infinite people

FREE CHECKLIST · 22 QUESTIONS

Is your organisation ready for Copilot?

Buying Copilot licences is the easy part. Getting people to use it well is where most rollouts stall. Tick what's true for you today. It takes about 10 minutes and shows you where to start.

1. Tick
Go through the six steps and tick only what's true right now, not what's planned.

2. Count
Add up your ticks at the end. Each step also has a quick tip.

3. Act
Start with the step that has the fewest ticks. That's usually your real blocker.

1 Understand the work

Why are we doing this?

- [ ] We know which teams will get Copilot first, and why them.
- [ ] We've listed 3 to 5 everyday tasks that take too long (meeting notes, reports, email follow-ups).
- [ ] Leaders have explained, in plain words, why we're bringing in Copilot.
- [ ] People know Copilot is there to help them, not to replace them.

Tip: start from people's work, not from Copilot's features. "What wastes your time?" is the best first question.

2 Modernise work

Is our Microsoft 365 house in order?

- [ ] Files live in OneDrive, SharePoint and Teams, not on desktops or as email attachments.
- [ ] We know who can see what. Sensitive files aren't shared with "everyone".
- [ ] Old, duplicate and outdated content has been cleaned up or archived.
- [ ] Confidential information is labelled or protected.
- [ ] People already use Teams and OneDrive with confidence.

Tip: Copilot can only see what each person already has access to. If sharing is messy, Copilot will show it quickly.

3 Introduce AI

Are people set up to succeed?

- [ ] Licences go to people with clear use cases, not handed out at random.
- [ ] We have a short AI guideline: what's OK to use Copilot for, and what isn't.
- [ ] We have a group of champions across departments to try it first.
- [ ] People have been shown how to write a good prompt: goal, context, source and what good looks like.

Tip: one hands-on session using people's own work beats ten feature demos.

4 Redesign the work

Are we changing how work gets done?

- [ ] We've picked 2 to 3 processes to redo with Copilot, step by step.
- [ ] Each process we change has a clear owner.
- [ ] We've thought about where an agent could take over repetitive steps later.

Tip: adding Copilot to a broken process just makes the mess faster. Fix the steps first.

5 Measure value

Will we know if it's working?

- [ ] We know how long key tasks take today, so we can compare later.
- [ ] Someone checks the Copilot usage reports every month.
- [ ] We regularly ask users what's working and what isn't.

Tip: usage numbers show who opened Copilot. Time saved on real tasks shows value. Track both.

6 Keep improving

What happens after launch?

- [ ] People have ongoing support: champions, drop-in sessions or a place to ask questions.
- [ ] New Copilot features are shared with people regularly.
- [ ] We review our Copilot plan at least every quarter.

Tip: adoption isn't a launch day. Most of the value shows up in months two to six.

My total ticks: ☐ **out of 22**

18 to 22

Ready to scale

Your foundations are strong. Focus on redesigning more processes and measuring the value.

10 to 17

Getting there

The basics are in place, but gaps will slow adoption. Fix the step with the fewest ticks first.

0 to 9

Start with the foundations

Hold back on a big rollout. Sort out the "why", your files and sharing, and a small pilot first.

Want help closing the gaps?

We're Microsoft Certified Trainers who help South African organisations, and Microsoft partners, get people using Copilot well. Training in South Africa and online.

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