

**By Susan Neece Robien, Senior Director
Microsoft Customer and Partner Solutions**

Disclaimer: This document has been prepared by Microsoft to provide insights into internal Microsoft Customer and Partner Solutions best practices for driving Copilot adoption including, but not limited to Microsoft Copilot and Copilot for Microsoft 365.

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Microsoft Customer and Partner Solutions Internal Adoption Strategy for Copilot with Microsoft 365

Executive summary

Microsoft Customer and Partner Solutions (MCAPS) journey with Copilot for Microsoft 365 represents a paradigm shift in how the Microsoft internal sales organization leverages Microsoft AI Copilot to enhance productivity and decision-making within the organization. This white paper outlines our strategic approach, key initiatives, and the lessons learned from our internal adoption efforts while acting as customer zero to drive future product enhancements and concurrently selling our new technology and products to customers.

Introduction

This paper outlines the Microsoft Copilot adoption strategy and approach used internally at Microsoft for the Microsoft Customer and Partner Solutions (MCAPS) organization. MCAPS is a global organization of approximately 60,000 employees who are responsible for selling and supporting Microsoft products and services to customers and partners across various industries and markets, as well as providing operational support for the organization.

As with most sales organizations, MCAPS faces several challenges in its daily operations, such as managing complex sales cycles, engaging in diverse customer segments, collaborating with multiple stakeholders, and staying up to date with the latest product knowledge and market trends. To address these challenges, MCAPS leveraged Copilot for Microsoft 365, an AI-powered assistant which enables individuals to work smarter, be more productive, boost creativity, and stay connected. Copilot for Microsoft 365 is a part of the broader Microsoft 365 suite of productivity tools that enable modern work and collaboration.

In this paper, we describe how MCAPS approached the internal adoption of Copilot for Microsoft 365. We also present the lessons learned and best practices derived from our internal adoption experience, which can be useful for other organizations that are considering or already implementing similar AI solutions.

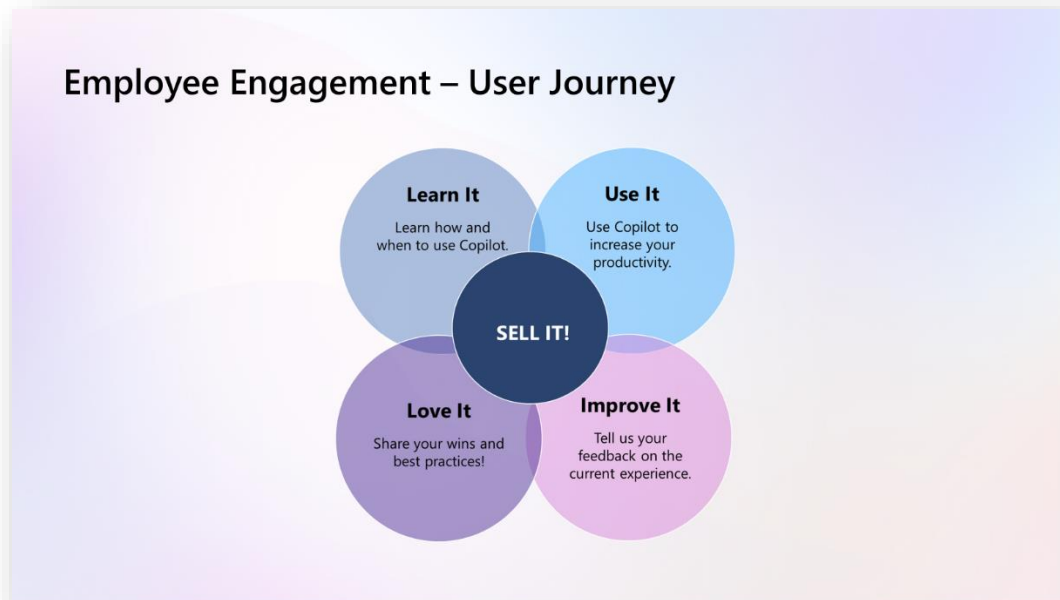
Microsoft's Implementation Framework

The MCAPS implementation approach was centered on three (3) main objectives:

- Improve capability through product proficiency, building credibility in sharing the Microsoft AI Copilot story and driving user enablement.
- Improve productivity by leveraging the power of AI via Copilot use in the daily flow of work.
- Support product improvement through feedback channels and identification of additional use cases.

Empowering employees

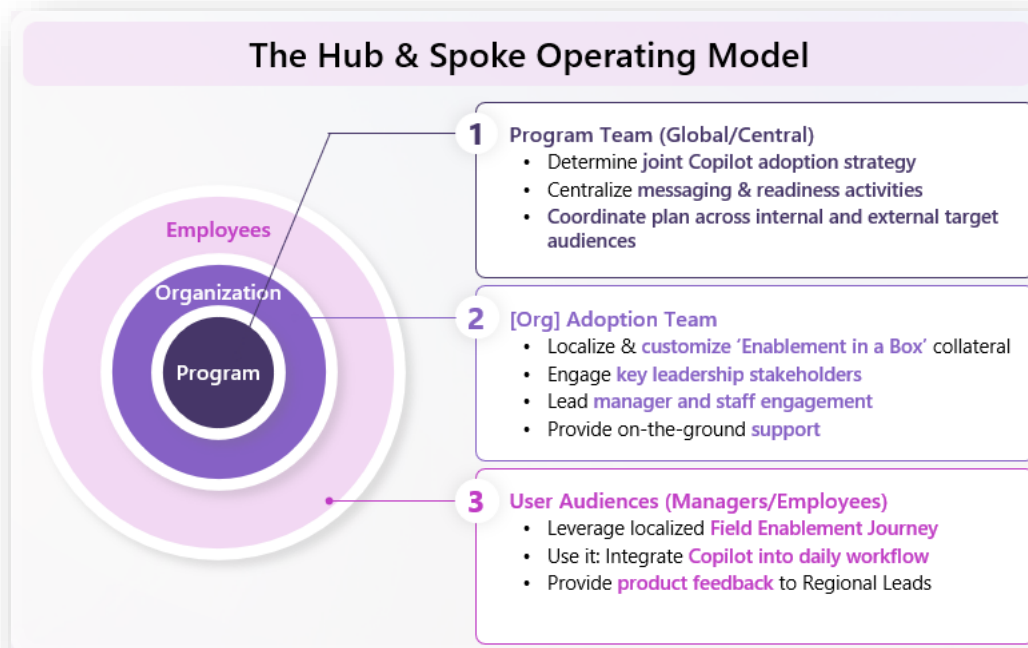
To support the employee journey to adoption, MCAPS leveraged a "Learn It, Use It, Love it, Improve It, Sell It" model. This model started with learning how and when to use Copilot, with a focus on using Copilot to increase productivity. Once using Copilot, employees were encouraged to share their love of Copilot by sharing best practices and success stories. To continue to improve and add to the Copilot experience, feedback mechanisms were made available to all employees. With the goal of empowering our customers to realize the benefits of Copilot, the MCAPS salesforce was armed to more effectively position and sell Copilot due to their own use of the product.



Governance and scalability

A key requirement of the user enablement strategy was to scale across approximately 60,000 employees in our organization globally. To achieve this, a governance model was developed to distribute accountabilities and engage stakeholders effectively. A hub and

spoke model was established between the program team and local teams. The program team, or “hub,” focused on the centralized enablement strategy and approach, consistent messaging, readiness activities, and a packaged set of modularized content. Localized user enablement teams were formed to support teams within MCAPS, leveraging existing communications channels and rhythms of the business and driving user enablement based on their knowledge of the individual teams.



An "Adoption in a Box" concept that provides a customizable package of assets to aid in establishing a change management strategy was developed. The “Adoption in a Box” concept and materials were shared internally and leveraged as input into the externally published [Copilot Success Kit](#) for customers.

Driving user enablement through flexible execution

“Adoption in a Box” was developed as a customizable modularized set of materials which allows individual user enablement teams to leverage the guidance to most effectively drive usage for their audience. Seven (7) modules were provided, aligned to the Microsoft Implementation Framework phases of Get ready, Onboard & engage, Deliver impact and Extend & optimize.

The following visual outlines the “Adoption in a Box” components aligned to those phases, as well as the associated content and target audience for each asset.

Phase	Module Title	Resource Title	Target Audience
Get Ready	Module 1: Build your Adoption Strategy	Adoption in a Box Overview	User Enablement Specialist
		Local Adoption Plan Template (template)	User Enablement Specialist
Onboard and Engage	Module 2: Gain Leadership Alignment	LT Alignment Guide Deck	User Enablement Specialist
		LT Kickoff & Overview Deck (facilitation material)	Sponsors/Leaders
		Gain Local Leadership Alignment (draft communications)	Sponsors/Leaders
Deliver Impact	Module 3: Build your Influencer Community	AI Influencer Guide Deck	User Enablement Specialist
		AI Influencer Kickoff & Overview Deck (facilitation material)	Influencers/Champs
Extend & Optimize	Module 4: Engage Managers and Employees	Building your AI Influencer Community (draft communications)	Influencers/Champs
		Field Enablement Planning Guide Deck	User Enablement Specialist
	Module 5: Skilling and Learning endorsed by MCAPS Academy	Engage Managers & Staff (draft communications)	Managers/Employees
		Learning & Skilling Guide, Assets, & Resources	Managers/Employees
	Module 6: Launch Gamification and Campaigns	Gamification Program Guide	User Enablement Specialist
Launch Gamification and Campaigns (draft communications)		Employees	
	Module 7: Reporting	Adoption Dashboard, Metrics Guidance, and Feedback	User Enablement Specialist

Measuring success

At Microsoft, the MCAPS organization set clear targets for adoption related to Monthly Active Users (MAU), Weekly Active Users (WAU), and Daily Active Users (DAU). To quantify the impact of the change journey for our organization, we measured MAU as an indicator of awareness, WAU as an indicator of adoption and DAU as an indicator of the transformation of work. These metrics were available through a Power BI dashboard to allow tracking of usage and identification of trends over time.

Additionally, we created an adoption survey and reporting approach to understand progress and sentiment over time. Baseline and periodic 10-question surveys were sent to:

- Gauge baseline awareness of Copilot and capabilities
- Understand initial enthusiasm
- Benchmark starting knowledge levels
- Establish baseline of user skills
- Anticipate roadblocks to overcome
- Measure advocacy strength
- Evaluate effectiveness of support
- Surface success factors to address
- Capture qualitative perspectives

Lessons learned

With any new product offering, there will be lessons learned, feedback provided, and product feature releases. This was true of the internal Microsoft Copilot experience as well. One of the most valuable exercises was visiting global sites in person, which allowed the user enablement and product teams to better understand how Copilot was being used and what additional features users wanted.

The following is a summary of the learnings aligned with each of the “Adoption in a Box” modules:

Things we learned	
Build your Adoption Strategy:	Create a comprehensive adoption plan leveraging change management best practices
Gain Leadership Alignment:	Tops down endorsement is key; sponsorship and engagement by leadership is critical
Build your Influencer Community:	Create peer-to-peer influence and opportunities to share best practices
Engage Managers & Employees:	Ensure managers have clarity to help support and drive employee behavior
Skilling & Learning:	Identify skilling and learning opportunities and surface them to employees
Launch Gamification & Campaigns:	Innovate and make it fun!
Dashboard, Metrics & Feedback:	Provide visibility to how it's going so you know where to focus efforts.

This listening mechanism allowed the user enablement team to adjust in an agile fashion. Weekly updates were made to the “Adoption in a Box” content, which included either clarity around existing content, additional new content requested or additional gamification activities to drive more excitement and engagement.

Conclusion

Microsoft’s Customer and Partner Solutions organization is embracing a new way of working with Copilot. Our user enablement efforts have been successful in driving awareness and adoption, and we are on the path towards full transformation. As with any transformation, the software adoption is only a part of the journey. Mindsets and behaviors must shift over time. We are confident that the adoption efforts we’ve completed and the strategy and support we have in place will allow us to complete the shift to fully transform our daily work lives and our business.