



CoAction



Copilot

Get Ready for AI with Copilot for Microsoft 365

Adopting AI at Scale: a Journey, Not a Sprint

Integrating Copilot for Microsoft 365 into your organization is not just about acquiring licenses; it's a strategic move that requires careful planning and preparation. This guide aims to provide CoAction partners with a comprehensive Roadmap to ensure a smooth adoption of Copilot for Microsoft 365, leveraging the transformative power of efficiency.

? What are your **goals** for using AI?

? What are the **pain points** that AI Can address?

Establish The Foundations

Technical challenges may hinder the smooth adoption of Copilot. Cloud adoption, technical debt, and legacy systems can act as roadblocks. Copilot for Microsoft 365 interacts with the applications millions of users use (Microsoft 365) while leveraging corporate data residing on SharePoint, One Drive and your Microsoft Cloud tenant by extension. Therefore, adopting these technology solutions becomes the bedrock of any Copilot implementation..

Zero Trust Principles In Action



Use least privileged access for application and data management



Verify explicitly with identity and endpoint management

These principles lay the groundwork for Copilot implementation, ensuring a secure and well-managed environment. Tick these foundational boxes to set the stage for a seamless AI integration.

Security: A Pillar of readiness

Envision the profound impact AI can have on operations. The ability to prompt Copilot for detailed insights, such as the top 20 accounts' buying behavior and margin performance over the last two years, holds immense potential. Without a robust security posture, the consequences of sensitive information falling into the wrong hands can be severe. This phase requires organizations to go beyond standard security measures and embrace advanced solutions.



M365 Business Premium with Defender for Endpoint

A comprehensive security solution that provides advanced threat protection across endpoints.

Privileged Identity Management

Elevate security by adopting a privileged identity management strategy, limiting access to critical data and functions to only those who require it.

Data Strategy Components

Data Management

Classify data based on sensitivity and importance and remove or archive old data to create a structured foundation for Copilot

Sensitivity Labels

Apply sensitivity labels to documents, ensuring that Copilot can discern the importance and confidentiality of each piece of information.

Spearhead the AI Transformation

As organizations prepare to spearhead the AI transformation with Copilot, it's essential to understand the nuanced phases of adoption. CoAction's own experience with Copilot has revealed a strategic approach, implemented in waves, that allows organizations to learn their way into an AI-powered future. With foundational elements in place, it's time to spearhead the AI transformation. Copilot is not just an IT tool; it's a cultural shift requiring involvement across all departments, especially executives and C-levels.

Adoptions Phase

Tech POC: Validating Impact

The Tech Proof of Concept (POC) is the initial phase where organizations validate how Copilot positively impacts individual productivity, with tools such as Copilot Dashboard. This involves deploying Copilot in controlled environments to understand its capabilities and assess and capture its potential benefits.

Organic Efficiencies: Identifying Opportunites

Following a successful Tech POC, orgs move on to identifying business units, functional areas, or specific use cases that are prone to be streamlined with AI. This phase involves building AI competence within the organization and laying the groundwork for broader adoption.

Transformational Efficiencies: Rethinking Operations

The final phase is marked by a holistic transformation of the way the business operates. This is only possible when the organization fully embraces AI. It involves rethinking workflows, processes, and business operations to align with the capabilities and potential of Copilot.

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