

# The pre-flight checklist for Microsoft Copilot

## Ready for lift off in 3, 2, 1...

This checklist will cover key preparedness tasks for both the included (free) version of Copilot and Copilot for Microsoft 365. You can read more about the different kinds of Copilot in [our definitive Microsoft Copilot guide](#).



So, where do you start with Copilot?

**1. Map out your Copilot use cases.**

[Here are some great examples.](#)

**2. Make sure your organization meets minimum requirements.**

- Get users off of the semi-annual update channel if you're using that.
- Adopt the Microsoft 365 apps (OneDrive, SharePoint, New Teams, Loop, and Whiteboard are all required, and we suggest New Outlook as well)

**3. Get your digital house in order to optimize for Copilot functionality.**

This includes:

- Cleaning up your cloud storage (Copilot for Microsoft 365 is only as good as the data it can access.)
- Improving your sharing and permissions management (Don't leave your organization exposed.)
- Copilot will use any resources an end user has access to when it generates responses.)
- Adopting the M365 apps in the browser (Copilot will be available immediately in the web apps, but may take a few days to show up on desktop versions.)
- Adopt general Copilot (The free versions of Copilot can add value and play an important role for your organization.)

**4. Build a rollout plan for leveraging generative AI at your organization that is aligned to applicable use cases and goals for your organization.**

Your plan might look something like this:

- Create a communications plan for how you'll tell users what your plan is for Copilot.
- Create a training plan for how you'll teach users about the various copilots available to them and how to use each effectively.
- Establish metrics for measuring the impact of Copilot in your organization.
- Make sure you meet licensing eligibility requirements (highlighted earlier). And if you don't, build a training and deployment plan to get those in place sooner than later.
- Ensure users have good information management hygiene. Where should they store files? Making sure information is structured accessibly for Copilot will be key.
- Establish any usage governance or guidelines for your employees. Is copilot the only approved generative AI app? Are there any limitations in the way they should use it?
- Start building momentum in your organization with Copilot!

BrainStorm is here to help. We have years of expertise helping organizations get their end users to efficiently adopt their tools and drive increased ROI from your stack. Our courses cover Copilot preparation, launch, and ongoing use to drive value for your organization. Let us help you start on the right foot.

[Contact us today](#)