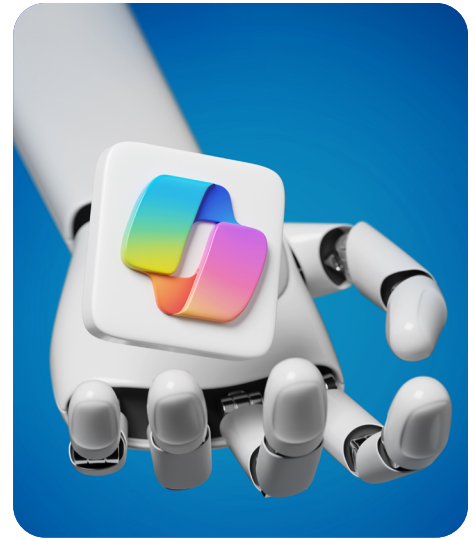The
Tech
Selector

How to Onboard Microsoft 365 Copilot
Your everyday AI companion

In today's fast-paced digital world, the sheer volume of emails and messages can overwhelm even the most organized professional—the typical Microsoft 365 power user receives, on average, upward of 250 emails daily and juggles 150 chats daily. Many of us are no strangers to the overwhelm that comes with the digital hustle. But imagine if you alone didn't have to bear the weight of these increasing workloads.

AI has proven to be a game-changer in productivity, augmenting human capability and accelerating everyone's innate ingenuity. It doesn't just make it easier to check off items on our to-do lists—it unlocks our creative potential, helping us overcome the drudgery of work to rediscover the joy in work. But like any new tool, it takes practice to master.

Copilot for Microsoft 365 has the potential to redefine the boundaries of what an organization can get done. Yet, there is an art and science to successful adoption across an organization. To reap the benefits, you must first understand the process of integrating generative AI capabilities into your business operations and investing in the strategies, skills, and techniques needed to unlock the full value of Copilot.

The Full Potential of Copilot for Microsoft 365

Early Microsoft 365 Copilot users rave about its impacts on their productivity.

What they have to say:

70% said they were more productive.

77% said they didn't want to give it up.

They executed a series of tasks (searching, writing, and summarizing) 29% faster overall.

They caught up on missed meetings nearly four times faster.[2]

The benefits of Copilot extend across the business, from the C-suite to the Finance department, addressing critical pain points:

The Busy Executive: Preparing with Confidence

Executives are always pressed for time. Imagine what you could accomplish with an AI-powered assistant at your disposal. You may not have a break in your schedule, but you can achieve more between meetings than you ever thought possible.

The HR Director: Smoothing the Hiring Process

The cost of replacing an individual employee can range from one-half to two times the employee's annual salary—and that's a conservative estimate, according to Gallup.[3] Copilot for Microsoft 365 changes this paradigm by creating a more efficient hiring process that reduces costs and ensures you are selecting the most suitable candidates for the job.

The Operations Manager: Solving Problems Faster

Production issues cost money. That's why solving them quickly is always a top priority. Copilot for Microsoft 365 identifies issues and finds solutions faster to reduce the cost of lost production. Everyone is trying to avoid production downtime as much as possible. Those with Copilot have a clear advantage when it comes to getting to the bottom of an issue—fast.

The Sales Manager: Closing Bigger Deals

From conducting industry research to creating proposals, Copilot for Microsoft 365 works alongside sales teams, handling administrative and routine, repetitive tasks. As a result, they can save time and focus on building pipelines and closing deals. Your customer wants to feel special. Meet that expectation by personalizing content, landing the right messages, and freeing up your time to give them the attention they deserve.
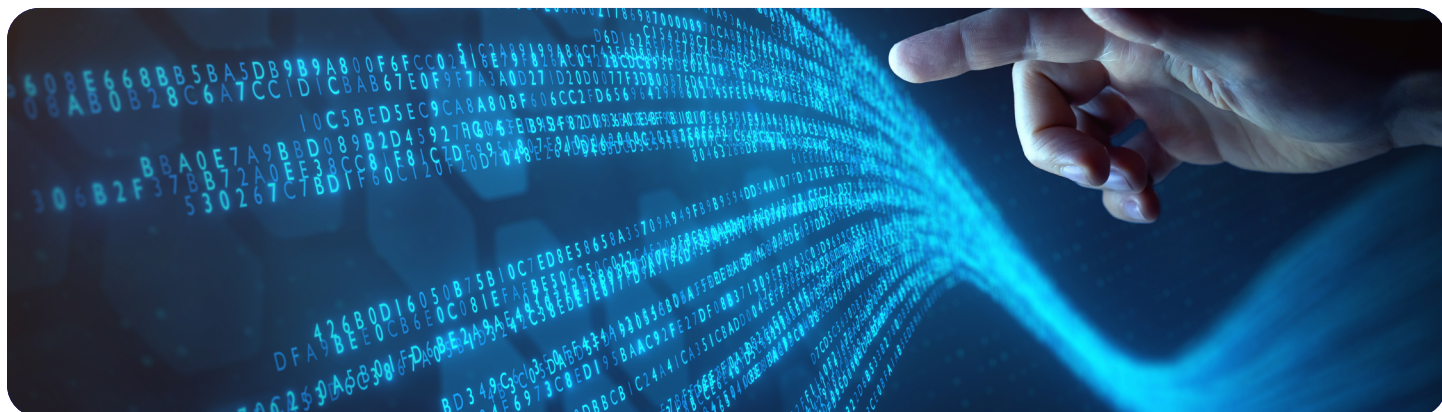
The Marketing Director: Pitching Stronger Campaigns

From developing strategic marketing plans to collaborating with other teams, composing marketing copy, and more, Copilot for Microsoft 365 works alongside marketing teams so they can focus on turning ideas into qualified revenue opportunities. We may live in a digital world saturated with content. But you can stand apart with an intelligent assistant that helps your team unleash creativity at scale like never before.

The Financial Analyst: Forecasting with Ease

In today's fast-paced financial landscape, analysts need all the help they can get to do more with the data they have and make proactive, strategic decisions amid an overflow of information and ever-tightening deadlines. Copilot for Microsoft 365 helps you organize information in more productive ways, streamlining processes like forecasting, financial reporting, and coordinating stakeholder communications. Processes like completing an acquisition can be tedious, requiring careful coordination of people, data, and insights. Efficiencies can be unlocked when you can lean on AI to support every step.

The Art and Science of Successful AI Adoption

It's not enough to activate Copilot—your people need guidance on how to build new skills and The Tech Selector can help.

Copilot isn't designed to replace human capabilities—it's designed to enhance them. Copilot for Microsoft 365 is an AI-powered assistant that's built to enhance your experience with Microsoft 365 applications, including Word, Excel, PowerPoint, Outlook, and Teams. People engage with Copilot just like they would any other virtual assistant, using their native language to ask questions and make requests. The difference is Copilot knows how to access and manage your content and data spread across Microsoft 365.

Copilot for Microsoft 365 knows how to access information from your inbox. It can make some highly informed recommendations based on email threads and chats. It can quickly generate content based on information and ideas you share. And it can perform complex or repetitive tasks with simple commands, among many other use cases. But Copilot isn't a person. Your work output still requires professional judgment that only you can provide. To realize the full potential of generative AI, it's important that your people understand how to use this technology to augment their own capabilities.

As your trusted partner, The Tech Selector can help you ready your people and processes to successfully embrace everything it has to offer via the following methods:

Understand the data

To use Copilot for Microsoft 365 effectively, team members must grasp the origins, integrity, and bounds of the data it leverages to draw insights and suggestions. Copilot analyzes a wealth of organizational content within an organization's Microsoft 365 tenant, including calendars, emails, chats, documents, meetings, contacts, and more – all from within the secure Microsoft 365 compliance boundary. The more data available in Microsoft 365, the richer and more personalized the Copilot suggestions.

Education and customization are our areas of expertise. Gain a deeper understanding of what kinds of data the Copilot system is analyzing. Configure policies and integrate other systems to optimize experiences. And ensure your employees know how to apply generated responses to their unique situations and objectives.

Engineer prompts:

Prompts are how you can ask Copilot to do something for you—like creating, summarizing, editing, or transforming information. The experience of crafting a prompt is similar to having a conversation in that you'd use plain but clear language to communicate something while providing the necessary context.

While the experience seems simple enough, mastering the art of prompt engineering takes practice. To get the best results, employees need to learn how to structure their prompts—a skill we can help your organization hone over time. Partner with us to drive continuous learning and experimentation and establish best practices to ensure the accuracy and appropriateness of AI-generated content.

Empower others to lead

When deployed correctly, Copilot can transform each team member into a leader who is equipped to handle not just mundane tasks but also complex challenges. Beyond automating repetitive processes, employees can entrust Copilot with bigger responsibilities—ranging from research and analysis to creative ideation. However, to realize the fullest potential of Copilot, you'll need to alter how employees think about work, adopting the qualities of an adept leader that can be helpful, such as delegation, communication, and analytical thinking.

We can help you sow the seeds that will grow these capabilities across all levels of your organization. Receive guidance on how to integrate advanced AI tools into everyday operations. And get your people to understand all the powerful ways Copilot can impact their work.

Our Five-Stage Implementation Framework

At The Tech Selector, we help you transform your business with Copilot, providing you with the support you need to navigate your AI journey with confidence in five steps.

1. Build your AI transformation strategy
We offer AI advisory services that empower organizations to rethink processes with Microsoft AI. Build your transformation strategy around core Microsoft Copilot workloads to meet business needs. Identify top personas that would deliver value if reimagined with AI then come up with a plan. Together, we'll collaborate to create the roadmap to successful implementation and adoption.

2. Prepare your technology environment
Confirm you have the right platforms and licenses in place to successfully deploy Copilot for Microsoft 365. We'll work with you to evaluate and close technology gaps by conducting a comprehensive readiness assessment. Reassure stakeholders that you're starting your AI journey from a solid foundation with a well-defined operating and governance model. Go beyond awareness and get security ready by configuring policies in your Microsoft 365 tenant and ensuring data privacy and protection.

3. Customize and deploy with confidence

Don't just assume Copilot for Microsoft 365 will fit your organization's needs out of the box. In most cases, customization is necessary. We can help you determine the best use cases, personas, and extensibility options that are right for your organization. Then we'll work on customizing and deploying Copilot experiences to meet those needs.

4. Empower your people to drive adoption

Change begins with empowering people. If you want to become an AI-powered business, you must invest in the people your AI investments will impact the most. We work closely with organizations to drive change management and adoption activities to ensure your employees are equipped with the knowledge and skills they need to become Copilot power users. Work with a dedicated team to transition processes and adapt behaviors, providing continuous support, training, and updates to maximize impact.
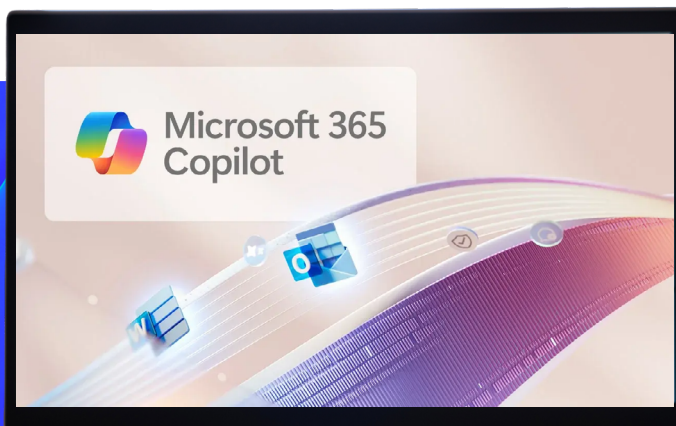
5. Extend Microsoft AI capabilities

Did you know that Copilot for Microsoft 365 can become even more powerful when integrated with other systems within your organization? If you're looking to expand, enrich, and customize Copilot further, we can help you create plugins and Graph connectors to extend capabilities. There's more than one way to personalize Copilot for Microsoft 365 by drawing from the intelligence of external services, apps, and data. Let us help you make those connections to achieve more than you ever thought was possible.

The Human Impact of AI Augmentation

We are all struggling under the weight of work. We are overwhelmed by information, deadlines, and the crush of always-on communication. AI can help—not just by making work easier or faster, but by making it more fulfilling. When we don't need to spend as much cognitive energy on figuring out what happened in that meeting, getting caught up on email, or finding that document from that chat last week, we can spend more time on the substance of our work—and our purpose for doing it. Copilot for Microsoft 365 has the potential to transform how we navigate our workdays. To realize the value, take charge of how you're driving adoption and get your organization AI-ready with support from The Tech Selector.

At The Tech Selector, we empower businesses to adopt AI with confidence. As a certified Microsoft partner, we specialize in secure, strategic implementations of Microsoft 365 Copilot—helping you automate workflows, protect data, and unlock productivity.

Contact us today to schedule your Microsoft 365 Copilot assessment and begin your AI transformation journey.