

M365 Copilot Adoption Roadmap

A proven path to Copilot productivity.

You have Copilot. Getting your team to actually use it—and use it well—is where the real work begins. You don't have to figure it out as you go. HBS brings a structured, eight-week readiness and adoption program that covers everything your organization needs: security, governance, policy and in-depth training, so you and your people feel confident and productive from day one.



Copilot Readiness & Adoption Plan

PHASE 1 Administrative

We build the right foundation before your team ever logs in. That means an **AI Acceptable Use Policy**, an **AI Envisioning Workshop** and a **full Copilot Admin Center review**. You won't have to fix governance problems after rollout.

PHASE 2 Assessment

We assess your OneDrive and SharePoint environment, identify exposure, and configure file expiration settings. Your team gets a **picture of exactly where you stand** and what needs to change before Copilot touches your data.

PHASE 3 Rollout

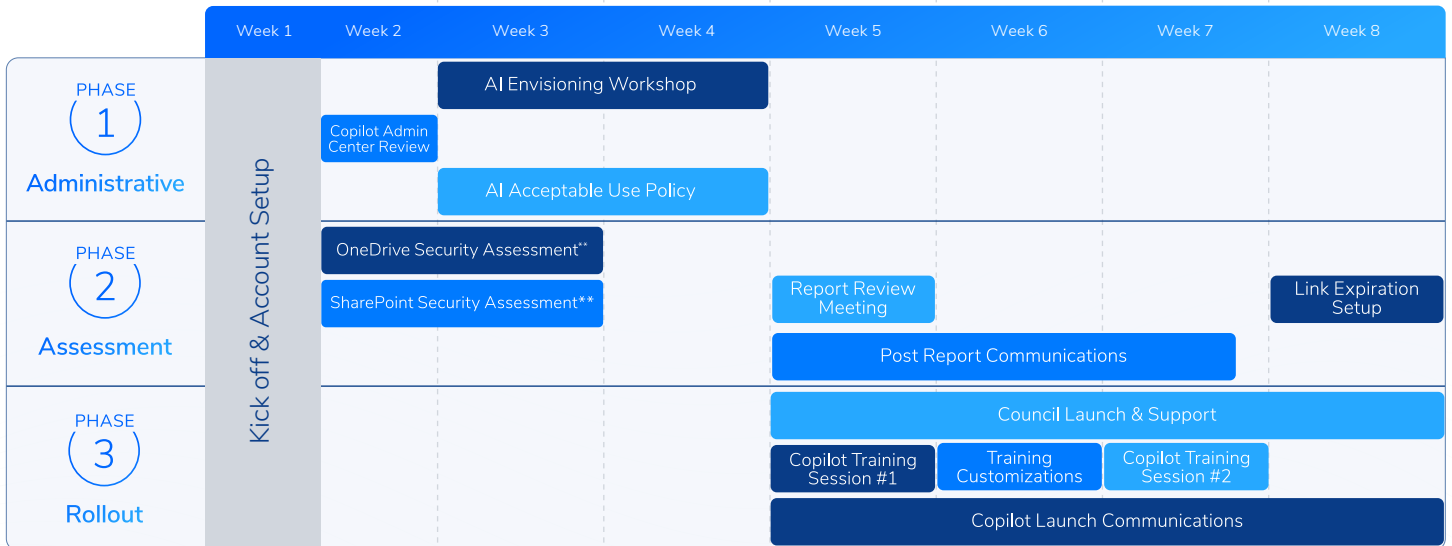
This is where your people get ready. We launch your Copilot Council, deliver role-based training sessions and launch communications that give employees context, confidence and ways to engage Copilot.

Copilot Training

Three training tracks. Built for how your team works.

Copilot: Basics	Agent Builder 101	Agent Builder 201
<p>Training Includes:</p> <ul style="list-style-type: none"> ✓ Navigation and Layout <ul style="list-style-type: none"> ▪ Usage, available features, functionality ✓ App Based & Department Specific Examples <ul style="list-style-type: none"> ▪ Demos of Outlook, Teams, Word, PowerPoint, Excel and more ✓ Starter Prompts and Best Practices <ul style="list-style-type: none"> ▪ Getting started and starter prompts ▪ Tips & Tricks 	<p>Power User Training Includes:</p> <ul style="list-style-type: none"> ✓ Navigation and Layout <ul style="list-style-type: none"> ▪ Copilot in Teams and SharePoint agent builders ✓ Use Cases <ul style="list-style-type: none"> ▪ HR support and ticketing systems ✓ Information Libraries <ul style="list-style-type: none"> ▪ Capabilities, training, providing correct information ✓ Demo: Agent Development <ul style="list-style-type: none"> ▪ Step-by-step setup of example agents 	<p>Power User Training includes:</p> <ul style="list-style-type: none"> ✓ Navigation and Layout <ul style="list-style-type: none"> ▪ Copilot Studio ✓ Use Cases <ul style="list-style-type: none"> ▪ HR support and ticketing system ✓ Information Libraries <ul style="list-style-type: none"> ▪ Capability and training or providing correct information ✓ Demo: Agent Development <ul style="list-style-type: none"> ▪ Step-by-step setup of example agent

Copilot Roadmap Timeline



**Security Assessment & Meetings dependent on scheduling.

Ready to build your adoption plan?
Talk to an HBS Copilot expert today.