ADOPTION GUIDE · BUSINESS OWNERS & MANAGERS

AI Agents & Microsoft 365 Copilot Adoption Guide

A practical, step-by-step path from "we should be using AI" to real time savings—covering use cases, data readiness, security, piloting and rollout.

Who this is for: owners and managers of small and mid-sized businesses who want practical results from AI—without putting company data at risk.

1 Start with the work, not the tool

List the repetitive tasks that eat your team's week. The best first AI projects are **high-volume, rules-based and low-risk**. Common starting points:

Front desk & customer service

Answering common questions, taking messages and booking appointments after hours.

Sales & lead follow-up

Qualifying inbound leads and drafting follow-up emails for review.

Operations & finance

Moving data between invoicing, CRM and email without re-typing it.

Everyday office work

Summarizing email threads and meetings, drafting proposals, analysing spreadsheets.

2 Choose the right kind of AI

Microsoft 365 Copilot	Works inside Outlook, Word, Excel, PowerPoint and Teams using your organization's own data. Best for speeding up everyday office work.
Custom AI agent	A chat or voice assistant trained on your business knowledge that answers customers or staff and hands off to a person when needed.
Workflow automation	AI steps inside a process—reading an email, extracting details, updating your CRM or invoicing system.

3 Readiness checklist

- [ ] Everyone signs in with **multi-factor authentication** (MFA).
- [ ] **Sharing permissions reviewed** in SharePoint, OneDrive and Teams. Copilot respects existing permissions, so anything a user can already open, Copilot can surface for them.

- [ ] Old, duplicate and outdated files archived so AI answers come from current information.
- [ ] Sensitive folders (HR, finance, legal) restricted to the right people; sensitivity labels applied where available.
- [ ] Licensing confirmed — Microsoft 365 Copilot is a per-user add-on to eligible Microsoft 365 plans; check current eligibility and pricing with Microsoft or your licensing partner.
- [ ] A written **AI use policy**: which tools are approved, and what must never be pasted into public AI tools (client data, passwords, financials, personal information).
- [ ] A named owner for each AI project who reviews results and handles exceptions.

4 Pilot before you roll out

- [ ] Pick **3–10 people** and one or two use cases for a 30-day pilot.
- [ ] Record how long the task takes today so you can measure the difference.
- [ ] Hold a hands-on training session using your team's real documents and tasks.
- [ ] Collect feedback weekly: what worked, what was wrong, what was risky.
- [ ] For customer-facing agents, test with real questions and define when the agent must hand off to a person.

5 Roll out, measure, improve

- [ ] Expand to more users or more use cases based on pilot results.
- [ ] Share a short "how we use AI here" guide and good example prompts with staff.
- [ ] Track time saved, response times and error rates monthly.
- [ ] Review agent conversations and automation logs regularly and update the knowledge they use.
- [ ] Re-check permissions and the AI use policy at least once a year.

6 AI opportunity worksheet

List candidate tasks with your team. Tasks that are frequent, time-consuming and low-risk make the best first projects.

Task	How often	Time each	Systems / data involved	Who reviews output	Risk (L/M/H)

Find your first AI win

Book an AI consultation and we will help you pick, pilot and secure the right use case.

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