



# Fast Track to AI Transformation with Microsoft 365 Copilot Chat

E-book





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01

# The AI moment: Why now?

AI isn't coming. It's here—and it's becoming part of how work gets done across a growing number of organizations. Instead of treating it as a standalone initiative, forward-looking companies are beginning to embed AI into everyday operations—streamlining processes, supporting faster decisions, and enhancing collaboration.<sup>1</sup>

As a business leader, you're in the position to help shape this monumental shift. The 2025 Work Trend Index from Microsoft introduces the concept of Frontier Firms: organizations that work fluently alongside AI. They're tapping intelligence on demand, enabling human-AI collaboration, and exploring the potential of agent bosses—AI tools that can take on increasingly complex tasks and oversight.<sup>2</sup>

Some leaders are still exploring their path forward, but many are already taking action. **Forty-six percent** of leaders say their organization is using agents to fully automate workstreams or business processes.<sup>2</sup> **Seventy-eight percent** are considering hiring for AI-related roles.<sup>2</sup> And **eighty-two percent** of leaders expect to use digital labor to expand their workforce in the next 12 to 18 months.<sup>2</sup>

This isn't just a technological shift—it's a reimagining of work itself.

Embracing AI doesn't require a sweeping overhaul. It can start with a single prompt. That's what makes Microsoft 365 Copilot Chat such a powerful tool. It's a secure, intuitive, easy-to-use AI assistant built into the apps people already use every day. No extra setup—just click the icon, type a prompt, and let Copilot Chat help you drive AI transformation at scale.

This guide will show you how to use Copilot Chat to spark real behavior change across your organization—from individual experiments to team collaboration with Copilot Pages and powerful automation through agents. It's not just about trying AI—it's about building an AI habit that sticks.

Let's dive in.





02

## Build AI fluency— from curiosity to confidence

That first AI prompt? It's the spark that ignites momentum. Copilot is the UI for AI, and it all starts with Copilot Chat. With suggested prompts to help you get started, every employee can begin building AI fluency from day one—driving productivity and innovation across the organization, enabling everyone to work smarter, faster, and more collaboratively.





## Here are some prompts your team can try right now:

### Use a file to draft an email

"Create a summary of this document with key takeaways I can email to my team. Add bullets and a recommended next step for each point."



### Create an agenda from a document

"Use this document to help me prepare an agenda for our upcoming team meeting."



### Upload and analyze files

"Describe the differences between these materials."



Each success builds confidence. Each new use case builds momentum. And when you're ready to go from trying a tool to building a habit, start the [Great Copilot Journey](#)—your organization's guided path to putting AI into practice, one prompt at a time.



03

# Level up with agents

Once employees are comfortable with the chat experience, it's time to add agents. These are specialized AI tools designed for specific tasks with the ability to seamlessly connect to your business data.

**Agents can:**

- Help manage projects
- Perform compliance checks
- Gather research insights from company databases

You don't need developers to build them. With Agent Builder, just describe what you want in natural language and connect to your data sources. You scale based on need—no big upfront investments.

**Agents turn individual productivity wins into sustainable organization-wide impact.**



04

# Enable multiplayer collaboration with Copilot Pages

The tipping point comes when teams start to align around AI. Copilot Pages makes AI a team experience. Copilot Pages can turn individual chats into a shared canvas, giving teams the flexibility to collaborate on AI-generated content when and how they choose to share it. Copilot Pages keeps context accessible to all team members—making it simple for everyone to contribute, refine, and build on ideas together. This multiplayer extension of Copilot Chat ensures that everyone is on the same page, literally and figuratively.



05

# Measure AI habits as they scale

Building AI habits is only the beginning—knowing where they’re catching on is how you accelerate real change.

**Microsoft 365 Copilot Dashboard helps you track the signals of success:**

**Track adoption**

See how often and where Copilot is used across apps.

**Spot impact**

Understand how key features affect work behaviors and outcomes.

**Compare trends**

Use filters to explore usage patterns across teams.

Use this data to scale what’s working, close gaps in adoption, and guide targeted enablement.

When you know where habits are forming, it’s easier to turn momentum into transformation.



06

# Spot the signs of AI maturity

As your teams grow more confident with Copilot Chat, certain behaviors signal they're ready for more advanced use. Look for employees who go beyond basic prompts—those who upload their own files, explore complex scenarios, and openly share tips with colleagues. When people start asking how to connect AI to business systems and internal data, that's a clear indicator they're not just using AI—they're thinking strategically about how to scale it.

When you notice that momentum, capitalize on it by providing your power users with best-in-class Microsoft 365 Copilot. This will empower them, and your teams, to leverage AI for quick, visible wins in areas like customer support, marketing, operations, and more. This is how you build momentum and achieve ROI.



07

# Everyday work can spark enterprise momentum

Daily interactions help your employees explore AI at their own pace, gaining confidence and forming the kind of habits that can lead to transformation.

As your teams grow more confident with Copilot Chat, it's easier to expand adoption across departments. When your organization is ready to go further, the full Microsoft 365 Copilot experience helps boost efficiency, accelerate decision-making, and fuel innovation—at scale.

With our best-in-class offering of Microsoft 365 Copilot, employees can access Copilot directly within the familiar Microsoft 365 apps like Word, Excel, PowerPoint, Outlook, and Teams. This seamless integration allows users to leverage AI features right where they're already working. Additionally, Copilot Chat inherits your existing Microsoft 365 security, privacy, and compliance settings, ensuring that every interaction remains protected by the standards you already trust.



# Momentum checklist: Encouraging enterprise- wide adoption



## Start with curiosity

**Action:** Employees try Copilot Chat for the first time

**Outcome:** Immediate benefits from quick prompts (summarize documents, create visuals, etc.)



## Build confidence

**Action:** Increased use across teams for consistent tasks (generate reports, craft content)

**Outcome:** Employees feel more comfortable and confident with AI tools



## Share the knowledge

**Action:** Employees share tips, prompts, and results

**Outcome:** Collective learning begins; AI fluency spreads



## Scale across teams

**Action:** Multiplayer AI collaboration with Copilot Pages

**Outcome:** AI becomes a team tool for workflow improvement



## Unlock agents

**Action:** Transition from manual tasks to automation with agents

**Outcome:** Routine tasks are automated, freeing up time for strategic work



## Measure momentum

**Action:** Track success using the Microsoft 365 Copilot Dashboard

**Outcome:** Recognize high-impact use cases and teams leading the charge



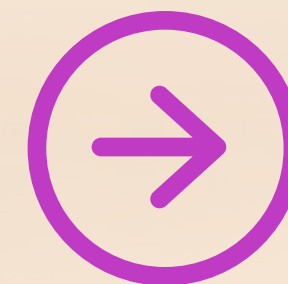


# Your organization, accelerated by AI

This isn't just about making tasks easier—it's about transforming how your organization operates.

With Copilot Chat, your teams make decisions faster, create better content, uncover smarter insights, and collaborate effortlessly. As they integrate AI into their everyday tasks, they'll develop stronger AI habits—fueling faster innovation, improved productivity, and more impactful outcomes that push your business forward. This seamless integration leads to more advanced use of Copilot Pages and agents, enabling your teams to leverage sophisticated tools for enhanced project management, data analysis, and automated workflows.

This is how real transformation starts. With more impact and unstoppable momentum.



And it all starts with one click. **Try Copilot Chat today.**

**Source:**

<sup>1</sup> "Agents of Change," Microsoft Work Lab, 2025. <https://www.microsoft.com/en-us/worklab/agents-of-change>.

<sup>2</sup> "2025: The Year the Frontier Firm Is Born," Work Trend Index annual report, April 23, 2025. <https://www.microsoft.com/en-us/worklab/work-trend-index/2025-the-year-the-frontier-firm-is-born>.

The Work Trend Index survey was conducted by an independent research firm among 31,000 full-time employed or self-employed knowledge workers across 31 markets between February 6, 2025 and March 24, 2025. Knowledge workers in this context means those who typically work at a desk (either at home or at an office).

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Read the 2025 Work Trend Index to learn about the emergence of the Frontier Firm—built on intelligence on demand, human-agent teams, and a once-in-a-generation shift in how we work.

**2025:**  
The Year the Frontier  
Firm Is Born

