



Work Smarter in 30 Days

Discover how your team can work smarter with AI

Turn everyday work into AI-powered work

Over the next 30 days, you'll discover where Copilot creates the most value, put it to work in your daily routines, and build AI habits that last

What you'll discover

Where Copilot adds the most value

Identify the tasks, projects, and workflows where Copilot can save time and work more efficiently.

How Copilot fits into daily work

Use Copilot in actual meetings, emails, documents, and projects, not practice exercises.

Which AI habits are worth keeping

Develop simple, repeatable ways of working that continue long after the trial ends.

What you'll achieve

- 1 Identify 3 to 5 high-value scenarios where Copilot saves meaningful time.
- 2 Draft emails, summaries, and content faster with less effort.
- 3 Create agendas, capture actions, and find answers from meeting discussions.
- 4 Bring Copilot into the workflows your team uses every day.
- 5 Create a practical starting point for broader AI adoption.

Did you know?

77%

Of early Copilot users say they don't want to give it up

Source: Microsoft Work Trend Index.Special Report, "What Can Copilot's Earliest Users Teach Us About Generative AI at Work?" (2023).

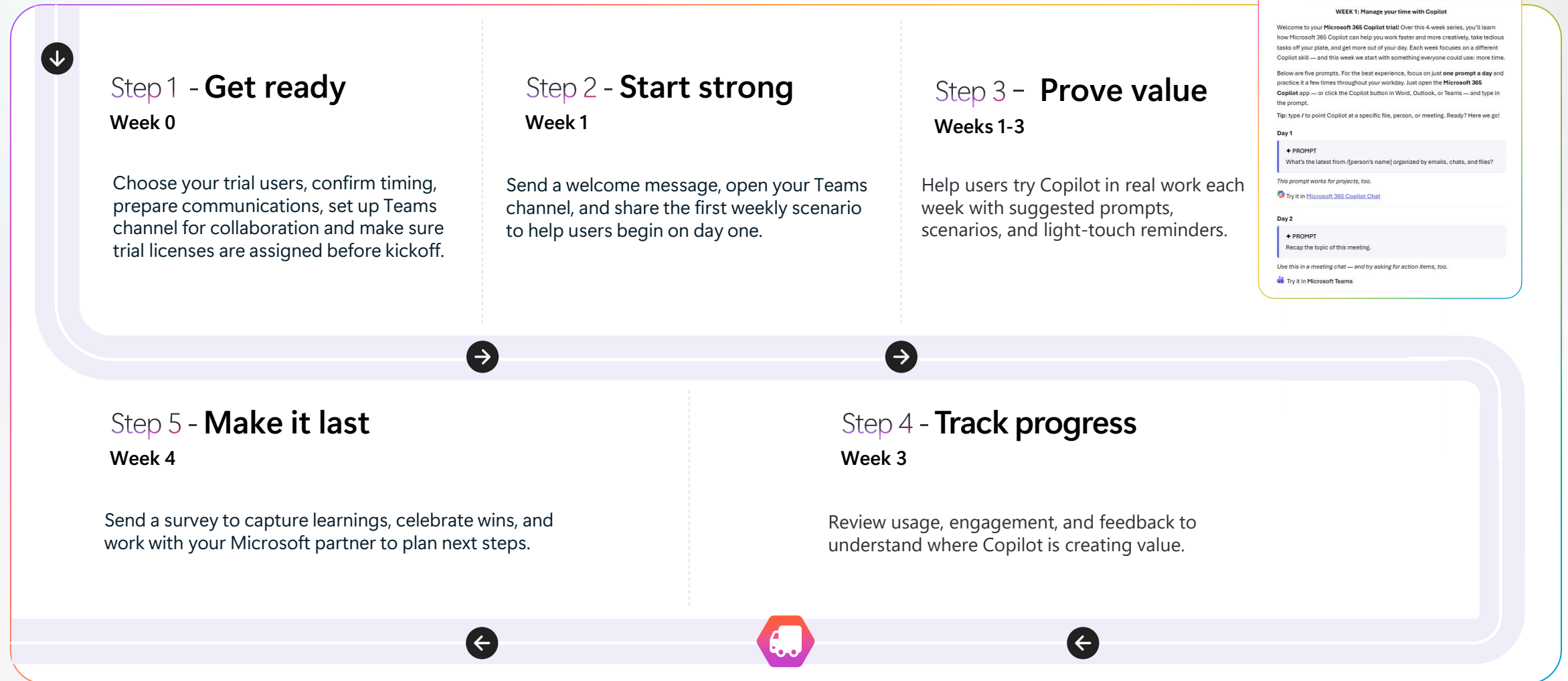
Five ways to help your team get more from Copilot

Small actions early in the journey can help your team build confidence, share learnings, and turn Copilot into a daily habit.

-  **Prioritize activation** Get all 25 trial users started in the first week so the team can build momentum together.
-  **Set the example** Visible executive participation sets the tone and is one of the strongest drivers of adoption.
-  **Make it social** Use a Teams channel where people can post wins, questions, prompts, and lessons learned.
-  **Small, repeatable wins** Encourage users to try one prompt/workflow each day tied to work they already need to do.
-  **Celebrate progress** Recognize early wins and use them to motivate others to keep going.

Your 30-day Copilot journey

A simple path to help your team start strong, discover value, and decide where to go next.



Get ready for day one

Complete these steps before kickoff so every user can start with confidence.

1

Build your [Copilot Success Plan](#)

Use the Copilot Success Planner to create a personalized 30-day plan before the trial starts.

2

Confirm key settings

Enable the recommended settings that help users get the full Copilot experience.

3

Prepare your welcome message

Use the kickoff email to explain the purpose, timing, and what users should expect.

4

Create your Teams Channel

Give users one place to find prompts, ask questions, share wins, and stay engaged.

5

Activate trial & assign Copilot licenses

Make sure each user has access before the trial begins.

Start with people who can build momentum together

Copilot works best when people can learn together, share examples, and apply it across the work they already do.

THE PRINCIPLE

When selecting users to participate in the trial experience, choose people who already collaborate. The best experiences includes users who work together in meetings, documents, emails, and shared projects. When people can try Copilot on connected work, they learn faster and see value sooner.

A A mix of users (Recommended)

Best when you want to explore value across multiple teams or functions. Select 4 to 5 small groups of users that collaborate regularly and can share different use cases.

B One department or function

Best when you want to focus on a specific workflow, team process, or business area. Select one group that works closely together and can quickly apply Copilot to shared priorities.

Confirm Key Settings

Enable the recommended settings that help users get the full Copilot experience.

Enable the best Copilot experience

In the Microsoft 365 admin center, expand *Copilot* > *Settings* and confirm the following default settings.

-  [Enable Web search](#) – supplements your organizational data with current information from across the web
-  [Pin Copilot Chat](#) – puts Copilot in Teams, Outlook and the M365 apps
-  [Teams transcription](#) – enables Copilot to summarize meetings and answer questions from transcripts



Enable Copilot Cowork (optional)*

Your trial includes the option to enable [Copilot Cowork](#), which incurs usage-based charges. Limit access to trial users and set a budget to explore confidently while minimizing costs.

- 1** Set up usage-based billing and assign a Billing Admin or AI Admin to manage usage.
- 2** Set a monthly spending budget to limit the number of credits that can be used
- 3** Create a group of trial users and assign this billing policy to those users

EXAMPLE: set ~\$50/user (≈\$1,250 for 25) with alerts set at 50/75/90%.

Setup step 3 & 4

Start your trial strong

Get users excited, engaged and receiving value from day one



Welcome from leadership

Have your exec sponsor send a short note introducing and personally endorsing the trial.



Kickoff weekly emails

Send the first weekly email, "Take control of your inbox," Monday morning, so everyone has a prompt to try on day one.



Open the Teams channel

Post the welcome message, pin the prompt list, and keep one short nudge going each day. For plug and play posts, see the Teams Channel Guide included in your Copilot in 30 kit.

Week 1:

Take control of your inbox



Week 2:

Get more from every meeting



Week 3:

Create in less time



Week 4:

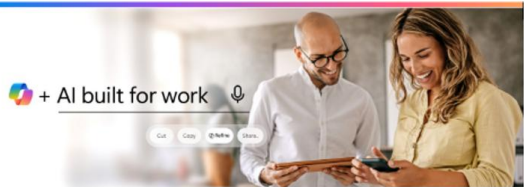
Automate repetitive work

Copilot in Outlook

Copilot in Teams

Copilot in the Apps

Agents & Cowork



WEEK 1: Manage your time with Copilot

Welcome to your **Microsoft 365 Copilot trial**! Over this 4-week series, you'll learn how Microsoft 365 Copilot can help you work faster and more creatively, take tedious tasks off your plate, and get more out of your day. Each week focuses on a different Copilot skill — and this week we start with something everyone could use: more time.

Below are five prompts. For the best experience, focus on just **one prompt a day** and practice it a few times throughout your workday. Just open the **Microsoft 365 Copilot** app — or click the Copilot button in Word, Outlook, or Teams — and type in the prompt.

Tip: type / to point Copilot at a specific file, person, or meeting. Ready? Here we go!

Day 1

+ PROMPT

What's the latest from `/[person's name]` organized by emails, chats, and files?

This prompt works for projects, too.

Try it in [Microsoft 365 Copilot Chat](#)

Day 2

+ PROMPT

Recap the topic of this meeting.

Use this in a meeting chat — and try asking for action items, too.

Try it in [Microsoft Teams](#)

What a daily trial email looks like

Know how your trial is landing

A quick weekly check can show whether users are engaging, where they are finding value, and who may need a nudge.



Readiness & adoption report

In the [Microsoft Admin Center](#), navigate to:

Reports > Usage > Microsoft 365 Copilot > Copilot

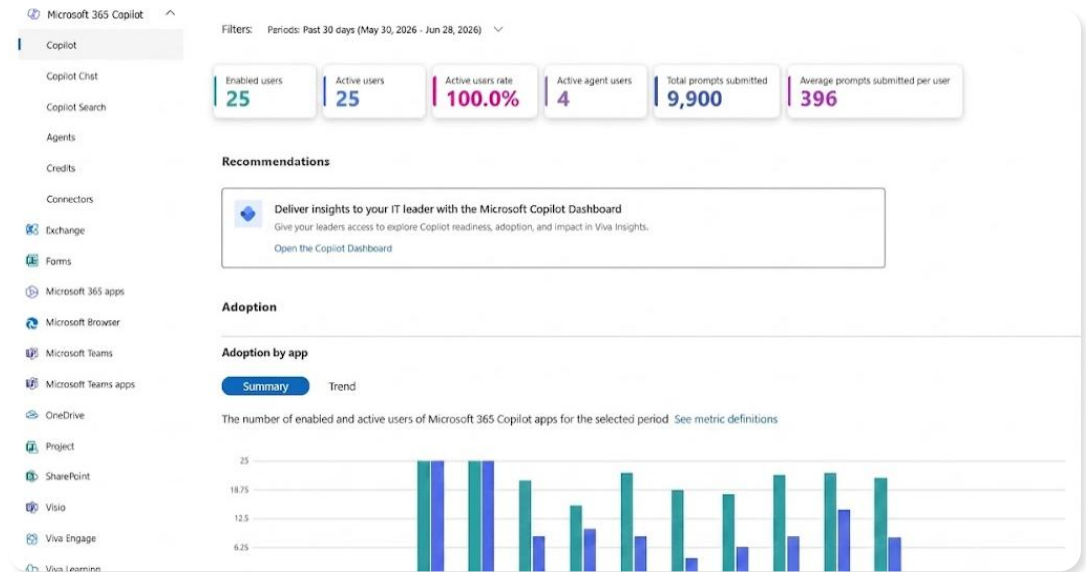
Review:

- **Active users** – Are licensed users engaging with Copilot?
- **Prompt volume** – Is usage growing week over week?
- **App adoption** – Are users finding value across the apps they work in?

Need deeper insights?

Open the Microsoft Copilot Dashboard in Viva Insights¹ to explore readiness, adoption, impact, and sentiment trends.

¹ Data processing starts with 1 assigned Copilot license. 50 or more Copilot or Viva Insights licenses adds agent insights, benchmarks, and group-level data.



Microsoft Admin Center - Microsoft 365 Copilot usage

What good looks like: Adoption is steady or increasing, prompt volume continues to grow, and usage expands beyond chat into everyday workflows. Spot at-risk users early - anyone with no actions or unopened emails by midweek - and send a quick nudge.

Focus on the signals that matter

Look for simple indicators that show whether Copilot is becoming part of how your team works.



Daily active users

Are users coming back to Copilot each week?



Copilot usage per app

Where is Copilot landing - Outlook, Teams, or other apps?



Number of prompts used

Are users actually using prompts?



Survey sentiment

Is confidence trending up across the month?

Winning formula: Most users active weekly + prompt volume rising + usage spreading across apps + positive feedback

Get users engaged in week one and momentum builds from there. The strongest trials show consistent weekly usage, growing prompt activity, adoption beyond chat into Outlook, Teams, Word, and PowerPoint, and users reporting that Copilot is helping them work faster.

Turn early wins into lasting habits

Use the final week to capture what worked, celebrate progress, and decide where Copilot can create value next.

In the channel: The Teams Channel Guide has a ready-to-send closing post and survey prompt built in — post it, thank the team, and ask everyone for their favorite prompt to start your team's own playbook.



Close it out

Send the final email, quick survey, and celebrate the wins together in your Teams channel.



Keep it going

Compare usage and sentiment to your baseline, and keep the prompts that earned their spot pinned as daily habits.



Expand from here

Talk to your Microsoft partner about what comes next in your Copilot journey.

Take the next step with Copilot

THIS WEEK

Review results, identify your strongest use cases, and document user wins.

BUILD YOUR PLAN

Work with your Microsoft partner to determine licensing and rollout scope.

EXPAND WITH CONFIDENCE

Start with the teams that saw the most value and expand adoption over time.

Start small. Prove value. Scale with confidence.



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[Schedule a Meeting](#)