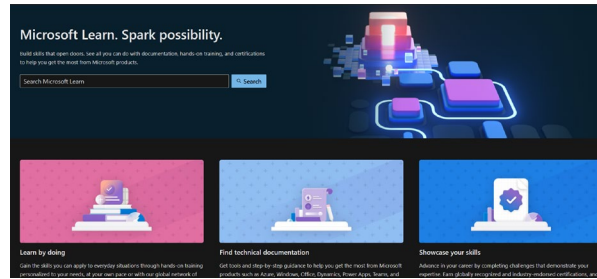
Join Driving Adoption Tech Community



<https://aka.ms/DriveAdoption>

Collaborate, share, and learn from experts

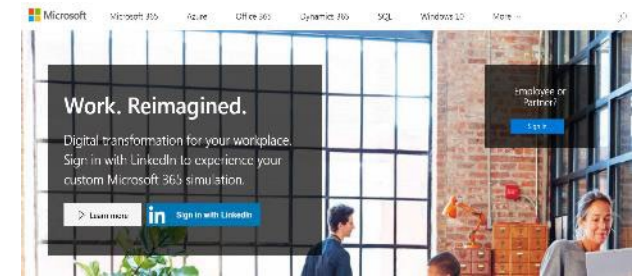
Microsoft Learn



<https://learn.microsoft.com>

Technical documentation for developers and IT professionals

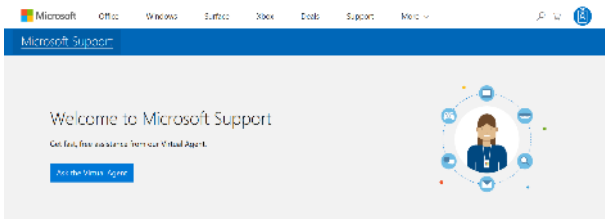
Microsoft Adoption Hub



<https://adoption.microsoft.com>

Resources to help you drive adoption of Microsoft services

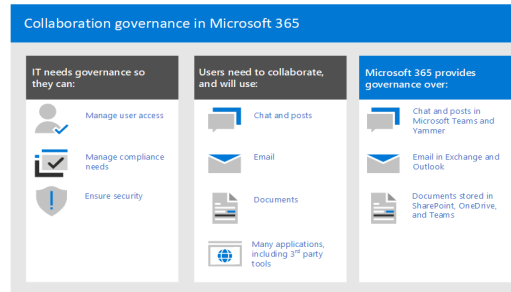
Microsoft Support



<http://support.microsoft.com/copilot>

Access FAQs and user help and learning

Teamwork governance



<https://aka.ms/TeamworkGovernance>

Collaboration governance guidance for Microsoft 365

Join our communities
Utilize our resources
Achieve your goals

Copilot Lab

A comprehensive learning resource that helps everyone begin their Copilot journey with confidence and grow with Copilot.



Get started with ease

Find prompt inspiration directly in your favorite Microsoft 365 apps or visit the Copilot Lab website for a full collection of training videos, helpful articles, and ready-made prompts to get started quickly.



Build new AI skills

Discover what's possible with Copilot and learn prompting fundamentals to create effective prompts on your own and unlock the magic of Copilot.



Achieve more together

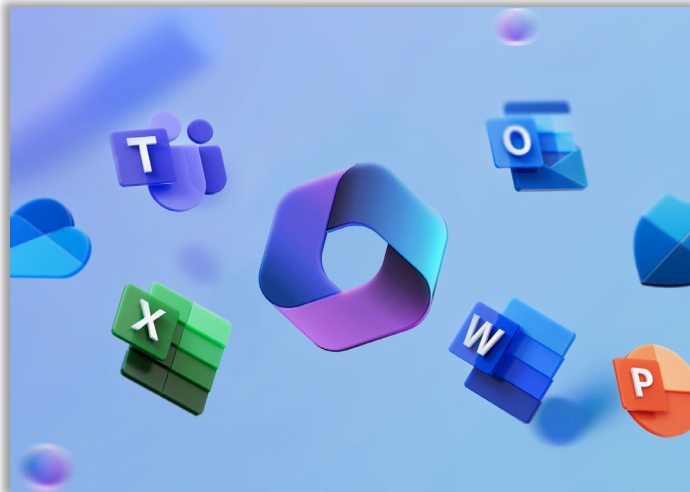
Explore our curated selection of suggested prompts or create, save, and share prompts of your own to help you and your team get more done and tackle any project or task at hand.

Get started today: aka.ms/CopilotLab



Copilot Enablement for Partner as Customer Zero

Opportunity



- Unlock the full potential of Copilot licenses in your organization
- Deliver more value to your Copilot clients
- Achieve higher ROI

Program & Benefits

Partner can select one, some or all:

- 1. Technical Enablement**
 - Criteria: ≥ 150 O/M365 seats and ≥ 50 Copilot seats
 - Deployment and technical guidance from Copilot SMEs
- 2. Adoption & Change Management Best Practice**
 - Criteria: ≥ 300 Copilot seats
 - 1:1 ACM consultation
 - ADKAR change framework
 - Advise on selecting scenarios
 - Tactics to enable organizational culture change
- 3. Build With Program**
 - Criteria: **FastTrack and JumpStart partners**
 - Develop Copilot value-added services with our Copilot PSAs

Call to Action

Nominate your company by scanning the QR code or using the link below:

[Partner as Customer Zero Nomination Form](#)



Join our exclusive program and be among the first partners to experience the benefits of Copilot Customer Zero Motion



Questions



**THANK YOU FOR
JOINING US TODAY!**
