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THINGS EVERY MICROSOFT 365 LEADER MUST FIX BEFORE ACTIVATING COPILOT

01 YOUR DATA FOUNDATION

- Leaders want AI outcomes without data hygiene.
- Copilot cannot reason over scattered sites, outdated files, or missing metadata.

What to do: Clean, classify, and centralize the content that teams actually use to work.

02 WORKFLOW CLARITY

- Installing Copilot into broken processes only accelerates confusion.
- Define the workflow first, then layer AI on top.

What to do: Document 5 core workflows per team & anchor Copilot around them.

03 PERMISSIONS & ACCESS

- If permissions are outdated, Copilot will surface things people should not see.
- Fix access control before rolling out AI at scale.

What to do: Review SharePoint,    access patterns.

04 TRAINING BY ROLE, NOT DEPARTMENT

- One generic training session for everyone.
- Sales, finance, HR, and engineering need radically different Copilot use cases.

What to do: Train people the way they work, not the way org charts look.

05 PROMPT STANDARDS

- Everyone improvises prompts and gets inconsistent results.
- Organizations need standard prompt packs just like they have SOPs.

What to do: Create reusable prompts for reporting, communication, documentation, and analysis.

06 INTEGRATION WITH BUSINESS APPS

- Copilot becomes a chat tool instead of a workflow engine.
- Connecting it to Power BI, SharePoint lists, Dynamics, Jira, CRM.   

What to do: Identify the top 3 data sources each team depends on and connect Copilot to them.

07 FEEDBACK LOOPS

- Prompts, workflows, and automations go stale.
- Review them weekly and refine based on real usage.

What to do: Establish a Copilot improvement cadence with power users.

08 LEADERSHIP MODELING

- If leaders don't use it, no one else will commit.
- Adoption starts with visible behavior, not memos.

What to do: Give executives 3 personalized Copilot workflows and measure usage.

