

Volume I

Navigating AI transformations: The playbook for measuring Copilot implementation and impact with Viva

This first edition offers guidance on how to get started with measuring Copilot readiness, adoption, and impact using the Viva measurement apps (Insight, Glint, & Pulse)

Playbook



Contents

03

Introduction

04

Holistic measurement strategy for Copilot implementation

09

Using Viva to measure Copilot implementation

10 Measuring readiness

14 Measuring adoption

18 Measuring impact

23

Key takeaways

24

References

25

Appendix

Introduction

The global shift to an Artificial Intelligence (AI)-powered workplace is a transformation that is rapidly redefining the way we work. Employees, not organizations, are leading the charge on AI integration at work. In our study, a staggering 80% of employees say they already use AI tools at work¹.

As leaders consider enterprise investments in AI, a common question emerges: *How can I best measure the effectiveness and impact of AI at my company?*

Organizations are in the process of catching up to their employees by investing in AI tools and implementing rollout initiatives in varying types and sizes. But even though we are seeing more and more organization-led AI transformations, 41% of organizations report struggling to define and measure the exact impacts of their Generative AI efforts².

Without a way to clearly understand the impact of AI for their organization, many leaders are left in the dark about the true extent of what it can do for their employees, teams, functions, and overall business.

78% of executives say AI is critical for business success¹.

Harnessing AI capabilities to realize value requires behavioral changes throughout the workforce. We know from the history of organizational change management initiatives that sustainable behavior change can be difficult, and many employees have some hesitation and fear surrounding change, which detrimentally impacts the success of change initiatives³.

While leaders may be on board with AI transformation, adopting new technologies and practices that fundamentally change the way people work requires intentional planning and measurement, and a people-centric approach to be successful. Unlike typical digital tool implementations, AI is an elective technology that requires buy-in from employees, starting with awareness and motivation before knowledge and skill development can be activated, and value to users and the business realized.

An **AI change leader** is a leader in the organization responsible for driving function- or enterprise-wide AI implementation and transformation efforts. They provide strategic oversight and act as a bridge between technical teams and business stakeholders to ensure AI initiatives align with organizational goals.

This playbook is written for and intended to support AI change leaders. No matter where you are in your journey, this playbook can help you plan your AI measurement strategy holistically. As your strategy and this technology evolve, so will the methods to operationalize value. This playbook offers initial steps to get started. While it is not exhaustive, it provides essential guidance on how to measure, monitor, and achieve value from AI implementation.

We intend to increase AI change leaders' confidence and sense of empowerment in measuring AI readiness, adoption, and impact by providing foundational guidance and top-of-mind considerations for taking a people-centric approach to change measurement.

While suggestions in this playbook can apply to measuring AI implementation generally, we focus on Microsoft 365 Copilot, the tool that fully integrates AI capabilities into Microsoft 365 applications.



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“The key to getting a real return on your AI investment is a human-centered approach, enabling individuals to leverage these tools in service to their work. It is important to be intentional about measuring and listening throughout the adoption process to understand how AI innovation is creating value for employees and where there are opportunities for continuous improvement.”

Christopher Fernandez,
CVP, Microsoft HR

1 – Microsoft Viva People Science, The state of AI change readiness. August 2024.
2 - Deloitte, Now decides next: Moving from potential to performance. August 2024.
3 – Harvard Business Review, Change Is Hard. Here’s How to Make it Less Painful. April 2022.

Holistic measurement strategy for Microsoft 365 Copilot implementation

What to measure

While business impact is the ultimate goal of Copilot implementation, getting there requires a shift in organizational culture and employee behavior, with significant change management and adoption implications at every level. To effectively measure change with a large-scale transformation like AI, a measurement system should be comprehensive and holistic. Ideally, it should be able to assess organizational readiness for transformation, and track ongoing workforce behavior changes, make sense of them, and enable frequent and timely sentiment checks at key points in the adoption process.

No matter where your organization is on the Copilot journey, building a set of measurement tools to collect both behavioral data (e.g., Copilot usage levels) and sentiment data (e.g., people’s feelings of willingness to integrate Copilot) is an important step to help you track ongoing changes and to understanding your return on investment.

A holistic measurement strategy should also be agile and adaptive, empowering employees, managers, and senior leaders with enriched insights and increased accountability to incorporate Copilot work practices that best achieve desired outcomes for users and impact that matters to the business.

When to measure

Measurement strategies for organizational change need to consider all phases of the change, not solely the final stage outcome of the change initiative. Measuring along the way increases transparency of the change experience and provides more data-driven clarity, setting the foundation for repeatable and improved processes⁵.

When undergoing a change, you should leverage targeted listening channels to address specific components of the change experience and identify the proper rhythm to engage these channels. For instance, behavior changes often take longer to yield meaningful results, but weekly variations can offer early indicators of the impact of interventions. In contrast, sentiment and attitudes can be tracked at more flexible intervals, allowing organizations to capture both short-term feedback and longer-term shifts in perspectives and mindsets. This multi-data source approach enables a more nuanced understanding of the evolving dynamics of change.

For Copilot implementation, there may be different change experiences by team, by function, or by cohort. Your holistic measurement strategy should consider this organizational complexity by enabling multiple sources of data and feedback, which empower change leaders to be agile and pivot when necessary to create a positive change

experience and track the impact of the change across the organization.

How to measure

With numerous data sources and tools available, it can be challenging to know where to start. This playbook will help you outline your measurement goals, identify key metrics, and explore how various listening and feedback gathering tools (e.g., survey applications) can support a holistic assessment system and provide a strong foundation for your Copilot measurement journey.

While you can use any measurement tools at your disposal, we focus in this playbook on Microsoft Viva Insights, Viva Glint, and Viva Pulse applications and their measurement capabilities.

[More about the Viva measurement apps starts on p7].

These tools gather workforce sentiment feedback (how people feel and think), behavioral telemetry (what people are doing), and other signals. They analyze these data to highlight opportunities for better planning and accelerating your organization’s Copilot journey.

This playbook will guide you through a planning approach for using Insights, Glint, and Pulse to measure your implementation of Copilot. It will help you get a comprehensive understanding of your Copilot implementation's progress and value, by combining detailed workplace analytics from Viva Insights, with sentiment analysis from Viva Glint, and continuous feedback from Viva Pulse.

Sentiment feedback and behavioral insights can be understood even more deeply when augmented by conversations, focus groups, and interviews with various employees, user groups, and stakeholders.

The following pages will help you identify the value you wish to create, the goals you envision for Copilot implementation, the associated measures for individual roles, business functions, and across the organization, and how to apply holistic measurement to assess Copilot readiness, adoption, and impact.

A Holistic Measurement Strategy is a comprehensive, multi-channel approach of collecting, analyzing, and responding to employee behavior and feedback. A holistic measurement strategy encompasses multiple listening channels by which employees express their voice, interact, and engage with their organization. These strategies allow you to gather, understand, and respond to what employees are saying, how they are feeling, and what they are doing, which provides a full understanding of the employee experience and how it aligns with your people and business priorities⁴.

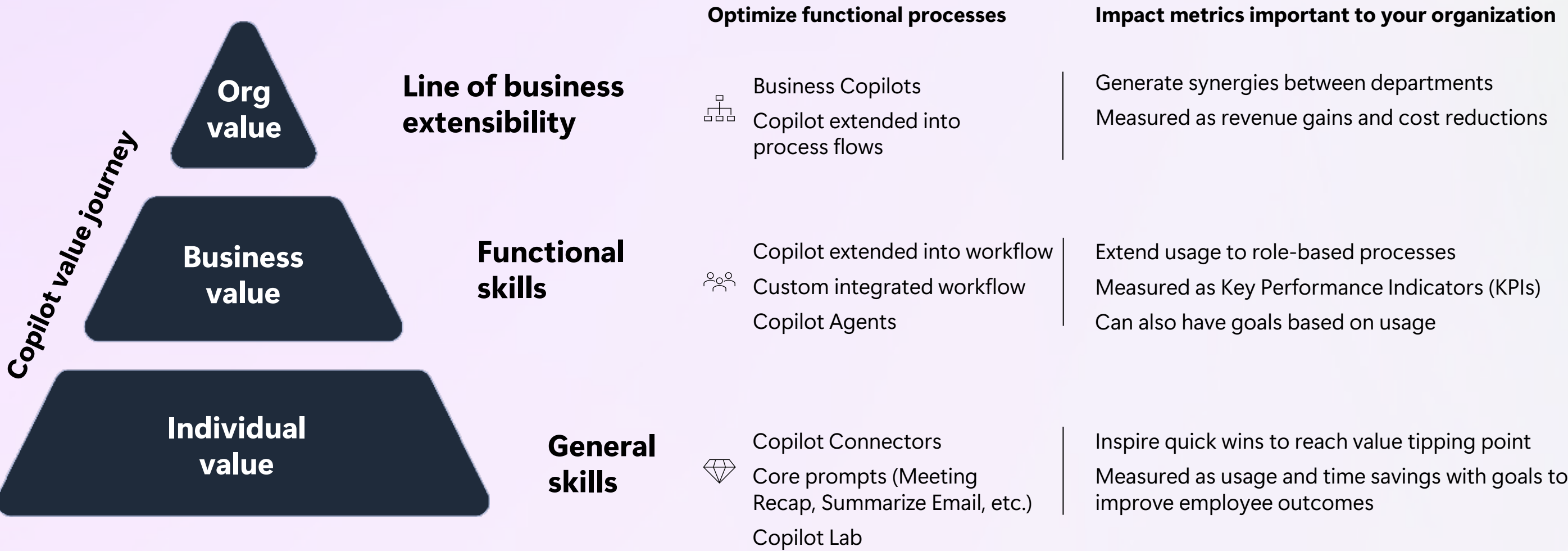
4 – Microsoft Viva People Science, Building a holistic listening ecosystem. July 2023.
5 – Harvard Business Review, How to Actually Execute Change at a Company. March 2024.

Value creation will vary across levels

When creating your holistic measurement strategy for Copilot implementation, it's important that you collect metrics at all levels of the organization, from organization-wide outcomes to individual utilization metrics, to help you generate a comprehensive view of the impact of your Copilot implementation. A recent study by Deloitte found that the top actions taken to measure and communicate AI value creation were using KPIs to evaluate AI performance (48% of organizations), building frameworks to evaluate AI investments (38%), and tracking changes in employee productivity (38%)².

Measures of value-creation will vary by level in the organization⁶. At the highest level, measures may consist of overarching business goals, such as increased revenue gains. Value at this level will take more time to realize than at lower levels. There will be varying Copilot implementation goals for each function within your organization based on their core job responsibilities and functional outcomes^a, such as reducing cost per lead for your marketing function^b. At the individual job and role level, measures will focus on both specific day-to-day experiences (e.g., work efficiencies) and long terms outcomes (e.g., job satisfaction).

Consider your measurement strategy as a series of pyramid levels. Each level reveals only a portion of the story, but together, they construct a comprehensive view of your organization's AI-driven workplace transformation. This perspective creates clarity for your Copilot implementation strategy, helping differentiate what goals are for the organization, for business or functions, and for individual job roles. Then, aligning measurable and trackable outcomes with these goals provides direction and can help charter important success metrics.



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Many organizations are in the middle stage of their AI journeys. They initially deployed Copilot licenses in a somewhat random manner, training individual employees on how to derive value from AI in their own day-to-day work. However, they are now seeing opportunities for a more purposeful approach, focusing on specific use cases driven by job function, role, or by specific teams.”

Adam Greenhouse
Microsoft Senior Business Value Advisor

2 – Deloitte, Now decides next: Moving from potential to performance. August 2024.
6 – Harvard Business Review, The 6 Disciplines Companies Need to Get the Most out of Gen AI. July 2024.

a – Microsoft Learn, AI Learning Hub.
b – Microsoft Adoption, Microsoft Copilot Scenario Library.

Aligning Copilot goals with measurement opportunities

To effectively apply this approach, start by identifying the key questions your measurement strategy is designed to answer. Each level of the pyramid will come with its own set of questions, ideal value-creation/inefficiency-reduction scenarios, and trackable metrics. We are seeing that in organizations that have implemented Copilot, the strategic mindset is two-fold: companies are implementing AI to achieve both efficiency and cost-saving goals, as well as to create greater value for higher quality business outcomes. Leaders must look beyond simple time savings and consider how Copilot can drive value and alleviate challenges at the organizational, business or functional, and individual levels.

Copilot will inevitably transform workflows, redefine tasks, and reshape the overall employee experience. Leaders who anticipate these shifts will be better positioned to measure changes and fully leverage AI's potential.

The next page of this playbook highlights the strengths of the Viva Measurement applications as tools to help you realize your Copilot measurement strategy.



What value are you trying to create for your overall **organization** through Copilot?

Key Questions

- What are my top business needs that can be supported by Copilot?
- How can Copilot help me create a competitive advantage in my industry?

Potential Value Creation & Reduced Cost or Inefficiencies

- Copilot drives business success at an enterprise-level, resulting in improvement in key business outcomes that align with our company's strategy
- Copilot reduces costs and effort at an enterprise-level, resulting in more targeted and effective use of human labor and cognition

Example Trackable Metrics

- New revenue generation
- Reduced costs
- ROI - \$ value of time savings based on labor costs
- Time to payback investment
- Employee retention
- Customer loyalty



What value are you trying to create for each **function** within your business through Copilot?

Key Questions

- What are the specific processes and distinct KPIs for each business function that can be augmented by Copilot?
- Where do I see Copilot implementation making an immediate impact versus a long-term impact?

Potential Value Creation & Reduced cost or Inefficiencies

- Copilot drives tailored success at the functional level, resulting in unique value creation that is relevant to each function's overarching goals
- Copilot reduces specific routine task effort at the functional level, resulting in reallocated time investment for higher-impact projects

Example Trackable Metrics

- Marketing: Cost Per Lead (CPL)
- Sales: Customer Retention
- Finance: Risk Management
- HR: Employee Onboarding Time
- Legal: Faster contract review
- Support: Customer service call times decreased

[See more Functional KPIs in the [Microsoft Copilot Scenario Library](#)^b]



What is the value of Copilot for the **individual** employee experience?

Key Questions

- How can Copilot accelerate progress on productivity goals?
- How can Copilot create better employee experiences and help me meet my people goals?

Potential Value Creation & Reduced Cost or Inefficiencies

- Copilot drives personalized success at the job role level, resulting in sustainable new working practices that not only increase employee output but also improve the employee experience
- Copilot reduces burden and monotony at the job role level, resulting in time savings that enable greater balance, innovation, and creativity

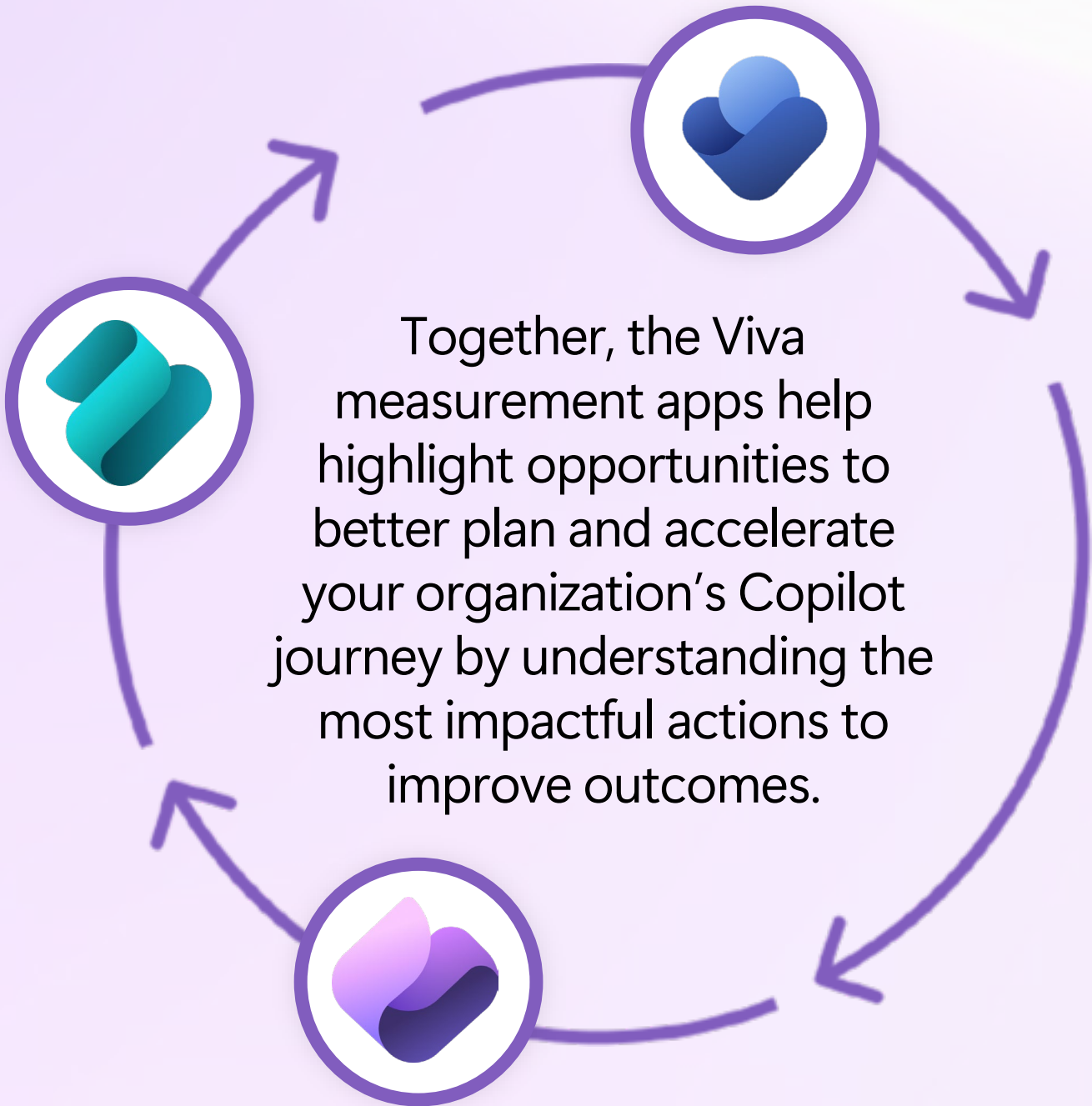
Example Trackable Metrics


- Workflow impact, e.g., daily task throughput times decreased
- % time reallocated from administrative tasks/meetings
- Collaboration effectiveness
- Productivity improvements
- Employee engagement

b – Microsoft Adoption, Microsoft Copilot Scenario Library.

The Microsoft Viva measurement applications

Measure, listen, and act to drive better outcomes for people, teams, and organizations during Copilot implementation






Viva Insights

Use Copilot Analytics in Viva Insights to identify actionable insights and usage trends.

Measures how people work

- How are people adopting Copilot?
- How are workplace collaboration patterns changing?
- Where are people experimenting with Copilot?
- How can I track Copilot usage against functional KPIs?




Viva Glint

Collect enterprise-wide employee sentiment on their Copilot experience and gauge overall effectiveness of Copilot implementation efforts.

Measures how employees feel

- Are people happy working here?
- Do they feel ready to adopt Copilot?
- Do they have the skills needed to adopt Copilot?
- Which job tasks will most improve when assisted by Copilot?



Viva Pulse

Collect democratized feedback from employees at the team level on their Copilot experience to help change leaders fine tune their adoption approach.

Measures how teams experience change

- How are teams adjusting to Copilot?
- What Copilot adoption barriers do we need to address?
- How can we better support Copilot transformation across different groups?

...aligned to your organization's:




Copilot business value creation goals	Copilot implementation strategy	Key Copilot adoption and impact indicators
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Complement findings from the Viva measurement apps with employee conversations via interviews and focus groups that provide a deeper understanding and surface the most actionable solutions.

Microsoft Viva measurement applications and license requirements

Your toolkit for holistic Microsoft 365 Copilot measurement

		Measuring Microsoft 365 Copilot implementation	Included with...	Microsoft 365 Copilot	Viva license
 Viva Insights	<p>Viva Insights^c is a privacy-protected data-collection and analysis platform, providing visibility into employee workplace activities, communication behaviors, and collaboration patterns.</p> <p><i>Copilot Analytics is best for monitoring Copilot implementation by measuring real time utilization activity, adoption trends and patterns, and resulting impact. It is most useful in comparing Copilot usage insights over time and between various functions and teams.</i></p> <p>See appendix p34 – 36 for more details about Copilot Analytics Reporting.</p>	<p>Copilot Analytics: Copilot Analytics powered by Viva Insights provides detailed analytics on Copilot utilization, adoption patterns, and impact^f. This anonymized and aggregated signals data^g can be used to measure the effect of Copilot on work quality, efficiency, and business results, while identifying where Copilot can further enhance satisfaction and productivity across the Copilot transformation journey. Watch a video demo here.</p> <ul style="list-style-type: none">• Advanced Analytics: Multiple pre-built reports and templates available (e.g., Advanced M365 Copilot adoption report, Copilot for Sales adoption report). Custom reports, dashboards, and tailored outputs can be conducted with Copilot Analytics.• Copilot Business Outcome Report: This prebuilt report allows organizations to customize their analysis based on their specific metrics and KPIs with their business data for a specific group of Copilot users. It helps change leaders to understand how Copilot usage relates to the key business outcomes for their functions and identify best practices and areas of opportunity.	<p>Viva Insights</p> <p>Copilot Analytics</p> <p>Analyst Workbench</p> <p><i>*Limited features with less than 50 Copilot licenses. Unlock all features with 50+ Copilot licenses.</i></p> <p><i>** Requires at least 10 Viva Insights licenses.</i></p> <p>Follow the Viva Insights Blog to keep up on all new features.</p>	<p>✓</p> <p>✓ *</p> <p>✓</p>	<p>✓</p> <p>✓ **</p> <p>✓</p>
 Viva Glint*	<p>Viva Glint^d is an admin-deployed employee survey platform, delivering visibility into employee sentiment at multiple levels in the organization. Viva Glint features advanced reporting, identification of key employee outcome predictors, and sentiment analysis at scale for a full picture view.</p> <p><i>As a centrally administered app, Viva Glint is best for measuring enterprise-wide Copilot sentiment where comparisons across roles, levels, and functions are needed.</i></p>	<p>Scaled Sentiment Analysis: Viva Glint helps the organization gain an enterprise-wide perspective of how prepared and ready employees are for Copilot, how they experience it during adoption, and Copilot’s impact on their jobs and for the organization.</p> <p>Tailor-made Engagement Strategies: Engaged employees are more likely to adopt AI¹. By analyzing feedback about Copilot among other broad topics important to employee happiness and success at work, organizations can craft strategies to improve engagement and address negative sentiments that could emerge during AI implementation, ensuring a smoother transition to Copilot-powered work experiences.</p>	<p>Viva Glint</p>	<p>✗</p>	<p>✓</p>
 Viva Pulse	<p>Viva Pulse^e is a real-time survey feedback tool, offering flexible and democratized capabilities for change leaders, local champions or managers to gather and act on employee feedback quickly when it matters most.</p> <p><i>Viva Pulse data cannot be aggregated, so it is best for quick, decentralized polling by local change leaders to identify Copilot attitudes and preferences unique to their own teams to enable prompt and tailored responses.</i></p>	<p>Timely and Agile Feedback: Viva Pulse allows change leaders to quickly and frequently gather real-time feedback from their teams using brief surveys throughout Copilot implementation. Unlike more general and less frequent Glint surveys, Pulse enables change leaders to quickly get a deep understanding of how Copilot implementation is going by identifying unique challenges and any immediate concerns, enabling change leaders to address them promptly and locally.</p> <p>Localized Insights: By using smart templates and research-backed questions, change leaders can gain validated insights into how their teams are adapting to Copilot and if they need support.</p>	<p>Copilot Surveys, integration with Copilot Analytics</p> <p>Customized survey creation</p> <p>Cross-Viva integrations</p>	<p>✓</p> <p>✗</p> <p>✗</p>	<p>✓</p> <p>✓</p> <p>✓</p>

1 – Microsoft Viva People Science, The state of AI change readiness. August 2024.

*Survey feedback can also be collected using your enterprise survey provider.

c – Microsoft Adoption, Viva Insights Adoption.

d – Microsoft Adoption, Viva Glint Adoption.

e – Microsoft Adoption, Viva Pulse Adoption.

f – Microsoft Learn, Connect to the Microsoft Copilot Dashboard for Microsoft 365 customers.

g – Microsoft Viva, Microsoft Copilot Dashboard Metric Interpretation and Considerations.

Using Viva to measure Copilot implementation

With a deeper understanding of your measurement needs and goals, you can now leverage Viva to enable your holistic measurement strategy for Copilot implementation. While Copilot implementation includes a technical component (e.g., license deployment^h), to best set up your organization for success it’s important to also continuously measure the human side of change (e.g., behaviors, attitudes, and sentiment). This process can happen even before employees have access to Copilot. We view Copilot measurement as an iterative process that generates reinforcing measurement, feedback, and learning through three assessment lenses: Readiness, Adoption, and Impact.

Readiness: gauge how willing and capable the target population is to embrace and adopt Copilot when compared to desired goals. Readiness also includes the identification of all tasks and workflows that may benefit most when Copilot-assisted.

Adoption: understand how the target population is experiencing Copilot, how Copilot-assisted tasks and roles are being affected, and identifying actions to improve implementation, usage, and value.

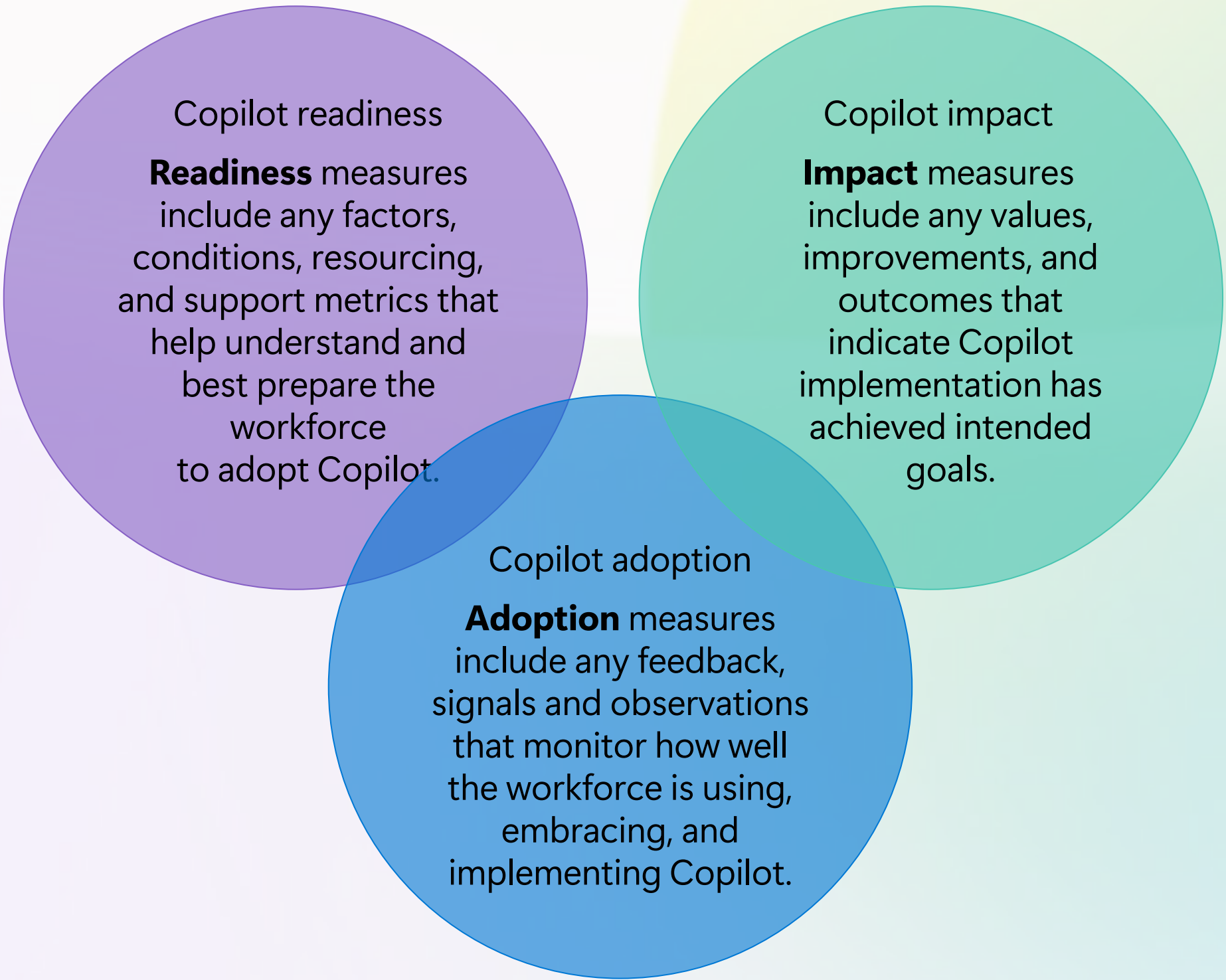
Impact: recognize the value created and outcomes achieved for different levels in the organization and show how ongoing changes in your Copilot journey are enhancing the organization. Lessons learned are applied to other areas of the business, spreading across different processes and teams to create a compounding effect over time.

This measurement and action approach reinforces learning, experimentation, and incorporation of new Copilot behaviors into everyday habits in the flow of work. **While this approach can be viewed as sequential, we should not think of these three measurement opportunities as “phases” where one stops and the next starts. Copilot transformation should be considered as an agile process, requiring experimentation and small iterations.** As various parts of your organization move through Copilot implementation at differing paces, the Viva measurement capabilities offer the flexibility to monitor Readiness, Adoption, and Impact simultaneously based on your specific measurement needs and opportunities. Each organization will spend time on these three measurement opportunities in different ways but it’s important not to over-index on just one (e.g., Adoption) and miss the big picture by not adequately assessing Impact.

No matter what your Copilot implementation approach, the following sections will help you optimize your measurement system using the Viva measurement apps.

^h – Microsoft Learn, Enable users for Microsoft 365 Copilot.

Microsoft 365 Copilot measurement



To support your Copilot implementation measurement strategy, we organize assessment opportunities by the above categories. We recommend a modular and agile measurement approach that is aligned with your unique needs and goals for individual roles, functions, and the organization.

Measuring readiness

Before Copilot is implemented, change leaders should attempt to understand organizational “Readiness” for adoption by assessing how prepared the organization is to make the transition. Engaged employees are 2.6x as likely to say they fully support AI being integrated in their workplace and are eager to contribute to the success of the transformation¹.

It’s important that leaders think about the conditions and factors that best prepare the target groups for Copilot implementation, such as which job roles and tasks are the best candidates for Copilot-assistance, and whether employees understand the goals, have the skills to facilitate the integration, and are motivated to leverage AI at work¹.






Measuring readiness

Using Viva measurement apps to measure Copilot implementation readiness

Readiness goal:

Gauge how willing and capable the target population is to adopt Copilot when compared to desired goals and identify all tasks and workflows that may benefit most when Copilot-assisted.

	Description	Outcome	Timeline	Recommendation	Consideration
 Viva Insights	Insights helps you answer: <ul style="list-style-type: none">Who is eligible for Copilot licensing?Which employees should I include in the pilot group?	<ul style="list-style-type: none">Gathered context necessary to define the best approach and target population for Copilot implementation.	When you need to understand current app usage behaviors of a deployment target population.	Copilot Analytics <ul style="list-style-type: none">Leverage the Readiness tab to get visibility into Copilot technical eligibility, licensing, and activation status, along with the number of employees who are using Microsoft 365 applications where Copilot is available.Design experiments with defined populations based on change scenarios aligned with implementation strategy.	Early on, consider which roles in the organization have the largest coverage across M365 apps to use Copilot and remember that the number of assigned licenses (less than 50) can lead to data limitations down the road for your Copilot implementation.
 Viva Glint*	Glnt helps you answer: <ul style="list-style-type: none">Who is ready based on their level of motivation, skill, confidence?What tasks, processes, and roles are ready for Copilot-assist based on survey feedback? <p>Review the appendix for Readiness survey item suggestions.</p>	<ul style="list-style-type: none">An established baseline of Copilot readiness sentiment including who and what could benefit from AI.Segmented Copilot target populations by job, function, or other specific sectors.	When you want enterprise-level readiness sentiment data or when you want to identify an optimal deployment population, getting a sentiment baseline that can be trended against over time with subsequent surveys.	<ul style="list-style-type: none">Deploy Glint surveys or add questions to programmatic employee census surveys to get an enterprise view on readiness.Compare survey results between target populations (e.g., cohort or pilot groups) and the overall organization on topics such as Copilot familiarity levels, excitement levels for the upcoming transformation, self-reported competency levels, and perceptions of value that Copilot will bring to various tasks and skills-building.	Consider collecting workforce readiness sentiment trends (e.g., competency, motivation) over a few timepoints with a scheduled Glint survey, especially if you want to understand to what extent people's preparedness is evolving as Copilot implementation resources and support programs are rolled out across the enterprise aligned with your implementation timeline goals.
 Viva Pulse	Pulse helps you answer: <ul style="list-style-type: none">What readiness support is needed unique to various target groups? <p>Review the appendix for the Viva Pulse Readiness template.</p>	<ul style="list-style-type: none">Change leaders, local champions, or managers understand which interventions are needed based on different group needs.	When you need a quick read on localized, target cohort group sentiment before deploying Copilot licenses to those individuals in cohort groups.	<ul style="list-style-type: none">Deploy Pulse readiness surveys to different teams, cohorts, or pilot group members to get a deeper understanding of team-specific readiness factors.Build bottom-up strategies by identifying needs for specific employee populations, enabling change leaders to mitigate risk and deepen support for specific groups.Utilize team-level sentiment data to generate targeted change initiatives that motivate specific employee groups.	Rather than gathering enterprise-wide readiness sentiment, Viva Pulse enables any change leader, local champion, or manager to gather quick feedback on support needed for kick off and implementation in their targeted groups.

*Survey feedback can also be collected using your enterprise survey provider.

Using Viva Pulse to assess Copilot readiness

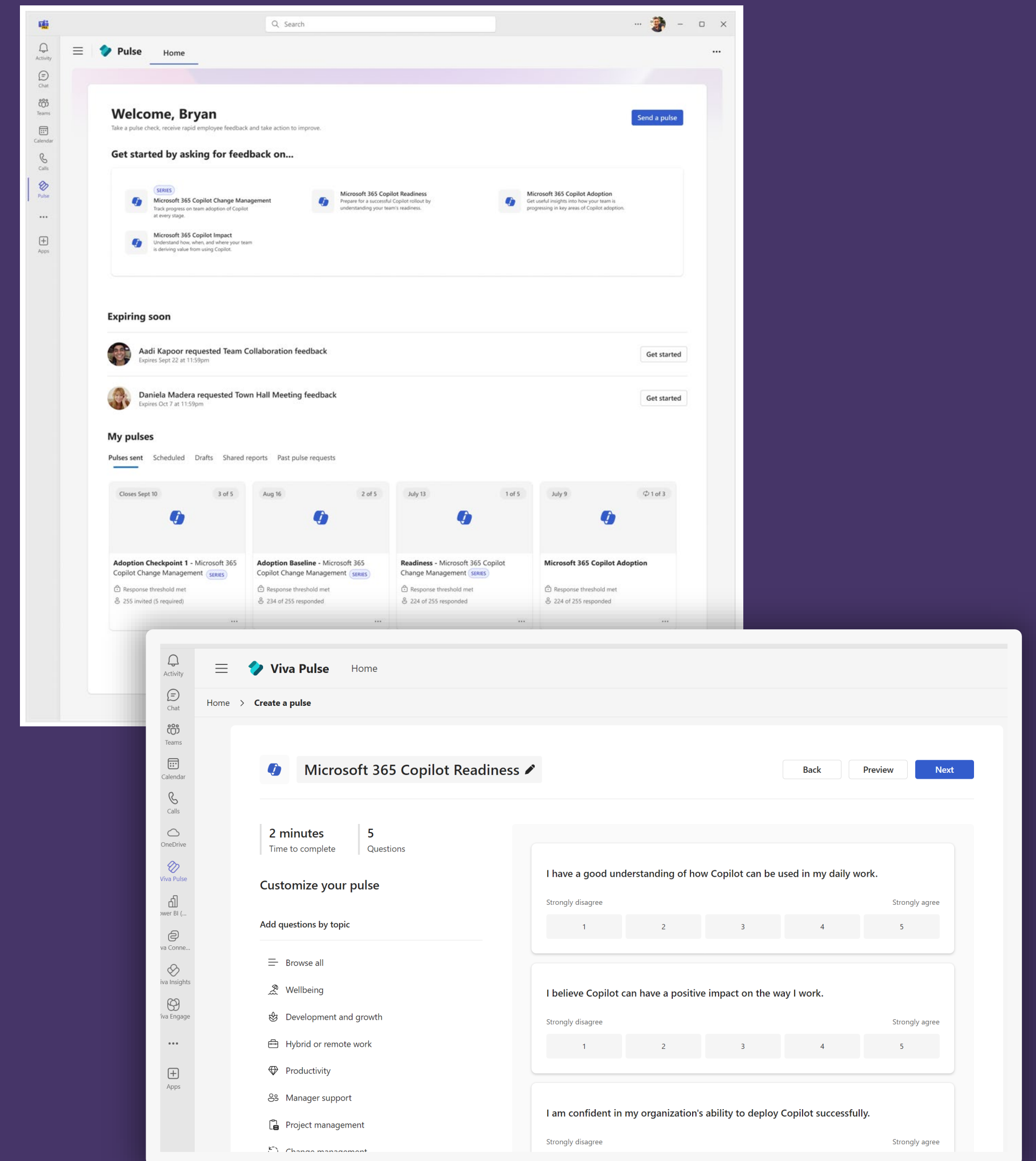
To illustrate one instance of leveraging the Viva measurement apps in the readiness phase, here is an example of how a change leader can leverage Viva Pulse to send out quick, lightweight surveys to various teams, cohorts, or pilot group members to get a deeper understanding of how ready they may feel to use Copilot.

In this instance, Pulse offers seeded out-of-the box questions for any change leader to immediately send out to assess readiness for a specific group. These questions help to gauge employees' understanding of the Copilot implementation goals and the value it is intended to bring and provide space for participants to expand on their potential concerns and excitedness.

Change leaders can send out Pulse surveys at several time points throughout the Copilot implementation process and across many cohorts and employee groups. This will help change leaders identify and uncover critical points of resistance so they can address any concerns early on that might hinder Copilot adoption down the road. This can also help change leaders determine which cohorts (e.g., based on job functions, employee groups) are more motivated, excited for, and open to Copilot, which can be useful for license deployment, such as predicting who may utilize and realize the most value from Copilot.

Remember that Viva Pulse surveys can be used to measure Readiness, Adoption, and Impact. They can be sent out in a programmatic way to various teams, cohorts, or pilot group members to gather distinct sentiment insights along each step in their Copilot journey. See appendix p30 – 33 for The Viva Pulse Copilot Survey Program offering a sequence of three survey templates.

Gathering this data provides metrics from one channel of your holistic measurement strategy for Copilot implementation. Connecting these measurements to your additional channels can help provide a comprehensive picture of readiness.



Being agile during the readiness phase

Successfully implementing Copilot will likely involve flexibility and adaptability, as the perceived value of utilizing Copilot may vary based the job function of the employee using it. To accurately gauge the readiness progress throughout your organization, teams, cohorts, or pilot groups, you will need to be able to adjust as you learn more about varying levels of readiness. This approach allows your Copilot transformation strategy and vision to mature throughout implementation¹.

Copilot transformation will include many iterative adjustments based on incoming signals and feedback; especially as various groups are experimenting with the technology. Being agile and open to iterative changes allows your measurement strategy to mature alongside Copilot transformation.

Understanding the spectrum of readiness throughout your organization can support you in setting realistic goals for various teams and functions, as employees with higher readiness will feel more primed to embrace Copilot changes than those with lower readiness who may need additional resources.

Any group's readiness to adopt Copilot will depend on several factors. For example:

1. How do they report their level of competence for adopting Copilot?

People who have had some experience with AI will be able to gauge their skill level, which, if somewhat proficient, will enable them to adopt Copilot more quickly when given access.

2. How confident do they feel to adopt Copilot?

People who report higher levels of confidence for successfully adopting new technologies will likely give Copilot a try when given access.

3. How motivated are they to adopt Copilot?

People who express excitement and enthusiasm for Copilot are more likely embrace Copilot when they have access.

4. How do they see Copilot being beneficial to their work?

Tasks that are repetitive, tedious, or rule-based are ideal for Copilot augmentation. Get an understanding of people's perception of current workflows to identify where Copilot can improve efficiency and scale.

The groups who score higher on these factors are more likely to be ready for Copilot implementation and value creation without additional intervention or change management structure. People Science research¹ found that AI readiness can drive up to 62% of realized individual value of AI*. Therefore, measuring readiness throughout your organization will help you set expectations, target enablement (such as training and prompts), and provide additional support where needed.

Microsoft Case-in-point:

Microsoft HR has focused on Copilot implementation from both a top-down and bottom-up approach. Copilot value can come from standard use cases implemented from the top-down at the company level, but it can also come from the unique ways that each employee uses Copilot to solve problems or increase efficiencies for their day-to-day.

This variance in uses cases, from organizational initiatives to personalized experimentation, requires Microsoft AI change leaders to consider the differences in AI readiness across the organization. A key stage of Microsoft HR's AI engagement cycle is awareness and understanding – which focuses on ensuring employees grasp AI's potential and relevance to their work. Increasing these components facilitates greater Copilot readiness through helping employees see where it fits into their day-to-day and what value they should expect to realize from the integration.



At Microsoft, as an early adopter of AI, we were faced with the challenge of understanding its impact on our employees. To do this effectively, we developed a model that reflects the unique nature of AI, emphasizing both top-down organizational strategies or use cases and bottom-up individual adoption of general-purpose AI, all while incorporating the three key stages of the AI engagement cycle: awareness/understanding, learning, and integration."

Ketaki Sodhi

Microsoft HRBI Senior HR Data Analyst

¹ – Microsoft Viva People Science, The state of AI change readiness. August 2024.

*Methodology: Regression Analyses was performed to model the relationship between AI Readiness and RIVA for AI users (n = 1443), controlling for job level and current AI use frequency.

Measuring adoption




Once implementation has started – typically after sufficient Copilot communications, access to resources, and training have been provided, it is now critical to assess “Adoption” - how well target groups are embracing and incorporating Copilot in their work. Timely adoption measurements help the organization adjust its approach and support to increase chances of success. This includes recognizing, rewarding, and amplifying best practices that align with adoption goals at all levels.



Measuring adoption

Using Viva measurement apps to measure Copilot implementation adoption

Adoption goal:
Understand how the target population is experiencing Copilot and identify actions to improve implementation, usage, and value.

	Description	Outcome	Timeline	Recommendation	Consideration
 <p>Viva Insights</p>	Insights helps you answer: <ul style="list-style-type: none"> What changes are there in Copilot usage? Where (in which apps) and how is Copilot being used the most? What are patterns of Copilot usage? 	<ul style="list-style-type: none"> Better understanding of Copilot enablement and interventions that best improve adoption based on adoption patterns, usage intensity, time to adoption, and collaboration patterns. 	When Copilot has been deployed for approximately 1 month, which will enable pre-Copilot and during-Copilot comparisons.	Copilot Analytics <ul style="list-style-type: none"> Leverage the Adoption tab to compare Copilot usage by app and activity, along with group, organization, and functional drop filters. Combine Glint and Insights dataⁱ to unlock deeper insights into your people’s Copilot experiences. 	When reviewing Insights adoption metrics, it may be that Copilot usage is slower for certain user cohorts at first. Rather than re-assign their Copilot licenses, instead, consider sending out a Pulse survey to understand points of resistance and how to support those who may need more help. Creating new habits takes time and re-assigning licenses too early can be detrimental to building lasting Copilot habits.
 <p>Viva Glint*</p>	Glint provides an enterprise-view of Copilot adoption sentiment. It helps you answer: <ul style="list-style-type: none"> What opinions and feelings are employees experiencing about Copilot adoption? <p>Review the appendix for Adoption survey item suggestions.</p>	<ul style="list-style-type: none"> Better understanding of employees’ motivation, experience, and potential enablers or barriers to Copilot adoption. 	When Copilot has been deployed for at least 3 weeks, and you are starting to reach utilization milestones aligned to your implementation plan.	<ul style="list-style-type: none"> Analyze how Copilot sentiment varies across functions to uncover which groups perceive the most value from AI adoption and why. Utilize survey programs on implementation perceptions and AI outcomes. Add an attribute to show Copilot participation levels in your HRIS feed, so you can see Copilot’s impact on the employee experience. Use Glint Copilot to summarize survey comments related to AI adoption. If timeline allows, integrate adoption items into the regular Glint survey cadence. 	As cohort group usage picks up and is meeting your Copilot adoption goals over time, consider switching out some or all your readiness questions in Glint with adoption questions. Think about collecting responses to Glint adoption questions over a few timepoints to monitor and examine overall workforce Copilot sentiment trends. By adding adoption items to preplanned Glint surveys and not conducting a new survey, you will help to mitigate survey fatigue.
 <p>Viva Pulse</p>	Pulse helps you answer for target groups: <ul style="list-style-type: none"> What is the Copilot implementation progress with specific teams, cohorts, and pilot groups? What localized actions are needed to best address challenges at the team level? <p>Review the appendix for the Viva Pulse Adoption template.</p>	<ul style="list-style-type: none"> Change leaders, local champions, or managers understand specific points of resistance or gaps in adoption progress. Quick responses to what is working and what is not. 	When you want agile and localized feedback for decision-making, such as after major targeted Copilot support interventions. Alternately, in a fixed cadence aligned with implementation milestones.	<ul style="list-style-type: none"> Deploy pulse surveys to specific teams, cohorts, and pilot groups to gauge progress and sentiments that enable change leaders to learn where groups may need additional attention or interventions to help accelerate progress. Create a cadence for survey deployment to track progress, either at a specific time (e.g., monthly) or at critical moments (e.g., feature additions). Combine Pulse and Insights data in this phase to provide a comprehensive view of the current state of Copilot implementation, enabling agile adjustments to be made. 	Findings collected with Pulse will only be visible to the person sending out the survey. If you decide to empower several local change champions to use Pulse, remember you will not get a centralized or aggregated view. Rather than keeping critical employee feedback siloed, think about how you might encourage sharing out these local adoption insights and needs more broadly across cohorts to facilitate Copilot implementation at scale.

ⁱSurvey feedback can also be collected using your enterprise survey provider.

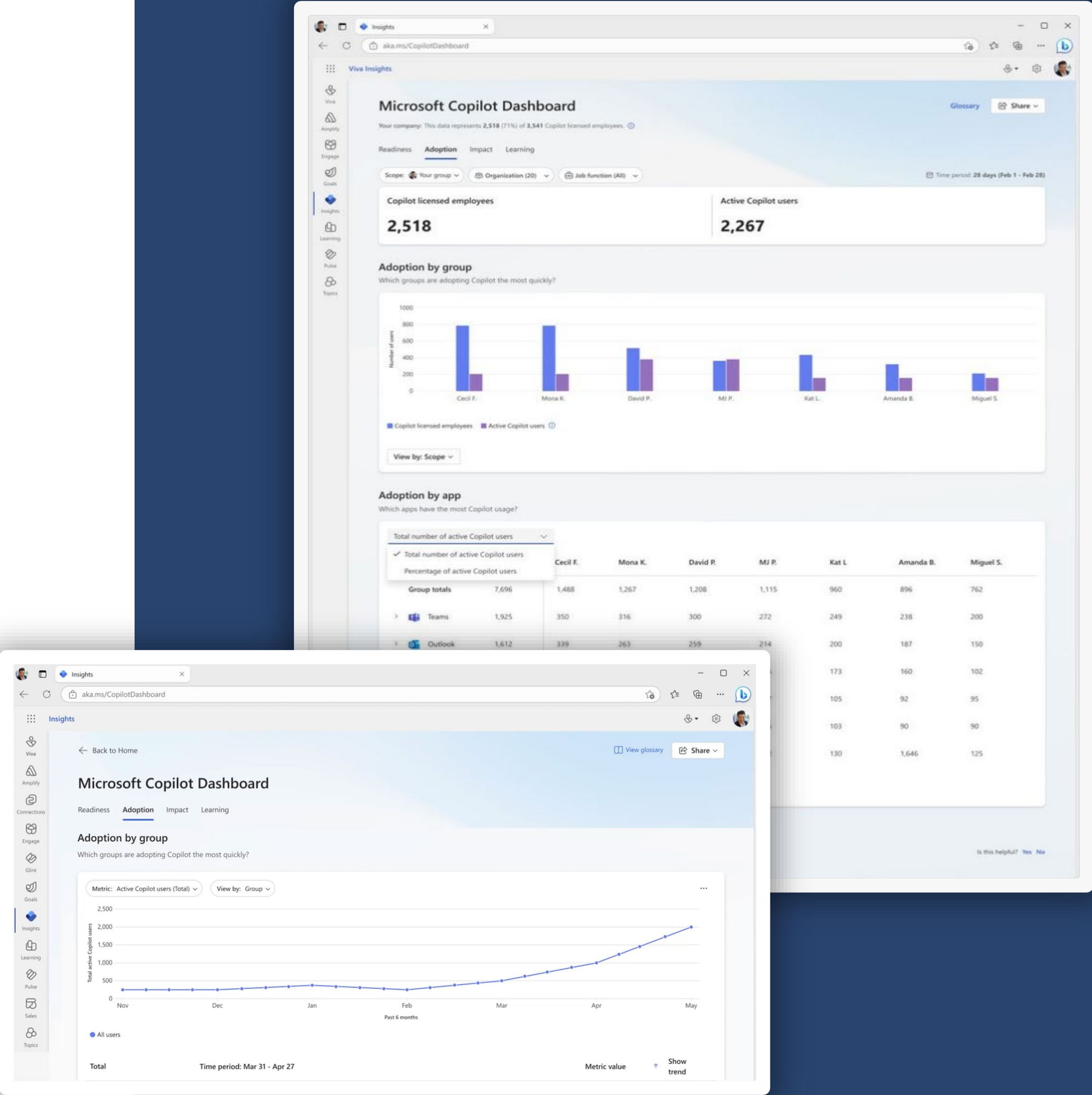
Using Copilot Analytics to assess Copilot adoption

To illustrate one instance of leveraging the Viva measurement apps in the adoption phase, here is an example of how a change leader can leverage Viva Insights Copilot Analytics to obtain a deeper understanding of adoption across various teams, cohorts, or pilot group members.

In this instance, under the “Adoption” tab, a change leader can view trends in Copilot usage by organizational group or job function over time to identify which populations tend to use Copilot the most. Additionally, they can see how different populations (e.g., job functions) are utilizing Copilot in their work by examining the breakdown of Copilot usage across different Microsoft 365 apps and in what ways (e.g., summarize a meeting). Granular insights such as these can help a change leader identify specific groups that are realizing the most Copilot value and which groups may need additional support in adopting Copilot, enabling them to quickly pivot their Copilot implementation strategy.

The Copilot usage data on Copilot Analytics is continuously collected and can signal where adjustments may be needed to meet adoption goals, reinforcing the agile and iterative process of Copilot implementation.

Combining Copilot usage data with sentiment data from Pulse or Glint in the adoption phase can help change leaders in refining their adoption strategies to best showcase the return-on-investment (ROI) and value of Copilot to leadership with a holistic and compelling story.



Adoption is not a one-size-fits-all experience

As different teams, cohorts, or pilot groups implement and experiment with Copilot, their rates of adoption will differ by function, level, job role, skills, and tasks (both between groups and within groups). It is important to measure and track Copilot sentiment and utilization differences to know where to apply support and intervention to keep your adoption goals on track.

Metrics and goals will likely vary depending on the group that you are measuring. Different groups will utilize Copilot for the unique tasks associated with their roles (see examples in the [Copilot Scenario Library^b](#)), which will likely lead to variable levels of adoption. This doesn't necessarily mean that Copilot adoption is lagging in the groups with lower trackable adoption (e.g., time savings), however, but does signal that these groups may benefit from additional support, such as use cases of how to integrate Copilot into their specific work or from further resources to upskill in prompt engineering.

When comparing groups, it can be tempting to focus on point-in-time differences. However, you don't want to overreact to single data points that may not tell a complete story. Instead, look for patterns and trends when interpreting feedback from users on their adoption attitudes and behaviors. Using Viva Insights, Viva Glint, and Viva Pulse offers various longitudinal and between-group data comparison reports.

It can be beneficial to focus on a multi-channel approach to adoption to get a holistic picture. Copilot Analytics can provide Copilot adoption metrics such as monthly active usage (MAU), helping you monitor adoption targets and progress to goal. Pairing that with Viva Pulse's Adoption Pulse Survey sentiment data helps leaders not just gauge how adoption behaviors are changing but also how different groups are feeling about their progress with Copilot adoption.

These sentiments can help change leaders identify and leverage success stories and best practices, and pinpoint specific places to make iterative changes that facilitate greater adoption.

Adoption will likely be measured over and over as more licenses are purchased or additional groups are provided access to Copilot, so it can be helpful to map out your adoption measurement strategy with a longitudinal view to ensure you are capturing trends and patterns for these various groups. This will set you up for success when moving on to measuring the impact of Copilot adoption, as you will have a comprehensive understanding of where you should expect to see impact in the short-term versus long-term, and in which groups.

Microsoft Case-in-point:

During Microsoft's Copilot implementation, an "HR AI Champion" community was created to support Copilot rollout and experimentation in Human Resources. These HR AI Champs are responsible for various implementation activities, such as leading co-innovation activities and leading AI use-case ideation sessions with their immediate team. To better serve their communities within Microsoft, these Champs are encouraged to leverage Viva Pulse to deepen their understanding of the adoption levels of those they're leading through the Copilot implementation journey.

Leveraging Viva Pulse in this manner provides a deeper level of understanding of various employee groups. This additional context and depth enables change leaders, such as the Microsoft AI Champs, to learn where specific groups may need additional attention or interventions to help accelerate progress.



At Microsoft, we encouraged our AI Champs to use the Copilot Adoption Pulse survey to learn how adoption was going in their cohorts and where they might want to rethink any part of their approach. When reviewing the Pulse feedback, the AI champs learned that most Copilot users valued hands-on practice and experimentation, and learning from peers as the best methods for learning how to use Copilot. These quick and critical Pulse findings allowed the Champs to be more agile, using local data to pivot their team's Copilot adoption tactics to better meet the needs of their team."

Gabriella Merino

Microsoft Business Program Manager

^b – Microsoft Adoption, Microsoft Copilot Scenario Library.

Measuring impact

Once a given target group has had sufficient time to upskill, adjust to, and adopt Copilot changes, the organization can begin measuring the “Impact” of Copilot implementation for that team. As different cohorts will reach this point at different times, measuring impact will be an ongoing activity. Measuring impact includes assessing outcomes like satisfaction, creativity, and productivity improvements at the job role level, process efficiency gains at the functional level, and value created, return on investment, and other important business goals at the enterprise level.




The Copilot implementation journey involves agility and iteration that will continue to change at a rapid pace. Various goals and desired outcomes may evolve over time requiring a continuous measurement approach to assess impact across multiple time horizons given team, functional, and organizational objectives. As the Copilot journey unfolds, monitor impact at various levels in the organization to identify lessons learned that accelerate adoption and optimize intended outcomes.



Measuring impact

Using Viva measurement apps to measure Copilot implementation impact

Impact goal: Recognize the value Copilot has created for different levels in the organization and how ongoing changes are reenforcing new habits and enhancing organizational outcomes. Lessons learned are applied to other areas of the business to create a compounding effect over time.

	Description	Outcome	Timeline	Recommendation	Consideration
 <p>Viva Insights</p>	<p>Insights helps you answer:</p> <ul style="list-style-type: none"> What is the difference in ongoing impact measurements with baseline data? 	<ul style="list-style-type: none"> Measure business impact of Copilot adoption and compare the impact of different change interventions by group, function, or job role to scientifically determine which change efforts worked best. 	<p>When employees have improved their utilization of Copilot features, approximately 2-3 months after Copilot adoption as usage will likely have increased.</p>	<p>Copilot Analytics</p> <ul style="list-style-type: none"> Leverage the Copilot Analytics Impact tab to view Copilot actions by productivity categories, Copilot assisted hours, and correlations between Copilot usage and various behavioral patterns. License additional groups based on business impact success. Integrate survey feedback into the Impact tab as organization-wide results are benchmarked against the results of a worldwide survey of Copilot users. Leverage the Copilot Business Outcome Report to explore the relationship between Copilot usage and key KPIs, learn how employees with favorable outcomes use Copilot, estimate the potential Copilot-assisted value for your organization, and uncover opportunities to boost Copilot usage. 	<p>Comparing Copilot's impact across different functions might help you customize Copilot implementation plans and their measurements to ensure maximum value by job role and process. However, be careful not to make conclusions about a given cohort and/or use case without seeing sufficient long-term trends and patterns in the group's data to be sure.</p>
 <p>Viva Glint*</p>	<p>Glint helps you answer:</p> <ul style="list-style-type: none"> Was there an impact on sentiment data and scores from the most recent Glint to baseline survey data? <p>Review the appendix for Impact survey item suggestions.</p>	<ul style="list-style-type: none"> Learn how Copilot sentiments and perceived value have changed over time. Learn if satisfaction, motivation, and other Copilot experience goals have been met and predict how it may change in the future. 	<p>When you are starting to reach internal Copilot adoption milestones to get an enterprise-view of the perceived impact of Copilot usage and its impact on employee experience and sentiment.</p>	<ul style="list-style-type: none"> Access the Copilot Impact template on Viva Glint, in settings under "Recurring" survey programs^j (for Glint admins). Use reporting and analytics capability within Glint to group Copilot opinion responses by different population cuts, such as organizational function. Assess how Copilot attitudes (e.g., motivation, satisfaction, level of competence) and self-reported value realization of Copilot for tasks and workflows has changed over time. 	<p>As different cohorts will have embraced Copilot at different rates, continue to leverage the Glint survey to measure enterprise-wide Copilot goal achievement and impact over multiple time horizons, rather than just one point-in-time. If not, you may be missing critical sentiment trends and patterns about the Copilot implementation.</p>
 <p>Viva Pulse</p>	<p>Pulse helps you answer for target groups:</p> <ul style="list-style-type: none"> How does perceived Copilot impact look for a specific team, cohort, or pilot group? <p>Review the appendix for the Viva Pulse Impact template.</p>	<ul style="list-style-type: none"> Change leaders, local champions, or managers uncover new ways to support ongoing usage, learning, and impact with target populations who have adopted Copilot. 	<p>When target populations have adopted Copilot, enabling change leaders, local champions, or manager to gauge achievement of cohort-specific Copilot goals.</p>	<ul style="list-style-type: none"> Deploy pulse surveys to specific teams, cohorts, and pilot groups to gauge Impact perceptions. Use the impact template in Pulse to see insights on how, when, and where a specific team, cohort, or pilot group is deriving value from using Copilot. Send the Impact survey again in the future to help ensure each cohort sustains the initial gains they realize from using Copilot. If so, a quarterly cadence is recommended for future use of this survey template with cohorts. 	<p>Plan ahead to determine which impact measures you want aggregated across the enterprise (using Glint), and which measures can be left at the local level (using Pulse). For example, Pulse is great for change leaders, local champions, or managers to quickly assess the impact of their initiatives and uncover learnings that can be quickly applied at scale.</p>

*Survey feedback can also be collected using your enterprise survey provider.

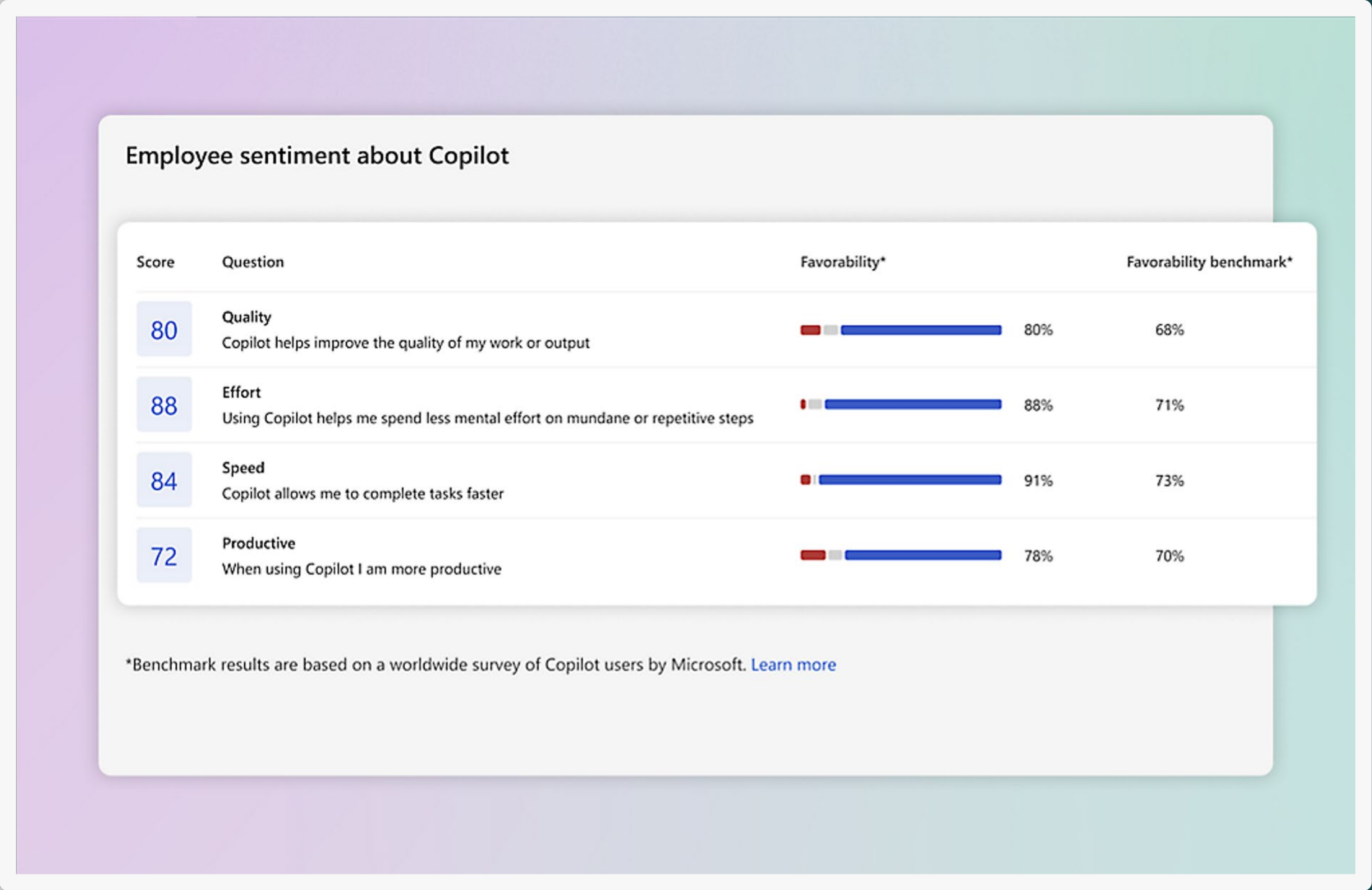
j – Microsoft Learn, Microsoft Copilot Impact Survey template in Viva Glint.

Using Viva Glint to assess Copilot impact

To illustrate one instance of leveraging the Viva measurement apps in the impact phase, here is an example of how a change leader can leverage surveys using Viva Glint to evaluate the Copilot impact on employee experience. They will be able to view a few of these questions either directly in Glint where they can leverage Glint reporting functionality such as heatmaps or a quick view integrated directly within Copilot Analytics.

In this instance, a change leader can easily include Copilot Impact questions in their organization-wide survey programming (e.g., engagement survey). There are core Copilot Impact survey items that ask employees to reflect on work-oriented benefits they experience as a result of using Copilot (quality, effort, speed, and productivity). Additionally, in Glint, a change leader can include optional Copilot survey items that support organizations in understanding “how well it’s going” with the Copilot implementation and shed light on where employees may need more support to realize greater value from Copilot.

Employee Copilot sentiment captured in Glint can be combined with work pattern and behavioral Insights data to help change leaders holistically understand the long-term impact of Copilot across the employee experience. Copilot is not only measured by transforming employee work behaviors, but also improving the employee experience through sentiment change, such as greater feelings of empowerment, job satisfaction, and better work outputs.



The changing nature of Copilot impact

Measuring Copilot impact is an ongoing process, not an end state. When thinking about measuring impact, it can be tempting to focus solely on traditional metrics, such as utilization rates, time savings, and user satisfaction — measures that only capture part of the scope of Copilot’s impact. While traditional metrics are important, additional value often lies in its enhancement of creativity, decision-making, and problem-solving, facets that are less tangible and more difficult to quantify. Harnessing the full benefits of Copilot requires learning and experimentation to determine how it fits into people’s day-to-day workflows and improves their employee experience.

While the initial impact metrics may indicate an efficiency gain, it’s what is then done with the time savings that contributes to the full value creation of Copilot. With the time savings, employees may be able to leverage this time to focus on meaningful or high impact work. While this will not always be the case, scoping out the broader impact you want your Copilot implementation to have will support you in realizing this value down the line.

Gauging Copilot impact at your organization will likely follow the Copilot value journey path from individual to functional to organizational. When evaluating impact, the metrics that will matter the most to you should be aligned with your organization’s goals and needs. If you have been measuring at all three points of implementation (Readiness, Adoption, and Impact), you may begin to see general trends in how the Copilot implementation process is going for your employees and your organization in whole. The measurements in the impact phase can provide insight on the effectiveness of your implementation efforts⁵ and whether adjustments made throughout the process helped you get closer to your goals or if additional intervention and iterations are needed.

Copilot impact will evolve as your Copilot implementation evolves. Leveraging the Viva measurement apps can provide additional context to understand trends of Copilot sentiments, usage metrics, and business outcome data for the entire organization or between different employee teams, cohorts, or pilot groups.

This first edition playbook demonstrates key ways that the Viva measurement apps can bring your Copilot measurement strategy to life. As organizations navigate through AI transformation, we will continue to learn and refine what impact truly looks like and how an effective measurement strategy can keep us on track.

Read about three customer examples of Copilot impact in the recent WorkLab article [here](#)!⁷

Microsoft Case-in-point:

The HR AI Orchestration, Adoption, & Impact (OAI) team at Microsoft is responsible for championing Copilot implementation within Microsoft HR. Their Copilot measurement strategy helps them understand whether their AI initiatives move the needle on their critical people priorities and goals. To achieve this, they are focusing on gathering data on both tangible and intangible benefits of Copilot through specified AI in HR value dimensions.

The OAI team takes a multi-channel approach to impact measurement, including both sentiment and behavioral metrics. For example, they recently partnered with the Microsoft Office of the Chief Economist and the HR Digital Strategy team exploring the impact of Copilot for Microsoft HR service providers and found that HR Advisors using Copilot are 26% faster responding to initial HR inquiries, with a 7% reduction in overall resolution time. Additionally, they found HR Advisors using Copilot 40 times per week are 16% more likely to enjoy their job⁸.



In Microsoft HR, we’ve created a set of AI in HR value dimensions which are the key areas of measurement where we believe AI can have a significant impact across the function. We are leading with the question, ‘How can AI help drive the business forward while helping us humans be more human?’ We look holistically at what impact means for different roles we have in HR.”

David Spahr
Microsoft Director, AI in HR

5 – Harvard Business Review, How to Actually Execute Change at a Company. March 2024.
7 – Microsoft WorkLab, AI’s Impact at 3 Industry-Leading Companies. September 2024.
8 – Microsoft News, The business value of AI - How Microsoft is reinventing Human Resources with Microsoft Copilot. October 2024.

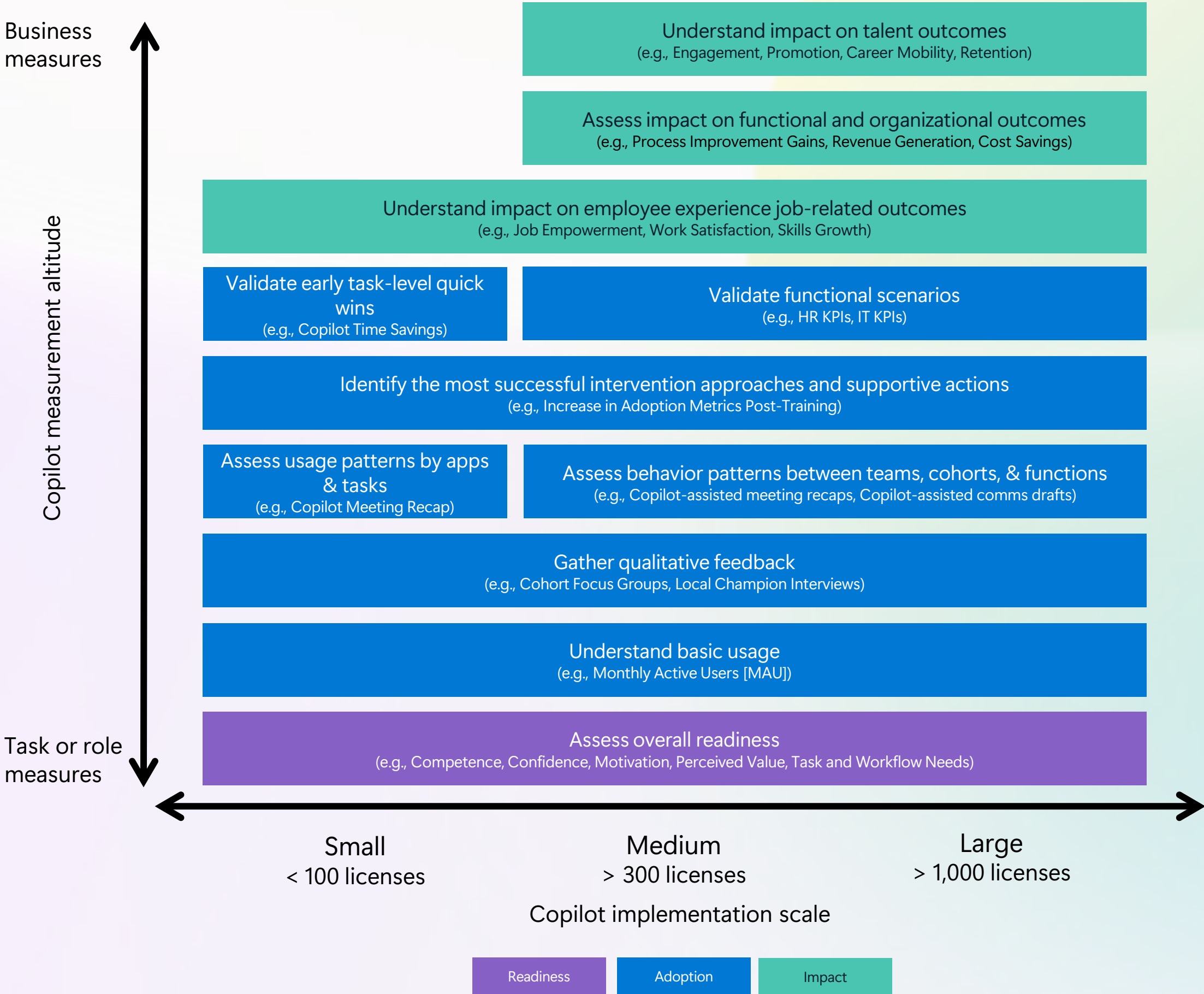
Constructing your personalized measurement strategy

Throughout this playbook, we’ve walked through how to approach your Copilot measurement strategy and consider your goals, trackable metrics, and the main considerations for Copilot Readiness, Adoption, and Impact measurement by each Microsoft Viva measurement application. As you engage in your own Copilot journey at your organization, you will be working within the parameters of your current Copilot implementation scale (i.e., deployment size & license count). Regardless of scale, your overarching approach to Copilot implementation should treat it as a complete transformation of workplace practices and work culture (not merely a digital tool implementation).

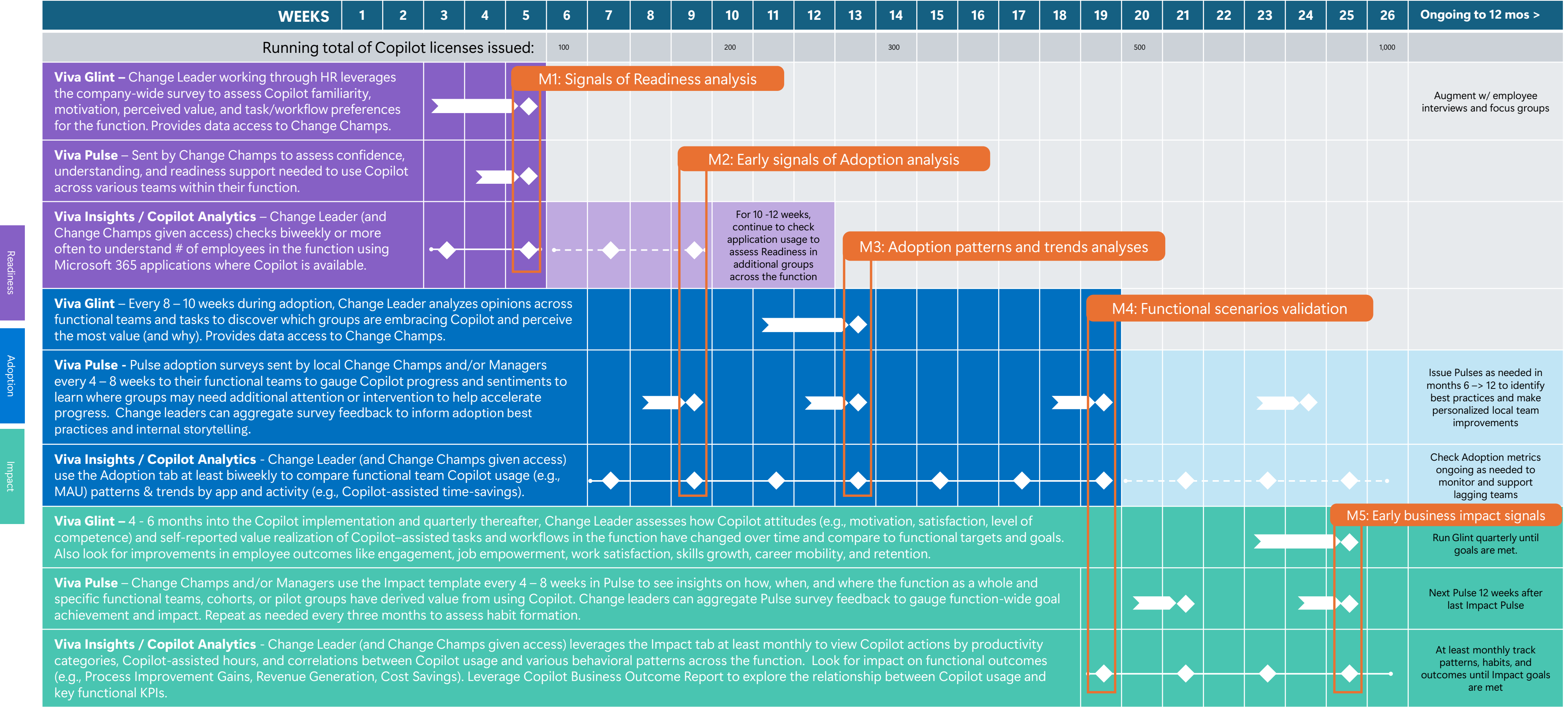
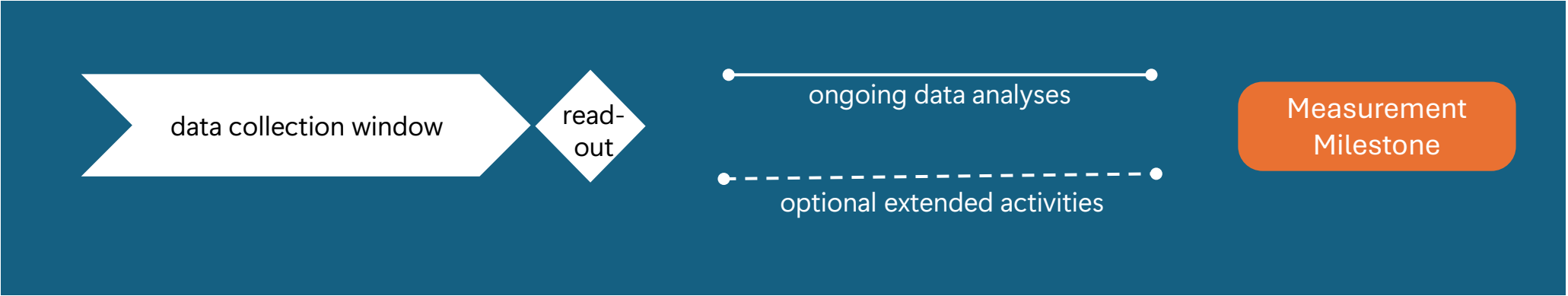
We like to think of these measures as building blocks that you can combine and build upon each other to craft the measurement strategy that works for you. Likely only a handful of the following blocks we provide on the right will be available to you at your specific phase of Copilot implementation, so the goal is not to necessarily leverage these blocks all at once. Instead, consider your current implementation scale and charter your measurement strategy. Take inventory of what metrics you have available now and which you’ll want to collect that will best help you tell the full story of Copilot implementation and workforce transformation in your organization.

On the following page you’ll find an example measurement timeline showing how a function of 1,000 employees might deploy Copilot licenses and implement Copilot across functional teams, led by a change leader and supported by Change Champs who been assigned to support the various local teams. The example shows the cadence for deploying the various Viva Copilot measurement “building blocks” over a 12-month period. This is an illustrative example – every organization (and function within the organization) should create their own timeline and cadence for measuring Copilot implementation.

Building blocks of Copilot measurement



Example This is an illustrative example of Copilot implementation in a single functional group of 1,000 employees using Viva Glint, Viva Pulse, and Viva Insights as a holistic measurement system.



Key takeaways

No matter where you may be in your Microsoft 365 Copilot implementation journey, it's never too late to think about your organization's holistic measurement strategy and setting your organization up for success in understanding the effectiveness of your Copilot implementation.

The Viva measurement apps (Viva Insights, Viva Glint, and Viva Pulse) are designed to provide a multi-channel and comprehensive understanding of how your Copilot implementation is progressing through Copilot readiness, adoption, and impact. Together, they offer a holistic approach to measurement, which includes understanding readiness attitudes and utilization patterns, iterating on and evolving your organization's adoption initiatives, and assessing outcomes and impact.

By utilizing these apps in the Viva measurement toolkit, AI change leaders can effectively measure, monitor, and achieve value from Copilot implementation for their business and people.

Visit the [Microsoft Viva Learn Community](#) for additional information about the full suite of applications in the Viva employee experience platform.

Connect your Copilot measurement strategy to organization, functional, and individual goals.

Viewing your measurement strategy as a series of pyramid levels can help you construct a comprehensive understanding of the Copilot value journey throughout your organization, not just at one level. Each level will come with a unique set of goals for value creation and reduced cost and inefficiencies, and your measurement strategy can map onto these goals with specific sets of trackable metrics.

Think of the aligned data and insights within this pyramid as ever building upon themselves as your deployment size increases and your Copilot implementation initiatives become more entrenched in your organization.

Craft a holistic measurement strategy for Copilot implementation to understand the full picture.

Look at both sentiment and behavioral data during readiness, adoption, and impact to identify implementation progress, what's working well, and what needs adjustments or support.

This approach empowers your AI change leaders to be effective and successful by equipping them with enriched insights to make informed decisions, proactively tailor their implementation strategy, and support them in realizing adoption impact sooner.

Balance agility and consistency in your measurement strategy.

At Microsoft, we are always learning and iterating on our own Copilot implementation practices and measurement strategy. What we've learned along the way is to consider this AI transformation as ever-evolving and allow for experimentation.

We are building agile practices that enable us to pivot and adapt our strategies with each additional insight and channel of feedback. At the same time, we remain focused on desired goals with consistent measurements that enable us to view our progress towards success longitudinally, rather than at one point-in-time.



Microsoft Viva

Copilot in Microsoft Viva • In the flow of work • Trusted platform

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- ² Deloitte, Now decides next: Moving from potential to performance. August 2024.
- ³ Harvard Business Review, [Change Is Hard. Here’s How to Make it Less Painful](#). April 2022.
- ⁴ Microsoft Viva People Science, [Building a holistic listening ecosystem](#). July 2023.
- ⁵ Harvard Business Review, [How to Actually Execute Change at a Company](#). March 2024.
- ⁶ Harvard Business Review, [The 6 Disciplines Companies Need to Get the Most out of Gen AI](#). July 2024
- ⁷ Microsoft WorkLab, [AI’s Impact at 3 Industry-Leading Companies](#). September 2024.
- ⁸ Microsoft News, [The business value of AI - How Microsoft is reinventing Human Resources with Microsoft Copilot](#). October 2024.

Enablement Pages

- ^a Microsoft Learn, [AI Learning Hub](#).
- ^b Microsoft Adoption, [Microsoft Copilot Scenario Library](#).
- ^c Microsoft Adoption, [Microsoft Viva Insights Adoption](#).
- ^d Microsoft Adoption, [Microsoft Viva Glint Adoption](#).
- ^e Microsoft Adoption, [Microsoft Viva Pulse Adoption](#).
- ^f Microsoft Learn, [Connect to the Microsoft Copilot Dashboard for Microsoft 365 Customers](#).
- ^g Microsoft Viva, [Microsoft Copilot Dashboard Metric Interpretation and Considerations](#).
- ^h Microsoft Learn, [Enable users for Microsoft 365 Copilot](#).
- ⁱ Microsoft Adoption, [Viva Glint + Viva Insights Playbook](#).
- ^j Microsoft Learn, [Microsoft Copilot Impact Survey template in Viva Glint](#).



Visit our website to learn more about the [Microsoft Viva suite](#)

Appendix

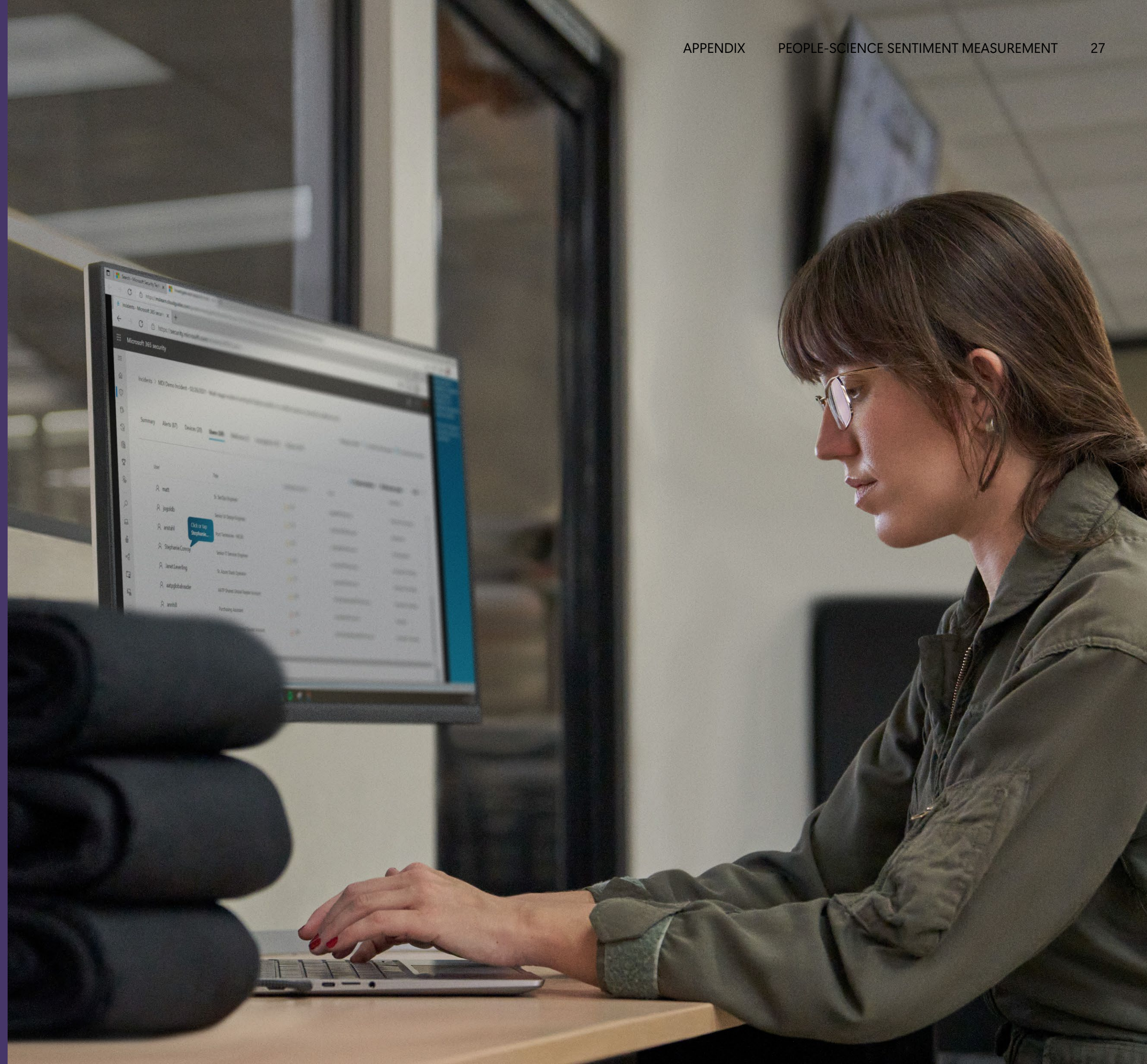
People Science-recommended survey questions that measure Microsoft 365 Copilot employee sentiment

At key opportunities in your Copilot implementation journey, you may wish to gather feedback directly from employees about how they are feeling and thinking about Copilot. Based on extensive research by the Microsoft Viva People Science team on conditions and key factors that accelerate change management and digital transformation, we offer Copilot survey questions categorized by theme. Items should be chosen based on the audience you want to survey, and the Copilot change experiences you wish to understand for the targeted survey participants. For both Viva Glint and Viva Pulse, attitudinal questions are organized by measurement opportunity (Readiness, Adoption, Impact):

- For Viva Glint, see p27 - 29
- For Viva Pulse, see p30 - 33

As a reminder, Viva Glint is best used for larger populations and at less frequent intervals to understand how employees feel about the overall effectiveness of Copilot implementation efforts. Sentiments to gather using Glint might be: Am I happy working here? Can I balance work and personal life? Do I feel ready to adopt Copilot? Do I have the skills I need to adopt Copilot? Which of my job tasks will most improve when assisted by Copilot?

Viva Pulse is best used to collect timely feedback from specific teams, cohorts, or pilot groups on their Copilot experience to fine-tune your Copilot implementation approach. Sentiments to gather using Pulse might be: How are various groups adjusting to Copilot? How can we best support Copilot implementation for a given team? What Copilot adoption barriers do we need to address? What impact is Copilot having on important team outcomes, such as satisfaction, productivity, and competence?



Readiness measurement using Viva Glint

General Copilot readiness attitudinal questions for use in Viva Glint.

Note: Items with [\[Item Name\]*](#) can be searched for directly in the Viva Glint Question Library. All other items must be entered manually by survey administrators.

Strategic Change Conditions	Key Change Factors	Employee Experiences that Successfully Drive Change for Each Factor	Employee Experience Attitudinal Survey Questions that Measure Each Change Factor (Recommended for use in Viva Glint)
Communication	Rationale	Clarity about what is changing and understanding of the need for Copilot implementation for both for the company and its employee.	<ul style="list-style-type: none">The reasons for Copilot implementation are clear to me.(Open-ended) What information would help you understand the reasons for Copilot implementation?
	Organizational Benefit	Understanding and belief in the benefits and improvements that Copilot implementation will create for the organization.	<ul style="list-style-type: none">I understand how Copilot implementation can benefit our company.(Open-ended) What concerns, if any, do you have about Copilot implementation?
	Individual Benefit	Understanding and belief in the benefits and improvements that Copilot implementation will create for the employees.	<ul style="list-style-type: none">I believe Copilot implementation can improve my work experience.(Open-ended) What excites you the most about Copilot implementation?
Empowerment	Involvement	Feeling involved in Copilot implementation planning decisions and seeing collaboration with all stakeholders, including employees.	<ul style="list-style-type: none">During Copilot implementation, my opinions seem to count.
Psychological Safety	Individual level of confidence	Confidence and trust that Copilot implementation will not expose weaknesses, and failures will not be negatively judged.	<ul style="list-style-type: none">I have all the information I need to feel confident about Copilot implementation.I feel confident to try Copilot implementation without fear of negative consequences.
	Individual level of trust	Trust that Copilot implementation is for the best interests of employees.	<ul style="list-style-type: none">I trust the organization has my best interests in mind when we adopt Copilot implementation.
Competency	Ability	Feeling ready to learn and try new skills required for Copilot implementation.	<ul style="list-style-type: none">I am prepared to learn new skills to adopt to Copilot implementation.
Support	Information	Ability to easily access information about the change	<ul style="list-style-type: none">I have the information I need to prepare for Copilot implementation.I am well-informed about Copilot. [CP – Well-Informed]*I know where to find answers to my questions about Copilot. [CP – Questions]*
	Manager	Confidence in Manager role as a change agent during Copilot implementation.	<ul style="list-style-type: none">My manager will set a good example for the team during Copilot implementation.
	Incentives	Feeling incented to make the effort to adopt Copilot.	<ul style="list-style-type: none">I am motivated to use Copilot.
	Additional Feedback	Any other thoughts about Copilot.	<ul style="list-style-type: none">(Open-ended) What else do you want to share about Copilot? [CP – What Else]*

Adoption measurement using Viva Glint

General Copilot adoption attitudinal questions for use in Viva Glint.

Note: Items with [Item Name]* can be searched for directly in the Viva Glint Question Library. All other items must be entered manually by survey administrators.

Strategic Change Conditions	Key Change Factors	Employee Experiences that Successfully Drive Change for Each Factor	Employee Experience Attitudinal Survey Questions that Measure Each Change Factor (Recommended for use in Viva Glint)
Communication	Open communication	The organization is transparent regarding Copilot and provides ongoing, helpful information through multiple communication channels (e.g., meetings, email, messaging, newsletters, presentations, etc.).	<ul style="list-style-type: none">Communications about Copilot implementation are transparent.I receive information about Copilot implementation that is helpful to me.I am well-informed about Copilot. [CP – Well-Informed]*
Empowerment	Involvement	Ability to voice opinions, feel heard, and have influence during the Copilot implementation process.	<ul style="list-style-type: none">I feel free to challenge the way things are done here. [Challenge Status Quo]*
	Responsibility	Understanding my role in the Copilot implementation process.	<ul style="list-style-type: none">I understand the changes in my role and work as a result of Copilot implementation.
	Autonomy	Ability to quickly adapt to Copilot implementation, free of obstacles that slow things down or create roadblocks to progress. A clear path to innovate, work more nimbly across silos, and generate impact quickly.	<ul style="list-style-type: none">I have the flexibility to make adjustments in my work as I adopt Copilot.(Open-ended) What barriers, if any, are there to your ability to effectively use Copilot? [CP – Barriers]*
Psychological Safety	Risk-taking / Experimentation	Feeling free to experiment and try new approaches during Copilot implementation.	<ul style="list-style-type: none">I am encouraged to find new and better ways to get things done. [Initiative]*
Competency	Manager	Role modeling and coaching by one’s Manager.	<ul style="list-style-type: none">My manager encourages our team to embrace Copilot implementation.My manager shows me by example how to adopt Copilot.
	Growth	Ability to Learn and successfully acquire new skills.	<ul style="list-style-type: none">I am learning new skills that help me successfully adopt Copilot.I know what I can do with Copilot. [CP – Understand]*Learning to use Copilot has helped my career growth.
Support	Resources	Employees feel that the organization is providing the resources (e.g., Job aides, guides, trainings, information, tools, space and time) needed to adopt Copilot and be successful.	<ul style="list-style-type: none">I am getting the support I need to successfully adopt Copilot in my work.(Open-ended) What additional support, if any, do you need to use Copilot successfully in your work?
	SME Coaching	Feeling supported by experts during Copilot implementation. Sponsors of Copilot implementation should be present, interact on a personal level and be willing to answer questions employees have about Copilot.	<ul style="list-style-type: none">I get the individual coaching I need to adopt Copilot.
	Incentives	Being acknowledged for efforts and rewarded for making progress in adopting Copilot.	<ul style="list-style-type: none">I get recognition that encourages me to make progress with Copilot implementation.
Progress	Utilization	Forming new habits to incorporate Copilot into the flow of work.	<ul style="list-style-type: none">On average, I use Copilot...(Single-choice select Options: 1. Daily; 2. A few times per week; 3. A few times per month; 4. Less than monthly; 5. Never). [CP – Usage]*
	Improvement	Overall positive feelings about Copilot implementation.	<ul style="list-style-type: none">Copilot implementation is having a positive impact on my work experience.
	Additional Feedback	Any other thoughts.	<ul style="list-style-type: none">(Open-ended) What else do you want to share about using Copilot? [CP – What Else]*

Impact measurement using Viva Glint

General Copilot impact attitudinal questions for use in Viva Glint.

Note: Items with [Item Name]* can be searched for directly in the Viva Glint Question Library.
All other items must be entered manually by survey administrators.

Strategic Change Conditions	Key Change Factors	Employee Experiences that Successfully Drive Change for Each Factor	Employee Experience Attitudinal Survey Questions that Measure Each Change Factor (Recommended for use in Viva Glint)
Progress	Utilization	Employees have changed how they approach their everyday work after the change and developed new habits.	<ul style="list-style-type: none">On average, I use Copilot...(Single-choice select Options: 1. Daily; 2. A few times per week; 3. A few times per month; 4. Less than monthly; 5. Never). [CP – Usage]*I have adjusted the approach to my daily work as a result of using Copilot.
	Quality	An employee's feeling that the change has increased the quality of their work/output or makes their work/output better.	<ul style="list-style-type: none">Using Copilot has had a positive impact on my work experience.Using Copilot helps improve the quality of my work or output. [CP – Quality]*
Productivity	Productivity	An employee's feeling of being more productive when leveraging the change in their work.	<ul style="list-style-type: none">When using Copilot I am more productive. [CP – Productive]* [
	Work speed	An employee's perception that generative artificial intelligence helps to speed up time to completion for their tasks.	<ul style="list-style-type: none">Using Copilot allows me to complete tasks faster. [CP – Speed]*
Work Effort	Stress reduction	An employee's perception that the change has reduced the burden on completing tasks.	<ul style="list-style-type: none">Using Copilot helps me spend less mental effort on mundane or repetitive tasks. [CP – Effort]*
Overall Benefit	ROI	An employee's overall opinion that the change is beneficial to their work and/or the company.	<ul style="list-style-type: none">(Open-ended) In what ways does Copilot benefit you at work? [CP – Benefits]*
	Engagement	An employee's overall opinion that the change has created a better place to work.	<ul style="list-style-type: none">Adopting Copilot has made our company a better place to work.
	Additional Feedback	Any other thoughts.	<ul style="list-style-type: none">(Open-ended) What else do you want to share about Copilot? [CP - What Else]*

Accelerating Microsoft 365 Copilot time to value with support from Viva Pulse Survey Templates

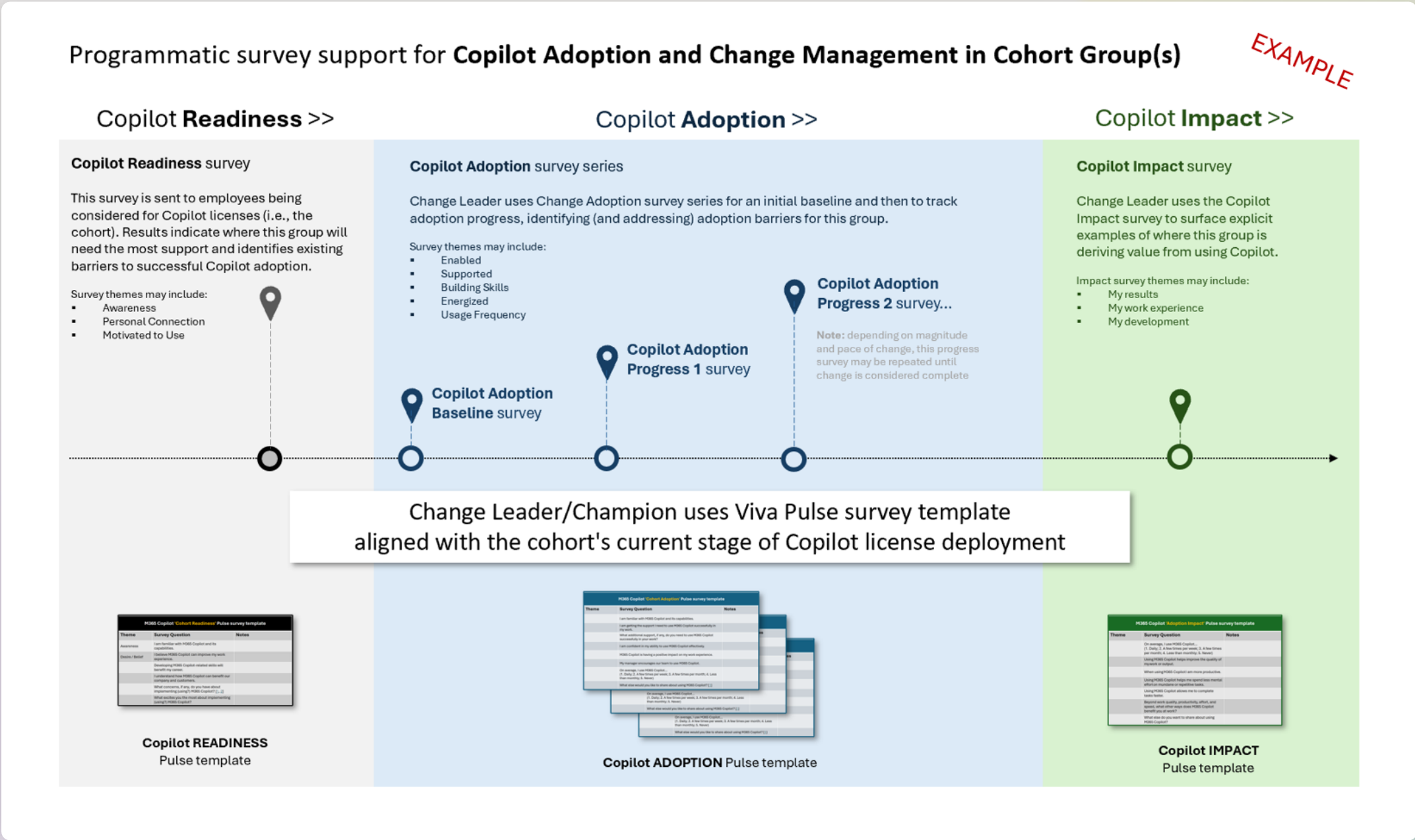
Viva Pulse can provide value to change leaders, local champions, or managers with a Viva People Science-vetted set of survey templates and questions aligned with change management best practices and key value drivers for individuals using Copilot. These surveys can be deployed to cohort groups in just minutes by change leaders and managers.

The survey templates align with the three general opportunities to measure the change management and Copilot implementation effort with each cohort group:

1. Copilot Readiness (Pre-launch)
2. Copilot Adoption
3. Copilot Impact

(Note: If a cohort group is already licensed and using Microsoft Copilot, then starting with the Adoption series is appropriate.)

These survey templates are lightweight, easy to complete in the flow of work, and provide leaders with timely, actionable insights for each respondent group.



Copilot readiness

Pulse survey template

Sent by: Change leaders, local champions, or managers

Sent to: All individuals in a specific team, cohort, or pilot group

When: Prior to deploying Copilot licenses to the individuals in the cohort group

Survey objectives: This survey is intended to provide change leaders, local champions, or managers with an overall picture of how ready/willing/able this cohort group is for making the most of the Copilot licenses they are about to receive.

The content in this template focuses more on the human side of the change rather than the technical aspects. Are they generally familiar with Copilot/AI? Are they excited about using it? Do they have any concerns about it?

With this data in hand, the change leaders, local champions, or managers understand the starting point for this cohort group and which interventions they may need to emphasize to set the cohort up for successful adoption and impact.

I have a good understanding of how Copilot can be used in my daily work.

Strongly disagree

Strongly agree

1

2

3

4

5

I believe Copilot can have a positive impact on the way I work.

Strongly disagree

Strongly agree

1

2

3

4

5

I am confident in my organization's ability to deploy Copilot successfully.

Strongly disagree

Strongly agree

1

2

3

4

5

What concerns, if any, do you have about using Copilot?

Leave your answer here

What excites you the most about using Copilot?

Leave your answer here

Copilot adoption

Pulse survey template

Sent by: Change leaders, local champions, or managers

Sent to: All individuals in a specific team, cohort, or pilot group

When: Approximately two weeks after the cohort group receives their licenses (this first instance can serve as the Adoption initial baseline survey), and then again periodically over the course of the change management effort (Adoption progress tracking surveys).

Survey objectives: This survey is intended to provide change leaders, local champions, or managers (and Exec sponsor) with insights on how this cohort group is progressing in their adoption of Copilot and informs change leaders, local champions, or managers where this cohort may need additional attention/interventions to help accelerate effective adoption.

Following the baseline instance of this survey, this Adoption template can be sent again to track how the cohort is doing in these key areas of adoption. Timing and cadence for the subsequent follow-up surveys may vary by cohort but sending monthly during the adoption period is a good starting point and lines up nicely with the typical run of business updates change leaders, local champions, or managers provide to executive sponsors and other stakeholders.

Content in this template centers on key drivers of individual adoption. Do individuals have the support they need? Are they getting more confident in their use of Copilot? How frequently are they using it?

I have a good understanding of how Copilot can be used in my daily work.

Strongly disagree

12345

Strongly agree

The prompts I create generate useful responses from Copilot.

Strongly disagree

12345

Strongly agree

I am finding new and/or better ways to use Copilot.

Strongly disagree

12345

Strongly agree

I am getting the support I need to use Copilot successfully in my work.

Strongly disagree

12345

Strongly agree

Which resources have been the most helpful in learning how to use Copilot?

Microsoft 365 Copilot Documentation

Webinars and Live Trainings

Online Tutorials and Video Guides

Community Forums and Discussion Groups

Hands-on Practice and Experimentation

Others (Please Specify)

What barriers, if any, are there to your ability to effectively use Copilot?

Leave your answer here

On average, I use Copilot...

Daily

A few times per week

A few times per month

Less than monthly

Never

What else would you like to share about using Copilot?

Leave your answer here

Copilot **impact**

Pulse survey template

Sent by: Change leaders, local champions, or managers

Sent to: All individuals in a specific team, cohort, or pilot group

When: This is sent at the discretion of change leaders, local champions, or managers after the cohort has had some time to integrate Microsoft Copilot into their everyday work. Results from the cohort's Adoption surveys combined with usage data from Insights (if available) will provide a good indication of when Microsoft Copilot has been integrated into the everyday work of the individuals in each cohort.

Survey objectives: This survey is intended to provide change leaders, local champions, or managers (and Exec sponsors) with explicit examples of how, when and where this cohort group is deriving value from using Microsoft Copilot. The survey content is focused on both 'productivity-related' value and work experience value (EXP).

🔒 View only

Using Copilot helps improve the quality of my work or output.

Strongly disagree

Strongly agree

1

2

3

4

5

🔒 View only

Using Copilot helps me spend less mental effort on mundane or repetitive tasks.

Strongly disagree

Strongly agree

1

2

3

4

5

🔒 View only

Using Copilot allows me to complete tasks faster.

Strongly disagree

Strongly agree

1

2

3

4

5

🔒 View only

When using Copilot, I am more productive.

Strongly disagree

Strongly agree

1

2

3

4

5

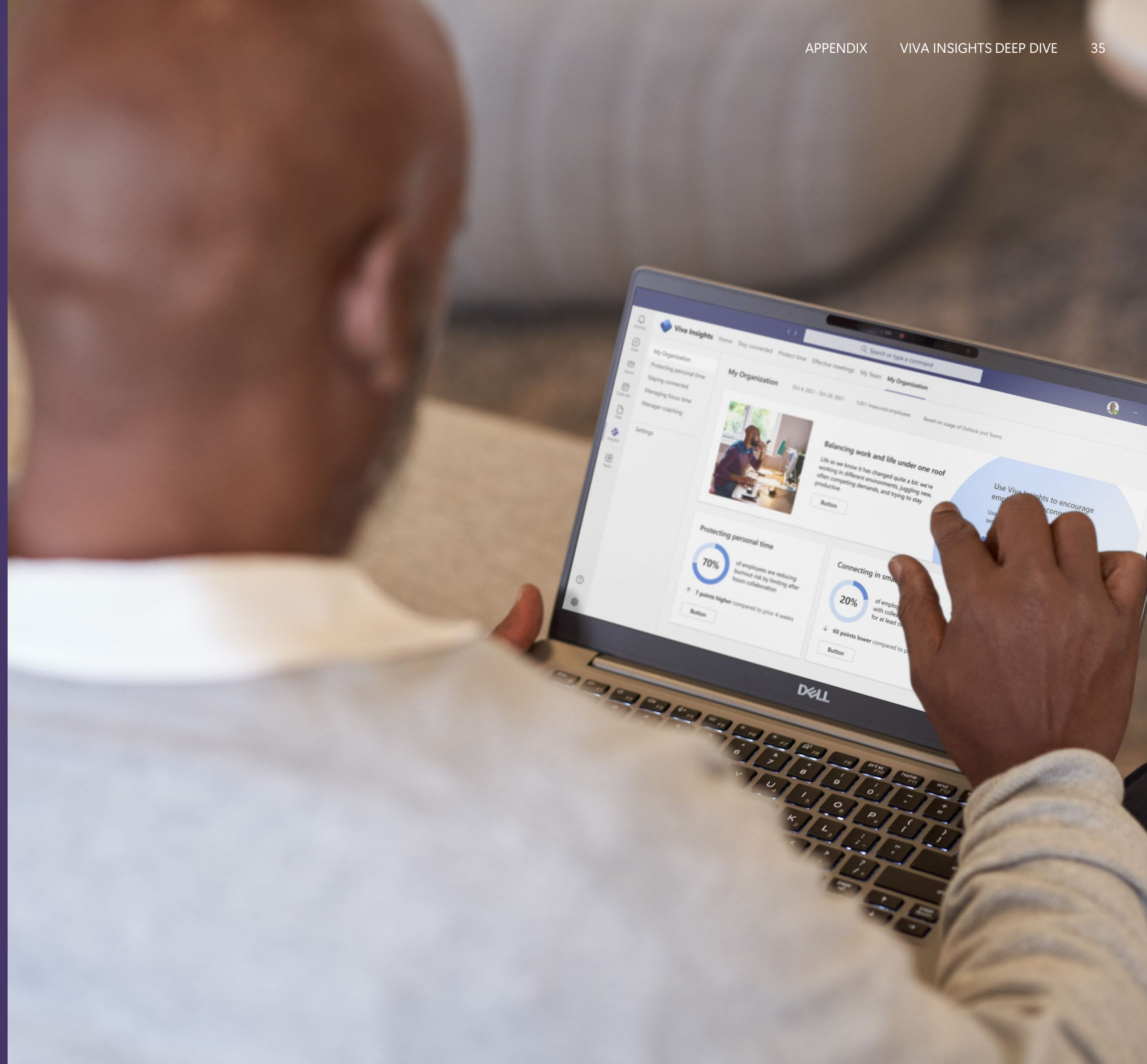
Viva Insights Functionality for Copilot Measurement

The following slides provide an additional overview of the Viva Insights functionality for Copilot, focusing on Copilot Analytics.

As a reminder, Copilot Analytics in Viva Insights helps organizations maximize the value of Copilot. It provides actionable insights to help your organization get ready to deploy AI, drive adoption based on how AI is transforming workplace behavior and measure the impact of Copilot.

Advanced reporting in Copilot Analytics gives you access to a wide range of usage metrics from Copilot in Microsoft 365 and Copilot for Sales. These are complemented by an out-of-the-box Power BI dashboard so you can get started rapidly and with minimal effort. You can always choose to build your own custom dashboards using the results from your analysis query in the Analyst Workbench.

The Copilot Business Outcome Report also allows organizations to customize their analysis based on their specific metrics and key performance indicators (KPIs) with their business data for a specific group of Copilot users.



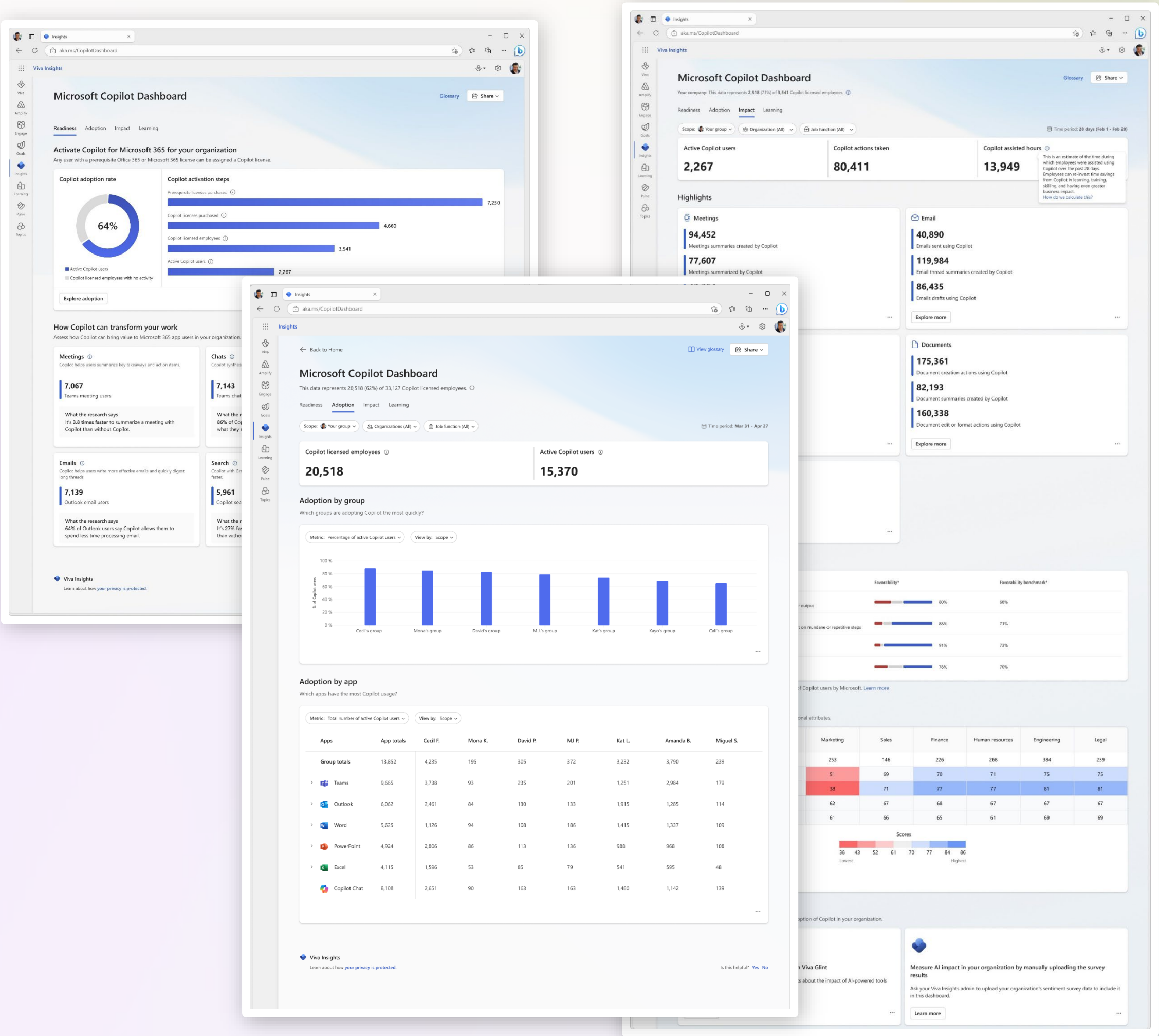
Microsoft Copilot Analytics

The new Microsoft Copilot Analytics (formerly known as Copilot Dashboard), powered by Viva Insights, providing privacy-protected insights across every stage of your AI transformation journey. The dashboard offers insights into Copilot usage metrics with organizational context and collaboration data, enabling deeper views of adoption and impact.

With Copilot Dashboard, you have the flexibility to filter by attributes like department, teams, or roles, understand differences between groups, and compare those same measures between users and non-users.

Copilot Dashboard helps you:

- Activate Copilot by understanding eligibility based on licensing status.
- Understand usage and adoption trends across products, groups, organizations, and job functions.
- Analyze employee sentiment of Copilot users with research-backed templates.
- Access research and learning courses to accelerate Copilot adoption.
- [Watch video](#) to learn more about the Microsoft Copilot Dashboard.
- Read [this article](#) to learn more about Microsoft Copilot Dashboard access and features.



Advanced Copilot reporting in Viva Insights

Dive deeper into Copilot usage and create customized reports by leveraging the advanced tools and library of prebuilt templates in Viva Insights. Create custom views, dashboards, and analyses with row level data.

Advanced Copilot reporting helps you:

- Filter and group using custom organizational attributes (e.g., regions, team, tenure, level, etc.).
- Pull usage data older than 28 days with dynamic time ranges.
- Customize the definition of active Copilot users and other metrics that are necessary for your custom reports.
- Import your relevant functional data (for example sales performance or customer service KPIs) to identify business value correlations. (see next page for examples).
- Watch video to learn more about Business Outcome PowerBI Reports.

