



# Ready, Set, Adopt: How to Drive Microsoft 365 Copilot Adoption & See Results

Presented by: James Spignardo & Greg Dodge

## MEET OUR PRESENTERS



**James Spignardo**

Strategic Solutions Consultant



**Greg Dodge**

Strategic Solutions Architect

# ProArch's Journey

- Background
- Identifying and Prioritizing Use Cases
- Upskilling the Teams
- Calculating the ROI & Value
- Voice of the End User
- Lessons Learned
- Next Steps



First, let's start with a gut check.

# The Reality vs. The Dream

Change is hard.

People don't want to do hard things.

Stakeholders need to see AI as a transformational technology...AND be onboard.

## You Need to Convert the Skeptics



Show them there  
is a better and  
easier way.



Tackle the "3" D's  
Dull, Disruptive, &  
Draining\*



Start Small.  
Measure. Improve.  
Expand.



# ProArch's Microsoft 365 Copilot Journey

# Why Microsoft 365 Copilot Makes Sense for ProArch

- 1 We are **heavy** Microsoft 365 users.
- 2 Our files are organized and stored in Microsoft 365 – SharePoint and OneDrive for Business.
- 3 Our Microsoft 365 environment is secure to keep sensitive information in the right hands.
- 4 We really like AI and Microsoft. 🥰





# 2024: ProArch's Microsoft 365 Copilot Journey

## January

Reviewed data governance and addressed security concerns.

## March

Development of use cases.  
Testing and evaluation.

## May

Identified more use case candidates.

## July & Beyond

Surveyed users.  
Continuous refinement.

## February

Selected leader of Copilot initiative.  
Formed internal adoption working group with key stakeholders.  
Met with department leaders to understand their pain points.

## April

Roll out of first use case to full production.  
Multiple training sessions.

## June

Rolled out two additional use cases.  
Training sessions.



# ProArch's Copilot Use Cases

## ACCOUNT TEAMS

Capture quality meeting notes with clients.

Translate client needs into clear business objectives.

Prepare for client meetings by understanding client needs and researching solutions.

## SERVICE DESK ENGINEERS

Transcribe customer calls and generate a meeting summary and action items to include in the ticket.

Copilot Chat in Team or Edge to research issues and identify potential solutions.

Outlook or Chat in Teams to assist drafting client responses and if needed copy to tickets.

## PROJECT MANAGERS

Copilot for Outlook to assist in drafting emails based on targeted audiences for status updates.

Use Copilot for Chat (Edge) to assist in compiling project status notes to draft a summary update.

Use Copilot to Record/Transcribe sales calls to establish action items

## MARKETING ASSISTANTS

Copilot in Word/PowerPoint to generate initial draft content based on samples/templates.

Transcribe internal meetings to capture requirements and feedback on content.

Solicit feedback on content to improve quality and client reach/impact.

# Steps for Copilot Adoption

# Steps for Microsoft 365 Copilot Adoption

## STEP 1

### Identify a High-Value Target

1. Identify group of users with a specific role/persona
2. Opportunity to streamline efficiency
3. Incentive to embrace the technology



## STEP 2

### Dig into the Challenges

1. Coordinate with lead or manager to gather information
2. Identify and prioritize the pain points
3. Align them to Copilot capabilities



## STEP 3

### Develop High-Impact Use Cases

1. Narrow down potential use cases to:
  1. What is feasible?
  2. What has the potential of the best ROI?
2. Develop the tools and prompts



## STEP 4

### Implement & Manage

1. Develop Customized Training
2. Implement a Center of Excellence and an Advisor Group
3. Track adoption metrics
4. Optimize as needed



# Scenario Workbook

## Sales: Defining Business Objectives

### Enabling Technology

DESCRIPTION	PERSONA	READY-MADE	CUSTOM	TECHNICAL DEPENDENCIES	SAMPLE PROMPTS
Use Copilot Chat/Copilot for Word to take various sources such as meeting notes, CRM data, and web content to write effective and meaningful business objectives for sales proposals.	Account Executive	Yes	NA	Copilot in Teams Copilot for Word HubSpot CRM	Review /meetingname and draft a paragraph of business objective for a proposal for [Solution]. Include relevant justification that pertains to [Industry/market/vertical] and respond to any objections raised in the meeting.

### Scenario Roadmap

0-1 MONTH	1-3 MONTH	3-6 MONTH	6-9 MONTHS	12 MONTHS
Introduce the use case and provide training/support on Copilot in Teams and Sales Copilot	Sales begins to develop the business objectives within sales proposals.	Survey persona and collect feedback on improvements	Track how actively users are engaging with Copilot Chat by measuring the number of prompts and interactions.  Evaluate quality of content generated by Copilot for Word. Ex: Relevance and accuracy of information.	Expand Proposal development assistance to other areas beyond the business objectives.

# Upskilling the Team



## 1-HOUR CUSTOMIZED TRAINING SESSION

For each role/persona on the core capabilities of copilot with a specific focus on their assigned use cases



## COPILOT CENTER OF EXCELLENCE

"Snackable" training modules and example prompts to use with their use cases



## 4-WEEK FOLLOW-UP TRAINING

30-minute session was scheduled 4 weeks from the initial session as a roundtable to discuss tips & tricks and to gauge the temperature

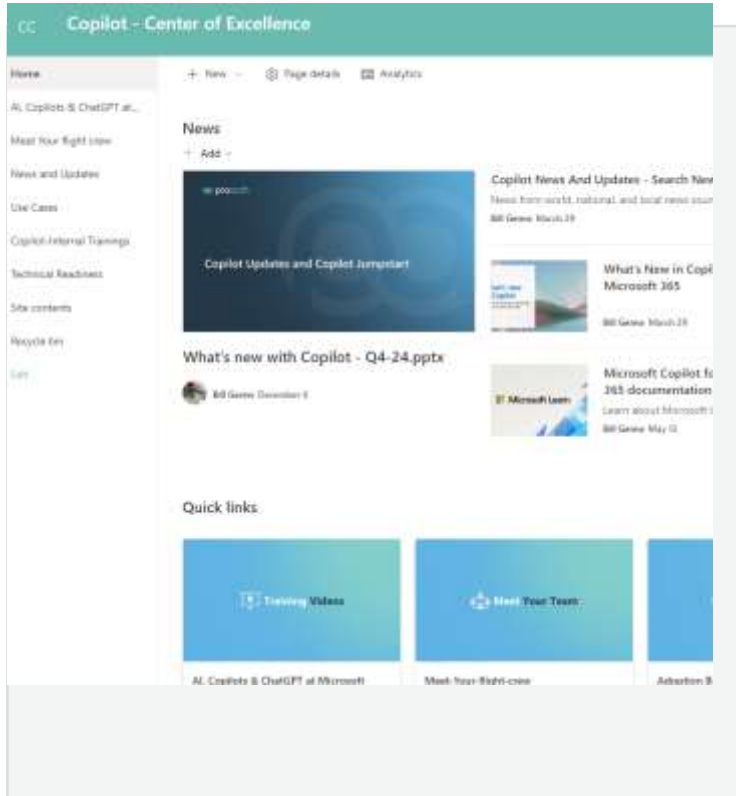


## CONTINUOUS ADOPTION ASSISTANCE

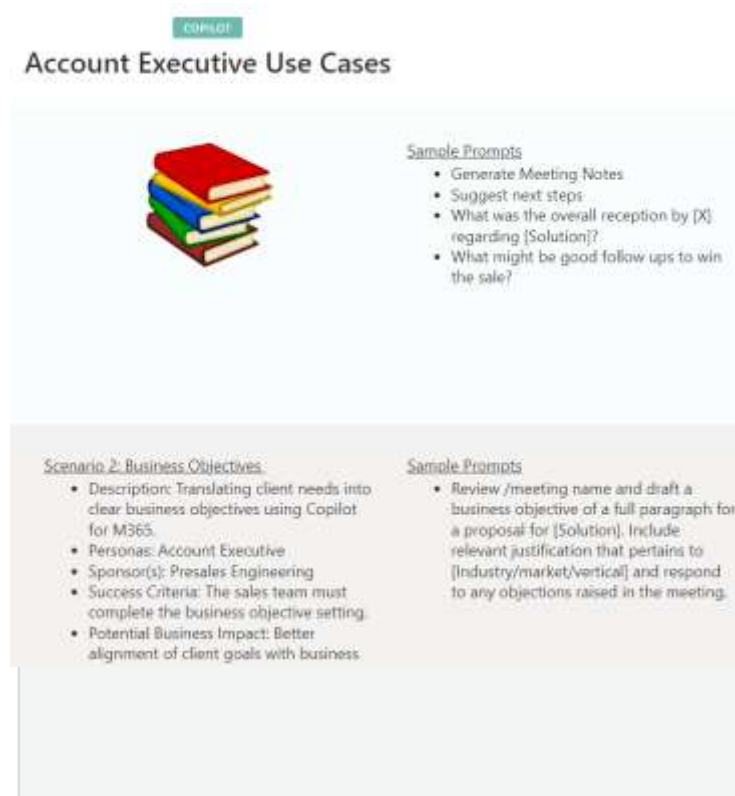
After reviewing the adoption metrics, follow-up sessions were scheduled as needed.

# Resources to Drive Copilot Adoption

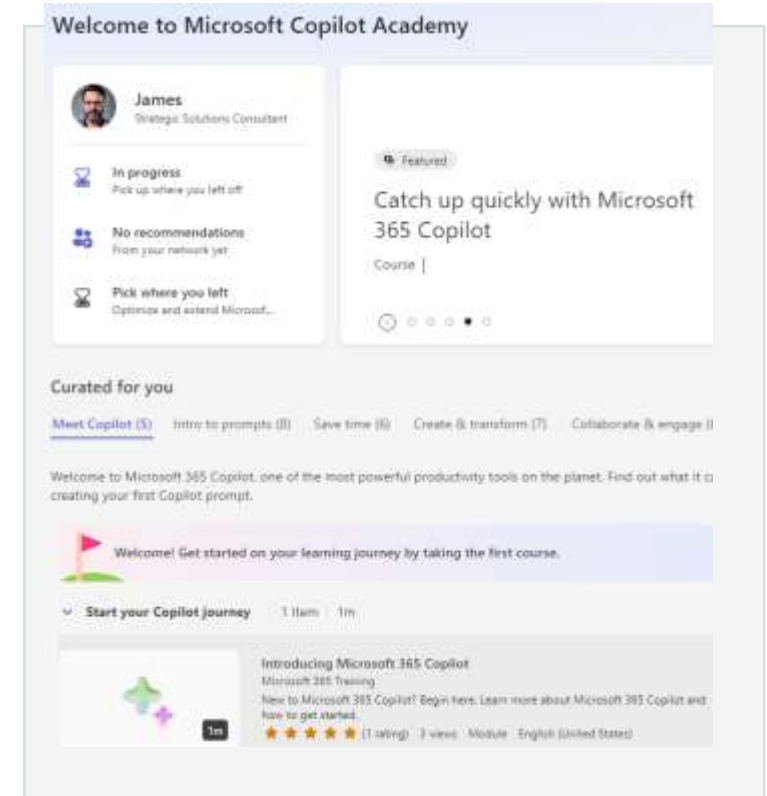
## Center of Excellence



## Defined Use Cases



## Viva Learning Paths





# Copilot Use Case Ideas

## IT HELP DESK AGENT

**Update Support Documentation:** Leveraging the feedback collected, use Copilot in Word to update employee resources and knowledge bases.

## CUSTOMER SERVICE

**Determine Root Cause:** Have Copilot analyze specific behavior, words, or phrases that may lead to negative responses from customers. Format the response using Copilot Pages.

## FINANCE/LEGAL

**Summarize Contracts:** Review the new contracts with Copilot in Word. Extract key insights, tender documents, and amendments for the deal and associated revenue impacting terms/conditions.

## HUMAN RESOURCES

**Create Interview Questions:** Brainstorm interview questions specific for any role with Copilot. Create both behavioral and technical questions depending on your needs.

## MARKETING

**Market Research:** Prepare a brief for your upcoming research by using Microsoft Copilot to write a first draft and tagging other key documents. Collaborate on the Copilot response with stakeholders using Copilot Page

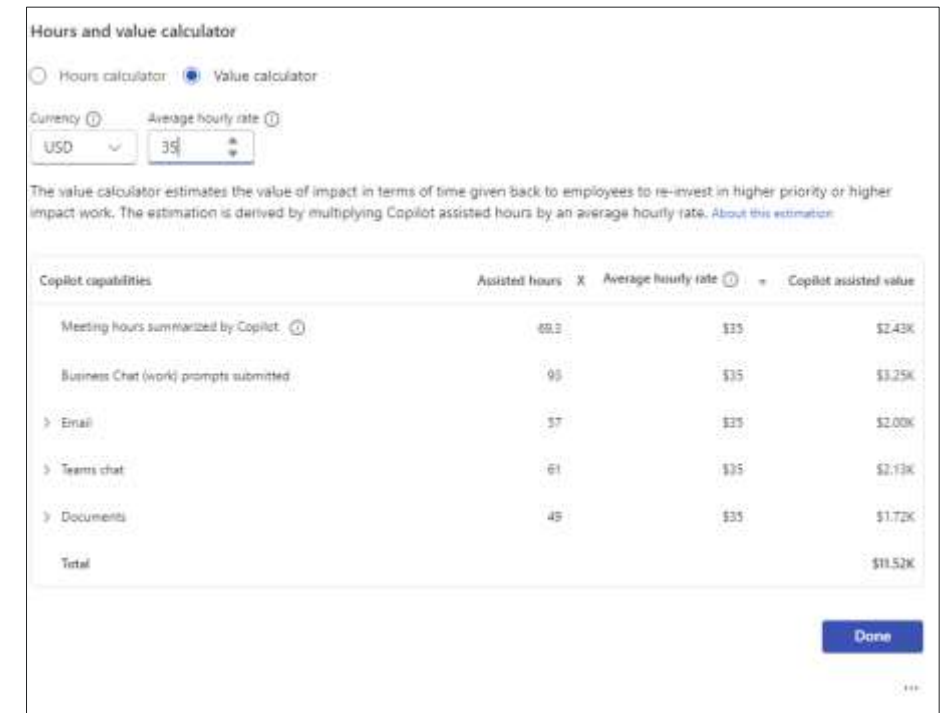
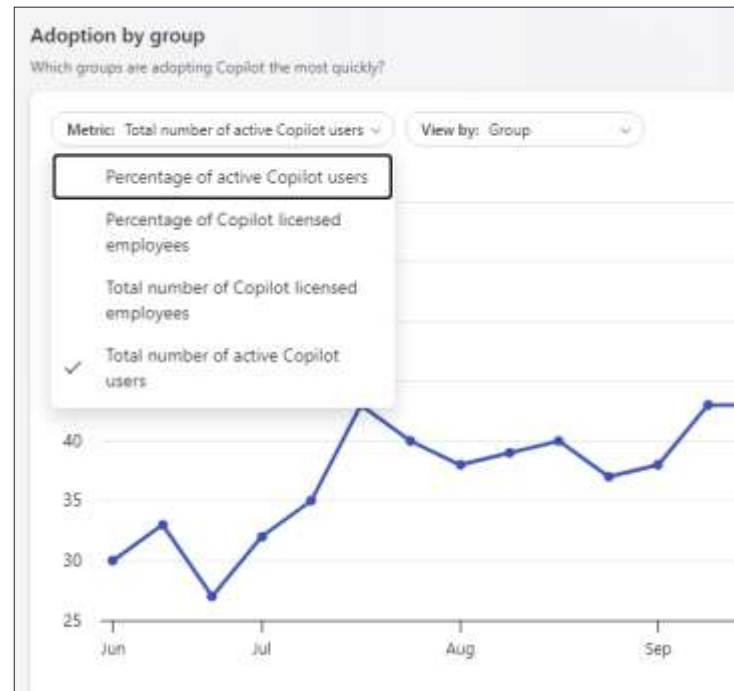
## SALES

**Respond to an RFP:** Prompt Copilot for responses to RFP questions, enhanced with a custom RFP repository agent built with Copilot Studio.



# Calculating the ROI & Value

# Copilot Usage Reports: Viva Insights



# How ProArch Demonstrates ROI

## Viva Insights Dashboard

- Overall adoption rate
- Analyze usage across M365 apps
- Demonstrate Copilot assisted hours and financial impact
- Capture user sentiment
- Identify areas of opportunity and remediation

## M365 Admin Usage Reports

- Long-term per-user usage statistics
- Downloadable CSV file that can be used to run analysis against
- Identify specific users that need assistance with Copilot adoption



Every dollar invested in M365 Copilot can deliver exponential returns across productivity, cost savings, and competitive positioning.



## ProArch's Adoption by the Numbers

**97%**  
**ADOPTION RATE**

Month-on-month across  
68 licensed users

**243 HOURS**  
**ASSISTED**

In the last month

**\$10,000**  
**OF LABOR**

Financial impact

**\$7,960**  
**MONTHLY ROI**

\$95,520 annual ROI.  
And growing.

## ProArch's Adoption by the Numbers

Copilot impact over a 28-day period:

Summarizes  
400+ Teams  
meetings

Assists in  
composing  
450+ emails

Kick-starts  
400+ draft  
documents &  
presentations

Synthesizes key  
points and tasks  
for 425+ chats

# Calculate ROI – What if Scenarios?

Try ProArch's Microsoft 365 Copilot ROI Calculator

MINUTES SAVED PER DAY:	14
<small><sup>1</sup> According to Microsoft, users of Copilot for M365 report an average daily time savings of 14 minutes or about 1.2 hours per week. Additionally, 22% of users said they save more than 30 minutes daily using Copilot for M365.</small>	
HOURLY RATE (\$):	28
NUMBER OF EMPLOYEES:	10
COPILOT COST PER MONTH (\$):	30
<button>Calculate</button>	

## Result

ROI

**379.11%**

Breakeven Months

**0.26**

Total Yearly Savings

**\$ 17,248.00**

Total Monthly Savings

**\$ 1,437.33**

Net Monthly Savings

**\$ 1,137.33**



[proarch.com/copilot-for-microsoft-365-roi-calculator](https://proarch.com/copilot-for-microsoft-365-roi-calculator)

# Voice of the End User

# Rich's Copilot Journey



**Rich Gleason**  
Senior Strategic  
Account Executive

## HOW I USE COPILOT

- Capture transcript of calls.
- Use Summary for actionable next steps.
- Save pertinent info to CRM for future reference.
- Research industry trends and issues.
- Create e-mail responses (don't use this as much as I should).

## WHAT SURPRISED ME THE MOST

- The transcript is VERY accurate.
- It's excellent at outlining call takeaways and next steps.
- Clients often want us to share the transcript with them for their records!



# Sam's Copilot Journey



**Sam Petix**  
Sr. Manager,  
Engineering

## HOW I USE COPILOT

- Without question the biggest benefit that I've found is capturing meeting notes.
- I build a base from those notes that I tailor and trim to meet a specific goal.
- For instance, I can generate simple email replies in Outlook or create new process or procedures for issue resolution in Word.

## WHAT SURPRISED ME THE MOST

- I was most surprised by how well it's integrated into the Office Apps. I'm already using throughout my day.
- As learn more and continue to use Copilot, I expect that ease of use and value is only going to continue to become stronger.

# Emilia's Copilot Journey



Emilia Tallon  
Project Manager

## HOW I USE COPILOT

- While my initial use of Copilot wasn't by choice, I'm thankful for the "gentle" coaxing from our Copilot Adoption Team!
- I use Copilot for 95% of my meetings to provide crucial minutes and action items that I share with clients and project resources alike.
- I easily save 15 minutes each meeting, which doesn't seem like a lot, but it adds up quickly!

## WHAT SURPRISED ME THE MOST

- For a Project Manager in the IT field, I am surprisingly technology adverse and as a rule don't love change.
- I've been pleasantly surprised with how easy and intuitive Copilot is to use.
- I was unaware that Copilot could so successfully synthesize information and present it in a palatable form for all users.
- I'm excited to continue to explore its functions and find new efficiencies.

# Lessons Learned

## ProArch's Copilot Journey – Lessons Learned

### **Embracing AI is a valuable**

investment of time and resources that can significantly enhance your future success.

**Not everyone is going to be onboard.** Adoption will vary across personas and roles, affecting both the use of Copilot and the initial acceptance of the tools.

**You need an AI evangelist** to continuously generate interest and translate the technology into terms understandable by end-users.

### **Copilot is constantly improving.**

What was impossible yesterday or caused struggles may soon be addressed.

**Identify relevant use cases** for roles and personas that showcase immediate value.

**Rollout licensing in phases/groups.** Recognize that the journey is continuous—commit to an AI culture and consistently iterate and measure.

## Where does the journey go next?



### DEVELOPMENT OF AGENTS

Analyze current use cases and, where appropriate, develop agents to create narrow AI and introduce more automation and autonomous AI



### INTEGRATION WITH 3<sup>RD</sup> PARTY SOURCES

Build or source connectors to provide Copilot access to CRM and Ticketing Systems to have more grounded responses.



### EVALUATE COPILOT PAGES FOR COLLABORATION

Incorporate AI into collaborative endeavors for teams by using the new Pages feature of Copilot.



# Steps to Microsoft 365 Adoption

## Preparation

- ☐ Establish an AI Advisory Group and/or AI Evangelist
- ☐ Select Roles/ Personas
- ☐ Identify and Prioritize Pain Points by Greatest Impact

## Mapping Capabilities

- ☐ Map Pain Points to Copilot Capabilities
- ☐ Evaluate and Select 2 or 3 Use Cases
- ☐ Develop Tailored Prompts and Resources

## Implementation

- ☐ Provide Role-Specific Training Session(s)
- ☐ 4-Week Post-Training Roundtable Session
- ☐ Track Usage Metrics and Offer Support

## Continual Improvement

- ☐ Create a Center of Excellence
- ☐ Gather User Feedback Regularly
- ☐ Share Successes Internally

# How ProArch Can Help

## 6-Week Microsoft 365 Copilot Smart Start

- Establish Microsoft 365 Copilot use case(s)
- Get a roadmap for deployment
- Have a Microsoft 365 environment primed and ready for Copilot

## 4-Week ImpactNOW Assessment

Explore the potential of AI.

- Tangible working prototype of your AI/Gen AI solution
- Detailed architecture diagram visualizing the framework
- Implementation recommendations



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