



Copilot Adoption Starter Checklist

A simple downloadable checklist for business owners and managers who want to start using Microsoft 365 Copilot the right way.

What is this checklist?

This checklist helps your business identify where Microsoft 365 Copilot can save time, reduce manual work, and support safer AI use inside Outlook, Word, Excel, Teams, OneDrive, and SharePoint.

Why do you need it?

- To avoid buying Copilot licenses without a clear use case.
- To choose the first workflow where Copilot can create visible value.
- To check whether your team is ready for training, permissions, and safe adoption.
- To create early wins before expanding Copilot across the business.

Who needs it?

- Business owners exploring Microsoft 365 Copilot.
- Managers responsible for productivity, sales, service, admin, or operations.
- Team leads who want to test Copilot with one group first.
- IT or operations staff supporting a practical Copilot rollout.
- Training coordinators preparing employees for AI-enabled work.

When to use this checklist

- Before purchasing or assigning Copilot licenses.

- Before launching a pilot group.
- Before employee training begins.
- When leadership wants proof that Copilot can save time.
- When your team is unsure which workflow to improve first.

Instructions: How to use it

1. Review the business goals and check the areas where your team needs the most help.
2. Identify which Microsoft 365 apps your team already uses every day.
3. Pick the top three time-consuming tasks that repeat every week.
4. Choose one workflow to test first with a small group.
5. Answer the readiness questions before assigning licenses widely.
6. Create a simple training plan using real business examples.
7. Track success using practical measures like time saved, faster replies, and better follow-ups.

Section 1: Business goals

Why this matters: Clear business goals help your team connect Copilot to real outcomes, not just software usage. When employees know the purpose behind adoption, they are more likely to use Copilot for work that saves time, improves quality, and supports business priorities.

- ☐ We want to save time on emails.
- ☐ We want to create documents faster.
- ☐ We want better meeting notes and follow-ups.
- ☐ We want faster reporting.
- ☐ We want better use of Microsoft 365.
- ☐ We want to reduce manual admin work.
- ☐ We want employees to use AI safely and practically.

Section 2: Current Microsoft 365 use

Why this matters: Copilot works best when it supports the Microsoft 365 apps your team already uses every day. Understanding current app usage helps you choose practical training examples, assign licenses to the right people, and avoid forcing adoption into tools that are not part of daily work.

- ☐ Outlook
- ☐ Word
- ☐ Excel

☐ PowerPoint

☐ Teams

☐ OneDrive

☐ SharePoint

Section 3: Time-consuming tasks

Why this matters: Copilot adoption should start where your team feels the most friction. Identifying repeated, time-consuming tasks helps you select workflows where Copilot can deliver quick wins, reduce frustration, and prove value before expanding adoption across more departments.

☐ Writing emails

☐ Replying to customers

☐ Creating proposals

☐ Writing reports

☐ Analyzing spreadsheets

☐ Building presentations

☐ Summarizing meetings

☐ Finding files or information

☐ Managing follow-ups

Section 4: First Copilot use case

Why this matters: Choosing one first use case keeps adoption simple and focused. Instead of trying to change everything at once, your team can test Copilot in one workflow, learn what works, collect feedback, and build confidence before scaling to more tasks.

Our first Copilot workflow will be:

Why this workflow?

Who should test it first?

Section 5: Readiness questions

Why this matters: Readiness questions help you avoid common rollout problems such as unclear ownership, poor file organization, permission issues, and unsafe data sharing. A quick readiness check makes Copilot adoption more secure, practical, and easier for employees to trust.

- ☐ Do we know which employees need Copilot?
- ☐ Do we know which Microsoft 365 apps they use daily?
- ☐ Are our files organized enough for people to find information?
- ☐ Do we understand basic permissions and access?
- ☐ Do employees know what kind of information should not be shared?
- ☐ Do we have a simple training plan?
- ☐ Do we know how we will measure success?

Section 6: Training plan

Why this matters: Training turns Copilot from a feature into a daily work habit. A simple training plan helps employees practice with real examples, learn useful prompts, share wins, and apply Copilot consistently instead of experimenting without direction.

- ☐ Train one small group first.
- ☐ Pick one workflow.
- ☐ Practice with real business examples.
- ☐ Collect useful prompts.
- ☐ Share wins with the team.
- ☐ Review what worked.
- ☐ Expand to the next workflow.

Section 7: Success measurement

Why this matters: Measuring success helps leadership see whether Copilot is creating real value. Tracking simple wins like time saved, faster replies, better drafts, and employee confidence makes adoption easier to justify, improve, and expand over time.

- ☐ Time saved
- ☐ Faster replies
- ☐ Better document drafts

- ☐ Fewer missed follow-ups
- ☐ Better meeting notes
- ☐ More consistent work quality
- ☐ Employee confidence using Copilot

Final action

Why this matters: A final action turns the checklist into a decision. Writing one next step helps the business move from interest to implementation, whether that means choosing a pilot group, preparing training, reviewing licenses, or booking a Copilot adoption session.

The next step for our business is:
