

# Microsoft Copilot 90-Day Pilot Plan

A practical week-by-week template to run a credible Copilot pilot in 90 days - with named roles, weekly milestones, and the metrics you need to defend a buy or kill decision.

How to use this template: assign the roles below in week zero. Hold a 30-minute weekly check-in. At day 90, present the metrics dashboard to your sponsor and make a clear go / extend / stop call. Adapt the schedule to your own context - this is a starting point, not a script.

## Pilot ownership - who does what

A pilot fails when ownership is fuzzy. Name a real person against each role before week one. One person can hold more than one role on a small team, but the executive sponsor and pilot lead should not be the same person.

| Role                    | Owns  | Time commitment                |
|-------------------------|---|--------------------------------|
| Executive sponsor       | Outcome and budget. Makes the day-90 go / kill decision. Unblocks at the leadership level.      | 1 hour / week                  |
| Pilot lead              | Day-to-day delivery. Runs the weekly check-in. Owns the metrics dashboard and the final report. | 4-6 hours / week               |
| IT / data lead          | Tenant configuration, permissions, sensitivity labels, oversharing checks, and access to logs.  | 3-4 hours / week               |
| Champion (per team)     | First user, peer support, prompt library curator. One per pilot team of 5-10 users.             | 2 hours / week                 |
| Finance partner         | Validates time-saved assumptions and signs off the business case at day 90.                     | 1 hour / week                  |
| Security and compliance | Reviews data handling, third-party connectors, and any policy exceptions.                       | 2 hours in week 1, then ad-hoc |
| Communications lead     | Internal updates, FAQ, and managing expectations across the wider business.                     | 1 hour / week                  |

## Metrics that matter

Pick three to five metrics. More than that and nobody owns any of them. You need a mix of adoption (are people using it), value (is it changing the work), and risk (is it safe). Set baselines in week zero - without a baseline, you cannot prove a delta.

| Metric                  | How to measure   | Target by day 90                          |
|-------------------------|--|---|
| Weekly active users     | Microsoft 365 admin centre Copilot usage report.                   | >70% of licensed users active each week   |
| Actions per active user | Copilot usage report - prompts in Word, Excel, Teams, Outlook.     | >15 actions per user per week             |
| Time saved per user     | Self-reported in the weekly 2-minute pulse survey.                 | Median 3-5 hours / week                   |
| Output quality          | Champion reviews a sample of Copilot-assisted work each fortnight. | Quality unchanged or improved vs baseline |

| Metric                       | How to measure   | Target by day 90                     |
|------------------------------|--|--------------------------------------|
| Sentiment / NPS              | Single question pulse - 'would you recommend Copilot to a peer?'   | >30 NPS by week 12                   |
| Use-case adoption            | Track which of your top 3 named use cases are being used in anger. | All 3 in regular use                 |
| Security incidents           | Purview, sensitivity-label hits, oversharing alerts.               | Zero unresolved high-severity issues |
| Cost per active user / month | Licence cost / active users that month.                            | Tracking under modelled assumption   |

## Phase 1: Set up (weeks 1-2)

Goal: pilot ready to go live in week 3 with a clean tenant, named users, baselines captured, and roles confirmed. Do not skip the baselines - you will regret it at day 90.

### Week 1 - Stand up the pilot

- Executive sponsor signs off scope, budget, and the day-90 decision criteria.
- Pilot lead confirmed and roles assigned in writing.
- Pilot cohort selected: 10-20 users across 2-3 functions, mix of seniority.
- Top 3 named use cases agreed (e.g. meeting follow-ups, proposal drafting, month-end commentary).
- Baseline measurements captured: time spent today, current quality, current sentiment.
- Kick-off comms sent: what is changing, why, how to ask for help.

### Week 2 - Configure and prepare

- Licences assigned to the cohort only - not the wider business.
- IT runs an oversharing scan on the SharePoint and OneDrive sites the cohort can see.
- Sensitivity labels reviewed and applied to confidential sites where missing.
- Acceptable-use guidance circulated and acknowledged.
- Champions briefed and given a starter prompt library.
- Weekly 30-minute check-in scheduled with sponsor, lead, IT, and champions.

## Phase 2: Adopt (weeks 3-6)

Goal: get to genuine daily use on the named use cases. Most pilots stall here because users try Copilot once, get a mediocre answer, and never come back. Champions and prompts matter more than training videos.

### Week 3 - Go live

- 60-minute live launch session per team - hands-on, not slides.
- Each user picks one of the three use cases to focus on this week.
- Pulse survey #1 sent at end of week (2 minutes, 4 questions).
- First adoption snapshot pulled from the admin centre.

### Week 4 - Embed in the workflow

- Champions run a 30-minute peer clinic per team.
- Prompt library updated with the best prompts users have written so far.
- Pilot lead reviews adoption data and identifies the bottom-quartile users for a 1:1.
- Sponsor sends a short note recognising early wins.

### Week 5 - Stretch the use cases

- Each team adds a second use case from the agreed list.
- Quality review #1: champion grades a sample of Copilot-assisted work.
- Pulse survey #2 sent.

- First red-flag review with security and IT.

### **Week 6 - Mid-pilot health check**

- Mid-pilot review with sponsor: adoption, sentiment, time saved, issues.
- Decide: continue as planned, double down, or narrow the scope.
- Communicate the decision and any changes to the cohort within 48 hours.

## Phase 3: Optimise (weeks 7-10)

Goal: move from 'I tried it' to 'I would not give it back'. This is where you find out which use cases are real and which were wishful thinking.

### Week 7 - Deepen one workflow

- Pick the strongest of the three use cases and deepen it - templates, examples, integrations.
- Drop or de-prioritise any use case that is not working - do not flog a dead horse.
- Pulse survey #3 sent.

### Week 8 - Quality and risk pass

- Quality review #2: compare a sample to baseline outputs from week 1.
- Security and compliance review: any incidents, near-misses, label issues.
- Document any policy or governance changes the pilot has surfaced.

### Week 9 - Cost and value model

- Finance partner refreshes the time-saved estimate using survey data and observed adoption.
- Build the cost-per-active-user view and the projected 12-month total.
- Identify which Copilot SKUs (if any) you would add for phase 2 roll-out.

### Week 10 - Champion the wins

- Collect 3-5 short user stories - named, specific, recent.
- Run a 'show and tell' session open to the wider business.
- Pulse survey #4 sent.

## Phase 4: Decide (weeks 11-13)

Goal: a clear, evidence-backed go / extend / stop decision. Whichever way it goes, you will know why - and so will the business.

### Week 11 - Build the day-90 pack

- Pull the metrics dashboard against the targets set in week 1.
- Write a one-page summary: what worked, what did not, what we recommend.
- Draft the roll-out plan if the recommendation is 'go' - cohort, sequence, budget.

### Week 12 - Stress-test the recommendation

- Pre-read with finance, IT, and security ahead of the sponsor meeting.
- Identify the two or three questions the sponsor is most likely to push on.
- Confirm the licence commercial terms and any reseller actions needed.

### Week 13 - Decide and communicate

- Sponsor meeting - present the pack and make the call.
- Communicate the decision to the cohort and the wider business within 48 hours.
- If 'go': move into roll-out planning and start the next cohort within 30 days.

- If 'stop' or 'narrow': retain Copilot Chat (free, with enterprise data protection) for everyone, and document what you would need to see to revisit.

## Day-90 decision criteria

Agree these in week 1 and do not move the goalposts. The pilot has succeeded if it clears the 'go' bar on adoption, value, and safety - not on enthusiasm.

| Signal              | Go                               | Extend pilot      | Stop                     |
|---------------------|----------------------------------|-------------------|--------------------------|
| Weekly active users | >70% sustained                   | 50-70%            | <50%                     |
| Time saved (median) | >3 hours / week                  | 1-3 hours         | <1 hour                  |
| Sentiment / NPS     | >30                              | 0-30              | Negative                 |
| Quality of output   | Same or better than baseline     | Same with caveats | Worse                    |
| Security incidents  | Zero unresolved                  | Resolvable        | Material unresolved risk |
| Business case       | Pays back within modelled window | Marginal          | Does not pay back        |

**Need a hand running this pilot?** Visit [getreadyforai.co.uk](https://getreadyforai.co.uk) - independent, vendor-neutral guidance for UK SMBs.