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# User Experience Strategy Overview for Microsoft 365 Copilot

A guide to help User Experience & Adoption Leaders drive AI-powered business value and user satisfaction with Microsoft 365 Copilot.

Contents

[Introduction 2](#_Toc149692849)

[User Experience Strategy 2](#_Toc149692850)

[Envision the Change 2](#_Toc149692851)

[Onboard, Experiment and Deploy at Scale 3](#_Toc149692852)

[Drive Value, Optimize Experience, Create Fans 3](#_Toc149692853)

[User Experience Goals 3](#_Toc149692854)

[Assumptions 3](#_Toc149692855)

[Organizational Goals 4](#_Toc149692856)

[User Experience Principles 5](#_Toc149692857)

[User Experience Best Practices 5](#_Toc149692858)

[Continuous commitment to your User Community 6](#_Toc149692859)

[Stakeholder Management 6](#_Toc149692860)

[How to measure user adoption using the Microsoft 365 Adoption Score 6](#_Toc149692861)

[Conclusion 7](#_Toc149692862)

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# Introduction

Microsoft 365 is a suite of cloud-based productivity and collaboration tools that empower people to work smarter and faster. Microsoft 365 includes popular applications such as Outlook, Word, Excel, PowerPoint, OneNote, SharePoint, OneDrive. It also offers innovative solutions such as Microsoft Teams, a hub for teamwork that integrates chat, meetings, calls, and file sharing, and Microsoft 365 Copilot, a natural language interface that helps people improve productivity, unleash creativity, synthesize information and uplevel their skills.

However, adopting Microsoft 365 is not just about installing the software and using the features. It is also about changing the way people work and collaborate while creating a culture of digital transformation and knowledge sharing. To achieve this, people need to have a positive and engaging experience that motivates them to explore, learn, and adopt Microsoft 365.

This document outlines the user experience strategy for driving adoption of Microsoft 365, with a focus on Microsoft Teams and Microsoft 365 Copilot. It describes the goals, principles, and best practices for designing and delivering a user experience that meets the needs and expectations of users and helps them achieve their desired outcomes with Microsoft 365.

# User Experience Strategy

The user experience strategy for Microsoft Copilot 365 adoption is based on the Microsoft 365 Adoption Framework, user experience best practices and the culture and ongoing operations of our business. This holistic and comprehensive approach which covers the following aspects:

### Envision the Change

* **Strategy**: Define the business objectives and outcomes that Microsoft 365 Copilot can enable and communicate them to users and stakeholders. This includes identifying the strategic vision of your AI-powered organization.
* **Scenarios**: Identify the key use cases and AI-ready scenarios that Microsoft 365 Copilot can support and map them to the relevant products and services.
* **Readiness**: Assess the readiness and capabilities of people and the organization to adopt Microsoft 365 Copilot and address any gaps or barriers including assembling the proper team to ensure your success.
* **Staffing** – Assemble the appropriate Technology Enablement Team. For Microsoft 365 Copilot this may be a subset of an existing body that handles service roadmaps, technology strategy, governance and implementation priorities. This group size changes depending on the size and industry of your organization but always includes:
	+ **Executive Sponsors & Stakeholders** providing vision and overall leadership for the initiative.
	+ **User Experience / Adoption Leaders** accountable for user satisfaction and adoption of the new capabilities.
	+ **Business representation** including leaders and users to provide insight on target scenarios and day to day operations.
	+ **IT Professionals** accountable for the technical implementation, configuration and management of the new service. This include help desk / internal support leaders.
	+ **Champions** who provide user training and support before / during and after service deployment (e.g. the ***Copilot Flight Crew***). These individuals can advocate for and promote Microsoft 365 Copilot and provide peer-to-peer support and mentoring to other users.
* **Community Support** **–** Whether referred to as a Copilot Center of Excellence or community of practice, providing a shared experience for the user community to share knowledge and get support is essential to a successful deployment of Microsoft 365 Copilot. See our Guide to Building your CoE for instructions and inspiration on this topic.

### Onboard, Experiment and Deploy at Scale

* **Technical Readiness**: Work with your IT team to prepare for the new services including preparing the environment.
* **Early Adoption Program:** Select a key set of people who can onboard to Copilot and provide feedback for scale adoption methods.
* **Rapid Adoption Motions**: designed specifically for Copilot but applicable to other workloads this method allows for rapid user onboarding, rapid feedback cycles and in-product skilling tools as the primary model for adoption.
* **Safety**: review your security, privacy and governance practices in alignment with compliance requirements, organizational culture and values.
* **Awareness**: Raise awareness of the value and benefits of Microsoft 365 Copilot, and the available resources and opportunities for learning and support.
* **Learning**: Provide users with effective and engaging learning experiences that help them acquire the skills and knowledge they need to use Microsoft 365 Copilot.

### Drive Value, Optimize Experience, Create Fans

* **Metrics**: Establish the success criteria and indicators for measuring the adoption and impact of Microsoft 365 Copilot and track them over time. Ensure full enablement team access to Microsoft 365 Admin Center reporting resources.
* **Feedback**: Gather feedback from users and stakeholders on their satisfaction and challenges with Microsoft 365 Copilot and use it to improve the user experience and adoption strategy.
* **Culture Change**: Build an environment of curiosity, knowledge sharing and teamwork in the adoption of technology and attainment of specific objectives.
* **Rewards & Recognition**: Create objectives to reward employee engagement, new skills and knowledge sharing that is meaningful to employees and company culture.

# User Experience Goals

### Assumptions

The user experience goals for Microsoft 365 Copilot adoption are based on the following assumptions:

* Users have different levels of familiarity and proficiency with core functions of productivity services and may need diverse types of guidance and support as they onboard to Microsoft 365 Copilot.
* Users have different levels of trust and satisfaction with Microsoft services. Additional effort may need to be expended to rebuild trust with key users constituents.
* Users have different preferences and styles of working and learning and may need different options and modes of interaction.
* Users have different goals and tasks that they want to accomplish with Microsoft 365 Copilot and will need personalized instruction and a variety of different features and functionalities based on role.
* Users have different contexts and environments in which they will use Microsoft 365 Copilot and may need diverse levels of accessibility and availability.

### Organizational Goals

Our organization has a stated goal of becoming an AI-powered organization. Our collective leadership team has stated the following:

“Our intention as a leadership team is to leverage AI and AI-powered experiences to innovate, improve our competitive advantage in the marketplace, improve employee recruitment, retention, creativity and productivity and empower our organization for the future. Our customer, partners and employees are the heart of our organization and ensuring their user experience of our technology stack is continually improving is both a stated and measured objective. We continually seek to put their needs, both shared and unarticulated, at the center of our strategy as an organization. In doing so, we enable our continued growth for the benefit of current and future customers of our organization. “

Based on these assumptions and stated vision the user experience goals for Microsoft 365 Copilot are:

* Reduce organizational friction by consistently sharing leadership communications and goals
* Created realized value of stated culture goals by delivering meaningful change and recognition to employees. Transform the lived experience of employees.
* Provide users with a seamless and consistent experience across Microsoft 365 products and services, inclusive of Copilot and generative AI experiences, and across different devices and platforms.
* Provide users with a personalized and adaptive experience that caters to their individual needs, preferences, and goals.
* Provide users with a supportive and informative experience that helps them discover, learn, and use Microsoft 365 Copilot features and functionalities easily and with a minimum amount of workflow disruption, except when disruption is the stated goal of the scenario to be transformed.
* Provide users with a collaborative and social user experience that enables them to communicate, share, and co-create with others using Microsoft 365 Copilot.
* Provide users with a rewarding and satisfying user experience that increases their confidence, productivity, and satisfaction with Microsoft 365 Copilot.
* Provide meaningful way for users to share feedback with program and service leaders. Ensure feedback is analyzed and user are provided with outcomes for feedback themes.

# User Experience Principles

The user experience principles for Microsoft 365 Copilot adoption are based on the following values:

* **User-centricity**: The user experience should be designed and delivered with the user at the center, and should reflect the user's needs, expectations, and feedback.
* **Empathy**: The user experience should be empathetic and respectful of the user's emotions, feelings, and perspectives, and should create a positive and trusting relationship with the user.
* **Simplicity**: The user experience should be simple and intuitive, and should reduce the user's cognitive load and effort, and avoid unnecessary complexity and confusion.
* **Clarity**: The user experience should be clear and concise and should provide the user with relevant and accurate information and avoid ambiguity and misinformation.
* **Relevance:** The user experience should be relevant and useful and should provide the user with the features and functionalities that match their goals and tasks and avoid distraction and clutter.
* **Accessibility**: The user experience should be accessible and inclusive and should provide the user with the options and modes of interaction that suit their preferences and styles and accommodate their abilities and limitations.
* **Engagement**: The user experience should be engaging and interactive and should provide the user with the opportunities and incentives to explore, learn, and adopt Microsoft 365, and avoid boredom and frustration.
* **Collaboration**: The user experience should be collaborative and social and should provide the user with the tools and platforms to communicate, share, and co-create with others using Microsoft 365 Copilot, and avoid isolation and silos.
* **Feedback**: The user experience should be feedback-oriented and responsive and should provide the user with feedback and guidance that help them improve their performance and skills with Microsoft 365 Copilot and avoid errors and mistakes.
* **Recognition**: The user experience should be recognition-based and rewarding and should provide the user with recognition and rewards that acknowledge their achievements and progress with Microsoft 365 Copilot and avoid neglect and dissatisfaction.

# User Experience Best Practices

The user experience best practices for Microsoft 365 Copilot adoption are based on the following recommendations:

* Use Microsoft Teams or Viva Engage as the primary platforms for user experience delivery, as both integrate various Microsoft 365 Copilot features, and support teamwork and collaboration.
* Use Microsoft 365 and Copilot as the primary tools for user experience support and foundational content creation, analysis, and productivity assistance, as it provides personalized and adaptive guidance and learning for users while helping them complete tasks and learn new skills.
* Use a combination of different user experience methods and techniques, such as onboarding, tutorials, tips, notifications, gamification, badges, leaderboards, feedback, surveys, and analytics, to create a comprehensive and holistic user experience. Tailor approaches based on role, division or region as appropriate.
* Use a user experience design process that involves user research, user testing, user feedback, and user evaluation, to ensure that the user experience is user-centric, empathetic, and feedback-oriented.
* Use a user experience delivery process that involves user segmentation, user personalization, user adaptation, and user optimization, to ensure that the user experience is personalized, adaptive, and relevant.
* Use a user experience evaluation process that involves user satisfaction, user engagement, user adoption, and user retention, to ensure that the user experience is rewarding, satisfying, and effective.
* Use business goals in the form of objectives and key results, Microsoft 365 Adoption Score, Usage Reports, and direct user feedback to measure the success of the user experience, and to identify the areas of improvement and optimization.
* Standardize feedback gathering methods to baseline user engagement and satisfaction, if not already an operating principle of your organization.

### Continuous commitment to your User Community

In addition to these best practices, it is also important to have a long-term, consistent, and enthusiastic approach to user experience execution. User experience is not a one-time event, but a continuous process that requires constant monitoring, evaluation, and improvement. User experience also requires a culture of collaboration, innovation, and learning, where users, stakeholders, and user experience professionals work together to create the best possible user experience for Microsoft 365 Copilot. By having a long-term, consistent, and enthusiastic approach to user experience execution, users can enjoy the benefits of Microsoft 365 Copilot not only in the short term, but also overall.

### Stakeholder Management

Key stakeholders for improving the user experience are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ <fill in>. To manage expectations, program delivery and ongoing engagement that is visible to the organization we have adopted a standard briefing schedule. Within this briefing we will discuss key feedback items, program delivery and execution and overall company policies that will impact the user experience. This service health review will also share information on the technical health of the service including any service interruptions, support ticket volumes and resolution times and anticipated changes to the service for prioritization.

### How to measure user adoption using the Microsoft 365 Adoption Score

One of the key metrics that can help measure user adoption of Microsoft 365 is the Adoption Score. The Adoption Score is a numerical value that represents the extent to which users are using the core features and capabilities of Microsoft 365, such as Outlook, OneDrive, SharePoint, Teams, and Yammer. The Adoption Score is calculated based on the number of active users, the frequency of usage, and the diversity of usage across different Microsoft 365 services. The Adoption Score can range from 0 to 100, where 0 means no adoption and 100 means full adoption.

The Adoption Score can help user experience and adoption professionals to:

* Assess the current level of user adoption of Microsoft 365 and compare it with the target or benchmark level
* Identify the gaps and opportunities for increasing user adoption of Microsoft 365
* Track the progress and impact of user experience interventions and initiatives on user adoption of Microsoft 365
* Communicate and demonstrate the value and benefits of user adoption of Microsoft 365 to users and stakeholders

The Adoption Score can be accessed through the Microsoft 365 admin center, under the Reports section. The Adoption Score dashboard provides a comprehensive overview of the Adoption Score, as well as the breakdown by service, user segment, and time period. The Adoption Score dashboard also provides recommendations and resources for improving user adoption of Microsoft 365, such as training materials, adoption guides, and best practices.

It is essential to note that the adoption of a service does not equate with satisfaction with that service. Data gathered from feedback methods will validate user satisfaction based on the elements and stated goals of this strategy.

# Conclusion

This document has presented the user experience strategy for driving adoption of Microsoft 365 Copilot and associated Microsoft 365 experiences. It has outlined the user experience goals, principles, and best practices for designing and delivering a user experience that meets the needs and expectations of users and helps them achieve their desired outcomes with Microsoft 365 Copilot. By following this user experience strategy, we will deliver a seamless, consistent, personalized, adaptive, and satisfying user experience with Microsoft 365 Copilot as we embark upon the journey to be an AI-powered organization.