

FREE RESOURCE — MICROSOFT 365 COPILOT

Copilot Pilot Rollout Plan

A phased template for rolling Copilot out to the wider business without wasting licence spend on people who never use it. Select the right champion group, run a structured 30/60/90-day pilot with real success metrics, set a go/no-go gate, and expand department by department once it earns its keep.

3

ROLLOUT
PHASES —
30 / 60 / 90 DAYS

5

SUCCESS
METRICS
TRACKED

1

GO/NO-GO
DECISION GATE

Fillable

TICK & TYPE
IN ANY VIEWER

CHAMPIONS

30/60/90

METRICS

EXPANSION

PREPARED FOR

Cloudswitched Knowledge
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

01

Champion group & milestones

A pilot succeeds or fails on who is in it. Pick people who will genuinely use it and give honest feedback — not just the people who asked loudest for a licence.

Champion-group selection criteria

- **Mix of roles and seniority** — not all managers, not all one department. Aim for 15–30 users across at least 3 functions.
- **High-volume knowledge-work roles included** — people who write, summarise or analyse regularly see the clearest time savings.
- **At least one sceptic per department** included deliberately — genuine, critical feedback is more useful than universal enthusiasm.
- **Tenant readiness confirmed** for every pilot user before licensing — see the Copilot Tenant Readiness Checklist.

30/60/90-day milestones

MILESTONE	FOCUS	TARGET DATE
Day 30	Onboarding, prompt training delivered, baseline usage established across all champions.	_____
Day 60	Mid-pilot check-in, feedback loop live, early wins documented per department.	_____
Day 90	Full metrics review, go/no-go decision, expansion plan drafted if proceeding.	_____

PROMPT TRAINING IS NOT OPTIONAL

The single biggest driver of low Copilot adoption is untrained users typing vague, one-line prompts and giving up after a poor result. Run a structured onboarding session in week one — see the Copilot Prompt Cheat Sheet as a companion handout.

02

Success metrics & department expansion

Success metrics to track

- **Weekly active usage** — percentage of licensed pilot users prompting Copilot at least 3 times a week.
- **Time saved (self-reported)** — a simple weekly survey question: “How many hours did Copilot save you this week?”
- **Satisfaction score** — a 1–5 rating collected at day 30 and day 90 to track whether sentiment is improving.
- **Task-specific adoption** — which apps get used (Outlook, Word, Excel, Teams, PowerPoint) to guide targeted training for low-adoption apps.
- **Support tickets / prompt-help requests** — a falling trend indicates growing confidence; a flat or rising one signals a training gap.

Feedback loop

- **Weekly 15-minute champion check-in** (or async form) for the first month, dropping to fortnightly after.
- **A shared “best prompt” log** where champions post prompts that worked well, to seed the wider rollout’s training material.
- **Blockers logged and triaged weekly** — permission issues, licensing gaps, or unclear use cases.

Go/no-go gate (day 90)

- Go — expand to next departments
- Extend pilot 30 days
- No-go — reassess use case

Department-by-department expansion

DEPARTMENT	WAVE	TARGET DATE	READINESS CONFIRMED
_____	___	_____	□
_____	___	_____	□
_____	___	_____	□
_____	___	_____	□



Pilot sponsor sign-off

Name a single sponsor accountable for the pilot outcome and the go/no-go decision — a pilot without an owner drifts indefinitely without ever reaching a decision.

PILOT SPONSOR

ROLE / TITLE

PILOT START DATE

Notes

Want your pilot designed and run for you?

Cloudswitched runs managed Copilot pilots for UK SMEs — champion selection, training, metrics reporting and the expansion plan, end to end.

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