



STEPHENROSE.COM

"Top 10 Pitfalls in Copilot Adoption: Common Mistakes Companies Make Before and After Deployment"

aka Intelligent Garbage In, Semi-Intelligent Garbage Out

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About Me

- 15 years at Microsoft
- Consulting since 2023
- Over 20 certifications
- Host of UnplugIT
- LinkedIn Learning
- Volunteer at CMZ



My Current Clients and Partners Include





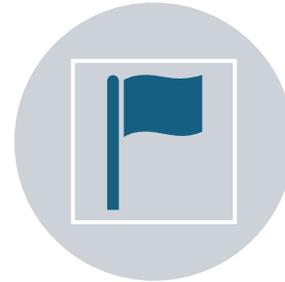
**What Will We Cover
Today?**

Agenda



What is Copilot and how it works

What is Copilot 2.0



Understanding The
“Microsoft Way”



Real World - Top Ten
Blockers to Copilot
Adoption, Governance and
Security



Adoption Tips



Expectations

WHAT WILL BE THE IMPACT OF CHATGPT ON OUR BUSINESS?



THERE'S A LOT WE DON'T KNOW FOR SURE...



LIKE HOW MUCH OF WHAT IT SAYS IS MADE UP...



OR IF IT WILL TAKE AWAY OUR JOBS...



OR THE SECURITY RISKS...



OR IF IT COULD DAMAGE OUR REPUTATION...



WHAT DO WE KNOW FOR SURE?

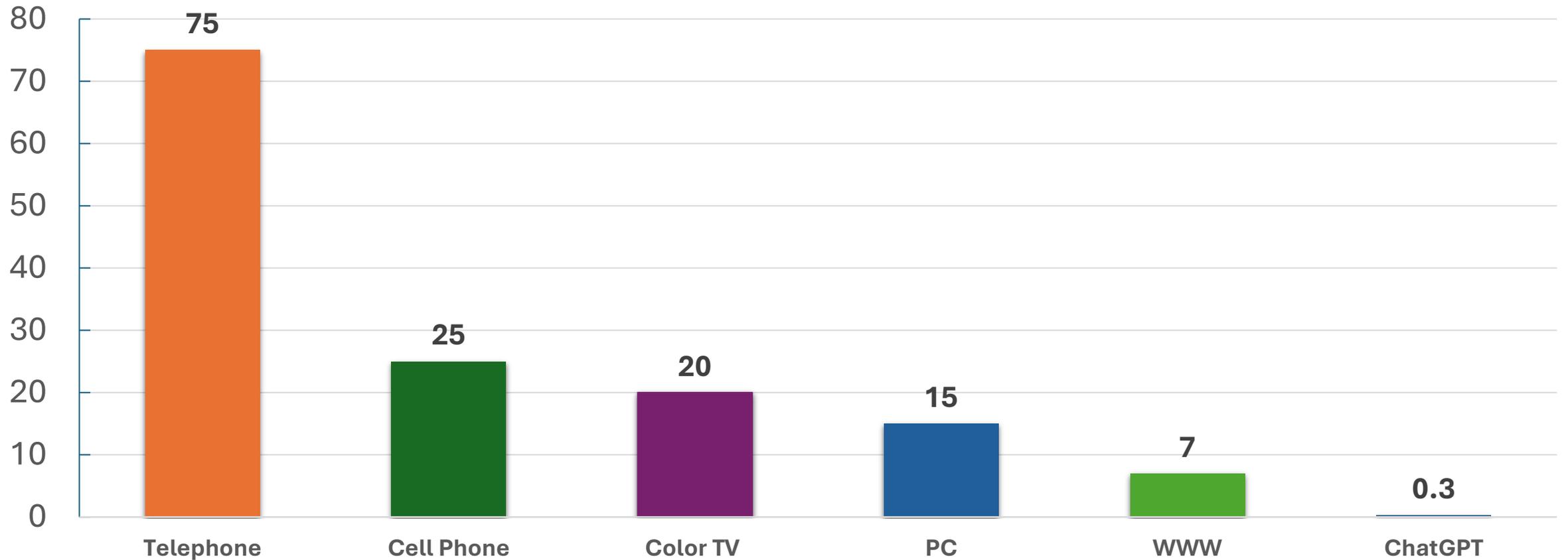


ONLY THAT WE WANT TO ADOPT IT EVERYWHERE AS FAST AS WE CAN.



TOM FISH BURNE

Years To Hit 100 Million Users





What is Copilot



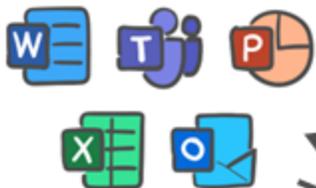
AI tools like Microsoft Copilot, allow employees to focus on work that leverages their hired skill sets by automating/executing time consuming or redundant tasks.

What is the difference between ChatGPT and Copilot?



ChatGPT

Microsoft 365 Apps



Microsoft 365 Copilot

Microsoft 365 Service Boundary

External Info
Internet/ChatGPT
Encrypted

M365 Cloud Content
Encrypted

Response + app commands

User prompt

Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation models

Large Language Model

Azure OpenAI instance is maintained by Microsoft. OpenAI has no access to the data or the model.

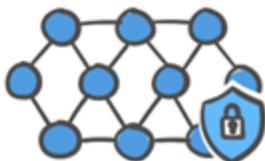
RAI is performed on input prompt and output results

Modified prompt

LLM response

Azure OpenAI

Microsoft Graph



Semantic Index

Your context and content emails, files, meetings, chats, calendars, and contacts

Pre-processing

Grounding

Post-processing

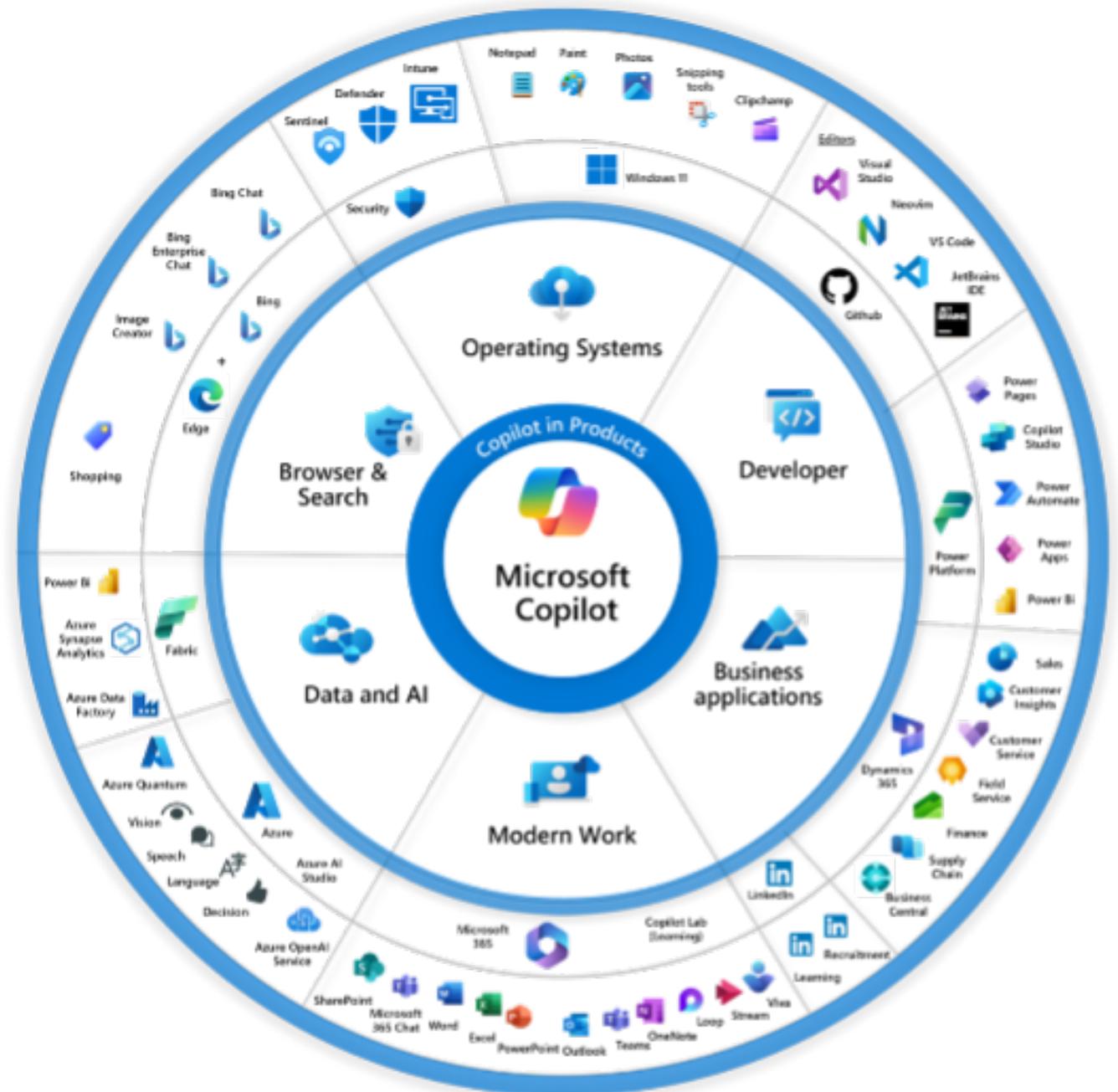
Grounding

Customer Microsoft 365 Tenant

Data flow (🔒 = all requests are encrypted via HTTPS and wss://)

- 1 User prompts from Microsoft 365 Apps are sent to Copilot
- 2 Copilot accesses Graph and Semantic Index for pre-processing
- 3 Copilot sends modified prompt to Large Language Model
- 4 Copilot receives LLM response
- 5 Copilot accesses Graph and Semantic Index for post-processing
- 6 Copilot sends the response, and app command back to Microsoft 365 Apps

Where does the Graph collect data from?





What is Copilot 2.0

Copilot Wave 2 announcement (Sept 2024)

- Copilot **Agents** and **Pages**
- Python Support in **Excel** Copilot
- Enhanced Capabilities in:
 - **Outlook** – Email Prioritization
 - **Excel** insights, trends, and visualizations
 - **OneDrive**- Search and Compare Files
 - **Teams**- Additional Meeting Insights
 - **PowerPoint** Design-Enhanced Capabilities

The screenshot displays the Microsoft 365 Copilot interface. At the top, a search bar contains the query: "I need some data on LAX Airport to assess the EV charging opportunity. How many passengers fly in and out daily, How many parking spaces do they have, and how many EV chargers are there?". Below the search bar, Copilot provides a summary of results under the heading "Passenger Traffic", "Parking Spaces", and "EV Chargers".

Passenger Traffic

- Daily Passengers: LAX handles approximately 88,000 passengers daily, based on the annual figure of around 32.2 million passengers in 2022.

Parking Spaces

- Total Parking Spaces: LAX offers over 11,000 parking spaces across various lots, including the Central Terminal Area (CTA) and Economy Parking.

EV Chargers

- EV Charging Stations: There are about 1,300 EV chargers available at LAX, distributed across different parking structures.

If you need more detailed information or have any other questions, feel free to ask!

Below the search results, there are four suggested links: 1. laxairport.net, 2. americanairportguide.com, 3. parking.flylax.com, 4. electrek.co. There are also buttons for "Edit in Pages", "Copy", and "Share".

At the bottom of the search results, there are three suggested prompts: "Can you provide more details about the EV charging stations?", "What does LAX Airport have?", and "How can I access the airports parking information online?".

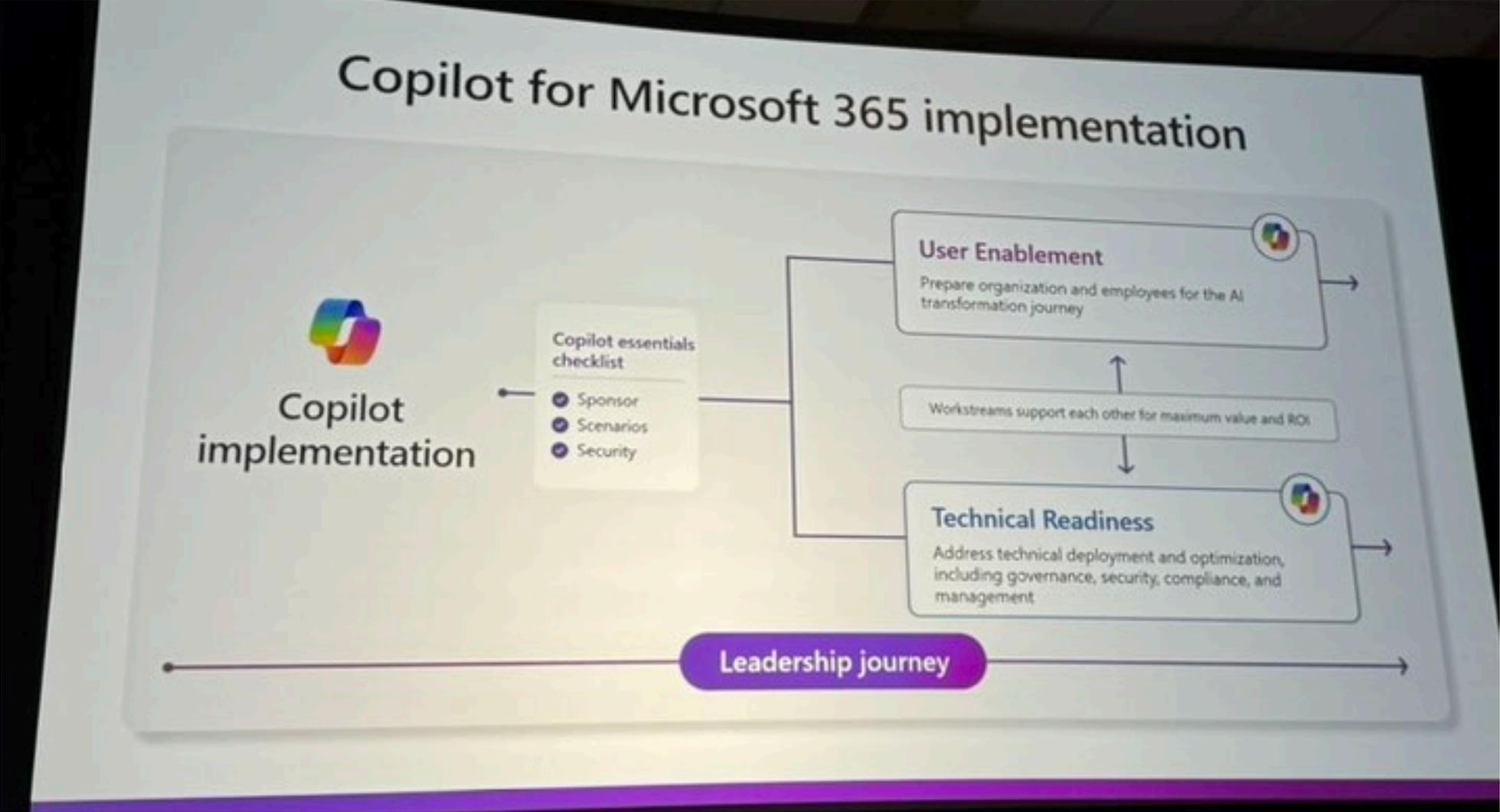
On the right side of the interface, there is a "Project Plan" section. It features a table with columns for "Project Milestones", "Timeline", and "Owner".

Project Milestones	Timeline	Owner
1 Identify the working team	Week 1	Cecil Folk
2 Kickoff meeting	Week 1	Kayo Miwa
3 Customer research	Week 2-3	Aadi Kapoor
4 Proposal outline		
5 Write the proposal	Week 3	Aadi Kapoor
6 Obtain internal approvals		
7 Submit the proposal	Week 5	



How Do I Get Started

M365 Spring Community Conference 2024





Why This Approach Won't Work For Most Companies



**1 in 3 companies pause
or abandon their
Copilot role out after
90 days ***

Why?

*Forbes Magazine March 2024

TECHNOLOGY

Take This Huge Lesson From Microsoft Copilot's Struggles

Don't launch a product unless it creates value for customers. [🔗](#)

EXPERT OPINION BY PETER COHAN, FOUNDER, PETER S. COHAN & ASSOCIATES @PETERCOHAN

AUG 8, 2024

While Nadella sounds optimistic, most of the customer case studies in my book did not find Copilot worth the money. A recent case study highlights the less optimistic view of Copilot's prospects "A pharma company stopped using Microsoft's Copilot AI tool, with an exec citing high cost and low value," reported *Business Insider*.

The executive was unimpressed by what Copilot could do and decided to cancel a trial of the service for 500 employees that would have cost the company \$180,000 annually. "He compared the slide-generation capability of Microsoft's AI tools to middle school presentations, according to a transcript of a call with the Morgan Stanley analysts that was included in their research note," *Business Insider* reported.

Salesforce CEO claims Microsoft has done a 'tremendous disservice' to the AI industry: "Copilot is just the new Microsoft Clippy. It doesn't work or deliver value."

Story by Kevin Okemwa • 12h • [🕒 4 min read](#)



↳ Salesforce CEO claims Microsoft has done a 'tremendous disservice' to the AI industry: "Copilot is just the new Microsoft Clippy. It doesn't work or deliver value."

According to Benioff:

"When you look at how Copilot has been sold to our customers, it's disappointing. It doesn't work. It spews data all over our floors, it doesn't deliver value. I haven't found a customer who has transformational work with Copilot. Copilot is just the new Microsoft Clippy."



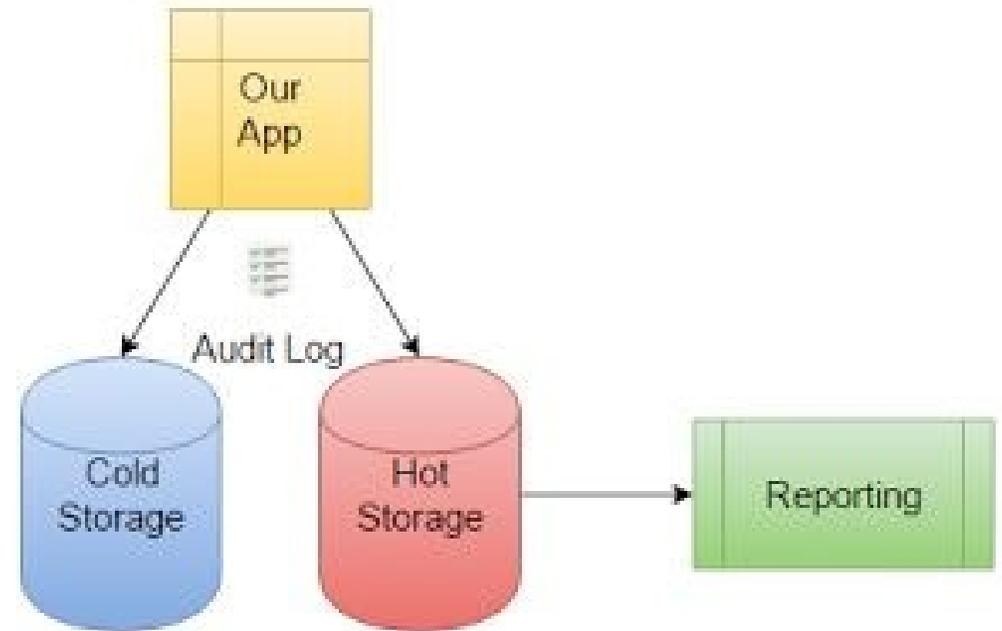
Top 10 issues that stall Copilot deployment and adoption

#10- Too Much Data



Best Practice

- Archive any email older than 12-18 months
- Archive OneDrive/SharePoint documents that are more than 3 yrs old and have not been used in 90 days
- Choose which SharePoint site data is crawled and which are not
- Have E5? Turn on labeling!



SharePoint

Search Service Application: Crawl Log - Content Source

Central Administration | Content Source | Host Name | Crawl History | Error Breakdown | Databases | URL View

Farm Search Administration | View a summary of items crawled per content source.

Search Administration

Content Source	Average Crawl Duration				Successes
	Last crawl	Last 24 hours	Last 7 days	Last 30 days	
Local SharePoint sites	00:04:01	00:13:00	00:07:44	00:06:27	157,297

Diagnostic: **Crawl Log** | Crawl Health Reports | Query Health Reports | Usage Reports

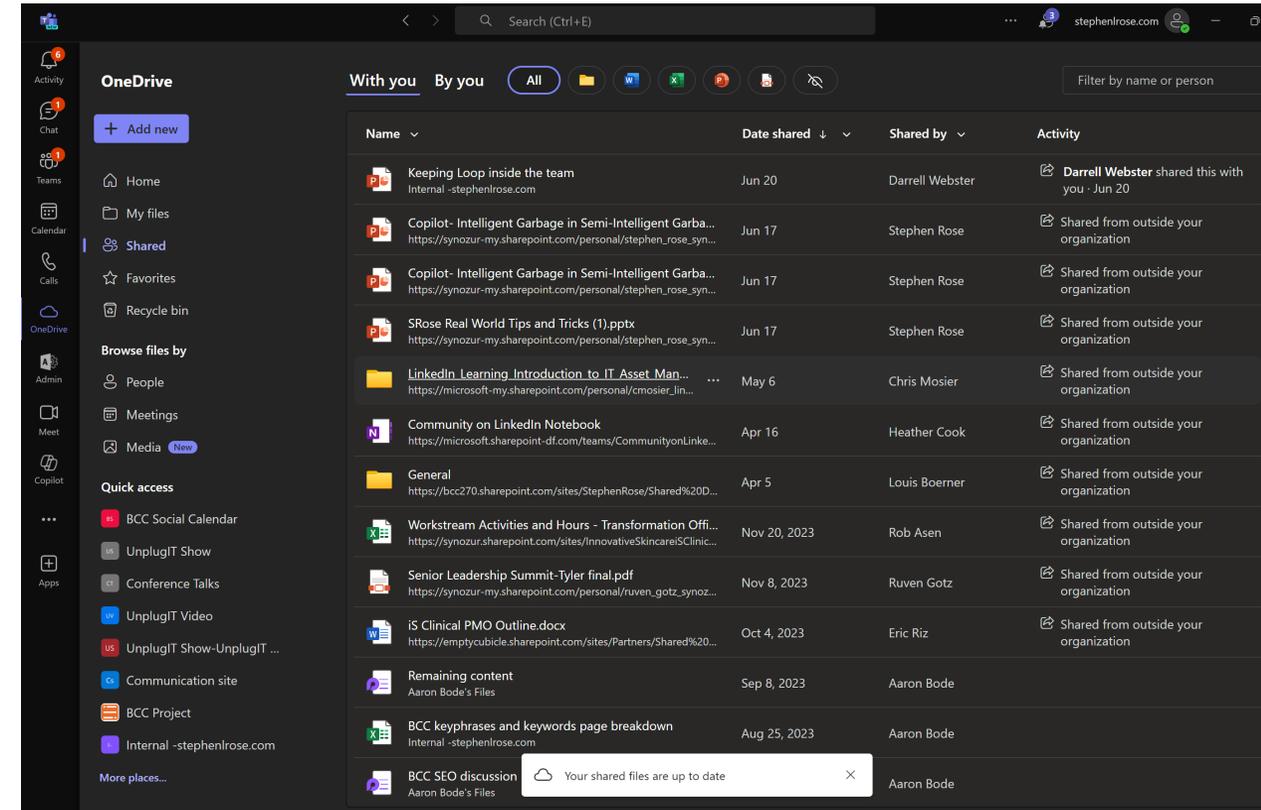
[Link to more about crawl log](#)



#9- Good Teams Culture = Good Copilot Use

Best Practice

- Move conversations out of Group Chats and into channels.
- Use web apps in Tabs or integrated web apps when possible
- Teach how to use the OneDrive view for a single look at all cloud files



#8- Bad end user experience



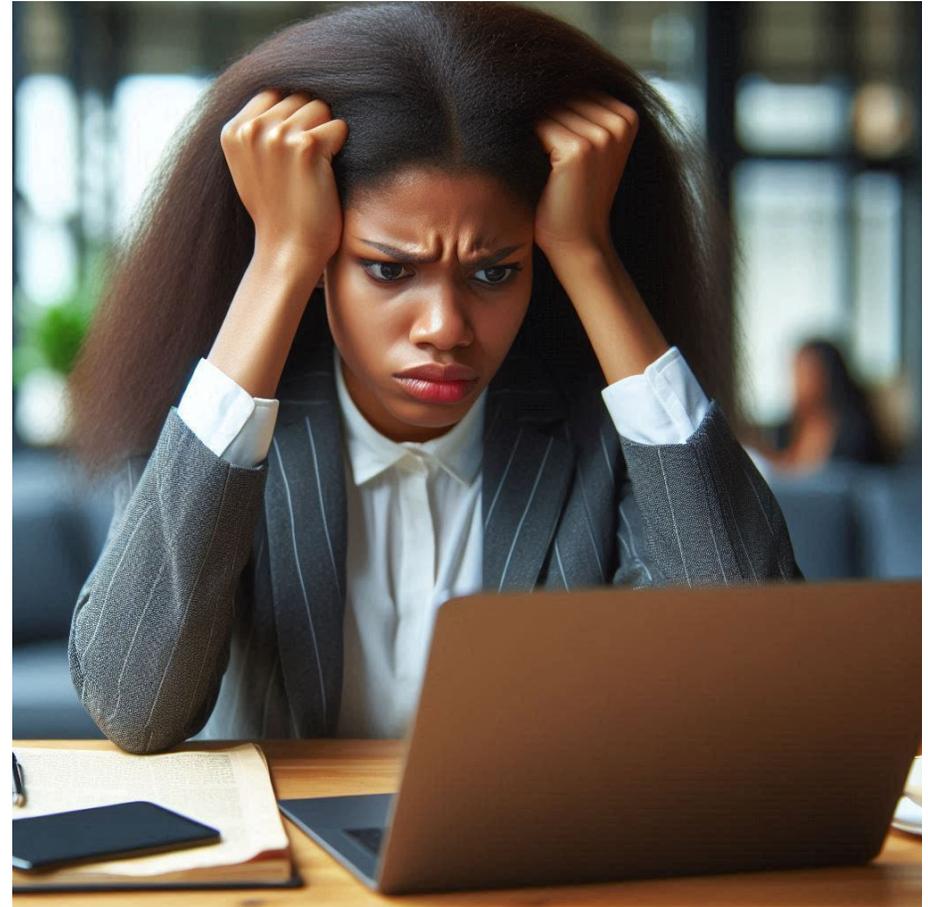
Best Practice

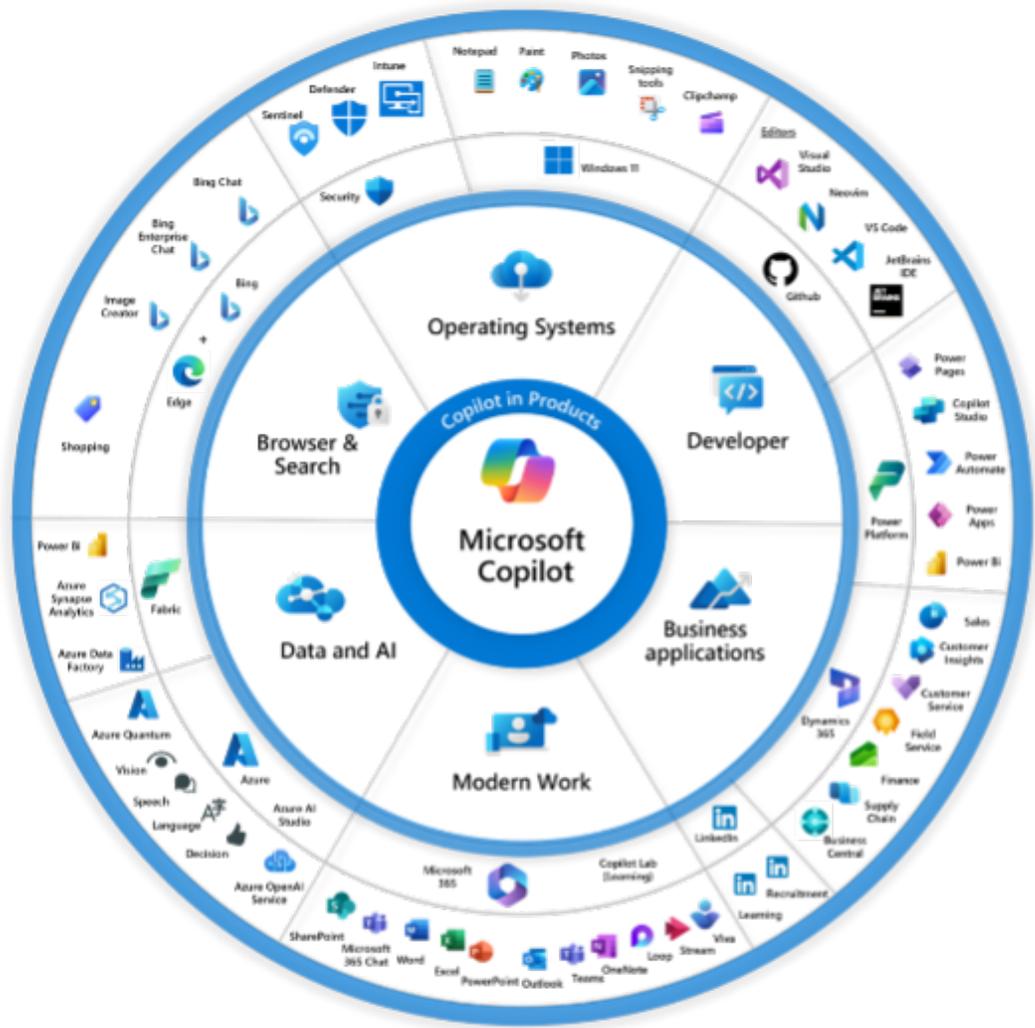
If a user has a bad experience 2-3 times:

They will wait 90 days to try again or will need to see a co-worker having success before they will try again.

Understand why and when users dropped out.

Track positive and negative experiences and look for trends (Viva Insights)





#7- Too Many Copilots

Type	Cost	Requirements	Encrypted
Copilot Free	Free	For Windows 11, Edge and Mobile	Unencrypted
Copilot Pro (consumer)	\$20 user/month	Includes access to M365 Web Apps Requires M365 Personal/Family License for Desktop	Unencrypted but prioritized
Bing/Edge Business	\$12 user/month	Free w/ Copilot for M365	Encrypted
Microsoft 365	\$360 user/year	M365 Subscription	Encrypted
Project w/ Copilot Pro	\$20 user/month	Project License (\$10-\$55 per user/month)	Encrypted
Dynamics / Sales Service and CRM	\$120 user/year	Requires M365 E3/E5 + Dynamics +Copilot Licenses	Encrypted
CRM Only	\$600 user/year		Encrypted
Security	\$4 per hr.	Avg Monthly- \$2,920 (24hrs*31days)	Encrypted
GitHub	\$39 user/month		Encrypted
Studio	\$200 month per tenant		Encrypted
Copilot for Finance	TBD	In Preview	Encrypted
Copilot for SharePoint	TBD	In preview	Encrypted



**The average company* will
investing between 1-5
million dollars in AI in 2025**

* Over 10+ Employees



Reduce Cost and Risk

Teams Premium

\$7 per user/month

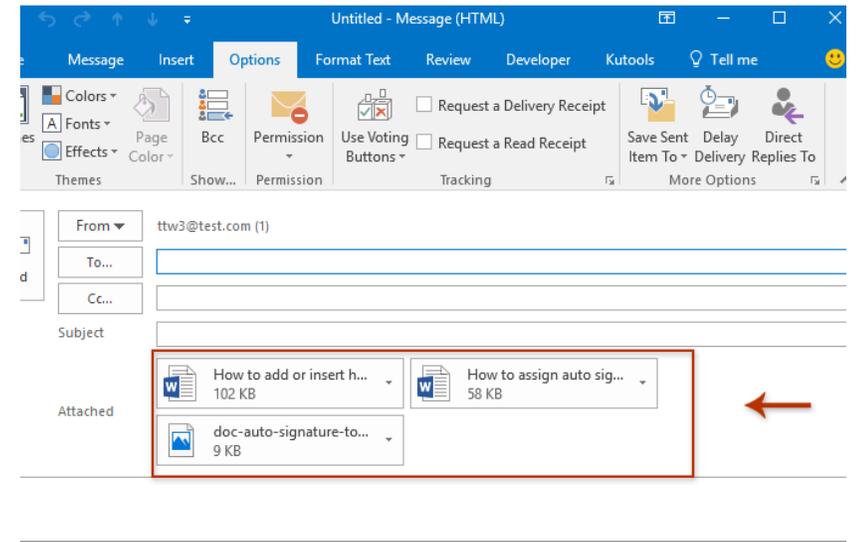
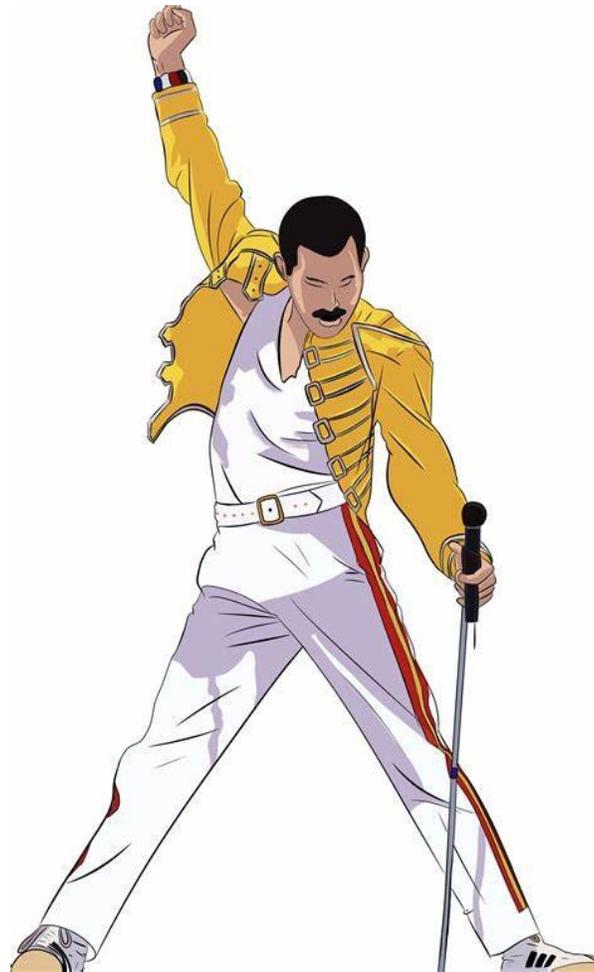
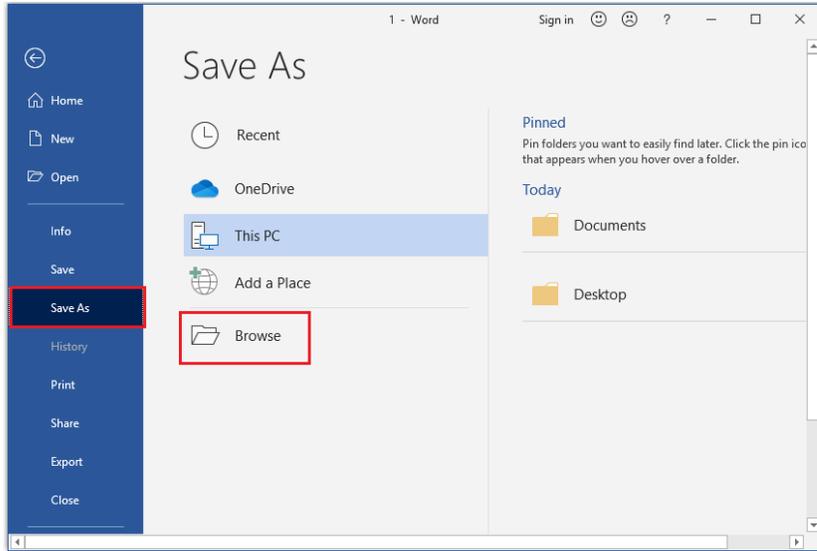
Better Together: Copilot for Microsoft 365 and Microsoft Teams Premium

	 Microsoft Teams Premium	 Microsoft 365 Copilot	
Advanced collaboration capabilities in Microsoft Teams	Advanced meeting protection like custom watermarks, end-to-end encryption, and auto-background blur	✓	
	Advanced Collaboration Tools with priority account chat controls and advanced collaboration analytics	✓	
	Meetings that are branded to you and your organization's style	✓	
	Meeting templates, pre-configured by IT	✓	
	Advanced Virtual Appointment capabilities with SMS reminders, web join, scheduling	✓	
	Advanced webinars with registration, custom communication, and Green room	✓	
	Real-time translation of meeting captions and transcripts	✓	
	Intelligent recap to quickly catch-up on the most relevant information from meetings	✓	✓
	Copilot in Teams to ask questions to resolve topics, catch up during meetings, organize points		✓
Advanced AI in Microsoft 365 apps (beyond Teams)	Microsoft Copilot UX	✓	
	AI-powered web grounding	✓	
	Microsoft 365 Graph grounding (content and context)	✓	
	Microsoft Copilot – Solve complex work tasks in one place..	✓	
	Copilot Studio - Customized Copilot workflows experience using your business's data, logic, and actions	✓	
	Copilot in the core Microsoft apps	✓	
	Copilot in Word – Transform writing with efficiency and creativity	✓	
	Copilot in PowerPoint – Turn your inspiration into stunning presentations	✓	
	Copilot in Excel – Analyze, comprehend and visualize your data with ease	✓	
	Copilot in Outlook – Stay on top of your inbox, manage meeting follow-up, and create impactful communication	✓	
Copilot in Loop – Unlock the power of shared thinking.	✓		
Copilot in OneNote – Revolutionize the way you plan, and organize	✓		

 = AI features

All licenses include Commercial Data Protection and Microsoft 365 Security, Privacy, and Compliance.

#6- One Truth, One Vision



Best Practices

- Turn off email attachments
- Turn on Save to Cloud
- Teach **my** files (OD) and **our** files (SP)
- Share vs Copy vs Move
- Turn on Known Folder Move in OD
- Add/Edit Microsoft Syntax

Search this library

Keywords

File name

People

Modified date

Any

File type

Content type ⓘ

+ Add more options ▾

- Aeroplane Manufacturer
- Airline
- Classification Date
- Confidence Score
- Flight Number

Search Close

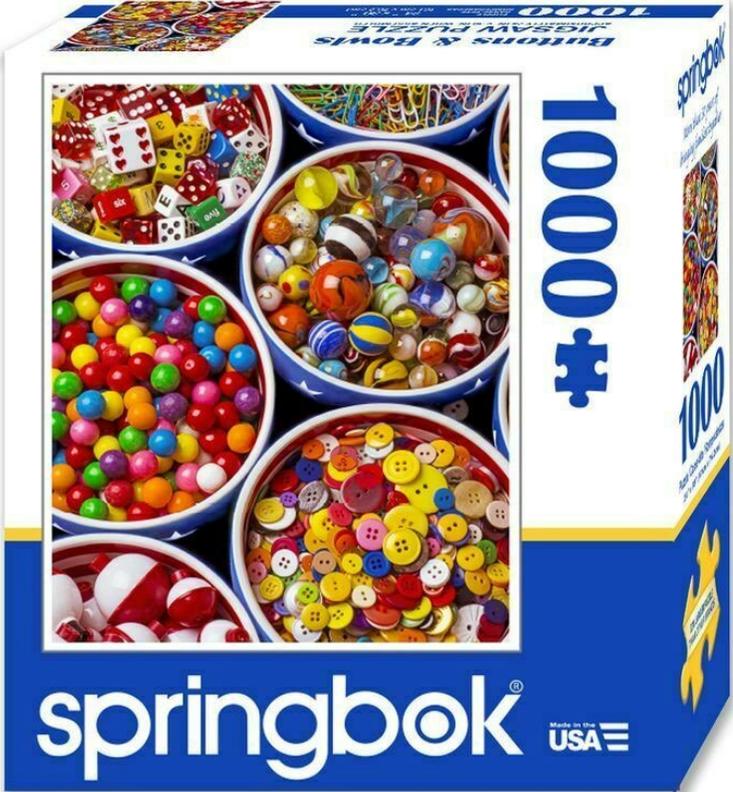
Modified 24/02/2022, 09:29:07 Modified By System Adm

Aviation Incident Report - S4-68

Occurrence when the crew needed to shut the right hand engine (CRM150) down will increase indication. The aircraft landed safely on Okinawa runway 34

A SATA International Airbus A320-200, registration CS-TXJ performing flight SA

#5- Envision What Success Looks Like



What does success look like?

- Roughly 1 in 3 companies are using Microsoft Teams for true collaboration
- You must define what will success look like:
 - Better work life balance
 - More time doing the work your paid for
 - Faster onboarding times
 - More effective meetings
 - Faster time to market
 - Reduction in staff
- What tools will you use to provide data to management?
 - Viva Insights/Copilot Dashboard



Before



After



Viva Insights

← Back to Home Share

Microsoft Copilot Dashboard Preview

Readiness Adoption Impact Sentiment

Total Microsoft 365 app users

5,000
Number of active users over the past 28 days

Your admin can manage Microsoft 365 Copilot licenses from the Microsoft 365 admin center.

Microsoft 365 users per app who could benefit from Copilot

To get the most out of Copilot, users should be actively using Microsoft 365 apps with Copilot capabilities, such as Microsoft Teams and Outlook.

App	Users
Teams meeting users	2.7K
Teams chat users	2.3K
Outlook email users	2.3K
Office document users	1.8K

Total prerequisite licenses

4,500

Count of users on eligible update channels

2,500
50% of total users on any channel

To use a Copilot license, users must be assigned a Microsoft 365 E3 or E5 license and have their devices enrolled in the Current Channel or Monthly Enterprise Channel. This is not a complete list of requirements. [Learn more](#)

Explore more

Get more resources to help your organization get started with Copilot.

Microsoft
Get started with Microsoft Copilot
[Read](#)

Microsoft
Learn how Microsoft integrates security and privacy into Copilot
[Read](#)

Microsoft
Explore how Copilot works with Microsoft Mechanics
[Watch](#)

Viva Insights
Learn about how your privacy is protected. Is this helpful? Yes No

← Back to Home Share

Microsoft Copilot Dashboard Preview

Readiness Adoption Impact

Return on investment

9,000 hours
Time saved in your organization since Dec 2023

1.2 hours
Time saved per user per week

65%
Respondents feel significantly more productive after using Copilot

[User behavior](#) [User sentiment](#)

Change in user behavior after using Copilot

Meeting effectiveness

- 20% reduction in attended meeting hours per user per week.
- 5 non-attended meetings summarized using Copilot per user per week.

Content creation

- 35% reduction in time to create and share per document.
- 4 presentations created by Copilot per user per week.

Email processing

- 20% increase in email response time.
- 45% of email drafts generated by Copilot are sent per user per week.

How has user behavior changed since your adoption of Copilot?

Metric: Number of attended meetings | Scope: Bruno's organization (625) | Role: Individual Contributors | Sentiment: All

Copilot users
72 meetings

non-Copilot users
86 meetings

Why does this matter?

Research shows that using Copilot to summarize a meeting is 3.8x faster than without Copilot. This frees up Copilot users to be more selective in the meetings they attend. In the past 3 months, there is a 20% decrease of meetings attended with Copilot users in your organization.
[Read the research](#)

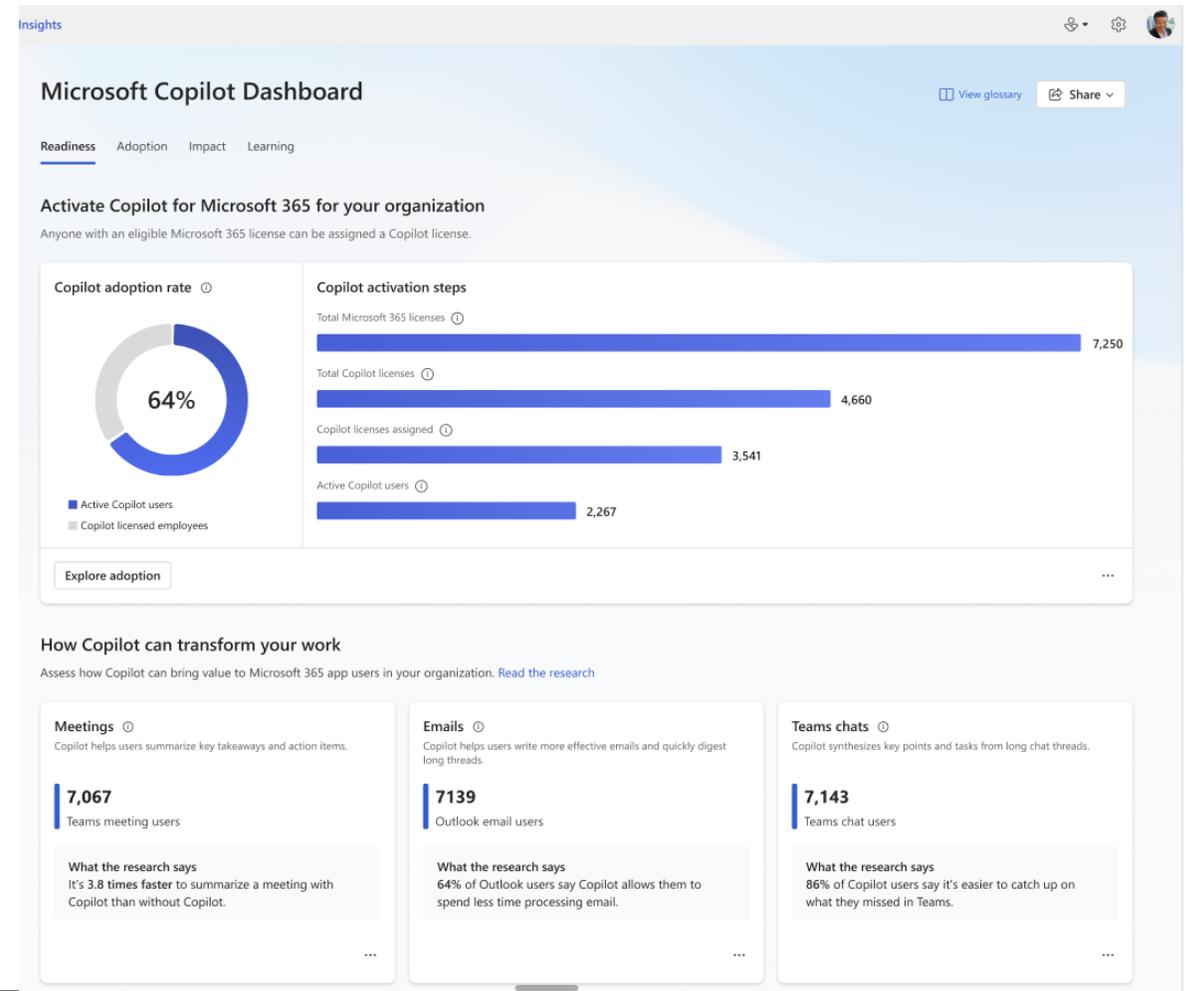
Viva Insights
Learn about how your privacy is protected. Is this helpful? Yes No

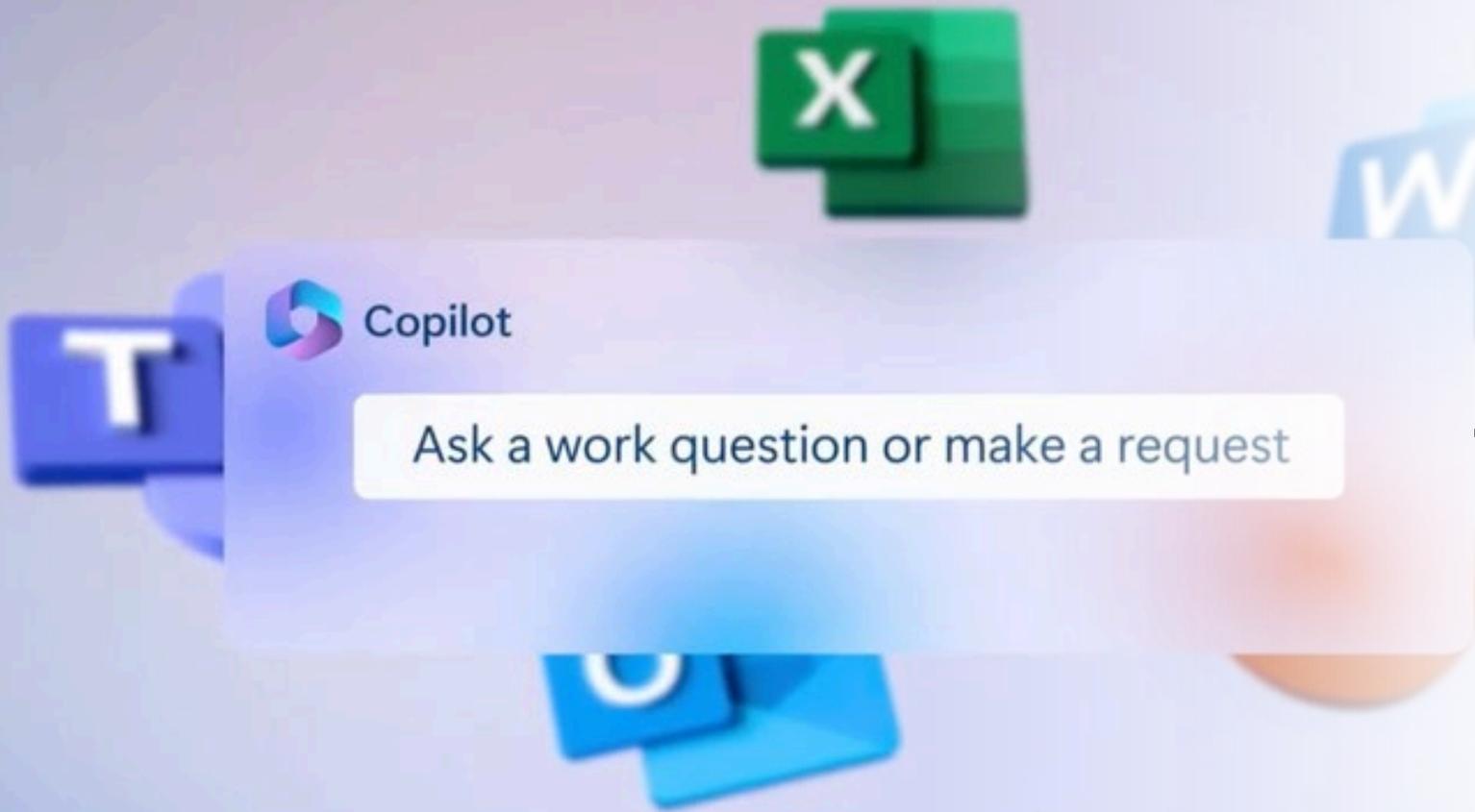


Viva Insights

Identify Copilot use including:

- Teams meetings summaries/action items
- Outlook email threads
- Summarization of a Word doc
- Draft, create or re-write
 - An Email
 - Word Doc
 - PowerPoint
- Rewrite a word or email.





 Copilot

Ask a work question or make a request

#4- Start simple

Top 5 Copilot Scenarios

- Meeting wrap-up and action items / Meeting brief and prep
 - Multiple document or email summaries
 - Email creation and response.
 - Time Off recap and actions
 - Turning a doc into a ppt



#3- Cleaning House

Best Practices

Data:

Incomplete / Inconsistent
Incorrect / Duplicate

Teams:

Sprawl
Duplicate / Similar
Old, Orphan, or Out of Date Teams

Security:

Microsoft Purview
Azure B2B
Guest and External User Policies
Windows 365/AVD



Sharing- If you can see it, so can Copilot

In the Microsoft 365 admin center

- "Reports"- "Usage"
- Reports for SharePoint Online and OneDrive including:
 - Who has access
 - Level of sharing (internal or external) across the organization
 - You can access individual user's OneDrive and SharePoint sites directly if necessary, with the appropriate permissions.

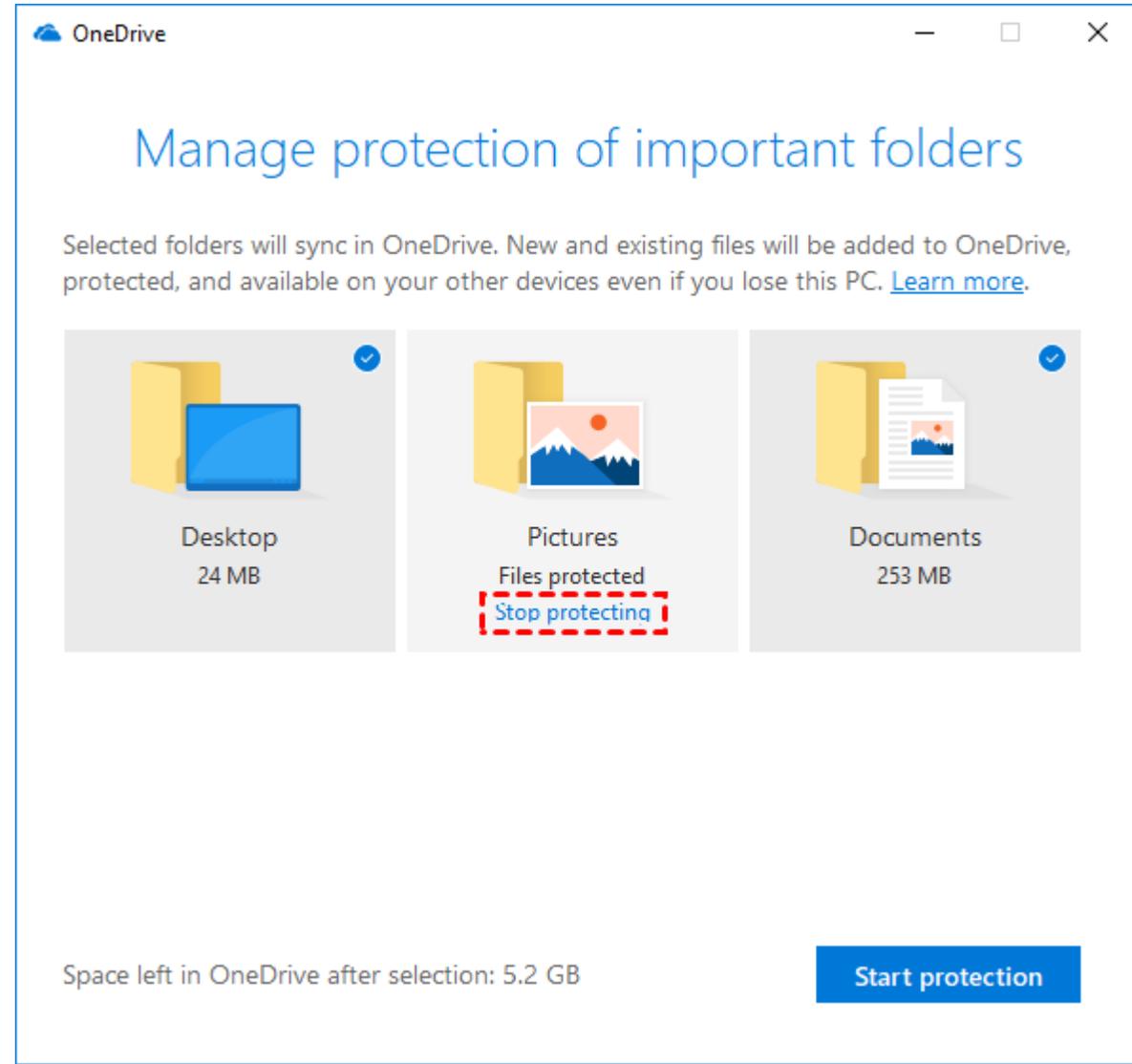


#2- Next Steps After Data Cleansing



Best Practice

- Migrate drives into SharePoint
- Turn on File Backup in OneDrive
- Archive old teams/Make Read Only
- Create templates for new teams based on OU, Security Groups or Global Groups in Entra (AAD)
- Review Teams permission structures and base permissions



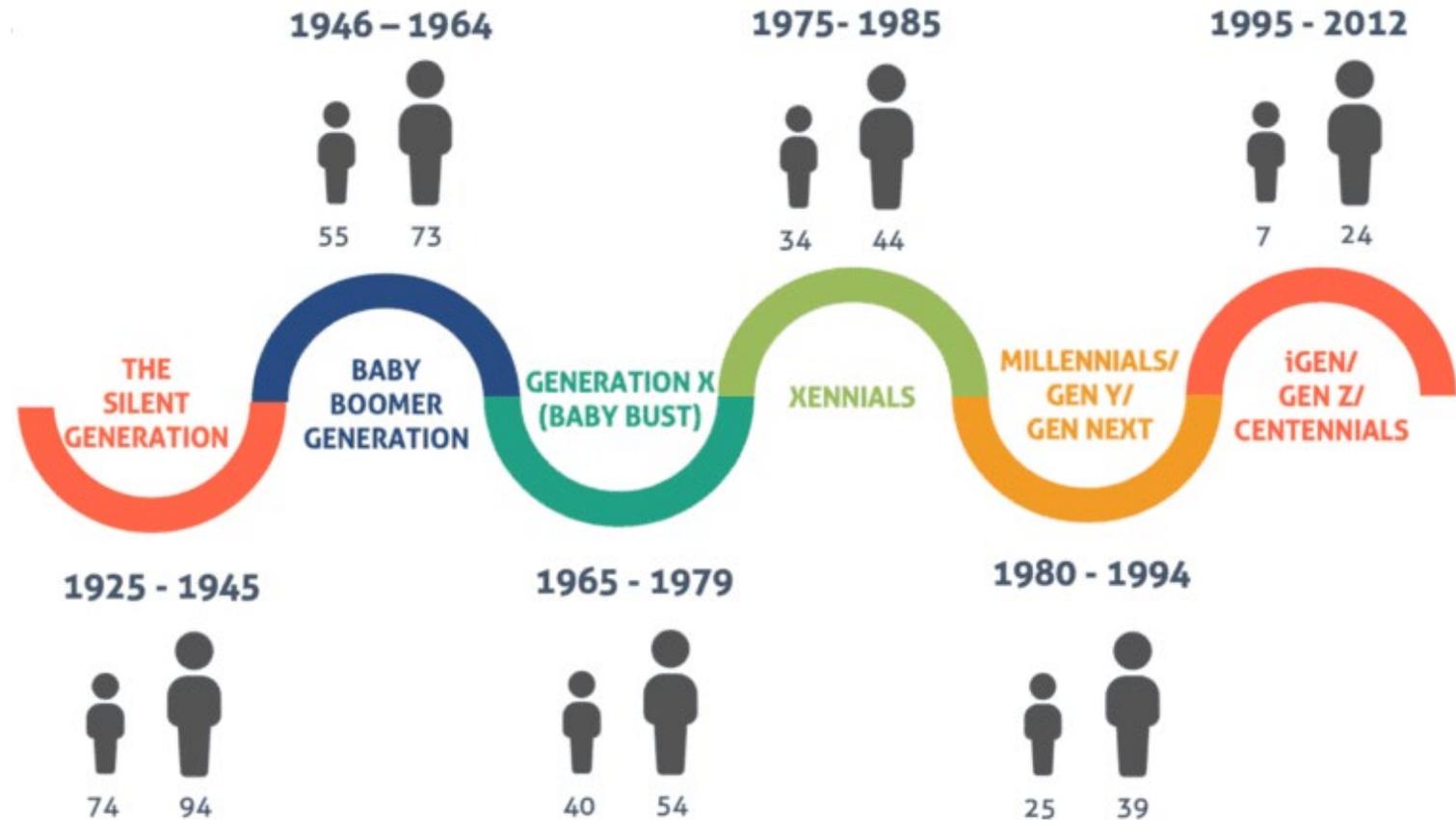
#1 - Change is Hard

To change is difficult.
Not to change is fatal.

William Pollard

quote fancy

Understand Generational Work Habits to Understand Management



The Generations



Baby Boomers

Born between
1946 – 1964



Generation X

Born between
1965 – 1976



Millennials

Born between
1977 – 1995



Gen Z

Born from
1996 – Current

Baby Boomer- 1st Computers

Gen X- First Laptops

Millennials- Fast Internet

Gen Z- 100% Cloud



Best Practices

- Change starts at the top.
- You must have C-Suite buy in.
- Survey your users
- Understand the pain your users have and if Copilot/PowerApps can help
- Leverage the work of others
- Get help when needed

Resources

Microsoft Adoption

<http://adoption.microsoft.com>

<https://adoption.microsoft.com/en-us/roles/business-user/>

<https://adoption.microsoft.com/en-us/guides/>

Microsoft Learn

<https://learn.microsoft.com/en-us/training/>

<https://learn.microsoft.com/en-us/training/educator-center/>

LinkedIn Learning

<https://learning.linkedin.com/>

Sessions of Interest

	Sessions
Wed AM	<ul style="list-style-type: none">• SharePoint Premium - Intelligent Content for Everyone: Chris 9:50AM• 10 Must Dos for Successful Copilot Adoption and Usage: Stephen 11:40AM
Wed PM	<ul style="list-style-type: none">• Roundtable Discussion - Real World Copilot: Stephen 2:20PM• Self-Care in a Digital Age: Well-Being Amidst Screens and Algorithms: Michelle 4:20PM
Thu AM	<ul style="list-style-type: none">• Ask the Experts: Expo Hall Stephen 10:00am• Best Practices for Deploying Copilot in Microsoft 365: Chris 10:50AM
Thu PM	<ul style="list-style-type: none">• Copilot- A Guide to Hacking, Managing, Securing Your Data: Stephen 3:30PM

Questions? Want to Chat more? Join me at Booth #101

Find your North Star with Synozur

Visit our booth for a chance to win a F30070M astronomical telescope, a pair of Logitech Zone True Wireless Earbuds or one of Synozur's very own bottles of Vega Velvet Zin, with wine bag, developed in partnership with Story Cellars in Washington! Prizes donated by Synozur.



**F30070M
telescope**



**Logitech Zone
True Wireless
Earbuds**

**Synozur's
Vega Velvet
Zinfandel**



Thank You



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petri

petri.com/UnplugIT