

Checklist: The Right Way to AI

Follow these steps to help with your AI rollout.

□ Get your data house in order.

Shore up your internal infrastructure: Copilot automatically inherits your existing Microsoft 365 data and security permissions, which makes it essential to have solid content management practices and data governance in place.

So, before you roll out AI, according to futurist Amy Webb ask yourself:

- When was the last time you did a data audit?
- Are all your confidential files labeled accordingly?

□ Be intentional about your rollout.

With Copilot, we've found that a three-pronged approach is most effective:

1. Give the technology to entire teams within a specific business function so they can share insights and learn from one another.
2. Allocate remaining seats to a variety of roles and levels, from senior leaders to IT admins to project managers.
3. Define clear objectives for how each team will use the new technology, such as "reducing ticket volume" for customer service.

□ Identify champions to lead the way.

Ask managers to identify one power user from their teams and empower these advocates to be internal influencers, inspiring work friends and colleagues to try it themselves.



Ideas for champions

- Lead virtual demo workshops, like a Copilot 101 session for salespeople
- Create quick video demos that can spread organically throughout the company
- Host Ask Me Anything sessions
- Launch Copilot tips Teams channels to share favorite prompts

AI is unlike any technology we've seen before, which means it requires a unique strategy to deploy and drive adoption. Organizations that take a thoughtful and deliberate approach are going to be the ones to reap the benefits.

—Jared Spataro, Corporate Vice President of Modern Work and Business Applications at Microsoft

□ Prioritize skilling.

Without ongoing training, AI won't make much of a difference to your bottom line. To help people develop their expertise:

- Create—and maintain—virtual spaces for people to share tips, ask questions, and find resources
- Encourage people to share their most powerful AI prompts with their teams
- Consult [Copilot Lab](#), our collection of prompt tips and prompt guidance

□ Help people build new work habits.

To build an AI-powered organization, leaders need to help their teams embrace [new mindsets and habits](#). Communicate to your teams that working effectively with AI means:

- Always asking: "How can AI help me with this task?"
- Learning to delegate
- Exercising good judgment
- Applying subject-matter expertise

In other words, they need to [think like managers](#).