

# 8 KEYS TO SUCCESS WITH **AI & MICROSOFT COPILOT®**

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# INTRODUCTION

## What is Microsoft Copilot?

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Microsoft 365 Copilot® is an AI-powered digital assistant and productivity tool. It provides real-time intelligence that enables users to complete tasks more efficiently, enhance their productivity and skills, and improve their overall work experience. Copilot pairs with everyday Microsoft apps, such as Word, Excel, PowerPoint, Outlook, Teams, and more.



*Microsoft Copilot empowers organizations by streamlining workflows, enhancing collaboration, and driving efficiency through AI-powered insights and automation, enabling teams to focus on strategic initiatives and achieve greater business outcomes.*

# Benefits of Copilot

Some of the most common benefits of Microsoft Copilot include enhanced employee productivity, improved collaboration across teams, and powerful data insights. Beyond these, users can automate repetitive tasks with Copilot Actions, manage calendars and meetings, create and edit content, and transform business processes with agents in Copilot Studio. Microsoft studies even show that 70% of Copilot users are more productive, and 68% claimed AI improved the quality of their work.

While it is easy to understand the benefits of Copilot and AI, it's something else entirely to implement them into your organization and see real results. From data governance to phased implementations to seeing results, deploying Copilot is more than just flipping a switch. This eBook will explore best practices, expert insights and advice, and tips and tricks to successfully implementing AI and Copilot.



**70%**

**Copilot users  
are more  
productive**



**68%**

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claimed AI improved the  
quality of their work**

## BEYOND THE BASICS, COPILOT CAN

### **AUTOMATE.**

Automate the recruitment process by screening resumes, scheduling interviews, and sending follow-up emails

### **TRACK.**

Track employee performance by collecting and analyzing data from various sources, such as project management tools and feedback forms

### **MANAGE.**

Manage payroll processing, benefits enrollment, and compliance reporting

### **PROVIDE.**

Provide real-time language interpretations in Microsoft Teams meetings

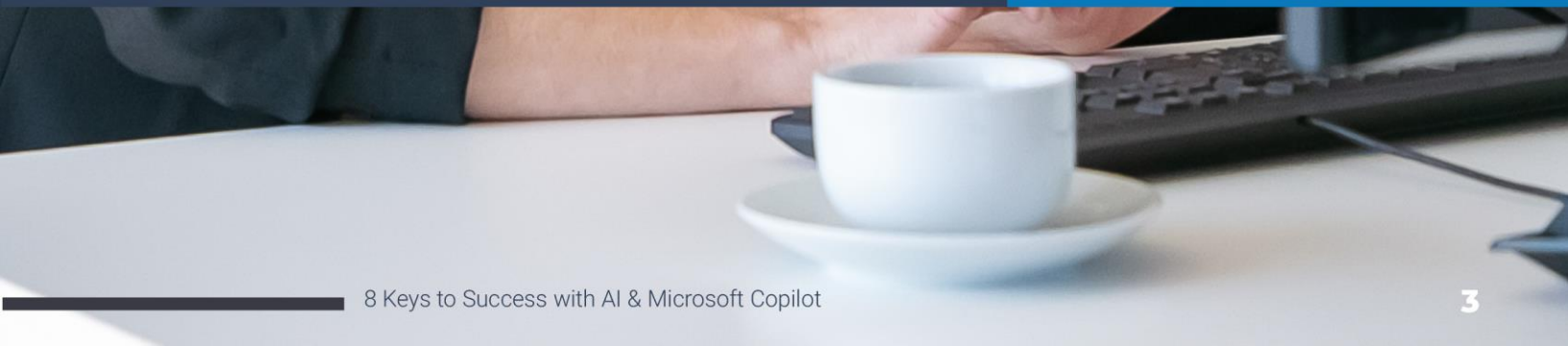
### **ANALYZE.**

Analyze data-backed insights to support quicker and more informed decision-making





# Keys to Success



## KEYS TO SUCCESS

# Make a Plan

Perhaps the most important factor that contributes to a successful experience with artificial intelligence is setting goals and expectations prior to implementation. Your team should be on the same page about what you are using the solution for, what you expect your experience to look like, and how you plan to measure success. The biggest driver for AI adoption is productivity gain, but it's best to be clear on exactly what that looks like in your business, as well as how it will set your business up for growth and success in the future.

In the case of Copilot, it is also recommended to plan which systems will be using Copilot. Do you plan to start with an all-in approach, where you integrate it with all your systems at once? Or, will you implement in phases, starting with Outlook or Teams and moving on to your ERP or CRM in the future?



"With AI, like any tool, success begins with strategy. Creating a dedicated team to evaluate your organization's use cases, risks, and opportunities ensures you leverage Copilot with intention rather than improvising as you go."

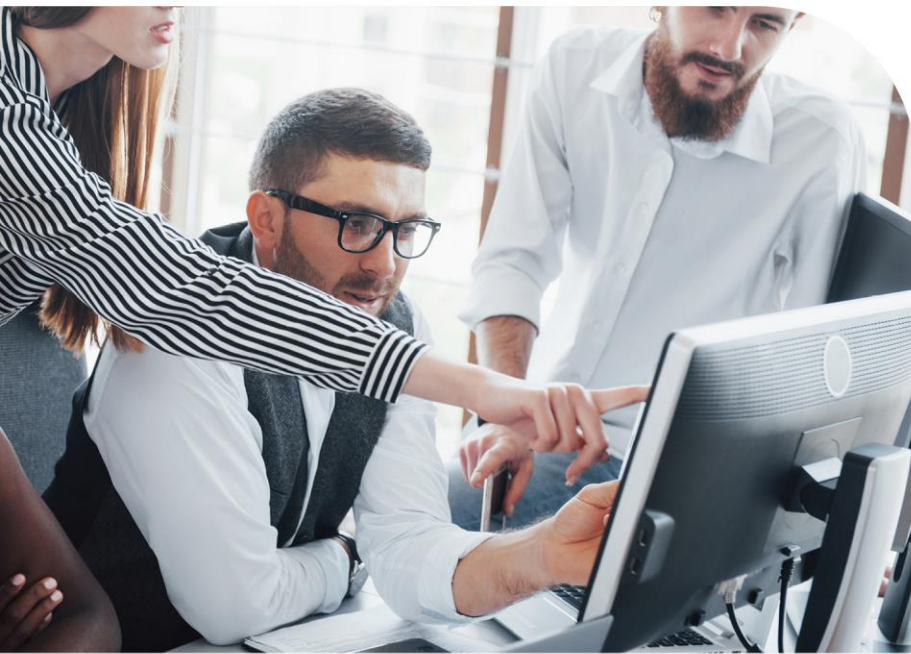
- Mégan Alba, Marketing Director, [Martus Solutions](#)



## KEYS TO SUCCESS

# Prepare Your Data

Proper data governance is key when it comes to implementing any sort of AI solution. Companies should thoroughly audit their data infrastructure to identify any potential issues before deploying AI solutions like Copilot. Before implementation, ensure your security, privacy, and compliance policies are robust and aligned with Microsoft's best practices. It's possible that users have access to inappropriate data or that there are gaps in data security measures that need to be addressed before full implementation. Safeguarding sensitive information when leveraging new technologies is critical to maintaining data integrity and trust across your organization.



## HOW WE RECOMMEND YOU APPROACH DATA PREPARATION

### 1.

Evaluate your data sources and connectivity. Since Copilot may pull information from multiple sources (such as your CRM, ERP, etc.), it's important to assess these systems for compatibility and connectivity with Copilot.

### 2.

Ensure your data is accurate and complete. We recommend evaluating each of your data sources to identify gaps, outdated information, or inconsistencies in order to prevent skewed or inaccurate results or recommendations. In addition, remove duplicate information to minimize confusion and errors.

### 3.

Standardize your data formats. Consistent data formatting across systems can avoid mismatches or errors when Copilot interprets data.

## KEYS TO SUCCESS

# Use Your Resources

You are not the first company to deploy Copilot, nor will you be the last. One of the biggest recommendations for guaranteeing a successful deployment (and usage afterward!) is to use the resources available to you.

First off, Microsoft has created the [Copilot Success Kit](#). This documentation is designed to help support your Copilot implementation, as well as make the case for the solution.

**It includes:**

- Implementation Summary for Leaders
- User Enablement Guide
- Technical Readiness Guide
- Business Leaders' Guide to AI Adoption
- Scenario Library (Interactive Website)
- Modern Management of Microsoft 365 Apps
- And more!

Beyond that, there are many tools and resources you can use to help manage your data, such as:

**MICROSOFT GRAPH**

Connects your organization's data with Microsoft 365 applications, enabling Copilot to provide relevant and personalized responses. This is used primarily to help ensure your data is secure and accessible to the right roles.

**COPILOT SETUP GUIDE**

You're not on your own with implementation. Use the Copilot Setup Guide (available in Microsoft 365 Admin Center) and follow the recommended steps to streamline the process and eliminate any possible bumps in the road.

**MICROSOFT 365 ADMIN CENTER**

Manages administrative roles and ensures your data security and compliance settings are up to date. This is key for data governance and ensuring everything is in the right place with the correct access.

**MICROSOFT PURVIEW  
INFORMATION PROTECTION**

Use this to manage and protect your data across your Microsoft 365 environment.





# 4.

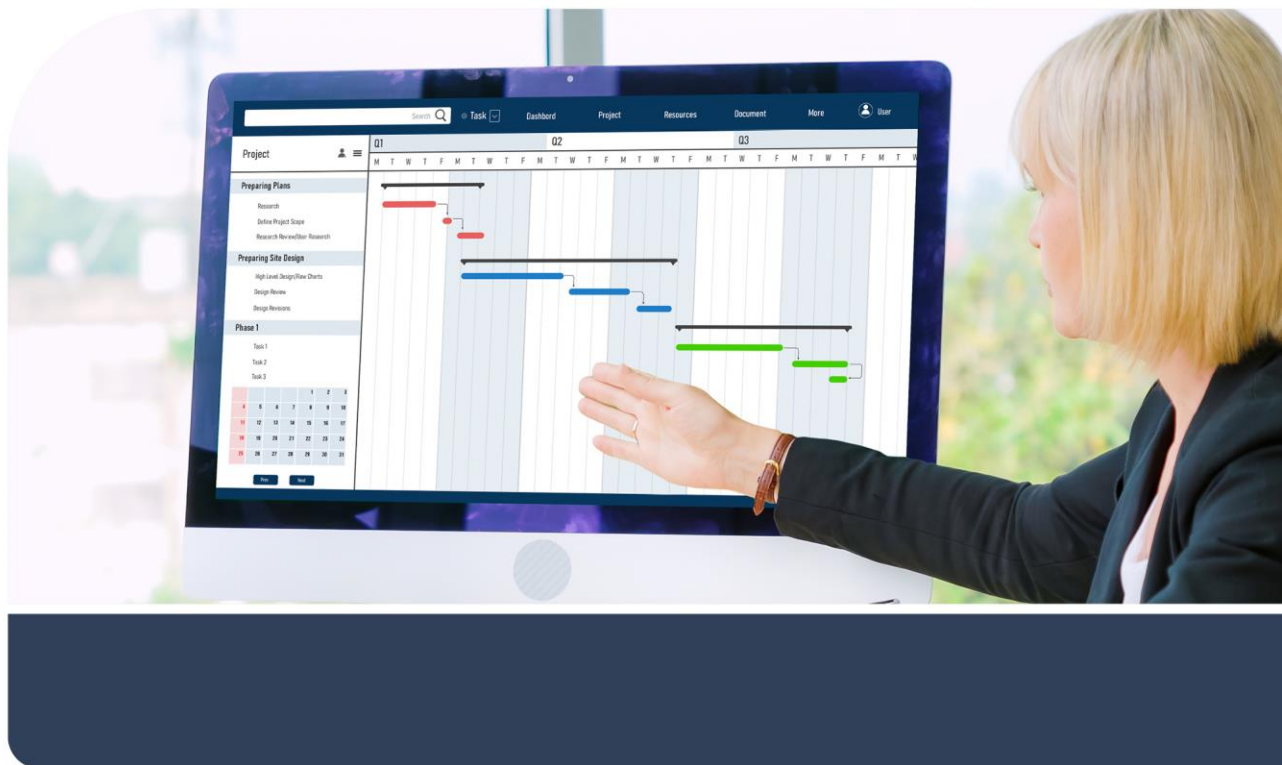
## KEYS TO SUCCESS

# Deploy in Phases

To ensure a successful deployment of Copilot, a phased implementation is best. While it primarily minimizes risk and allocates resources more efficiently, it also allows for more robust user training and support – further enhancing the success of the project internally.

First, choose a small group of early adopters to grant access to Copilot. Allow this group to learn their way around and test the solution in their daily work life. Then, bring in the leadership team. Subsequently, onboard a team of employees who may be more “tech savvy” and open to this new change in their routine. Finally, deploy Copilot to the rest of the employees.

A phased approach allows for a gradual and controlled rollout across the organization. In addition, it allows your business to better manage complexities and any errors that may arise, as well as maximize your user acceptance and achieve a more efficient and tailored deployment process.



## KEYS TO SUCCESS

# Educate Your Team

It is critical to conduct comprehensive training sessions aimed at ensuring all your users fully understand Copilot. Providing training on how to leverage Copilot capabilities and how it will seamlessly integrate into their daily workflows will drastically increase your success rate, rather than simply taking a “sink or swim” approach. Conduct new learning sessions or workshops to keep everyone informed whenever there are new developments or best practices. In the end, Copilot will only be successful if all your employees are successful.



AI's success depends on its users. Asking the right questions and investing in ongoing education and training ensures your team fully embraces Copilot and maximizes its potential.

- Vanessa Chambers

VP of Product and Service Delivery,  
*Martus Solutions*

## A FEW BENEFITS OF CONTINUOUS TRAINING AND EDUCATION AROUND COPILOT

**1.**

Helps your users understand how AI works and what its capabilities and limitations are.

**2.**

Keeping your employees informed can increase trust and confidence in the technology.

**3.**

Well-trained users will use the product more efficiently, maximizing your key performance indicators such as productivity, decision-making, and overall performance.

**4.**

Overcoming any initial resistance to change and encouraging a positive attitude toward AI technology.

# 6.

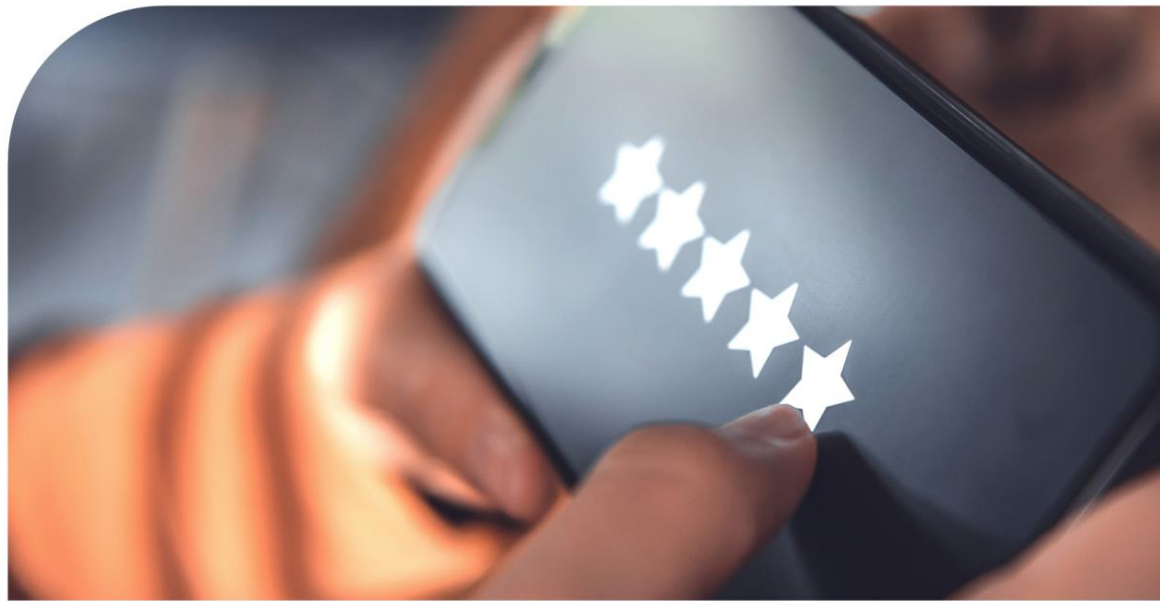
## KEYS TO SUCCESS

# Implement An Employee Feedback Loop

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The truth is that it will take time to use Copilot to its full potential. One way to get there faster is to establish some sort of employee feedback loop that allows employees to share their experiences and provide feedback that you can cross-reference with performance metrics to identify any issues, inconsistencies, or areas of improvement.

Consider sending regular surveys and asking for regular, formal feedback. Allow your employees to ask questions and discuss challenges, as well as offer answers and advice for others on the team. These are honest ways to provide a clear picture of how your employees are receiving Copilot.





## KEYS TO SUCCESS

# Track Your Metrics

While Copilot is still in its early years of deployment and adoption, tracking the success of the technology within your business is crucial.

Tracking the metrics on the right can help you build a well-rounded view of Copilot's early impact, from user engagement to measurable business outcomes.



A FEW METRICS YOU CAN TRACK TO MEASURE THE SUCCESS OF COPILOT:

## User Adoption and Engagement

Focus on metrics like daily active users, session lengths, and feature utilization rates to understand which features your users are engaging with most frequently and how Copilot fits into their day-to-day work life.

## Productivity and Efficiency Gains

Monitor task completion time and efficiencies gained in report generation, document creation, and data analysis. By comparing time spent on key tasks before and after Copilot implementation, you can measure how well it reduces manual workloads.

## Open Opportunities and Close Rates

If Copilot is used to automate menial tasks, improve the quality of marketing content, and streamline customer interactions such as emails and meetings, your sales team can focus on what they do best, which leads to improved close rates.

## KEYS TO SUCCESS

# Enforce AI as a Corporate Strategic Initiative

To succeed with AI and Copilot, every member of your business has to believe in the solution and the benefits it will bring your company – from C-level leaders to sales and marketing to IT and support to HR and beyond. Consider aligning the use of AI with your business goals, starting from the top. This will greatly impact your business's ability to adapt and embrace Copilot.

Making AI a corporate strategic initiative can unlock significant advantages, from increased efficiency and cost savings to enhanced innovation and customer experiences. Organizations must approach AI integration thoughtfully, ensuring it aligns with their overall business strategy and incorporates continuous learning and adaptation. The reality is that AI is not going anywhere, anytime soon, and companies that embrace it and use it to their advantage will better maintain their competitive advantage.



AI isn't magic, and it won't fix broken processes on its own. To get real results, leadership must treat AI like any other strategic investment: align it with business goals, train your team, and continuously refine how it's used. The companies that succeed with AI aren't the ones that add it to their tech stack; they're the ones that commit to it, measure its impact, and adapt as they learn.

- Paul Wheeler, CTO, [Martus Solutions](#)

# CONCLUSION

## Copilot Microsoft Integrations

As a part of the Microsoft 365 ecosystem, Copilot can seamlessly integrate with various Microsoft products to lead to further business success. While Teams, Outlook, PowerPoint, Word, and Excel are the most common, here are a few others:

- D365 Business Central
- Power Platform
- D365 Sales
- Viva
- OneNote
- SharePoint

Copilot's ability to connect with so many Microsoft systems and simultaneously pull information from different apps at once allows for a more cohesive, and more successful, business experience.

Connected systems with accessible data can improve visibility and decision-making, automate tasks easier, and much more.



“We see the potential for Copilot to change how businesses and organizations interact with knowledge bases, both internally for employees and externally for customers. By integrating Copilot into existing systems, companies can harness the power of LLMs (large language models) to make knowledge more accessible, actionable, and contextual.”

– Caitlin Walter, QA Engineer, [Martus Solutions](#)



# FINAL WORDS



Looking into the future, it is likely that Copilot will become an increasingly intuitive and adaptable part of Microsoft systems. With 28 million active users worldwide and counting, as well as constant innovation and new features being added by Microsoft, Copilot is here to stay. With technology advancing so rapidly, companies that do not consider the modern business tools available today, such as Microsoft Copilot and other artificial intelligence solutions, will ultimately be left behind. Microsoft studies even show that 30% of employees have said access to Copilot/AI would influence their choice of an employer, and it's likely this number will increase in the future as AI becomes more prevalent.

With these eight keys to success, hopefully implementing Copilot, or any AI solution, into your business strategy doesn't seem quite so overwhelming. In fact, optimizing your operations from every corner of your business should be easier than ever.



## About

**Martus helps organizations bridge the gap between mission and finances.** We enable teams to budget faster, report easier, and forecast better. By integrating with your existing ERP or accounting system, we can provide real-time data and actionable insights so you spend less time budgeting and more time engaging in what matters most: your organization's mission.

Because Martus looks and feels similar to a spreadsheet, it's easy for non-financial team members, yet powerful enough to handle complex budgeting processes.

We've helped 850+ organizations transform their financial planning process and cut their budgeting time by 50% over traditional spreadsheets.



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