



VisioClara

MICROSOFT CLOUD & AI PARTNER

COPILOT ROLLOUT KIT

The SMB Copilot Rollout Kit

A 30-day adoption plan, made simple.

Vision-led. Trust-built. Clarity-driven.

BUILT FOR CANADIAN STARTUPS & SMBs

Govern first · Adopt fast · Measure honestly

1-7
FOUNDATIONS

8-14
PILOT

15-21
EXPAND

22-30
EMBED

Microsoft, made simple.

visioclara.com · info@visioclara.com · Toronto, Canada

Why a rollout beats more licences

ADOPTION IS THE GAP

Buying licences is easy. Getting people to use them is the hard part.

The distance between paying for Microsoft 365 Copilot and getting real value from it has a name: **adoption**. A licence is permission to use the tool. A rollout is the plan that turns it into hours saved and better decisions. Most teams that are disappointed with Copilot never had a rollout — they had a switch flipped on and hoped for the best.

This kit gives you a simple, governed, 30-day plan to take Copilot from 'switched on' to 'part of how we work.' You do not need a big team or a big budget — just a clear sequence, one or two real use cases, and a few champions. Work through it in order. Figures shown as [add stat] are placeholders for your own verified numbers.

Govern first, then scale

Copilot only shows a person content they already have permission to open. That is exactly why governance comes first: if access is too broad today, Copilot makes that oversharing easy to find. Before you invite the whole company in, **right-size access**, **publish sensitivity labels**, and **clean up oversharing** with Microsoft Purview. Governed foundations make every later phase safe.

How to use this kit

Four phases, one week each: **Foundations**, **Pilot**, **Expand**, **Embed**. Tick the boxes as you go, keep a running note of quick wins, and hold a 30-day review at the end. Keep Canadian data in **Azure Canada Central / Canada East** throughout.

Before you start: govern first

RIGHT-SIZE ACCESS · LABEL · CLEAN UP

Copilot inherits your existing permissions. Fix the foundation before the pilot.

Copilot only surfaces content a user is already allowed to open — which means any sharing sprawl you have today becomes discoverable in seconds. Close the gaps first, and every phase that follows inherits a clean, governed base.

- ☐ **Right-size access.** Review who can see what. Remove broad ‘everyone / all company’ sharing and stale guest access that no longer needs to be there.
- ☐ **Publish sensitivity labels.** Roll out a simple set — Public, Internal, Confidential — so sensitive content is marked and protected wherever it travels.
- ☐ **Run an oversharing cleanup.** Find over-permissioned sites, files, and shared links and tighten them before Copilot can surface them.
- ☐ **Turn on Microsoft Purview controls.** Labeling, data loss prevention, and audit logging so protection stays with the data, not just the folder.
- ☐ **Keep Canadian data in-region.** Hold personal and regulated data in Azure Canada Central / Canada East to support PIPEDA and Quebec Law 25.
- ☐ **Name a governance owner.** One person signs off that access and labels are clean before each expansion step.

Why this comes first

Copilot is only as safe as the permissions underneath it. Right-size access and label your data before the pilot, and you turn Copilot from a governance risk into a governed advantage — [add stat] over-shared items are worth finding before, not after, you scale.

The 30-day plan

FOUNDATIONS · PILOT · EXPAND · EMBED

Four one-week phases take Copilot from a governed pilot to an everyday habit. Start small, prove value, then widen — re-checking access and labels each time a new team joins.

DAYS
1-7

Foundations

GOVERNANCE, USE CASES, CHAMPIONS

Goal: Set the guardrails, pick where to start, and name the people who will carry it.

- ☐ Confirm governance is in place — access right-sized, labels published, oversharing cleaned.
- ☐ Assign licences to a small first group, not the whole company.
- ☐ Pick **1–2 high-value use cases** (e.g. summarize email threads, draft first-pass documents).
- ☐ Name **2–3 champions** who will model the behaviour and answer everyday questions.
- ☐ Capture a simple baseline — how long these tasks take today ([baseline]).
- ☐ Book a 30-minute kickoff to set expectations and share this plan.

DAYS
8-14

Pilot

SMALL GROUP, EVERYDAY PROMPTS, QUICK WINS

Goal: Get a small group using Copilot every day on real work — and bank a few quick wins.

- ☐ Run a short, hands-on session on everyday prompts: summarize, draft, catch up, find.
- ☐ Ask each pilot user for **one Copilot task per day** in their real workflow.
- ☐ Focus on the everyday apps first — Outlook, Teams, Word, Excel.
- ☐ Collect quick wins and time saved as you go ([add stat] hours back this week).
- ☐ Hold a mid-week check-in to unblock people and share what is working.
- ☐ Keep governance tight — pilot only within the group you have licensed and secured.

DAYS
15-21

Expand

MORE TEAMS, SHARE WINS, PROMPT LIBRARY

Goal: Widen to more teams, make wins visible, and give people prompts that already work.

- ☐ Add one or two more teams using the same governed onboarding.
- ☐ Share pilot wins in Teams and your newsletter to build pull, not push.
- ☐ Publish a **starter prompt library** (next page) so no one starts from a blank box.
- ☐ Have champions run a 20-minute 'prompt clinic' for each new team.
- ☐ Track active users and adoption by team ([add stat] of licensed users active).
- ☐ Re-check access and labels for every new team **before** they join.

DAYS
22-30

Embed

HABITS, MEASURE, PLAN NEXT

Goal: Turn early wins into habits, measure the impact honestly, and plan what comes next.

- ☐ Fold Copilot into existing rituals — standups, weekly reviews, document drafting.
- ☐ Measure against your baseline: hours saved, active users, wins shared.
- ☐ Retire prompts that do not help; promote the ones that do.
- ☐ Decide who gets licences next, and in what order.
- ☐ Spot repeatable tasks that could become a Copilot **agent** (see the note that follows).
- ☐ Book a 30-day review to lock in wins and set the next 30-day goal.

Starter prompt library

COPY, PASTE, ADAPT

Give your pilot a running start. These everyday prompts work across the apps your team already lives in — hand them out on day one of the pilot and add your own as wins land.

Outlook

“Summarize this email thread and list what I need to do.”

“Draft a polite reply confirming the meeting and asking for the agenda.”

Teams

“Catch me up on what I missed in this chat since yesterday.”

“Summarize this meeting and list the decisions and action items.”

Excel

“Explain what this table shows and highlight the top three trends.”

“Suggest a formula to calculate month-over-month growth.”

Word

“Draft a first version of a project update from these notes.”

“Make this document clearer and more concise, and keep the key points.”

Prompt tip: lead with what you want, then the context — ‘Summarize this for a client, in three bullets.’ A clear ask gets a better answer, every time.

From assistant to agent: where this goes next

Microsoft 365 Copilot — AI inside the apps you already use every day: Outlook, Teams, Word, Excel, PowerPoint.

Copilot Cowork — an agentic teammate that can take on multi-step work for you, not just answer in the moment.

Copilot Studio — build and customize your own agents for the repeatable tasks your team does again and again.

Agent 365 — govern and secure those agents at scale, included in **E7**, so oversight keeps pace with automation.

The same rule applies at every step: right-size access and label your data first, and every agent inherits a trusted foundation.

Measure what matters

SET A BASELINE, CHECK AT DAY 30

Pick three simple numbers, set a baseline in week one, and check them at your 30-day review. Honest measurement is what turns a pilot into a business case for the next wave.

Metric	Baseline	30-day target	How to check
Hours saved per person, per week	[baseline]	[target]	Quick pulse survey
Active users % of licensed users active	[baseline]	[target]	Usage reporting
Wins shared posts in Teams / newsletter	[baseline]	[target]	Running win count

Make it a habit, not a hero project

Adoption sticks when Copilot lives inside rituals people already have — the Monday standup, the weekly review, the first draft of every document. Review your three numbers each month and set the next 30-day target from what you learn.

How VisioClara helps

YOUR MICROSOFT COPILOT ROLLOUT PARTNER

We help Canadian startups and SMBs roll out Microsoft Copilot the right way — governed first, adopted fast, and measured honestly — so you get real value from the licences you already own. Vision-led on where you're headed, trust-built in how we protect your data, and clarity-driven in every recommendation we make.

✓ Governance readiness

Right-size access, sensitivity labels, and oversharing cleanup with Purview.

✓ Copilot rollout plan

A tailored 30-day adoption plan with real use cases and named champions.

✓ Hands-on enablement

Practical sessions and a prompt library for your everyday apps.

✓ Adoption tracking

A simple baseline and dashboard so you can see the impact honestly.

✓ Agents & automation

Copilot Studio and Agent 365 — governed and secure as you scale.

✓ Ongoing partnership

A roadmap that grows Copilot as your team and confidence grow.

Book a free Copilot readiness call

30 minutes. We'll check your governance, pick your first use cases, and map a 30-day rollout — adoption and measurement included.

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