

24 Piloting Copilot

If your organization has not yet rolled Copilot out to a substantial number of people, this chapter provides suggestions for executing a pilot.

A word before diving in. **Before being enabled for Copilot, all users (including pilot users) should be surveyed about their day-to-day activities.** Specifically, they should be asked about the time spent on information work, and even more specifically, the time they spend working in the Office apps. These baseline (before) statistics can then be compared against a similar post-Copilot survey (after) to partially estimate ROI.

Who Should Participate?

As usual, the best success comes when soliciting input from cross-functional team members. Specifically involve:

1. Executive sponsors.
2. Someone from HR, someone from legal, and from cybersecurity.
3. The person who administers M365 and specifically, Microsoft Purview, so they get familiar with all the options and can experiment with the data loss prevention controls that should be rolled out to the organization (see Chapter 17).
4. People that will become champions within business. Specifically, people who regularly create content, attend many meetings, and who welcome change. Champions should be curious about AI at work and be willing to lead or advocate across the organization. Ideally, they are:
 - a. Critical and tech-forward thinkers.
 - b. People who will use the tool responsibly and provide valuable input.

- c. Folks who are willing to dedicate time to testing and to attend regular feedback sessions.

What Participants Should Know

People may not immediately know how Copilot is different than ChatGPT (see Chapter 21). They need to know that it's the more secure way to use GenAI, and that it is meant to leverage data within Microsoft 365. Basic training on prompts and how to use Copilot features are paramount to success and ROI, in addition to info about:

1. How Copilot and basic GenAI works, so that they can start with some reasonable expectations.
2. Requirements of being in the pilot program, including the goals and objectives, and the time they'll need to invest.
3. What data is scanned when using which apps that Copilot touches and where new content is stored.
4. The risks of and how to protect against overexposure of sensitive data.
5. Where to report any issues or oddities encountered.
6. Scenarios to begin using AI within the Microsoft 365 applications.

How to Communicate with Participants

A point of contact should be established to be the leader of the pilot. In addition to organizing the charter, they should:

1. Set up a team/channel within Teams where:
 - a. Participants should be encouraged to share their experiences, successes, and issues.
 - b. Organizational Change Management (OCM) and project leads should regularly post tips (i.e., from <https://adoption.microsoft.com/en-us/copilot/>) and encourage folks to share their experiences, lessons learned, and successes.

2. Lead periodic sessions to solicit feedback and share experiences.

How to Evaluate Success

The pilot lead and/or AI working group should start with the end in mind.

1. Set up success criteria for the pilot and how they'll be measured (surveys, cycle time/productivity measures).
2. Measure the return on investment (ROI) in terms of time saved and productivity improvements. See Chapter 27 for ideas.
3. Evaluate the impact of Copilot on cross-functional activities and multi-person workgroup workflows.
4. Set up exit criteria. Chances are that experiences will be positive. The team needs to establish a way to move the pilot to production and how to manage the inevitable tsunami of licensing requests.

Note: Plan to address perceived inequity in licensing. It will be important to consult with HR regarding eligibility criteria for a Copilot for M365 license. See Chapter 28 for more suggestions.

Conclusion

In conclusion, piloting Microsoft 365 Copilot requires careful planning and consideration. By following the processes outlined above, organizations can successfully pilot the Copilot for M365 features and evaluate its impact on productivity and collaboration.

To fully judge the ROI of GenAI, pilot users should be turned loose after only an initial training sprint, and their experiences measured. If people aren't successful after 11 weeks of training and usage (see Chapter 19), adding more and more training sessions will cut into the enterprise-wide ROI.