



**SIVICO LEARNING**

# Microsoft 365 Copilot Adoption

**Strategy and Governance**

# Executive Summary

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Most SMEs do not require a 50-page AI strategy to start their Copilot journey. But they do need to answer five key questions.

1. Where could Copilot create value?
2. What are the risks?
3. What rules and ownership groups should we establish?
4. What capabilities and skills do our people need?
5. How will we know it's working?

Strategy decides where Copilot can add value to your business; governance structures establish the rules for use, thereby increasing confidence and ensuring accountability.

## Governance Enables Adoption

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Successful Copilot adoption sits at the intersection of business objectives, governance and workforce capability.

Whilst Microsoft 365 Copilot can help organisations improve productivity, simplify routine tasks and unlock organisational knowledge, technology alone rarely delivers meaningful business outcomes. Organisations need clear objectives, practical governance arrangements and the skills required to use Copilot confidently and responsibly.

Leading international frameworks such as the NIST AI Risk Management Framework and ISO/IEC 42001 highlight the importance of accountability, risk management, workforce capability and continuous improvement when introducing AI into business operations. These principles are increasingly recognised as essential foundations for trustworthy and sustainable AI adoption.

With robust and appropriate governance structures in place, SMEs can create the confidence and clarity needed for successful adoption while reducing risk and supporting responsible innovation.

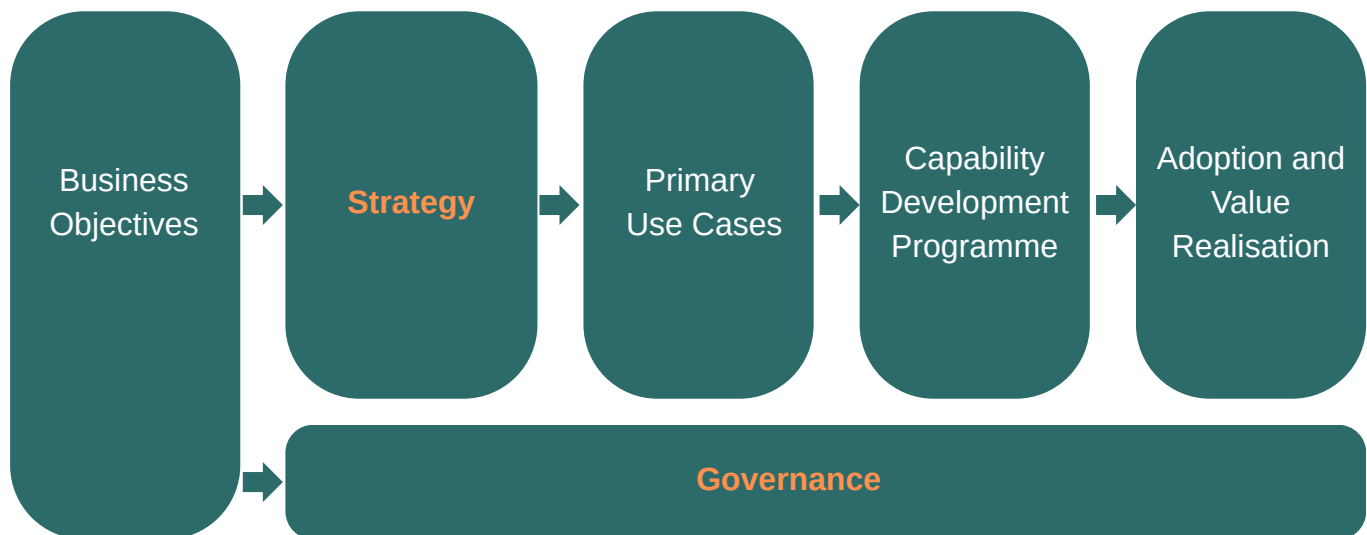
**Governance should not be viewed as a barrier to innovation.**

**Effective governance creates the confidence, trust and accountability that enable organisations to realise value from Copilot.**

# Where Strategy and Governance Fit

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Simply providing Copilot licenses to staff is unlikely to have much impact on the business. Neither will generic software training. Sivico Learning offers SME-specific adoption programmes that build confidence within the business.



## Where To Start

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A Copilot strategy is relatively easy to create.

A comprehensive, expert-led discovery process will develop a shared understanding of the business objectives, identify primary use cases that support those objectives and name the key people to be involved.

The supporting governance structures will draw on best practice - and legal requirements - and be aligned to the resources and environment of the organisation.

Governance will involve most of the following elements.



## A. Data and Information

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1. Staff know what information can be entered into Copilot.
2. Staff know what information must never be entered into Copilot.
3. Sensitive customer information is protected.
4. Approved Copilot Agents have been identified.
5. Staff understand their responsibilities for data protection.

## B. Human Oversight

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1. Copilot-generated outputs are reviewed before important decisions are made.
2. Customer-facing communications are checked by a human.
3. Copilot outputs are verified before publication or distribution.
4. Staff understand that AI can make mistakes.
5. Human judgement remains responsible for final decisions.

## C. Accountability

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1. An owner for Copilot adoption has been identified.
2. Managers understand their responsibilities.
3. Staff know where to seek advice.
4. A process exists for reporting concerns or issues.
5. Copilot-related decisions have clear ownership.

## D. Workforce Capability

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1. Staff understand the benefits and limitations of AI.
2. Relevant training has been provided.
3. Employees know how to write effective Copilot prompts.
4. Employees know how to check AI-generated outputs.
5. Teams understand approved ways of working with AI.

## E. Monitoring and Improvement

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1. Copilot adoption is being tracked.
2. New use cases are reviewed regularly.
3. Risks and issues are reviewed regularly.
4. Successes and lessons learned are shared.
5. Governance guidance is updated when required.



# Why Sivico Learning

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We help organisations establish practical governance arrangements that align business objectives and workforce capability as part of a Microsoft 365 Copilot adoption programme. The result is a more confident workforce, clearer accountability and a stronger foundation for long-term value realisation on the road to AI maturity.

## **Appropriate and robust**

Effective AI governance frameworks that work in your business context.

## **Ability to scale**

As your use of AI expands, now familiar structures will grow with you.

## **Compliant**

Drawn from best practice and legal compliance.

# Microsoft Certified

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**AI Transformation  
Leader**



**Copilot and Agent  
Administration  
Fundamentals**



**AI Business  
Professional**

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Ready to get started?



**Schedule an  
online consultation**

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