



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





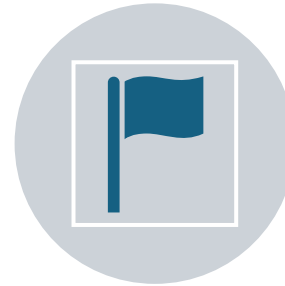
**What Will We Cover  
Today?**

# 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...



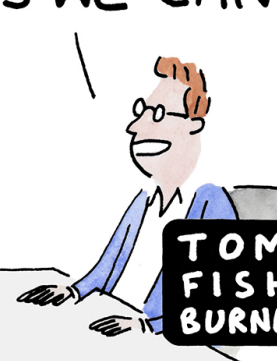
OR IF IT COULD  
DAMAGE OUR  
REPUTATION...



WHAT DO  
WE KNOW  
FOR SURE?

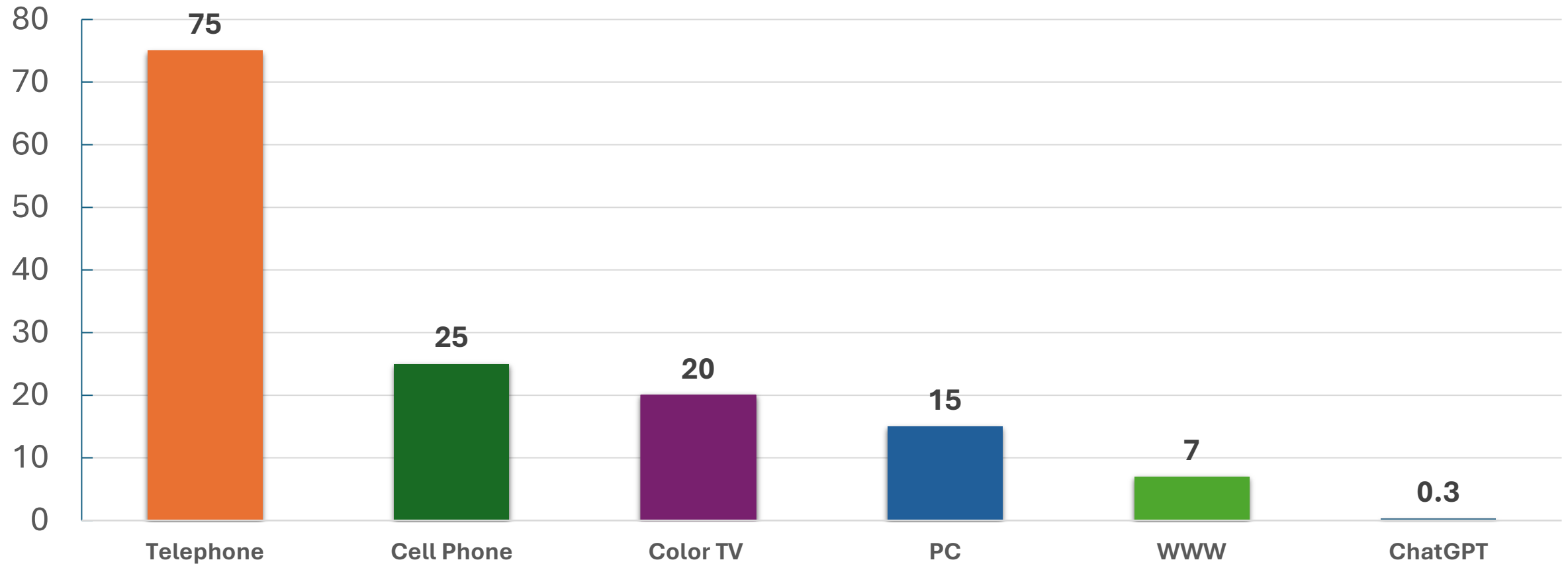


ONLY THAT WE  
WANT TO ADOPT IT  
EVERYWHERE AS  
FAST AS WE CAN.



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

Response +  
app commands

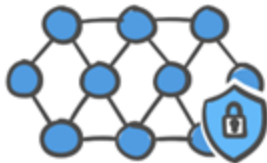
User prompt

**M365 Cloud Content  
Encrypted**

Pre-processing

Grounding

Microsoft Graph



Semantic Index

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

Post-processing

Grounding

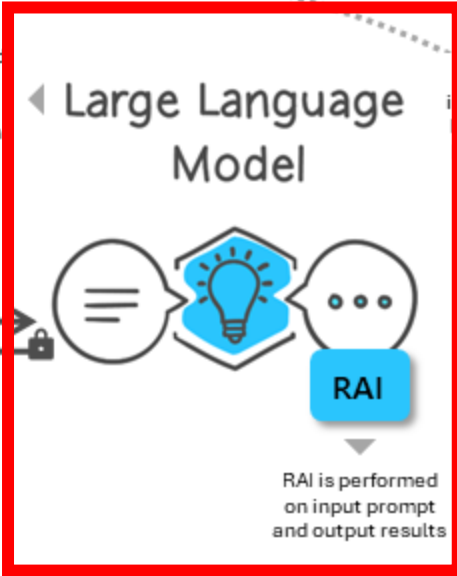
Customer Microsoft 365 Tenant

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



Modified  
prompt

LLM  
response



Large Language  
Model

RAI

RAI is performed  
on input prompt  
and output results

**External Info  
Internet/ChatGPT  
Encrypted**

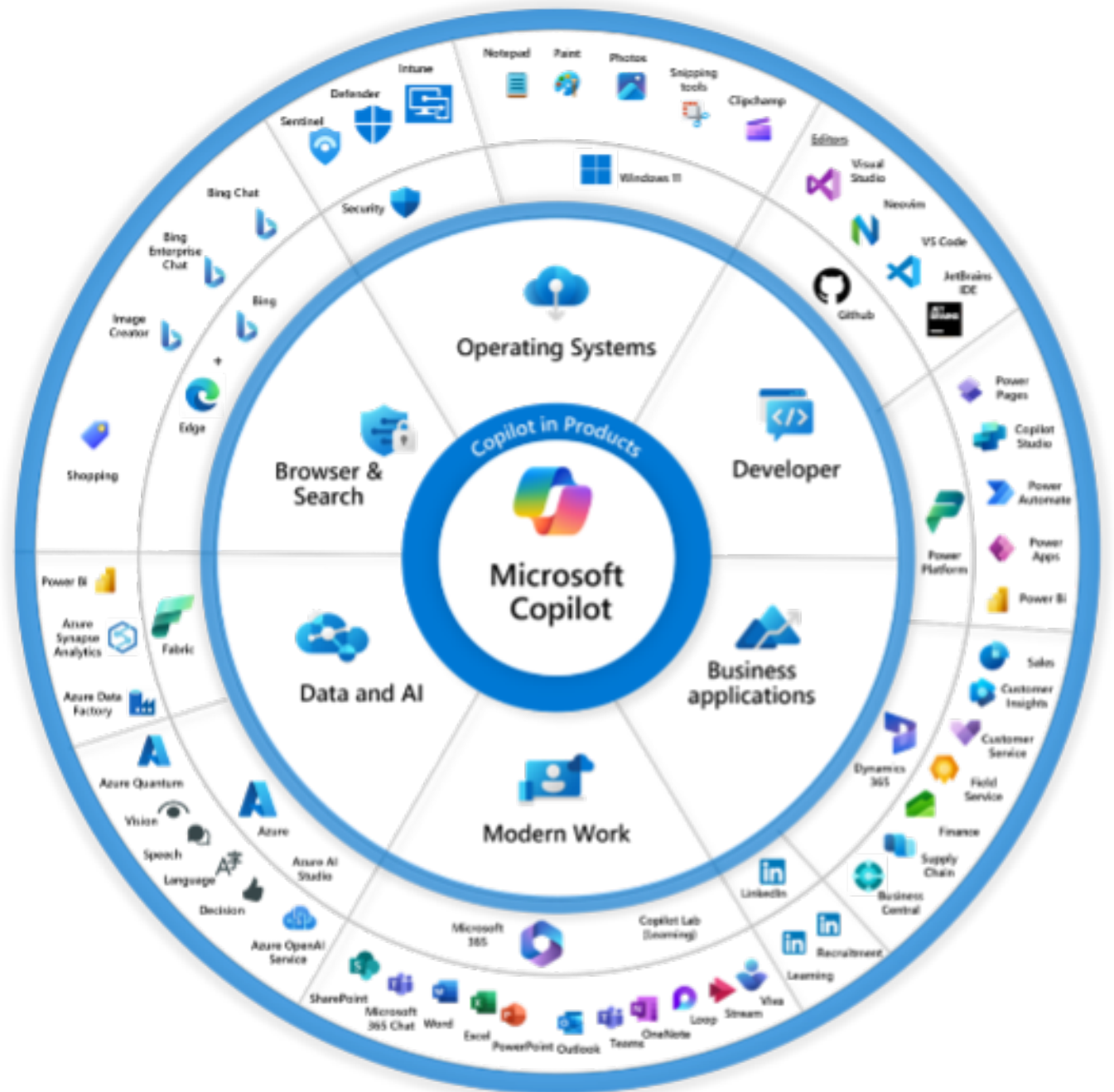
Azure OpenAI  
instance is maintained  
by Microsoft. OpenAI  
has no access to the  
data or the model.

Azure  
OpenAI

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?



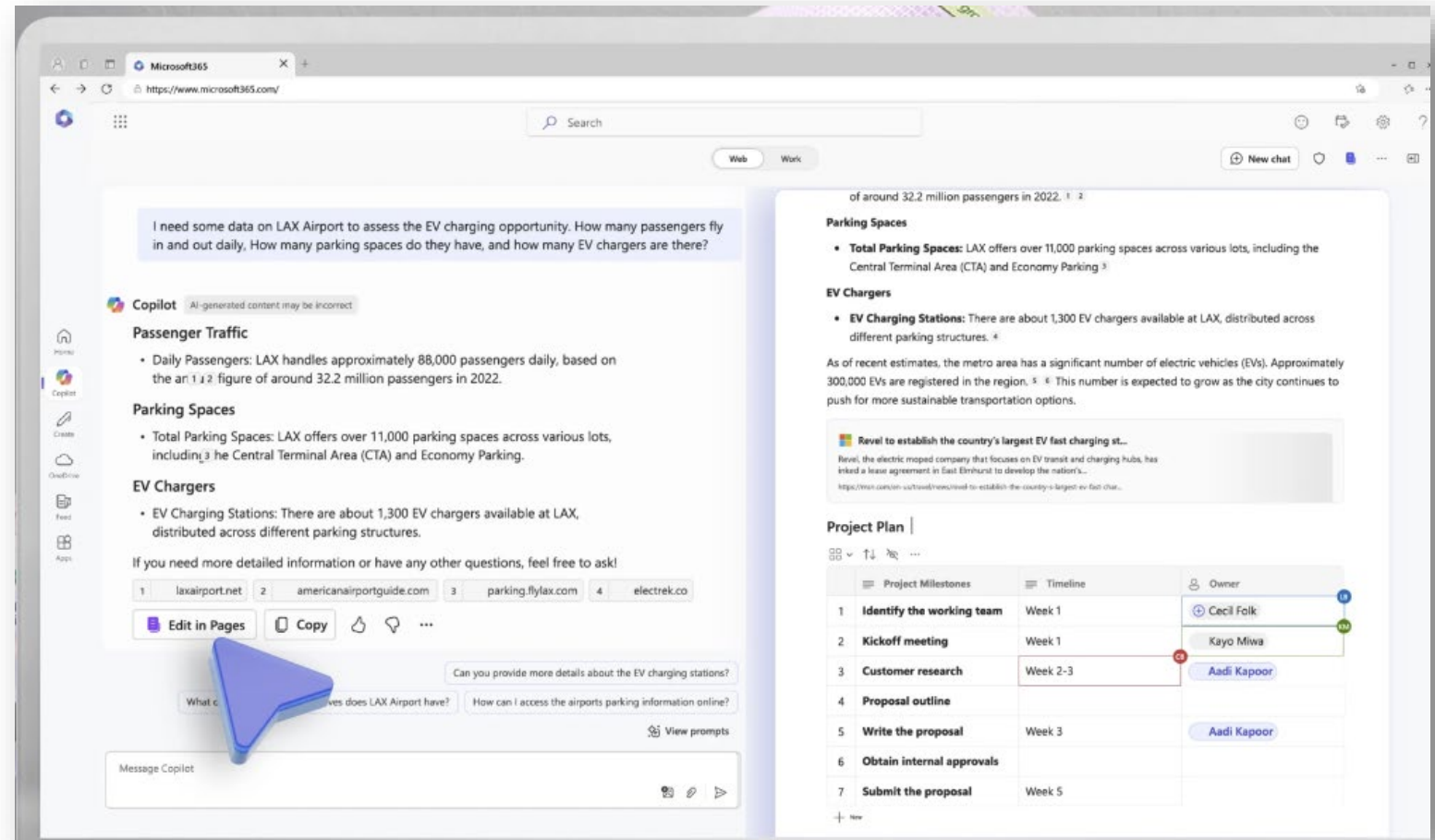




# **What is Copilot 2.0**

# Copilot Wave 2 announcement Sept 2024)

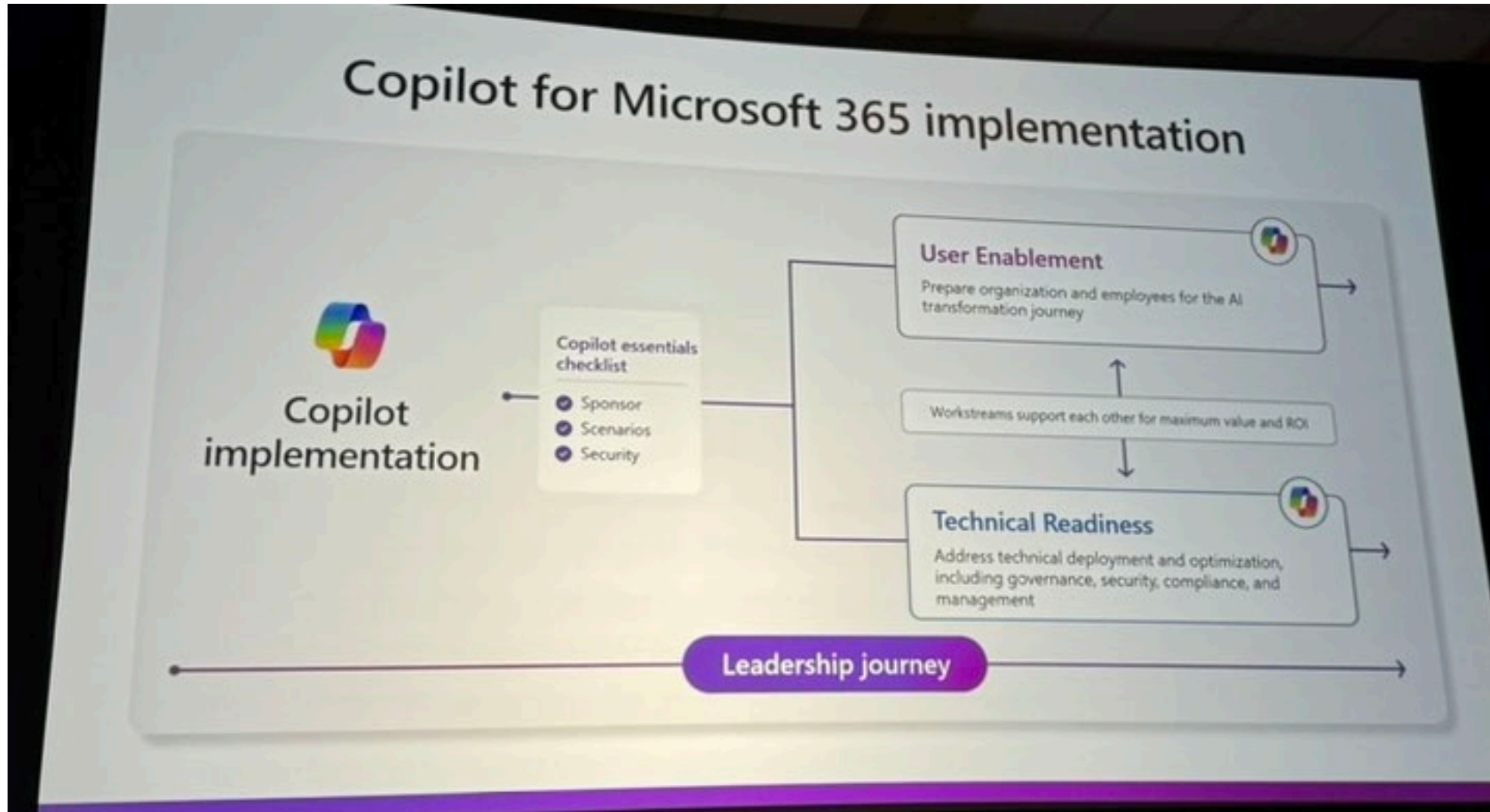
- Copilot **Agents** and **Pages**
- Python Support in **Excel** Copilot
- Enhanced Capabilities in:
  - **Outlook** – Email Prioritization
  - **Excel** insights, trends, and visualizations
  - **OneDrive**- Search and Compare Files
  - **Teams**- Additional Meeting Insights
  - **PowerPoint** Design-Enhanced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





**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."*



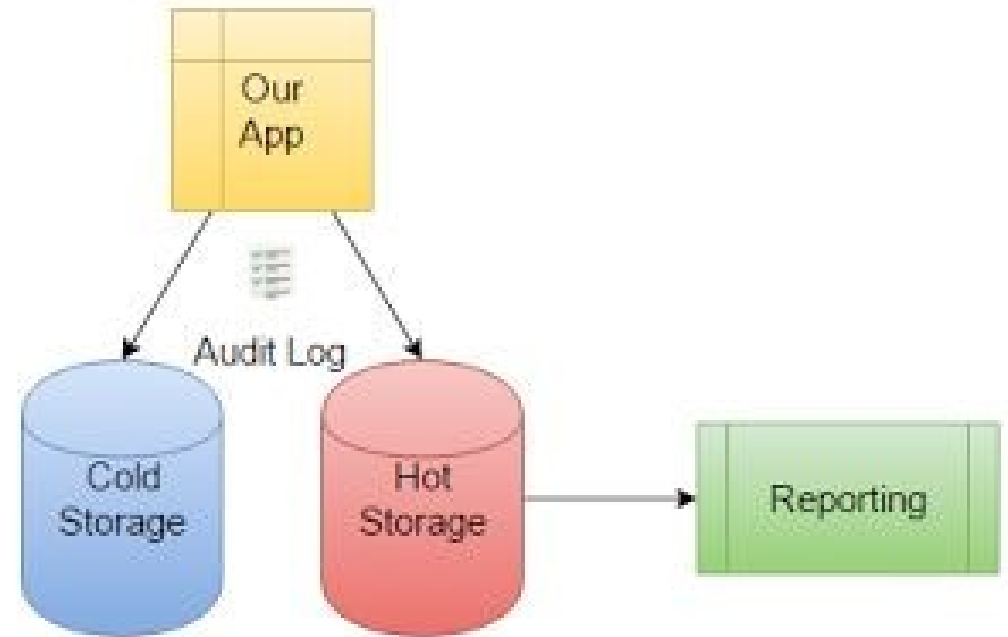
## **Top 10 issues that stall Copilot deployment and adoption**

# #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 | Farm Search Administration | Search Administration | **Crawl Log** | Diagnostics | Crawl Health Reports | Query Health Reports | Usage and Analytics

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

View a summary of items crawled per content source.

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

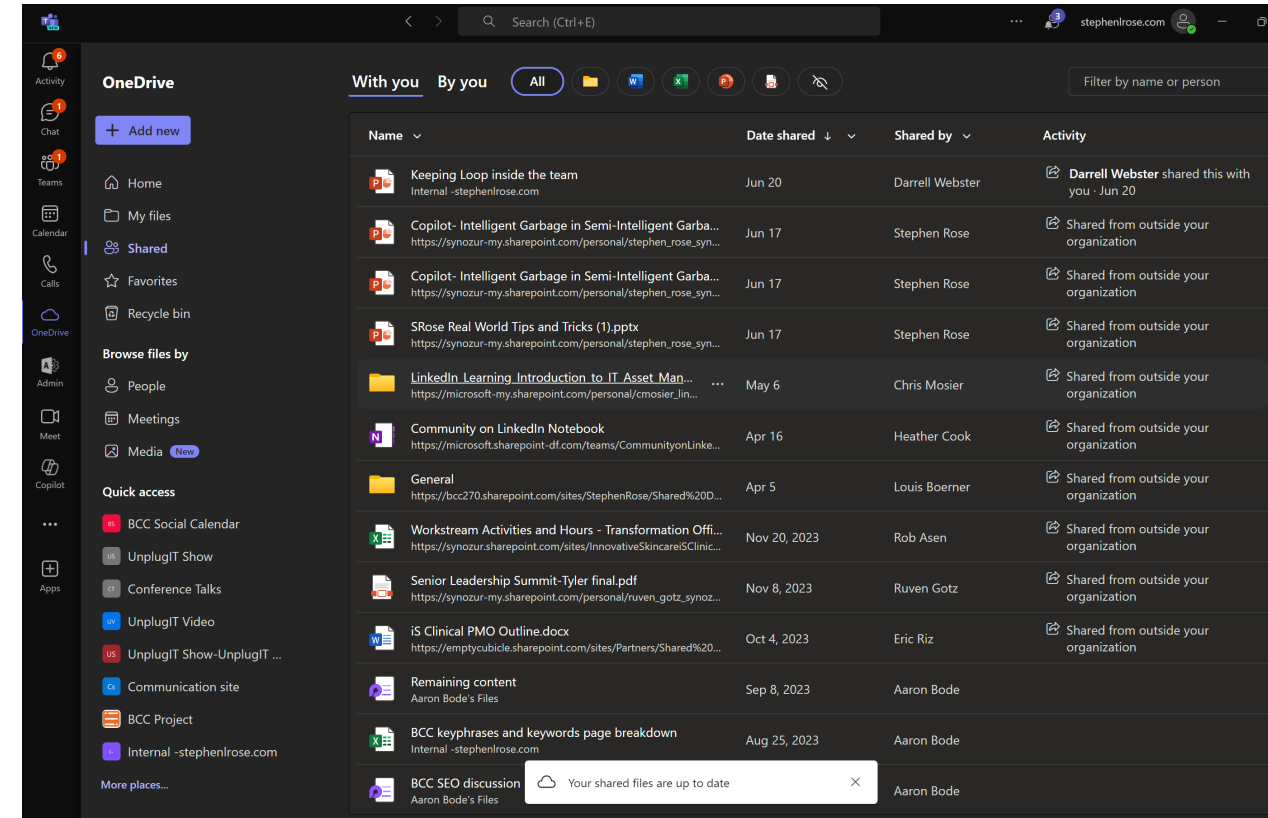
[Link to more about crawl log](#)





# 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

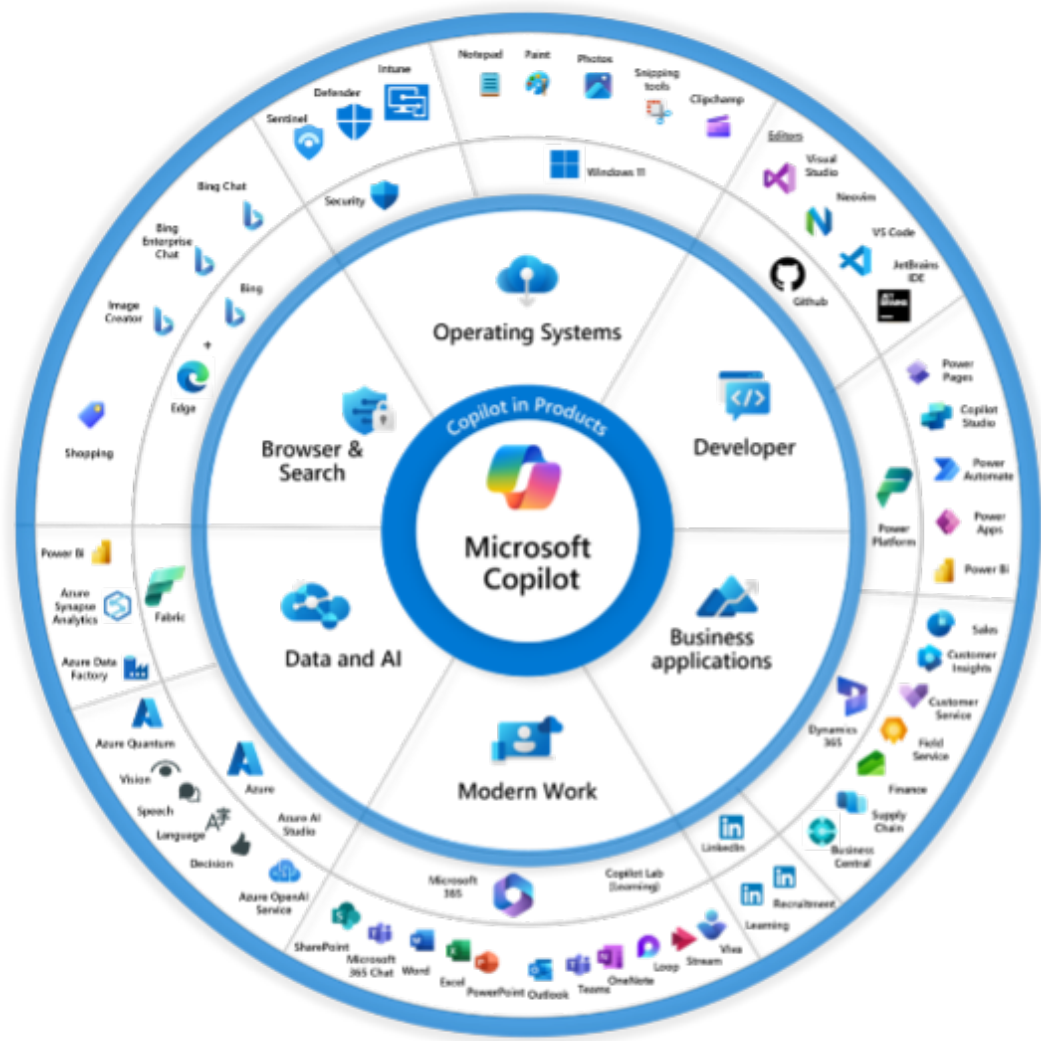
If a user has a bad experience 2-3 times:

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.

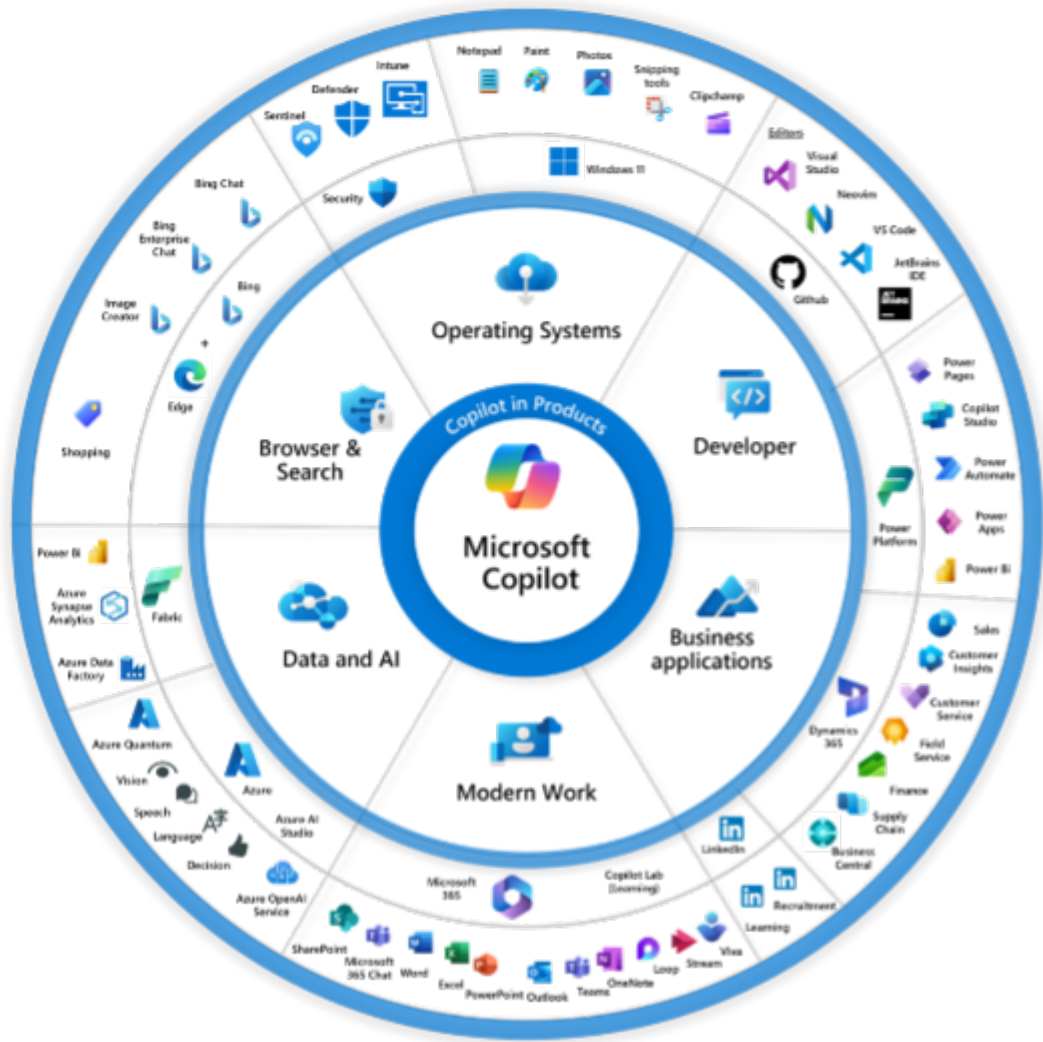
Track positive and negative experiences and look for trends (Viva Insights)





## #7- Too Many Copilots





**There are currently  
56+ Copilots with more  
coming**

**What is the cost to the  
average company who  
embraces Copilot?**

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

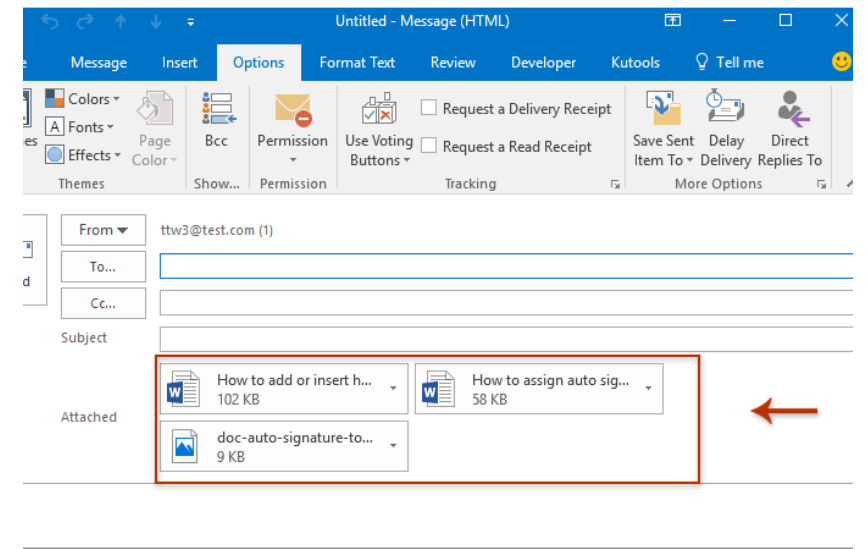
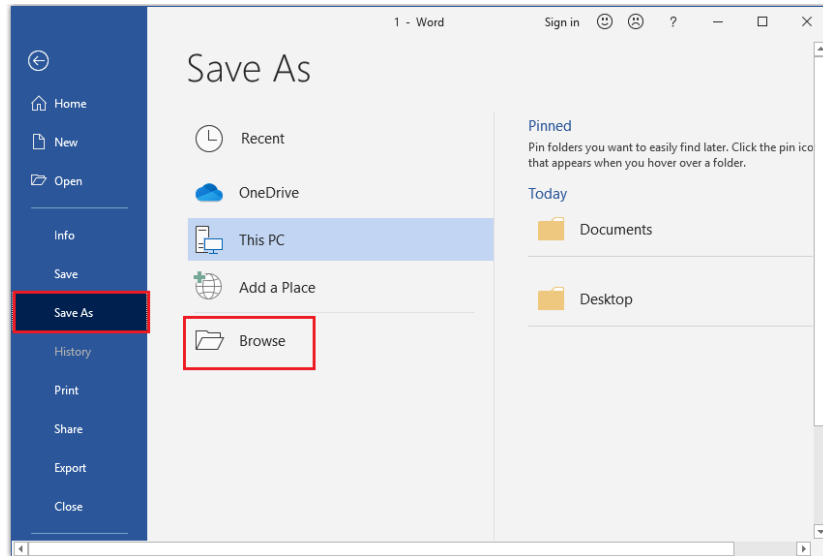
## Better Together: Copilot for Microsoft 365 and Microsoft Teams Premium

		 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	✓	✓
Advanced AI in Microsoft 365 apps (beyond Teams)	Copilot in Teams to ask questions to resolve topics, catch up during meetings, organize points		✓
	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 Admin

Aviation Incident Report - S4-68

Ukraine) when the crew needed to shut the right hand engine (CHN150) down with engine indication. The aircraft landed safely on Chongqing runway 34.

A SITA International Airbus A320-200, registration CS-TKX performing flight S4

# #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



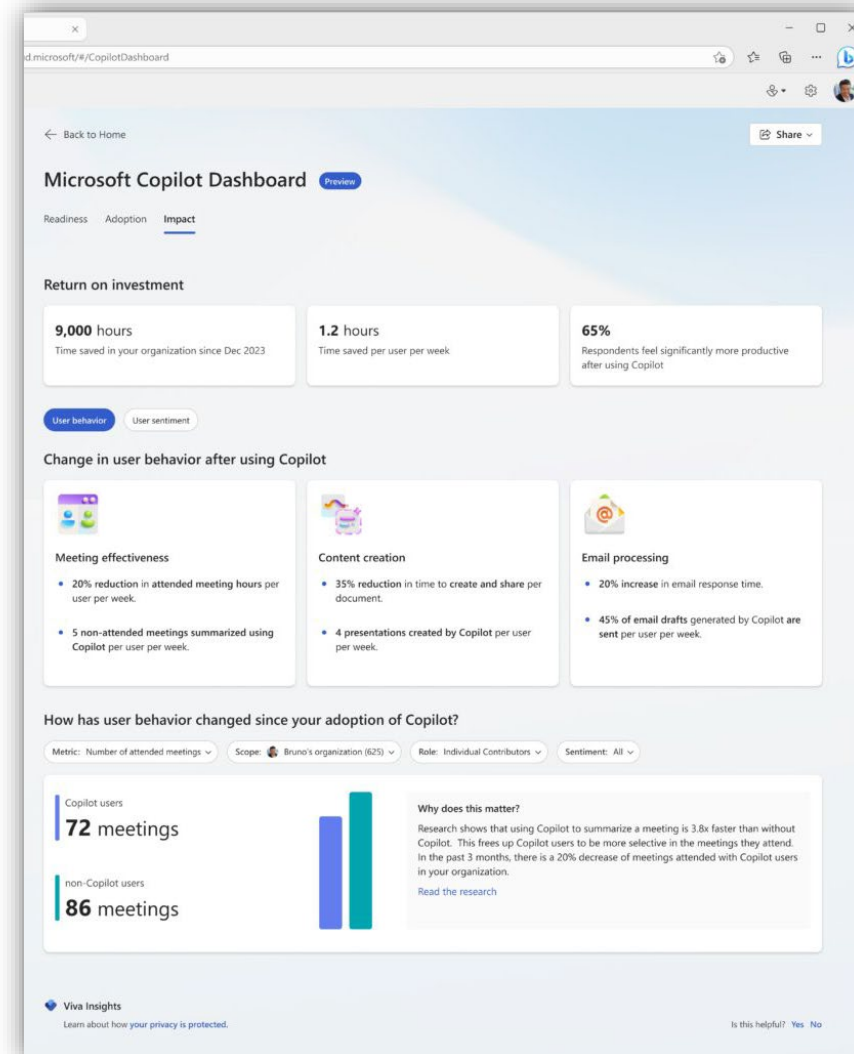
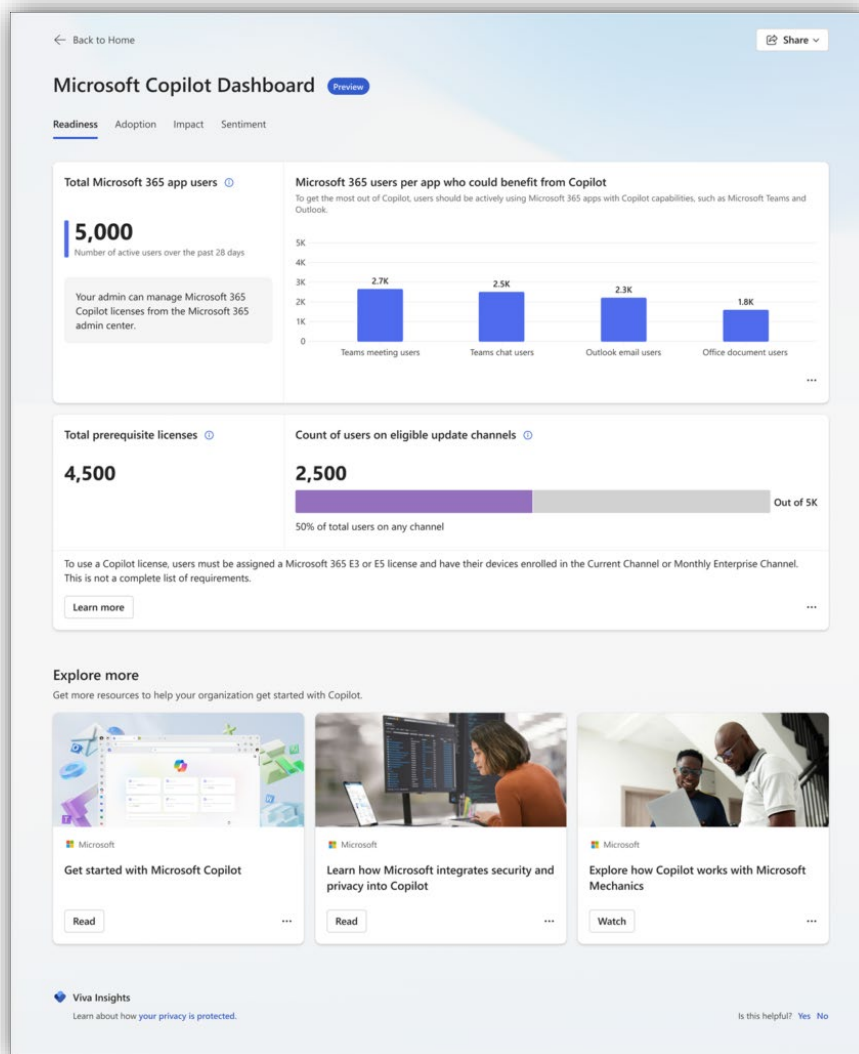
Before



After



# Viva Insights



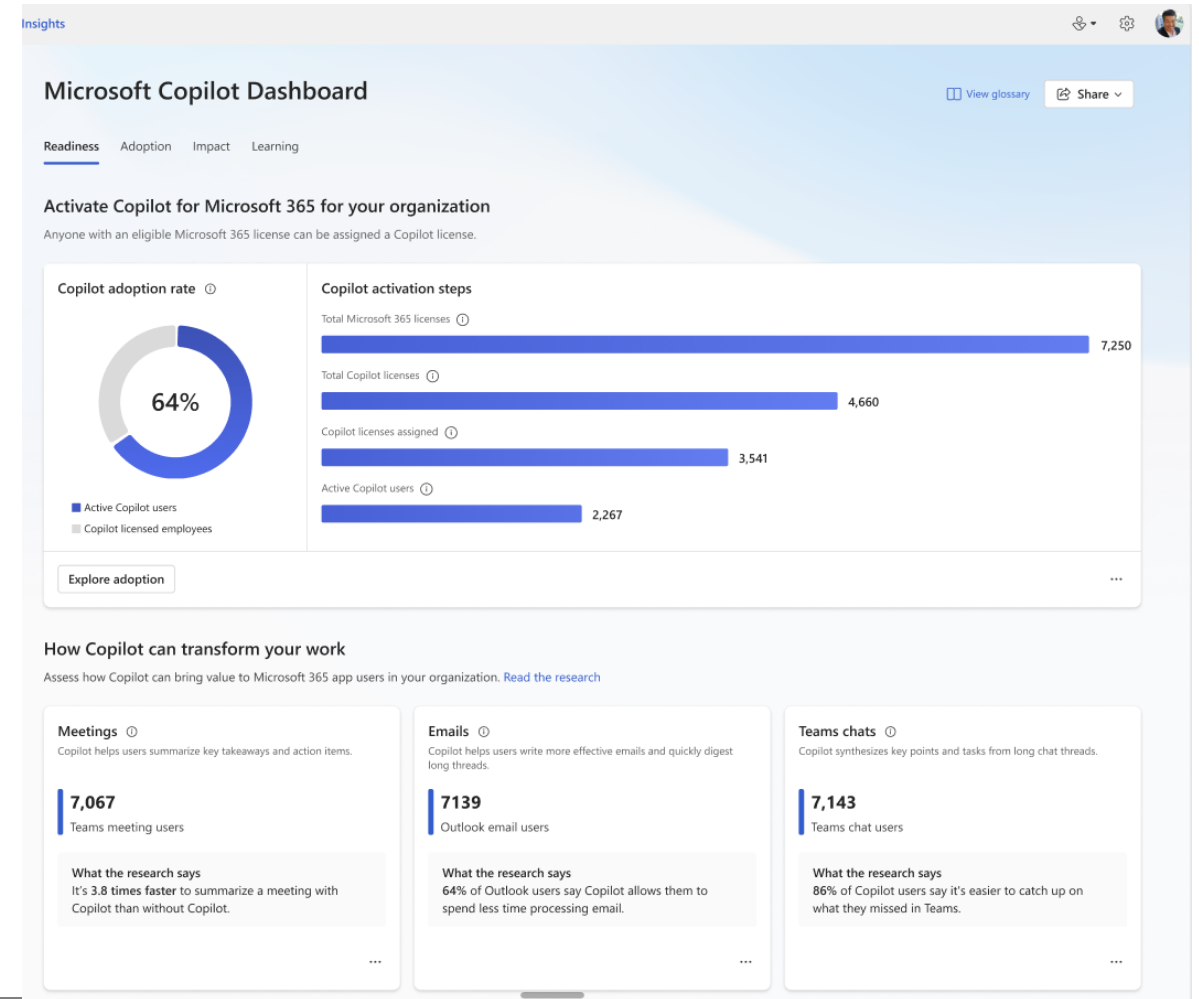


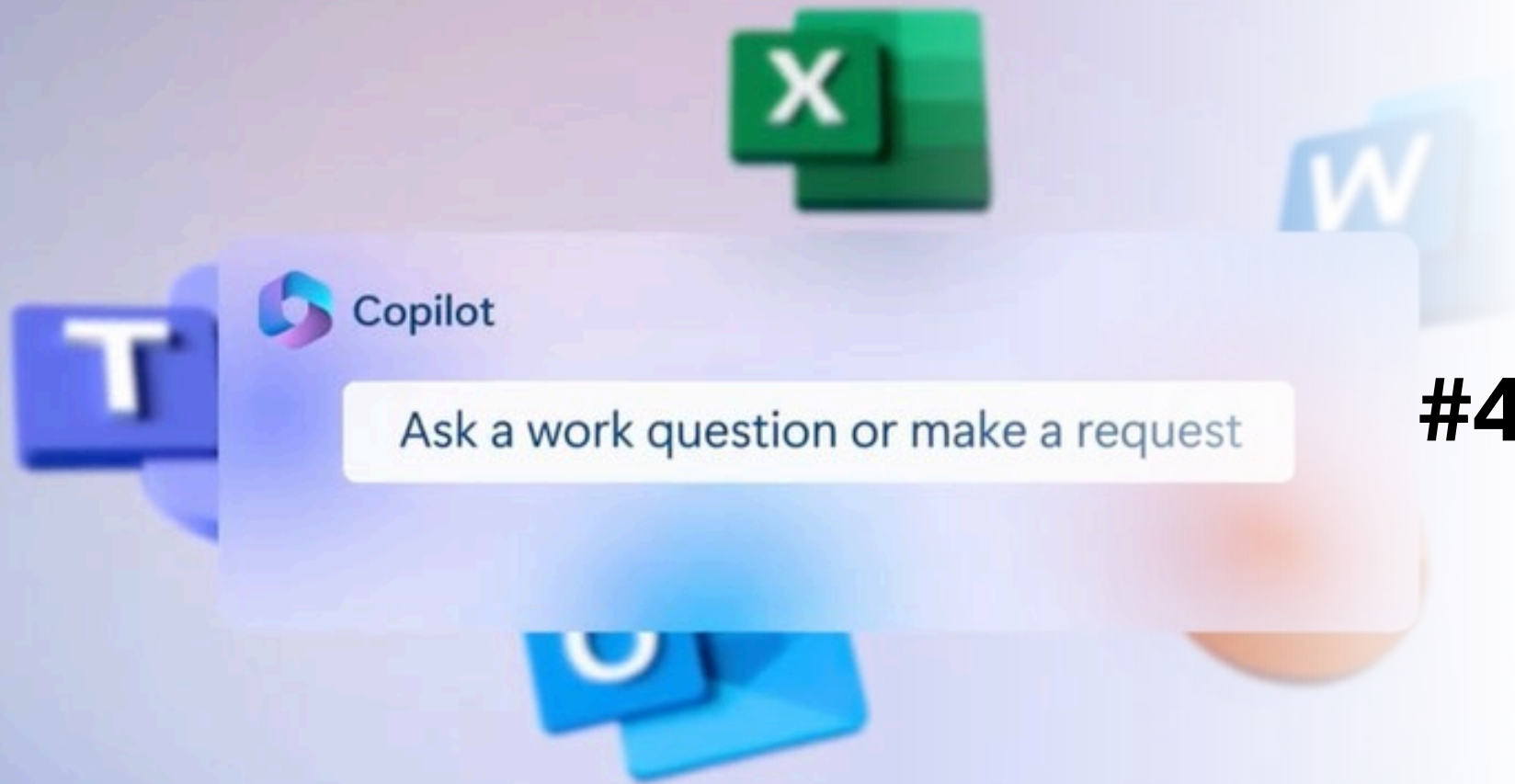


# Viva Insights

## 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.





**#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.

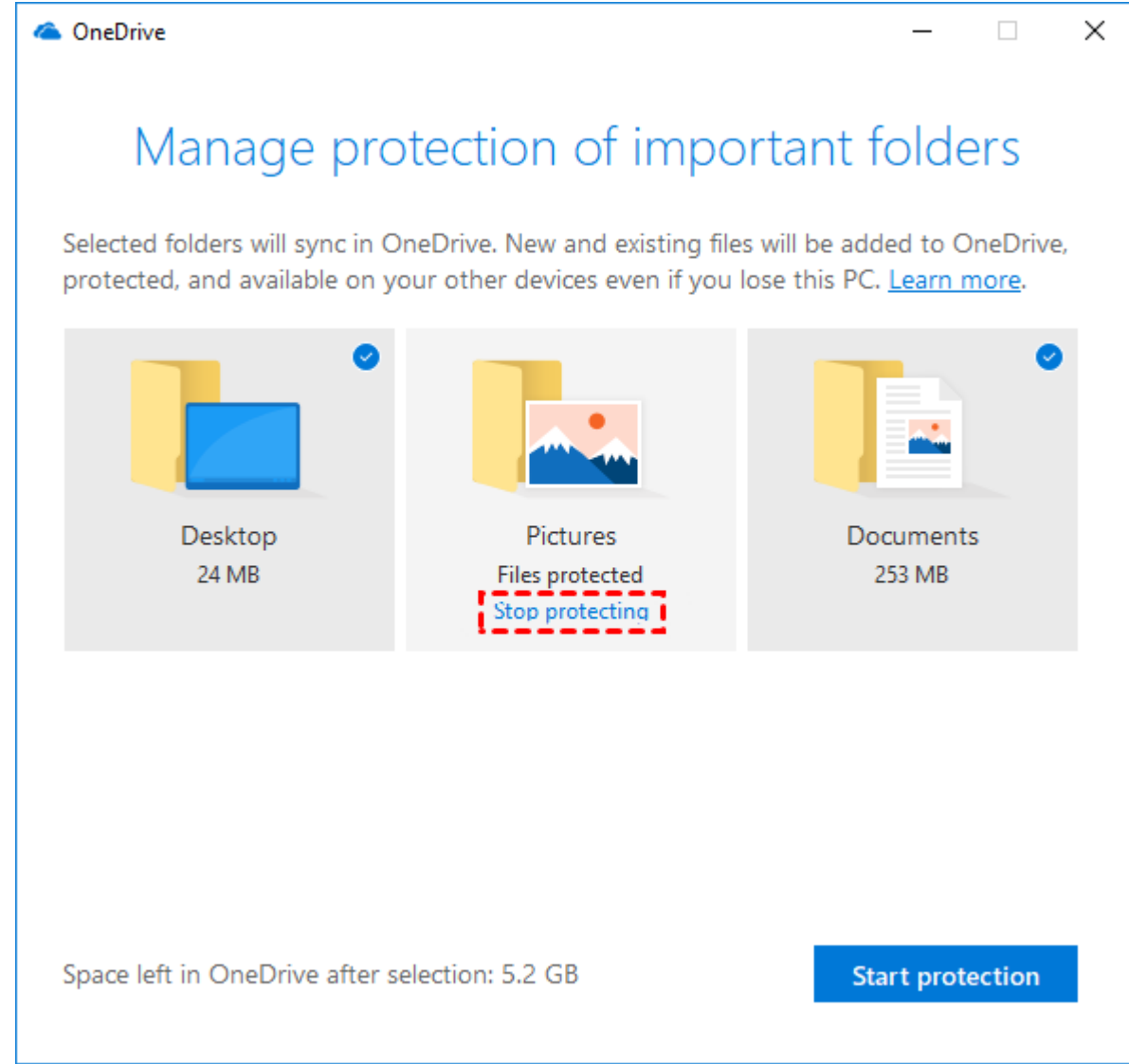


## #2- Next Steps After Data Cleansing



# 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





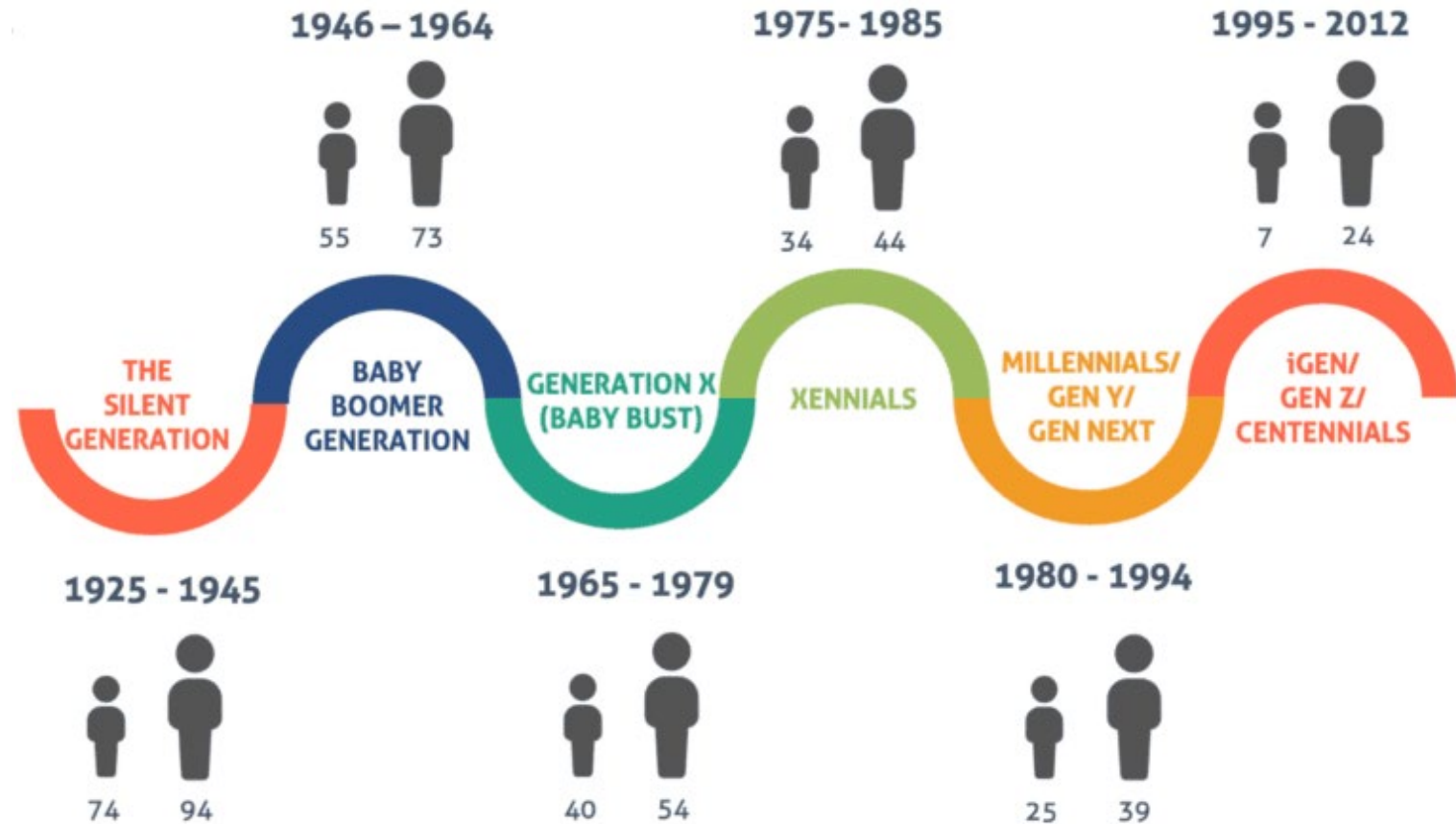
# #1- Change is Hard

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- 1<sup>st</sup> Computers

Gen X- First Laptops

Millennials- Fast Internet

Gen Z- 100% Cloud



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



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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