

Applying AI at scale

How Microsoft adopted Copilot for Microsoft 365

Authored by Cynthia Johnson, Product Marketing, Microsoft

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Executive summary

Microsoft has deployed Copilot for Microsoft 365 to more than 330,000 employees and contractors. Early [feedback](#) obtained by Microsoft Research suggests that Microsoft employees are rapidly integrating Copilot into their tasks and seeing immediate benefits. Seventy-four percent of internal survey respondents report feeling more productive, with an estimated time savings of 20 minutes per day.

Copilot for Microsoft 365 has the power to transform the way businesses operate, but it requires employees to change their habits and adopt new ways of working. Before Copilot, most employees did not have a personal assistant always ready to help perform research or writing tasks. Now they must learn to delegate these tasks to Copilot. To get everyone started, Microsoft initially focused its change management efforts on helping them learn how to communicate effectively with Copilot using prompts, which are instructions or questions used to tell Copilot what they want.

For the rollout, Microsoft engaged the Microsoft Digital global change management team and departmental-level adoption teams who had assisted with other AI-related change management programs in the year prior to the Copilot rollout. While Microsoft Digital provided foundational training on using Copilot, the departmental teams provide specialized coaching by role and region. By closely monitoring usage at the team level on Viva Insights dashboards, the departmental adoption teams can provide outreach to build motivation and deliver additional training.

This two-pronged approach also includes helping departments extend and customize Copilot for their needs through connectors and plug-ins. Individual teams identify opportunities for integration and product enhancements to improve key processes and work with the Microsoft Digital AI Center of Excellence to implement solutions and ensure proper governance is in place. With a firm belief in the value of AI for its business, Microsoft has set a goal of including AI assistance into 25% of employee applications by the end of 2024, with the anticipation of leveraging AI across all core business workflows over time. With this approach, Microsoft is gaining value at three levels:

- **Individual value** – Using basic Copilot prompting skills, like summarizing meetings and emails or creating a first draft, helps employees manage their time and tasks at work more efficiently, so they can accomplish more in a day and improve their work-life balance.
- **Departmental value** - Integrating Copilot into common business practices like responding to an RFP or reducing support ticket times helps individual departments improve their success metrics, such as specific OKRs tied to opportunities created, customer satisfaction scores, or other role-specific metrics.
- **Organizational value** - Infusing Copilot capabilities into applications and processes used across departments, such as employee onboarding or closing sales opportunities, creates value across the company.

Copilot value journey

Our goal at Microsoft is to grow value from a solid base of high usage and individual productivity by then optimizing departmental processes and impacting the metrics that are important to our organization.

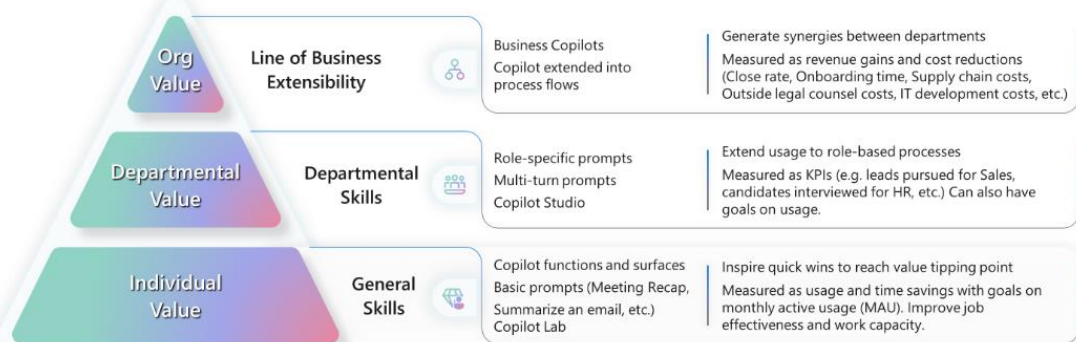


Image 1: Growing Copilot value through adoption and extensibility

Copilot for Microsoft 365: Applying AI at scale

Copilot for Microsoft 365 has the power to help transform the business landscape in much the same way that Microsoft Office did when it was released more than thirty years ago. "I'm inspired by the transformative power of AI," says Nathalie D'Hers, corporate vice president of Microsoft Digital, Microsoft's IT organization. "I've been impressed with how quickly our employees have put it to work for them."

Microsoft has now deployed Copilot for Microsoft 365 to more than 330,000 Microsoft employees and contractors. With its flexible orchestration engine that can interpret language, find relevant data, and interact with large language models and other solutions, Copilot for Microsoft 365 provides a way to bring AI into the daily activities of all employees through solutions they use most. Internal surveys conducted by Microsoft Research found that employees are rapidly integrating Copilot into their daily tasks and seeing immediate benefits: for example, seventy-four percent of internal survey respondents report feeling more productive with an estimated time savings of 20 minutes per day.

"We've moved from talking about AI to applying AI at scale."

—Satya Nadella, Microsoft Chairman and CEO [link](#)



To deploy Copilot for Microsoft 365, Microsoft relied on the same deployment and adoption playbook and programs that it used when introducing Microsoft 365, Viva, and other modern work solutions. Microsoft Digital, the internal IT organization at Microsoft, took its usual lead in governance, technical readiness, extensibility, and managing access and security. But for Copilot, Microsoft took a unique approach to enabling employees. While

Microsoft Digital performed corporate-level tasks such as delivering support, preparing Viva Learning courses, holding global, localized instructor-led courses that introduced Copilot for Microsoft 365 and application specific agendas, and moderating Viva Engage sites, the Global Engagement team focused more than ever on supporting departmental adoption teams. It partnered with them to define each organization's change management strategy and unique change management plan. This approach ensured that Microsoft employees received training and support from people who understood their roles, cultural and language nuances, and how Copilot for Microsoft 365 could deliver value.

In this article, we'll share how we deployed Copilot for Microsoft 365, how we're continuing to promote learning and adoption to drive business transformation, and how various departments inside Microsoft are measuring value for their employees who've adopted Copilot. And we'll also provide recommendations and resources to help you consider how to drive deployment and adoption of copilot for Microsoft 365 inside your own organization.

Best practice – Copilot Success Kit

Much of the guidance and best practices highlighted in this article have been pulled together into the [Copilot Success Kit](#). This set of downloadable materials included technical readiness guidance and user enablement materials to help make your Copilot deployment a success.

Get ready: Planning and governance

Adopting new technology is never easy, which is why executive support is so important to provide the resources and encouragement employees need to overcome the inevitable challenges that arise. At Microsoft, the impetus to quickly deploy and adopt Copilot for Microsoft 365 came directly from CEO Satya Nadella. "Today marks the next major step in the evolution of how we interact with computing, which will fundamentally change the way we work and unlock a new wave of productivity growth," said Satya Nadella, Chairman and CEO, Microsoft. "With our new copilot for work, we're giving people more agency and making technology more accessible through the most universal interface — natural language."

Prepare the tenant for the deployment

Copilot helps users find and interact with content from across the organization. Because Copilot makes data access so easy, proper data hygiene is critical to keep your sensitive

data protected. Microsoft uses sensitivity labeling to provide employees with access to the data they need, while limiting access to confidential information.

Microsoft encourages employees to create new SharePoint sites for each project instead of reusing existing spaces with mismatching permissions. Microsoft Purview automatically labels all new sites as "Confidential\Internal Only." File labels are inherited from the site label, but to verify the content-level permissions Microsoft also uses Purview to provide auto-labeling to detect and control sensitive content. Site owners must attest each site every six months to keep the content from expiring.

Microsoft uses Purview to limit oversharing by defaulting to company-shareable links instead of forcing employees to grant access to large groups. Microsoft also specifies that employees can only share highly confidential items with specific people. Microsoft then uses Microsoft Graph Data Connect extraction in conjunction with Microsoft Purview to catch and report oversharing.

Preparation: Ensure tenant hygiene and data governance

Ten steps for getting tenant data governance right with Copilot for Microsoft 365










-  Give employees the ability to create new workspaces across your Microsoft 365 applications. By maintaining all data on a unified Microsoft 365 tenant, you ensure that your governance strategy applies to any new workspaces.
-  Limit your taxonomy to a maximum of five parent labels and five sub-labels. That way, employees won't feel overwhelmed by the volume of different options.
-  Make your labels simple and legible. For example, a "Business-critical" label might imply confidentiality, but every employee's work feels critical to them. On the other hand, there's very little doubt about what "Highly confidential" or "Public" means.
-  Label your data containers for segmentation to ensure your data isn't overexposed by default. Consider setting your container label defaults to the "Private: no guests" setting.
-  Derive file labels from their parent container labels. That consistency boosts security at multiple levels and ensures that deviations from the default are exceptions, not the norm.
-  Train your employees to handle and label sensitive data to increase accuracy and ensure they recognize labeling cues across your productivity suite.
-  Trust your employees to apply sensitivity labels, but also verify them. Check against data loss prevention standards and use auto-labeling and quarantining through Microsoft Purview automation.
-  Use strong lifecycle management protocols that require employees to attest containers, creating a chain of accountability.
-  Limit oversharing at the source by enabling 'People in my organization' links rather than forcing employees to add large groups for access. For highly confidential items, limit sharing to employees on a "need-to-know" basis.
-  Use Microsoft Graph Data Connect extraction in conjunction with Microsoft Purview to catch and report oversharing after the fact. When you find irregularities, contain the vulnerability or require the responsible party to repair it themselves.

Image 2: Best practices for tenant hygiene and data governance

Microsoft works council collaboration

Because Copilot for Microsoft 365 has a large impact on employees, Microsoft Digital collaborated with the [12 country-specific works councils](#) that Microsoft established to help boost internal product rollouts. These councils represent Microsoft employees' interests and help to examine the regulatory and ethical boundaries for Copilot usage across the company. They also evaluate how AI can increase productivity and job satisfaction among their members. And from an inclusion and diversity standpoint, they provide critical insights that help us respect cultural nuances and ensure language accessibility.

Prioritizing key departments and employees for maximum return

MS Digital worked with Marketing and Product Engineering teams to prioritize the Copilot rollout to targeted audiences with a clear view towards business impact. They considered priorities such as:

- Measuring impact on business KPIs and employee productivity
- Function-specific learning strategies
- How product development teams would get feedback from employees
- What use cases to test across departments and roles
- How to educate executive and communications teams on Copilot value
- How to train internal experts to provide support

With those priorities in mind, licenses were initially assigned to groups that were predicted to make the most of the Copilot capabilities available at the time. These included features like meeting and email summaries and aligned well with many Sales roles. Microsoft also prioritized teams that were rapid adopters of other recent technology such as Microsoft Teams and Microsoft Viva to maximize the opportunities for feedback, as well as employees in the early adopter program. To supplement the early adopters, individual department leads were also asked to nominate 200-300 people from their departments to receive Copilot early. Many of these people were in roles working on Copilot. They were instrumental in testing role-based use cases and often joined the pool of departmental champions who helped lead the broader rollout.

Planning: Assign seats with a focus on value

Best practices for seat assignments from Microsoft's deployment



Focus on value

Identify roles that are likely to see immediate value to generate success stories that encourage other teams. Microsoft [Unified Support](#) offers a Copilot Art of the Possible workshop that can help identify use cases. You can also review use cases in the [Copilot Scenario Library](#).



Manage expectations to minimize questions

Clearly communicate the rollout strategy to users so they understand why some users have licenses and others do not.



Deploy across entire teams

Allocate Copilot to entire teams within a specific business function. Avoid distributing licenses thinly. When entire teams have access, they can share insights and learn from each other. And as more employees use Copilot consistently and effectively, the impact that Copilot brings to your organization multiplies.



Bring leadership on board early

Executive sponsorship isn't just useful for adoption. Leaders will also help you identify the key use cases and success metrics.



Engage your support team from the start

This is a new technology, so your support teams will receive requests. Ensure they're ready by giving them early access and training.



Collect feedback at every opportunity

Encourage feedback from employees in your early implementation phases to collect best practices and guide your wider adoption efforts.

Image 3: Assign seats with a focus on value

Microsoft decided that the internal support team at Microsoft Digital should be one of the first entire teams to test Copilot since they would need to answer questions coming from employees during the broader rollout. A clear business case existed for support team members using Copilot for Microsoft 365 to help them resolve issues faster. Using the semantic search capabilities in Copilot, support teams can find information faster and respond to cases with clear, comprehensive replies generated by Copilot. Microsoft also added a plug-in to ServiceNow, the solution Microsoft Digital uses for support ticket management. The support team used the following metrics to measure the value gained from using Copilot:

- Reducing onboarding time for new support team members.
- Streamlining access to knowledge.
- Eliminating repetitive administrative tasks.
- Reducing ticket volume.

Getting Copilot into the hands of more Microsoft employees

For the broader Copilot rollout, Microsoft started with customer-facing roles. The remaining Sales and Customer Support roles were the next set of employees to receive Copilot. Again, Microsoft saw a clear business case that improving Sales and Customer Support efforts would have a direct impact on revenue and customer experience. The deployment team believed people in these roles could use Copilot to create better content, summarize and organize customer information, and find product information quickly. That way, they could focus on customers and close more deals or resolve more support cases. The rollout to the remainder of the organization quickly followed.

Extending Copilot with plug-ins and connectors to amplify returns

The AI Center of Excellence (CoE) is a dedicated team within Microsoft Digital tasked with infusing AI into internal technology solutions at Microsoft. Prioritizing opportunities to maximize value has resulted in a few big bets including Copilot for Microsoft 365 extensibility. The team has deployed three Graph connectors internally so far, for ServiceNow, Workday, and SAP, and will continue to extend Copilot into key solutions. Extending Copilot and other AI technologies into line-of-business tools and other places

Best practice – Three tips for accelerating works council reviews of Copilot for Microsoft 365

1. Give your works council members early access to the product. This gives them time to understand how it works, and they can give their seal of approval much quicker if they can test it out themselves.
2. Have a regular cadence with specialists who can answer technical questions they might have, working with your Microsoft Account Team and your own IT folks. These regular check-ins can help you resolve questions and misconceptions early.
3. Raise understanding of Copilot value for employees by defining a learning path using available learning materials from Microsoft Viva Learning or LinkedIn Learning on what generative AI is and how employees can begin to interact with it as part of their daily work to help them save time and focus on more important tasks that align with team and business goals.

where employees interact with technology amplifies the value Copilot brings to Microsoft.

Microsoft is also using [Microsoft Copilot Studio](#) plug-ins to bring AI into various processes like AskHR and Microsoft Support. Copilot Studio is a low-code conversational AI platform that enables people to extend and customize Copilot for Microsoft 365 with plug-ins, as well as build their own copilots. The AskHR virtual agent is deployed on Teams and has 35,000 installs within Microsoft. It is currently resolving 27 percent of HR support inquiries without involving a support employee.

Onboard and engage: Enabling employees

Within Microsoft, the Microsoft Digital Global Change Management Team leads employee enablement efforts. Using their standard adoption framework for internal deployments, the team quickly began implementing the plan to help drive Copilot adoption across communications, readiness, champions, and communities.

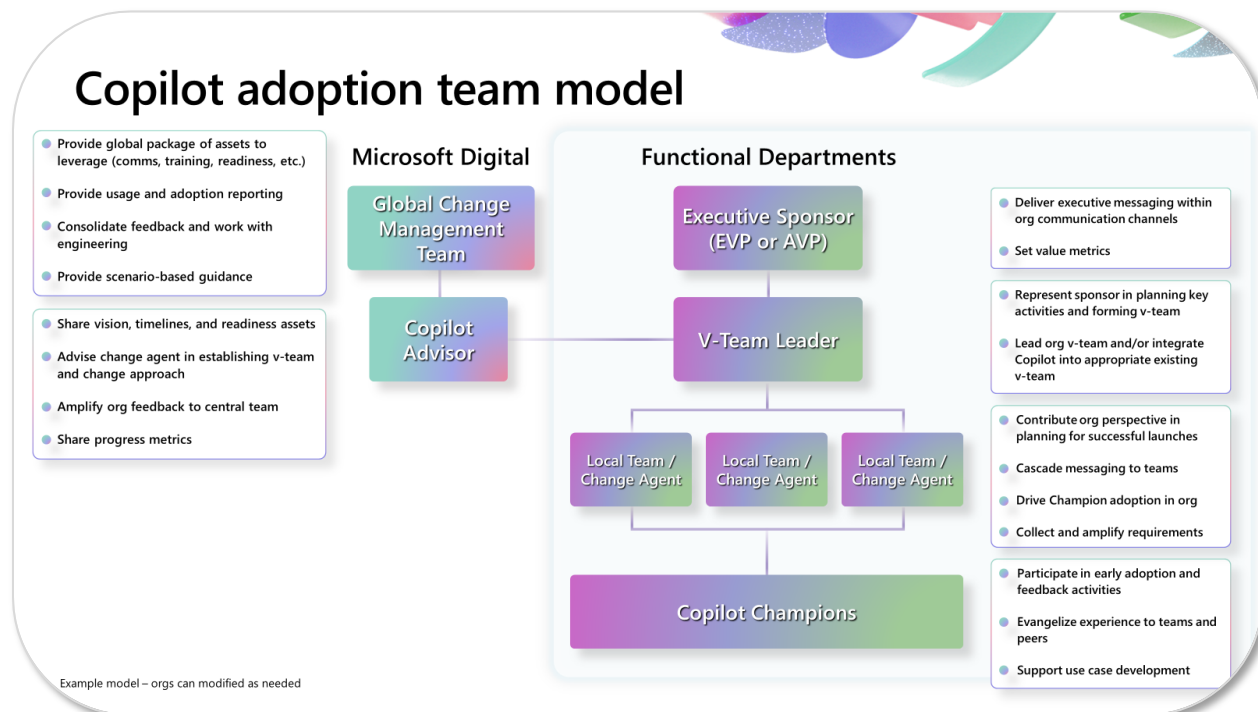


Image 4: Copilot adoption team model showing departmental approach

Generating excitement about Copilot

To help generate excitement about Copilot, the Microsoft Digital End User Engagement Experiences team sent an initial welcome email to employees with information and resources, including a link to the MS Digital Copilot for Microsoft Onboarding site hosted on SharePoint Online. The site contains a

variety of learning options to engage people with different learning styles and at different points in their adoption journey. Learning options included self-guided online courses in Viva Learning, short demos and videos, a prompting toolkit, and a comprehensive FAQ. Throughout the adoption cycle, this content was updated based on internal feedback and as new resources became available.

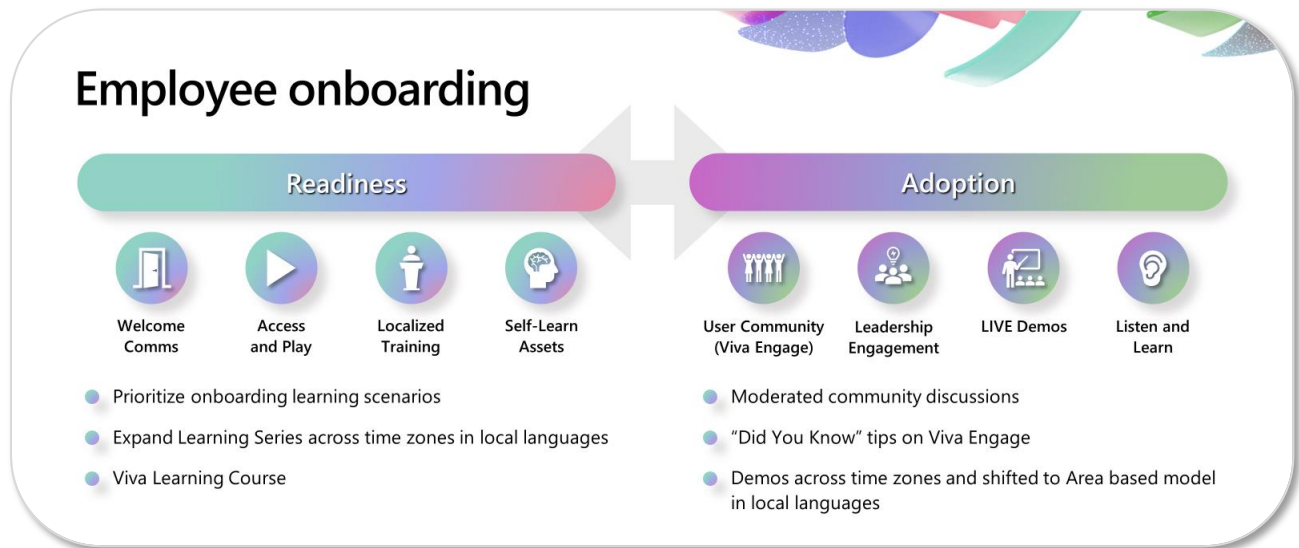


Image 5: Provide a variety of readiness and adoption resources

A key next step was offering instructor-led training courses held multiple times a day and in multiple languages to provide a guided introduction to the Copilot UI and basic prompting skills. About 30,000 Microsoft employees attended these courses. Now that the rollout is complete, the team has introduced a more advanced set of courses, with one for each Copilot application. These courses are also available on-demand through Viva Learning.

In addition to the learning content, Microsoft Digital ran a series of internal communications and marketing campaigns that began before the rollout and continued for the next couple of months. The launch campaign included materials such as Viva Engage posts from executives, Viva Connections articles, and banners on key internal SharePoint sites. These campaigns generated a groundswell of excitement and energy—driving awareness and encouraging adoption of Copilot by highlighting benefits, use cases, and prompt guidance.

Best Practice – Take advantage of the Copilot onboarding toolkit and Copilot Lab

To help customers with their own Copilot rollouts, Microsoft collected the emails it was using internally and turned them into customizable email templates. Check them out at [Copilot Onboarding Toolkit](#). The Toolkit provides a series of email templates that can be sent over several weeks to provide the reminders often required to help employees form new habits. Viva Amplify also has ready-made email templates for Comms managers.

After employees had tested and provided feedback on [Copilot Lab](#), we made it available to Copilot for Microsoft 365 customers.

The Digital Comms team also created a gamification program called the Digital Copilot Passport Campaign to drive excitement and spur employee adoption with a fun and slightly competitive aspect. Employees can get stamps on their passports by completing activities using Copilot. They are encouraged to show off their passports on Viva Engage along with their favorite prompts.

Microsoft found that teaching employees how to communicate with Copilot through prompts was a key training requirement. The team hosted instructor-led and on-demand courses specific to prompting. The courses focused on learning how to communicate with Copilot to get the best results, and employees left the training with specific prompts that would provide immediate value in their daily work. Beyond the extensive learning content Microsoft provided for employees on the corporate Copilot adoption site, the Product team also developed Copilot Lab, a web site that helps employees find prompts they can use for key activities and learn how to create their own prompts. Microsoft has now updated Copilot Lab with role-based prompts to enhance its value.

Building a Copilot community with Viva Engage



During the early adopter phase, employees receiving Copilot for Microsoft 365 were automatically enrolled as members of the Viva Engage site for internal Copilot users. After Copilot was rolled out to 50 percent of employees, membership became voluntary. This active community is a resource for

everyone to share experiences and ask questions and is the first place most Microsoft employees go to see what's new. Microsoft Digital uses the site to communicate product updates and share new learning resources, so employees can continue to learn new skills.

Internal experts, whether from the Champions community, product engineering, or marketing teams, actively moderate the site. Active moderation helps ensure that questions get answered quickly and accurately. The site now has more than 70,000 members, with about 46,000 monthly active users.

Getting down to business

One unique aspect of the Copilot for Microsoft 365 deployment is that, while there were significant centralized efforts for support and content creation led by the IT Global Change Management team, much of the change management work is being led at the departmental and regional level.

Copilot is excellent for helping employees with unique tasks that require creativity and are often specific to a role. Since use cases across different departments require specific knowledge, Microsoft Digital believes adoption efforts for each role should be led by teams that are as close to that role as possible.

To support these efforts, the Global Change Management team created the Copilot Champions Team, which is open to all Microsoft employees. Champions receive additional training and support to help them become experts on the product. They help expand the reach of the Change Management team and bring diversity across roles and regions. More importantly, Champions deliver Copilot training in local languages to correctly demonstrate the nuance required in prompts.

Each functional department also created their own Copilot change management teams to lead employee enablement efforts within their own organizations. Guided by an advisor from the Microsoft Digital Change Management team, each team created specialized content, held training sessions, and gathered requirements for development efforts to extend Copilot into their department's LOB applications, which the AI CoE helps to implement. The teams also meet regularly to exchange best practices as each has proven to have unique skills and perspectives.

Microsoft created additional Viva Engage communities for groups like the Copilot Champions and individual departments. Role-specific communities provide the opportunity to share information relevant to that team. For example, the Champions site allows the Change Management Team to give Champions the resources, tips and tricks, and materials they need to excite and onboard their teams. It also lets the individual Champions share best practices amongst themselves.

Best Practice – create a Champions program for Copilot

Who are Champions?

Champions evangelize and help train their teams on the new ways of working. They build awareness, understanding, and engagement throughout the community. Champions help to:

- Create the groundswell of enthusiasm that grows adoption.
- Build a circle of influence among their teams.
- Bring the new ways of working to life across teams.
- Identify business challenges and possible solutions.
- Provide feedback to the project team and sponsors.
- Reduce strain on core project team through active, ongoing engagement.

Developing departmental use cases to grow Copilot usage

Across Microsoft, teams are now documenting their own use cases to share as best practices. The Finance organization has been laser-focused on increasing the productivity of its team members for the past ten years. Copilot is accelerating this trend. While Microsoft revenues have increased more than 200% in the past 10 years, employee numbers have experienced



minimal growth, and the amount of outsourced work has decreased significantly. When it came time to deploy Copilot, the Finance team first identified key roles and asked the people in those roles to document their processes and how Copilot could help. It now has a library of role-based scenarios that are on the

Finance Copilot adoption SharePoint site. The organization is seeing the most benefits in collaboration and finding data such as responding to RFPs, finding data for tax forms, evaluating risk and control results, and communicating policy.

Microsoft Marketing used Copilot to help create Copilot for Microsoft 365 marketing materials. With that experience, it's no surprise the Marketing team brought new ideas to light when it came time to train their colleagues on how to use Copilot. In its department-wide training sessions, Marketing brought in engineering resources and developed a set of activities that helped everyone quickly get to that "a-ha" moment where they could see the value Copilot can deliver based on a well-constructed prompt. Based on internal research showing that employees who save 10-15 minutes a day on their usual tasks tend to become long-term adopters, Marketing found it was a best practice to teach employees one or two skills that can help them immediately experience those time-saving benefits from Copilot and begin to drive more usage.

The HR team is developing new processes that integrate Copilot into hiring and onboarding. They are also looking at how to extend Copilot to support employee access to HR programs. Microsoft has more than 100 benefit programs, and employee participation in these programs is a key metric for the organization. By extending Copilot for natural language interaction with HR web sites, the HR team hopes to deliver more benefits across the company. The HR team also helps to evaluate use cases against responsible AI principles.



Because Sales is the largest and most regionally diverse organization within Microsoft, the Sales adoption team had an immense challenge made even more complex by the fact that it was deploying Copilot for Microsoft 365, [Copilot for Sales](#), and [Copilot for Dynamics 365](#) at the same time. These complementary

products help to thoroughly infuse AI into the sales processes at Microsoft. To help deliver a consistent message to close to 60,000 sellers, the team created an Adoption in a Box, which is comprised of a collection of modules to enable each regional team to build a customized adoption strategy. The content was localized by regional teams and then executed by local Copilot Adoption leads. The ultimate goal of the Sales organization is to drive towards 100 percent usage by sellers to maximize the opportunities that can be pursued and closed by each seller.

Conclusion

The work to enable an AI workplace at Microsoft is just beginning. Extending Copilot capabilities into all solutions will take time and building habits that use AI effectively requires ample reinforcement. The enablement teams in Microsoft Digital and across each Microsoft department continue to innovate and share best practices that will help Microsoft generate value from its Copilot deployment.



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