Implementing Microsoft Copilot & Copilot Agents

1. Start With a Clear Use-Case Strategy

Before enabling Copilot broadly, define where it will create the most impact.

- ☐ Identify 3–5 high-value workflows that consume time today *(e.g., reporting, email triage, document creation, customer response drafting)*.
- ☐ Prioritize use cases that combine high effort with high repeatability.
- ☐ Involve both business leaders and IT early to align expectations and outcomes.

2. Ensure Your Microsoft 365 Environment Is Clean and Secure

Copilot can only access what your users can access, which means your data foundation matters.

- ☐ Review and update Microsoft 365 permissions and access controls.
- ☐ Clean up outdated SharePoint sites, Teams channels, and file repositories.
- ☐ Apply sensitivity labels and data loss prevention (DLP) policies before rollout.
- ☐ Confirm that identity and access management (IAM) is configured correctly.

3. Optimize Licensing Before You Deploy

Many organizations overpay for licenses they don't use — or lack the licenses required for Copilot.

- ☐ Audit current Microsoft 365 licenses vs. actual usage.
- ☐ Identify unused or misaligned licenses.
- ☐ Confirm which users need Copilot vs. which users simply need standard M365 tools.
- ☐ Map roles to the correct license tier to avoid overspending.

4. Start With a Pilot Group

A controlled rollout reduces risk and accelerates adoption.

- ☐ Select a cross-functional group of 10–25 users.
- ☐ Include both tech-savvy and non-technical employees.
- ☐ Gather weekly feedback on accuracy, usefulness, and workflow improvements.
- ☐ Adjust policies, prompts, and training materials before scaling.

5. Train Users on Prompting & Responsible Use

Copilot is only as effective as the prompts it receives.

- ☐ Provide short training sessions on effective prompting.
- ☐ Share examples of good vs. poor prompts.
- ☐ Teach users how to verify outputs and maintain data security.
- ☐ Encourage employees to use Copilot for daily tasks, not just "big projects."

6. Build Custom Copilot Agents for Repetitive, High-Value Work

Copilot Agents can automate multi-step processes and reduce manual workload.

- ☐ Identify workflows that require multiple apps or approvals.
- ☐ Build agents that handle repetitive tasks like onboarding, reporting, or ticket routing.
- ☐ Start small: one workflow, one department, one measurable outcome.
- ☐ Monitor agent performance and refine based on real-world usage.

7. Establish Governance & Guardrails

AI must be deployed responsibly and securely.

- ☐ Define what Copilot can and cannot access.
- ☐ Set policies for data handling, retention, and sharing.
- ☐ Monitor usage analytics to identify risks or training gaps.
- ☐ Review agent permissions regularly.

8. Measure Impact & Continuously Improve

AI adoption is not a one-time project, it's an ongoing optimization effort.

- ☐ Track KPIs such as time saved, output quality, and user adoption.
- ☐ Collect feedback monthly and refine use cases.
- ☐ Expand Copilot access only when governance and training are solid.

Ready to Implement Copilot the Right Way?

Most organizations either overpay for Microsoft licensing
or underutilize the tools they already own...
and Copilot success depends on getting both right.

Proven IT offers a full Microsoft Assessment that includes:

- A complete licensing audit *(what you need vs. what you pay for)*
- A readiness review of your Microsoft 365 environment
- A prioritized roadmap for Copilot and Copilot Agent deployment

Take the guesswork out of AI adoption

Contact Proven IT today to schedule your
Microsoft Assessment and build your
Copilot strategy with confidence.