

The background of the entire page is composed of several thick, wavy, blue lines that create a sense of movement and depth, flowing from the top left towards the bottom right.

— MICROSOFT 365 COPILOT IMPLEMENTATION

From Copilot installation to AI that actually delivers value.

Implementing Microsoft 365 Copilot takes more than activating licenses. We help organizations with readiness, strategy, pilots, adoption and scaling.

IN SHORT

Implementing Microsoft 365 Copilot takes more than activating licenses. We help organizations with readiness, strategy, pilots, adoption and scaling.

PHASES	Readiness, Strategy, Pilot, Rollout, Scale
CONTINUOUS	Security, governance, adoption and measurement
FOR	Organizations with Microsoft 365 that are adopting Copilot
START	A Copilot readiness conversation

WHAT YOU GET

- Copilot Readiness Report
- Copilot Strategy & Roadmap
- Pilot Evaluation
- Organization-wide Adoption
- AI & Agent Roadmap

BUILT ON OUR SERVICES

01

AI-readiness scan

02

AI strategy & roadmap

03

AI implementation

04

AI literacy

05

AI governance

Copilot is not an IT project

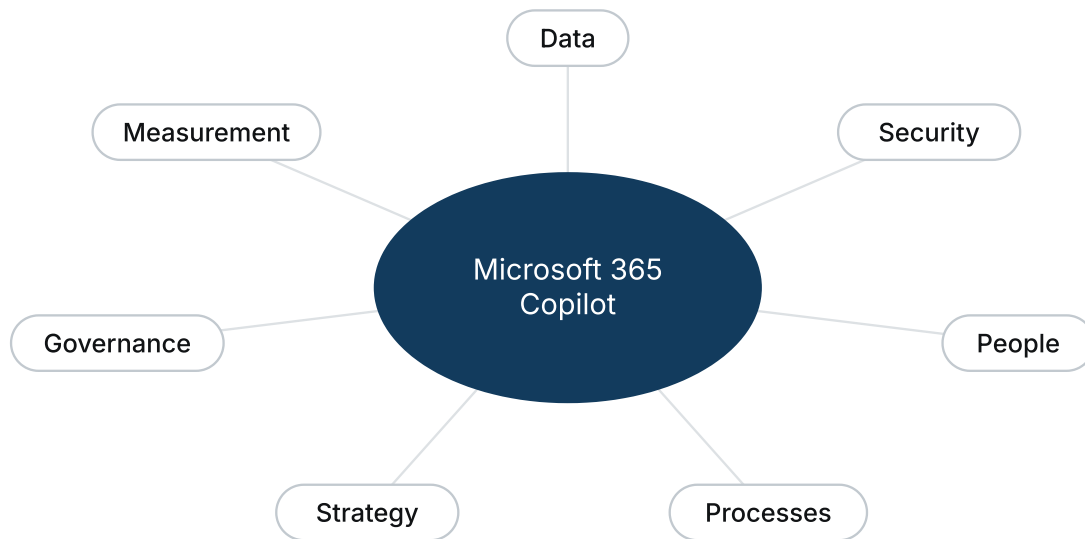
Microsoft 365 Copilot is technically fairly easy to activate. The challenge lies in making data safely available, finding valuable applications, changing work processes and demonstrating the return.

A successful implementation therefore spans several disciplines: technology, data, security, strategy, people, processes, governance and measuring value. Copilot sits at the intersection of them.

What happens when Copilot is treated as an IT project anyway is fairly predictable. Licenses are assigned, an introductory e-mail goes around and a few weeks later only a handful of enthusiasts still use it. Everyone else falls back on the old way of working, because nobody showed them which task could now be done differently.

So we start with the work itself. Which tasks take up a lot of time, which information is hard to find and where is there repetition? From that picture we set up the technology, record what is and is not allowed and measure whether the use really produces something.

The disciplines around Copilot



Data

Copilot works with the information users have access to. Good data governance is therefore an important part of readiness.

Security

Identity, access, sensitivity labels and DLP determine what Copilot may and may not see.

People

Adoption ultimately determines whether the investment actually delivers value.

Processes

The gains appear where work processes change: meetings, reporting, finding information.

Strategy

Without choices, Copilot remains a collection of experiments. Strategy determines what matters.

Governance

Rules and responsibilities become more important as AI is used more widely within the organization.

Measurement

What is not measured stays a feeling. Adoption, behavior and impact make the return visible.

One approach. Five phases.

An organization does not install Copilot, it goes through a journey. Each phase answers one question and delivers one concrete result.

01 Readiness ASSESS Is the organization ready?	02 Strategy PRIORITIZE Where does Copilot create value?	03 Pilot VALIDATE Does it work in practice?	04 Rollout ADOPT How does it become part of daily work?	05 Scale EXPAND What comes next?
SECURITY	GOVERNANCE	ADOPTION	MEASUREMENT	
Phase	Key question	Result		
01 Readiness	Is the organization ready?	Copilot Readiness Report		
02 Strategy	Where does Copilot create value?	Copilot Strategy & Roadmap		
03 Pilot	Does it work in practice?	Pilot Evaluation		
04 Rollout	How does it become part of daily work?	Organization-wide Adoption		
05 Scale	What comes next?	AI & Agent Roadmap		

What we deliver

After every phase the organization holds something concrete: a document on which the next decision can be taken.

01 · READINESS

Copilot Readiness Report

The technical status, the state of your data, security and compliance, the main risks and a concrete recommendation for the pilot.

02 · STRATEGY

Copilot Strategy & Roadmap

Strategic goals, personas, prioritized use cases, KPIs and a roadmap with a recommended pilot group.

03 · PILOT

Pilot Evaluation

Usage data, feedback, the use cases that work, the problems that surfaced, training needs and recommendations for the rollout.

04 · ROLLOUT

Organization-wide Adoption

A phased rollout plan, communication, role-based training, a champions network, support and an adoption dashboard.

05 · SCALE

AI & Agent Roadmap

Analysis of adoption and impact, new use cases, an agent roadmap, integration options and governance for the next phase.

PHASE 01

Readiness *Is the organization ready?*

This phase examines whether the organization is ready, technically, organizationally and in terms of data, to use Copilot responsibly. We look inside the environment itself and speak to the people who work in it every day. The answer determines whether you can start and where work remains first.

Technical readiness

We start in the Microsoft 365 tenant. Which licenses are assigned, how is Entra ID set up, does Exchange Online run in the cloud and are the Microsoft 365 apps current enough to support Copilot? Together with your administrators we go through the access configuration and the other technical prerequisites. This is usually the shortest part of the assessment, because the technology is further along than people expect.

Data readiness

Copilot sees everything a user can reach. So we go through SharePoint, Teams and OneDrive: how are documents structured, who has access to what and which sites are open to the whole organization when that was never the intention? We map oversharing, track down outdated documents that Copilot would otherwise present as current truth and decide which sources really matter for the first use cases. In practice this is where most of the work sits.

Security and compliance

With your security and compliance colleagues we review Microsoft Purview, the sensitivity labels, the DLP policy, privacy and retention. We test whether sensitive information is labeled recognizably and whether the access policy holds up once Copilot combines data from different corners of the environment. Anything that does not hold up is written down as a concrete action with an owner.

How we assess it

We hold conversations with IT, security, a number of end users and someone from management, and we also look inside the environment with read access. Every component gets a status and an improvement action. That way you know afterwards what you can pick up yourself, where you need help and which department lends itself best to a pilot.

— RESULT

Copilot Readiness Report

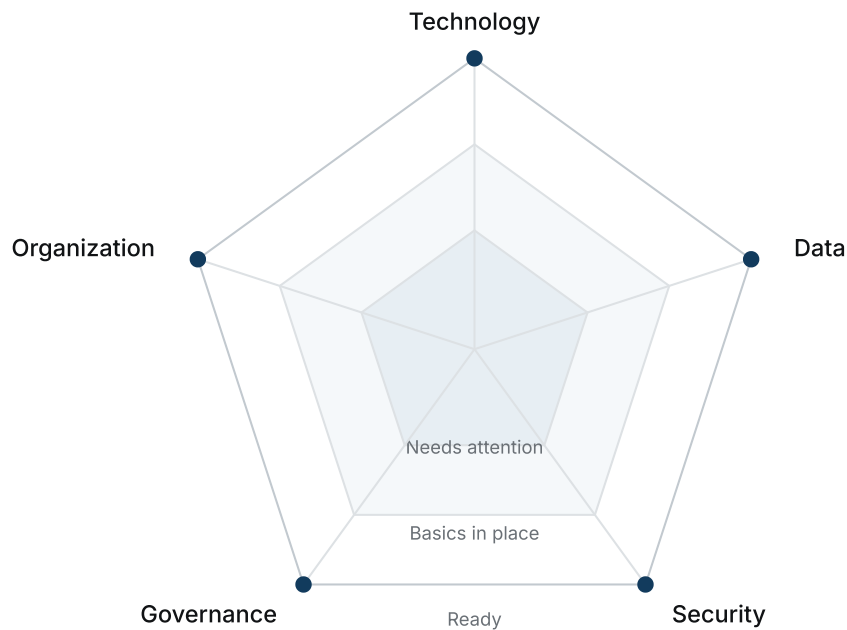
The technical status, the state of your data, security and compliance, the main risks and their impact, improvements with an owner, readiness per component and a substantiated recommendation for the pilot.

KEY QUESTION

Is the organization ready?

Readiness radar

Assessment framework: the five parts of the Copilot readiness assessment. Without scores, those follow from your own assessment.



Technology

Tenant, licenses, identity, Exchange Online, the Microsoft 365 apps and the technical prerequisites.

Data

Structure and permissions in SharePoint, Teams and OneDrive, oversharing, outdated content and the most important sources.

Security

Purview, sensitivity labels, DLP, privacy and the access policy that determines what Copilot may see.

Governance

Who decides, who manages and which rules apply to the use of AI in the organization.

Organization

Support, ownership, available time and the willingness to change ways of working.

PHASE 02

Strategy *Where does Copilot create value?*

This phase determines what the organization actually wants to use Copilot for. Daily work is at the center, the technology follows. We work with the teams themselves, because they know where the time goes.

Strategic goals

In working sessions with management and teams we look for the work where time disappears. Meetings that have to be written up afterwards, reports that are assembled again every month, information that lives in four systems at once and documents nobody can find. We connect those observations to the goals that matter this year, so that Copilot becomes something management actively manages as well.

Use cases

Those sessions produce a list of concrete applications. These come back in almost every organization:

- Summarizing meetings
- Analyzing documents
- Preparing reports
- Drafting e-mails
- Combining information from several documents
- Preparing presentations
- Research
- Unlocking internal knowledge

Personas

We link use cases to roles, because a manager gets something different out of Copilot than a consultant does. Management: meetings, reports and decision-making. Sales: customer preparation, e-mail and CRM information. HR: policy, vacancies and internal communication. Consultants: research, analyzes and reports. Project management: meetings, planning and documentation. For every persona we describe which tasks change and which training belongs with them.

Prioritization

We assess every use case on potential time saved, frequency, number of users, complexity, risk, availability of data and expected business value. Those scores go into a matrix of value against complexity. Whatever lands in the top left is what you do first. The rest gets a place on the roadmap or is deliberately dropped.

KPIs

For every use case we agree what we are going to measure, so the pilot has something to show later. Think of the time a monthly report takes, the lead time of a quote or the number of times someone finds information without e-mailing a colleague.

RESULT

Copilot Strategy & Roadmap

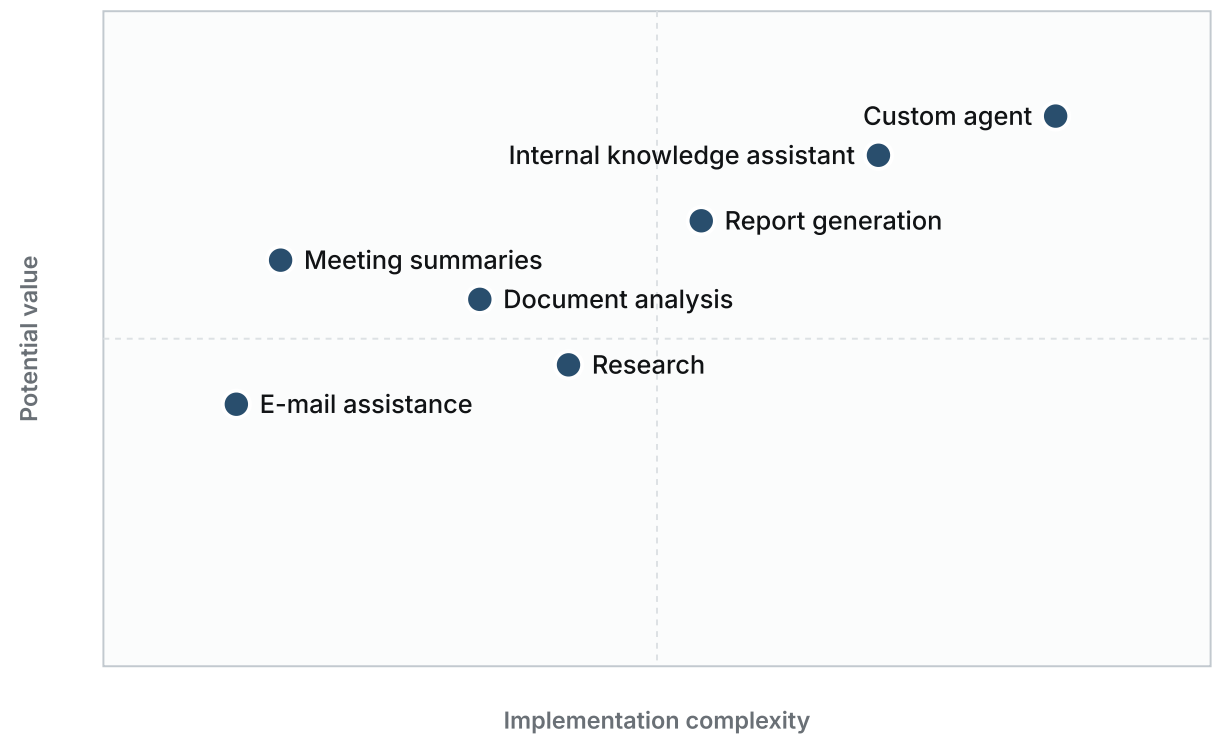
Strategic goals, personas, prioritized use cases, expected benefits, KPIs, a roadmap and a recommended pilot group.

KEY QUESTION

Where does Copilot create value?

Use-case prioritization matrix

Positions are illustrative, not empirical scores. Which use case comes out on top differs per organization.



Use case	Audience	Potential value	Complexity	Copilot in
Meeting summaries	Everyone who meets a lot	High with many meetings	Low	Teams
E-mail assistance	Sales, support, management	Medium	Low	Outlook
Document analysis	Consultants, policy, legal	High	Medium	Word, Copilot Chat
Research	Consultants, analysts	Medium to high	Medium	Copilot Chat
Report generation	Management, finance, project management	High	Medium to high	Word, Excel, PowerPoint
Internal knowledge assistant	Whole organization	High with good data	High	Copilot Chat, SharePoint
Custom agent	One specific process	High for that process	High	Copilot Studio

PHASE 03

Pilot *Does it work in practice?*

Copilot is first tested in a controlled way with a limited group of users. That way you know what works before the whole organization joins. The pilot runs long enough for habits to form and short enough to keep everyone sharp.

Pilot group

Twenty to fifty users from different roles, with a representative mix of functions and experience. We deliberately include a few skeptics. Their objections are exactly what you want to hear before the rest of the organization takes its turn.

Technical set-up

Licences, user groups, configuration, security, access and a delimited pilot environment. The risks from the readiness assessment are tested here in practice: do the agreements about access and labels hold up once people really work with them?

Use-case experiments

Staff work with scenarios from their own practice. Summarizing three meetings, comparing two versions of a contract, preparing a monthly report or collecting information from policy documents. Every experiment has an owner and a moment at which we look together at what it produced.

Training

Copilot fundamentals, prompting, giving context and checking results, applied in Word, Excel, PowerPoint, Outlook and Teams. We train in small groups using the participants' own documents, because general demos rarely stick.

Feedback and measurement

We collect usage data and speak to participants at fixed intervals. What works, what produces nothing, where do problems arise, which training is missing and which data issues surface? Those signals determine what has to be different in the rollout.

RESULT

Pilot Evaluation

Usage data, feedback, the use cases that work, problems, training needs, technical issues, security and data issues, KPI results and recommendations for the rollout.

KEY QUESTION

Does it work in practice?

Pilot journey

01 Select

A representative group of twenty to fifty users from different roles.

02 Configure

Licenses, user groups, security and access for the pilot environment.

03 Train

Copilot fundamentals, prompting, giving context and checking results, per app.

04 Experiment

Concrete scenarios: summarizing meetings, comparing documents, preparing reports.

05 Measure

Use, feedback, valuable use cases, problems and data issues.

06 Learn

What works, what is missing and what the rollout needs.

PHASE 04

Rollout *How does it become part of daily work?*

A successful pilot is not yet a successful organization-wide implementation. In this phase the focus shifts to adoption: how does Copilot become part of daily work? Technology is the smallest part here.

Phased rollout

We roll out in waves, so support and training can keep up. An example: wave 1 management, wave 2 sales and HR, wave 3 consultants, wave 4 operations, wave 5 the rest of the organization. The order differs per organization and usually follows the use cases that worked best in the pilot.

Change and adoption

Communication, introduction sessions, training, workshops, an FAQ, demos, office hours and feedback channels. What matters most is that people see what a colleague with the same job does with it. One recognizable example from their own team convinces more than a vendor presentation.

Champions

An internal champions network. Champions help colleagues, collect use cases, flag problems, share what works and give feedback to the project team. We help select, train and make that group visible, and make sure there is time for it in their calendars.

Role-based training

Managers: Copilot for meetings, decision-making and reports. HR: policy, communication and document work. Sales: customer preparation and communication. Consultants: research, analysis and reports. Every session uses documents and situations from people's own work, so they can carry on with it straight away.

Support and measurement

We set up support for the questions that come after the training and build an adoption dashboard with use, active users and the most popular functions per department. Teams that lag behind get targeted help instead of a reminder e-mail.

RESULT

Organization-wide Adoption

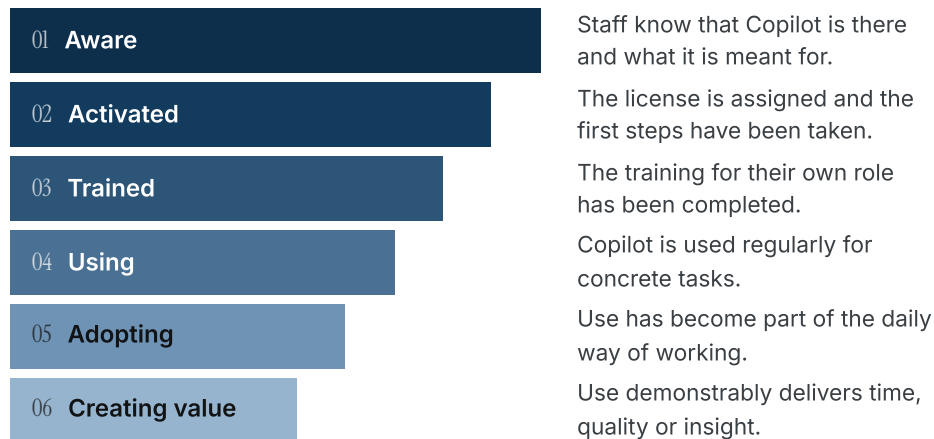
A phased rollout plan, user groups, communication, role-based training, a champions network, support, an adoption dashboard and a feedback mechanism.

KEY QUESTION

How does it become part of daily work?

Adoption funnel

The funnel shows the process, not percentages. Those come from your own adoption dashboard.



PHASE 05

Scale *What comes next?*

The implementation does not end when Copilot has been rolled out. The next step is to see how the organization can take AI further. Copilot is the starting point for what comes after that.

Measure

Use, adoption, popular functions, differences between departments, lagging user groups, productivity and business impact. We connect those figures to the KPIs from the strategy phase, so the conversation about the return can be held on facts.

New use cases

The rollout always produces applications nobody thought of beforehand. We collect them, assess them again on value and complexity and put them on the roadmap.

Custom agents

Organization-specific agents, for example an HR agent that answers questions about leave and policy, a sales agent that gathers customer information or a policy agent that checks documents against internal rules. We build them in Copilot Studio, start small and test with the people who do the work.

Integrations

Connecting AI to CRM, ERP, knowledge bases, databases and internal systems, so answers hold up outside the Microsoft 365 world as well. For every integration we weigh value, maintenance effort and risk.

Governance

As the number of AI applications grows, processes emerge for agent approval, data access, testing, ownership, monitoring and lifecycle management. We record who decides what and when an application is retired, so the portfolio stays manageable.

— RESULT

AI & Agent Roadmap

Adoption analysis, impact analysis, new use cases, an agent roadmap, integration options, governance, new business cases and the next implementation phases.

AI maturity



	What happens	Technology	Organization	What it produces
Assist	Staff use the standard Copilot functionality.	Microsoft 365 Copilot in Word, Excel, PowerPoint, Outlook and Teams.	Training and ground rules for responsible use.	Time saved on individual tasks.
Adopt	Copilot becomes part of daily work processes.	Copilot Chat with organizational data, shared prompts and templates.	Champions, role-based training and a fixed place in working agreements.	New ways of working per team.
Optimize	The organization measures use and improves use cases.	Adoption dashboard, Copilot analytics and feedback channels.	Ownership per use case and a cycle of measuring and adjusting.	Substantiated decisions on expansion.
Automate	Custom agents and workflows take over parts of processes.	Copilot Studio, agents and connectors to internal systems.	Governance for agents: approval, ownership and monitoring.	Processes that partly run on their own.
Expand	AI becomes a structural part of the organization.	Integrations with CRM, ERP, knowledge bases and databases.	Portfolio management of AI applications and lifecycle management.	An organization that keeps expanding AI deliberately.

KEY QUESTION

What comes next?

Security, governance, adoption and measurement run through the whole journey

Governance is not a sixth phase. These four themes return in every phase, from the first assessment to the agent roadmap.

01 Readiness	02 Strategy	03 Pilot	04 Rollout	05 Scale
SECURITY				
GOVERNANCE				
ADOPTION				
MEASUREMENT				

Security

Copilot sees everything a user has access to. That is why we look at identity, permissions, sensitivity labels, DLP and the Purview set-up from the very first assessment. In the pilot we test whether those arrangements hold up in real work, and during the rollout we watch that new user groups do not get to see more than intended.

Governance

Policy, responsibilities and ground rules that grow with the use. Early on it is about who decides and what staff may and may not do with Copilot. Once agents appear, it is also about approval, ownership, testing, monitoring and retiring applications that are no longer used.

Adoption

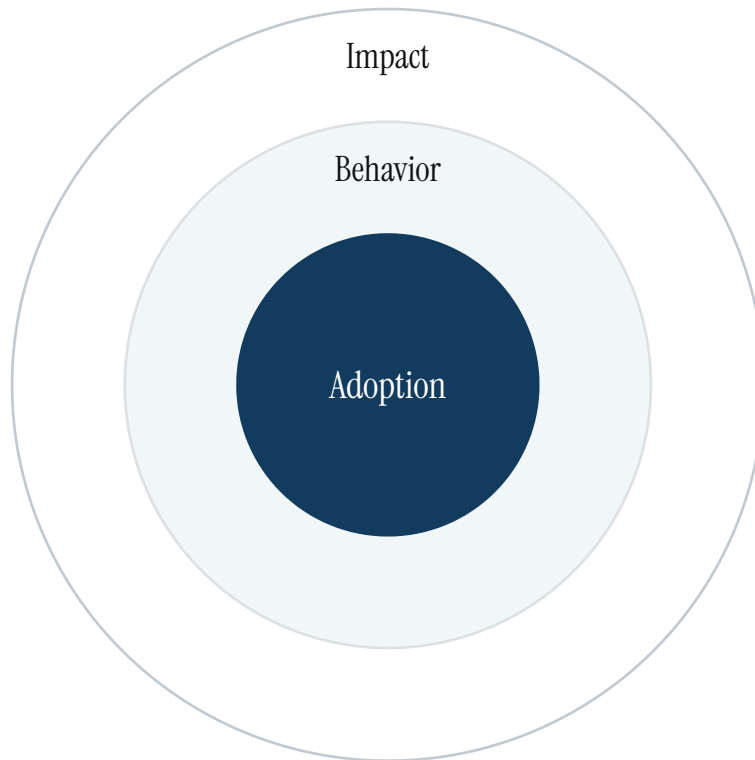
Technology changes nothing without behavior. Communication, role-based training, workshops, a champions network and visible support from management determine whether people really start using Copilot. In the pilot we learn which support works, in the rollout we scale it, and afterwards we keep it up to standard for new employees.

Measurement

What is not measured stays a feeling. We agree KPIs in the strategy phase, measure in the pilot whether they are realistic and track adoption, behavior and effect during the rollout. Those numbers steer the next choices: which use cases to expand, which teams need extra help and where an agent delivers more than a training.

From AI use to demonstrable value

Copilot does not deliver productivity by itself. That is why we measure value on three levels, from use to effect.



Adoption

Do people actually use Copilot? Active users, frequency of use and the functions used, per department and per role.

Behavior

Does the way people work change? Ways of working that have changed: less time summarizing, faster reporting, information found more often.

Impact

Does that deliver demonstrable value? Effect on lead time, quality, customer satisfaction or cost, linked to the KPIs from the strategy phase.

Book a Copilot readiness conversation

Leave your details. We will contact you within two working days to discuss where your organization stands and what a sensible first step is.

synaura.nl/en/solutions/microsoft-365-copilot-implementation

BUILT ON OUR SERVICES

01 · AI-readiness scan

A free one-hour conversation about how ready your organization is for AI, with a report within a week: opportunities, risks and a concrete starting point.

02 · AI strategy & roadmap

An AI strategy with real choices, an opportunity assessment of your operations and a roadmap that puts opportunities, risks, people, processes and technology in the right order.

03 · AI implementation

Redesign of work processes with the people who do the work, vendor-independent set-up of tooling and guidance of the rollout until the new process is in place and the results are measurable.

04 · AI literacy

Organizing, documenting and maintaining AI literacy per role: an inventory, a program with four levels, training with School of Data Science and documentation for Article 4 of the AI Act.

05 · AI governance

A light and workable governance framework for AI: an AI register, a policy people actually read, clear roles, AI Act compliance per system and a vendor check, fitted to how your organization decides.

CONTACT

info@synaura.nl

synaura.nl/en/solutions/microsoft-365-copilot-implementation

FURTHER READING

Why isolated AI experiments rarely reach scale

synaura.nl/en/insights/why-isolated-ai-experiments-rarely-reach-scale

Five questions every management team must answer about AI

synaura.nl/en/insights/five-questions-every-management-team-must-answer-about-ai