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Your Microsoft Copilot Preflight Checklist

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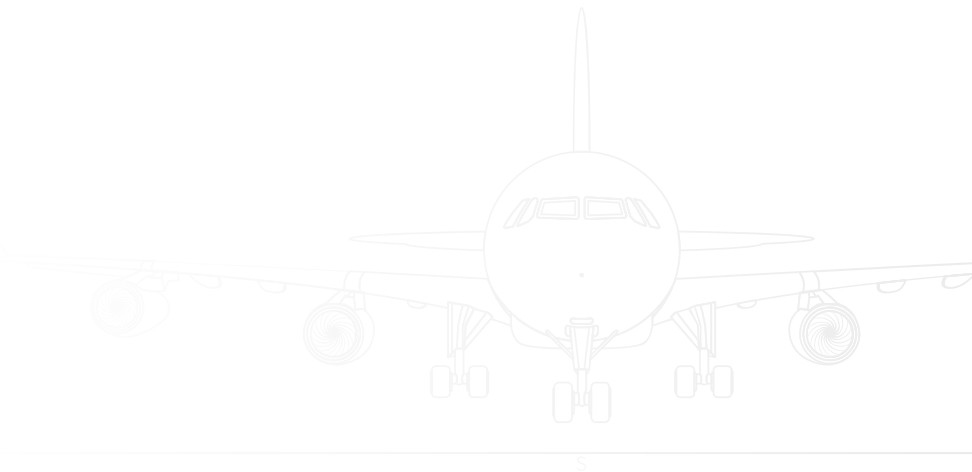
Ever feel like you're flying solo at work?

If so, Microsoft Copilot may be the AI partner you need to take the controls when the winds get rough.

A large-language model (LLM) artificial intelligence (AI) tool, Copilot securely accesses your business data to do everything from drafting contextual emails to helping improve business processes.

But taking flight with Copilots without a solid flight plan can lead to poor adoption, security risks, and stranded costs.

Our AI experts have prepared this Microsoft Copilot Preflight Checklist, which will help ensure safe flying – wherever your future takes you.



Know your AI and Microsoft Copilot flight plan.

Learn more about general AI in business applications (our May webinar, [The ChatGPT and AI Revolution: An Executive's Guide](#), is a great place to start).

Share your knowledge of AI concepts with key leaders.

Explore Microsoft's online materials about the Copilot components. [Here's a great place to start.](#)

Ascend to the cloud and deploy Microsoft 365.

Ensure your apps have the appropriate permissions.

Establish appropriate data management policies.

Consider establishing specified office hours — time periods when dedicated experts can field questions during the adoption process.

Run a tech check.

Understand licensing requirements to use the Copilot stack best as Microsoft releases more components.

Evaluate network readiness to minimize latency and other interruptions to increase the quality of service to and from Microsoft Cloud.

Establish a budget to support your AI technical readiness initiatives.

Understand and communicate Microsoft's privacy and security features, such as:

Copilot relies solely on organizational content indexed by Microsoft 365 within Microsoft 365's compliance boundary and network.

Copilot never writes data outside the user's home region.

Copilot does not use customer data or user prompts for training.

Copilot provides personalized and contextually relevant content tailored to each user's preferences.

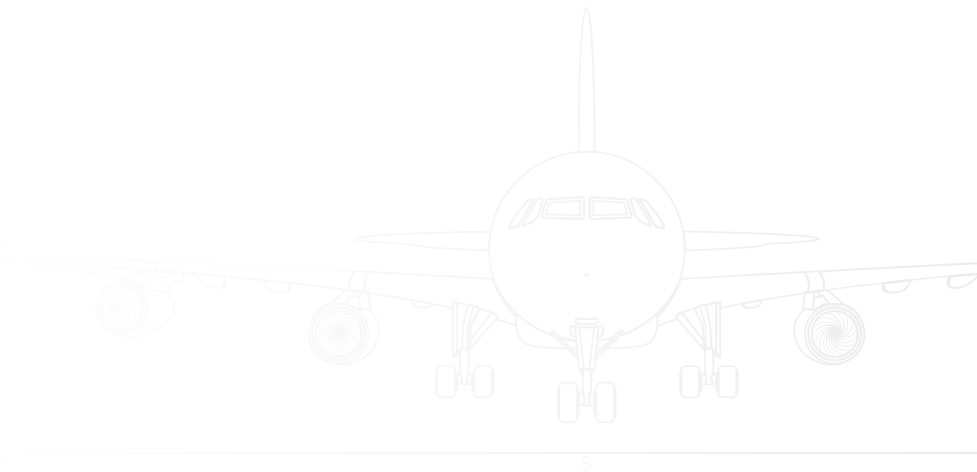
Clear the runway for adoption.

Identify primary audiences and use cases for those who will benefit most from Copilot (typical groups include HR, sales, finance, IT, security, and so on. See [our blog on ChatGPT use cases](#) for some ideas).

Develop a formal adoption and change management plan.

Plan for Copilot pilot programs.

Consider establishing a center of excellence (CoE) where employees can access training information and share feedback.



Keep an eye on your monitors to evaluate AI performance.

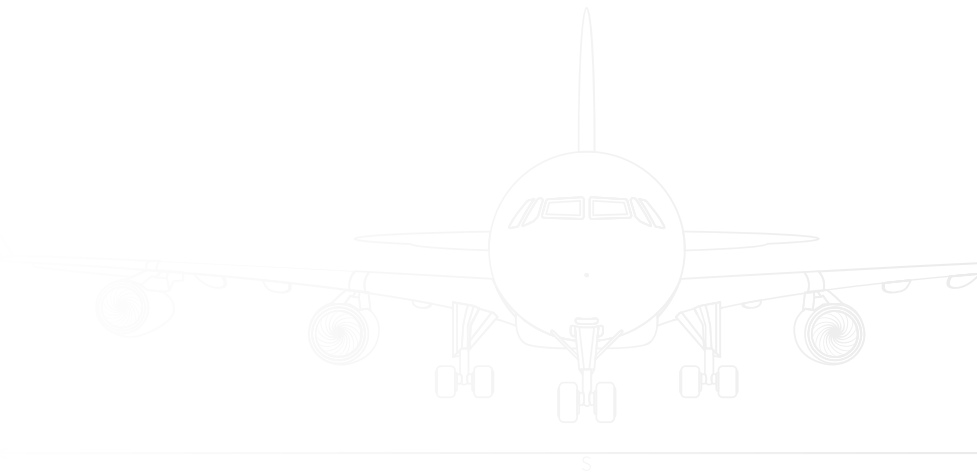
Establish metrics to help you track performance as you roll out Microsoft Copilot and other AI solutions.

Monitor adoption and change management within the team.

Consider optimizing processes.

Use Microsoft usage reports to track the adoption of tools.

Identify and prepare Copilot integrations with third-party knowledge-storage locations using Microsoft Graph's capabilities.



Be ready to change course when needed.

Establish an AI team to keep up with the latest releases and software changes.

Use office hours, your CoE, and Microsoft's usage reports to ensure adoption and keep everyone updated.

Continue to look for integration and improvement opportunities, both within Copilot and across the organization's other processes, practices and needs.

