Microsoft 365 Copilot

Executive Recommendations & Risks

November 15, 2024

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Overview

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- Additional Project Benefits
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  - Supporting data for each recommendation

Project Summary

Overview: The pilot assessed the potential and risks of M365 Copilot across UW Academy and UW Medicine, focusing on **business value**, **organizational readiness**, and **risk mitigation**. A multi-disciplinary team from UW-IT and UW-Med worked for five months with 200 pilot users, supported by executive sponsorship linked to the UW AI Task Force.

What We Did

- Completed 2 Microsoft hosted Prompt-A-Thons for M365 Copilot
- Analyzed 425 user tests of prompts
- Collected data from surveys and focus groups on usage, benefits, and challenges
- Developed recommendations and a plan for broader Copilot implementation
- Leveraged information from Gartner and Microsoft

Findings

- Differentiated benefits and challenges were identified across pilot participants
- Centralized funding not recommended
- Almost all pilot participants reported individual trial and error and actively exploring as primary methods of learning
- Risks from existing data overshare would be unacceptably expanded by broad Microsoft 365 Copilot rollout without mitigation
- Pilot participants primarily used non-UW-IT resources to learn how to use Copilot

Recommendations and Timeline

Advance M365 Copilot deployment via pay-to-play funding model among self-selected/targeted users.

Inform potential purchasers of Copilot's value proposition and improve value by adopting a time-limited proration on licensing costs through standard UW-IT licensing process.

Support user adoption with M365 Copilot help resources and learning opportunities with lightweight operational support.

Implement Varonis for data protection, deploy M365 Copilot under Protected Health Information (PHI) Business Associates Agreement and continue to mature security, privacy, and data governance controls.

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Key Risks

Risk	Exposure	Mitigation	Remediation
Amplified unauthorized access of data in Microsoft environment.	High	Large-scale automated data classification and amendment of permissions in Microsoft environment.	Address small-scale bad outcomes through existing processes. Large-scale bad outcomes may require pausing Copilot service.
Business disruption during remediation of oversharing and labeling of data.	High	Phased, targeted push of permissions changes. Provide comprehensive user communication and training to prepare employees for changes.	Adjust staffing levels to provide prompt support to users experiencing access issues.
Inadequate return on investment.	Medium	Communicate known-viable use cases to potential purchasers. Publish training materials and support community.	Collect user feedback to identify barriers to adoption. Refine training and support initiatives to improve ROI.

User Perspectives

Low raters (1-2)	High raters (4-5)
"The product was ultimately disappointing. Because I rarely benefitted from the responses, my use tapered off significantly over the course of the pilot." "I found Copilot pretty much useless and spent a lot of time frustrating myself trying to get it to perform."	"Co-pilot meeting and action item summary capabilities have saved [our team] hours per week and provided us an opportunity to engage in meetings vs. a focus on taking accurate notes." "Tremendous impact on time savings and overall utility - generating clear, concise and consistent content, specifically associated with email communications and document assembly."

Additional Project Benefits

- Enhanced partnership between UW-IT and UW Medicine
- Stronger collaboration with Microsoft, especially with Accessibility
- Improved data governance and security for future LLM and AI rollouts
- Increased user interest in AI and its potential
- Created reusable template and experienced core team for supporting future AI pilots
- Supported AI CoP

Recommendation #1:

Make M365 Copilot Broadly Available

Recommendation #1

Offer M365 Copilot and inform specific audiences of its value

- Offer M365 Copilot when a security, privacy, and data governance plan is in place (i.e., Recommendation #2)
- Allow anyone to purchase a Copilot M365 license following the security implementation plan and timeline
- Business-driven approach, include guidance in licensing process where we have seen the greatest and least benefit based on pilot results
- Share pilot results and Microsoft-generated use cases with potential users through UW AI Community of Practice including both UW-Med and Campus

Rationale

- Microsoft A5 license already provides access to Copilot for the web at no additional cost and supports strong data protection of UW data
- Half of pilot participants were using Copilot only occasionally or not at all at end of pilot; other half reported regular or expanded use
- Users rated the value of Copilot for their work an average rating of 3.5/5
- High raters (4 or 5) reported a better user experience overall (time savings, work integration, quality of output) than low raters (1 or 2)
- Pilot participants identified tasks where/reasons why they experienced greatest/least benefit
- Roles and potential benefits compiled by MS provide additional guidance for adoption
- When factoring the net benefit of time saved and time lost per user testing prompt, the overall increase in average time savings was significant
- **Gartner (October 7, 2024):** Take a business-driven approach to procurement, like that used with Microsoft Office add-ons such as Project and Visio. Let the business fund the licenses and take responsibility for enablement, with IT providing operational fitness. The State of Microsoft 365 Copilot: Survey Results

Risks

- Copilot increases the likelihood of users accessing overshared content
  - **Mitigation:** Implement Varonis data protection and data labeling before releasing Copilot M365 for all to purchase
- Copilot users do not find enough value to justify the cost
  - **Mitigation:** Broadly share pilot learnings and Microsoft continuous product development
- Copilot does not mature and evolve to meet new or additional higher education or medicine use cases
  - **Mitigation:** Copilot is an annual and individual license purchase and can be dropped
- Copilot's accessibility features such as keyboard shortcuts and screen reader compatibility are unintuitive and unreliable
  - **Mitigation:** Continue reporting accessibility issues to Microsoft and providing input through their Accessibility Council.

Approximate Return on Investment

Task	Description	Time saved/day
Email review and draft response using Outlook in M365 Copilot	Auto drafts a response from thread of emails, taking into consideration tone, factual accuracy, and grammar. Allows user to customize options.	6 mins per email, on average 5 emails per day 30 mins saved per day
Searching your Office files and OS for documents, key emails or presentations	Easy search built into Teams and Office apps to find what you need and are looking for.	6 mins per task, search, on average 3 per day 18 mins saved per day
Meeting Recap in MS Teams	Send bulleted meeting recap with key time stamps and action items assigned or user named for responsibility.	Five, 1-hr calls per day, 3 may be recorded, saves 28 mins per 3 recorded calls 28 mins saved per day
	TOTALS:	**1.3 hours/day saved**

1.3 hours/day saved X 260 workdays/year = 338 hours saved/year

Average UW professional employee earns $80/hr. (total compensation)

338 hours/year X $80 hourly rate = $27,200 saved per user per year

Potential productivity gains 338 hours/year/user

UW-Med = $84/hr. UW Academy = $77/hr.

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Recommendation #2:

Mature Security and Privacy

Recommendation #2

Seize the opportunity to mature security, privacy and data governance controls, which will support the current deployment of Copilot *and* future AI implementation across all UW.

- Embrace data labelling to enable generative AI as an assistant in the creation of knowledge. Formalize Data Governance and identify assigned resources.
- Enable safer use of Microsoft 365 Copilot and similarly situated tools by implementing automated data classification and permissions remediation.
- Pervasively communicate coming changes to all users.
- Disseminate baseline knowledge for AI use and awareness throughout the organization.
- Promote responsible data use by requiring all employees to affirm the Access and Use Agreement or successor document.

Rationale *(1 of 2)*

- Microsoft 365 Copilot consistently respects permissions in the UW tenant.
- Risks flowing from existing overshare in SharePoint, OneDrive and Exchange would be unacceptably expanded by broad Microsoft 365 Copilot rollout without mitigation.
- Test of Varonis software demonstrates adequate accuracy (sensitivity and specificity) of data type detectors.
- Test of Varonis demonstrates ability to quickly and effectively automate remediation of excess permissions.
- Expert and community sentiment recognizes Varonis's position as an industry leader with solid value delivery at enterprise scale.

Rationale *(2 of 2)*

- While this pilot has shown improved results over time in relation to hallucination and poisoning, these and other risks are pervasive with AI.
- Rapid expansion of AI use in diverse environments must be addressed through crowd-sourced and automated means.
- Microsoft 365 Copilot is covered by negotiated data privacy and business associate agreements—a competitive differentiator at this time.

See the Appendix: Security & Privacy

Risks *(1 of 2)*

- Varonis requires expansive permissions in our environment. A compromise in this space could have extraordinary negative outcomes.
  - **Mitigation:** Implement strongest protections of credentials. Monitor Varonis activity.
- Addressing the security debt in our Microsoft environment will entail business disruption. Some users will lose permissions on files they need for business purposes.
  - **Mitigation:** Contain problem through pervasive communication. Identify and respond to circumstances that favor user-driven remediation over automation.
- Business disruption for users may cause an unmanageable support burden for the UW-IT Service Desk and PPLAT team.
  - **Mitigation:** Conduct extended risk analysis. Consider engaging third-party supplemental support or temporarily allocating resources to help manage the initial disruption phase. Monitor the impact and adjust resource allocation as needed.

Risks *(2 of 2)*

- Varonis claims faster processing than third-party perception or proof-of-concept experience supports.
  - **Mitigation:** Schedule conservatively. Monitor progress and address contingencies early.
- Varonis SLA is 99%, low for a service of this posture, and operational support required is undetermined.
  - **Mitigation:** Negotiate improved availability in SLA. Document and treat unavailability risks.
- UW community may need help with data classification and governance, which UW-IT is not resourced to provide.
  - **Mitigation:** Emphasize self-sufficiency in process and documentation development. Monitor resourcing impacts and adjust allocation as needed.
- Untruthful output from Copilot and other generative AI may deceive users.
  - **Mitigation:** Disseminate baseline knowledge for AI use and awareness throughout the organization.

Recommendation #3:

Support User Adoption & Learning

Recommendation #3

Support user adoption through broad network of AI help resources and learning opportunities across all UW departments

- Leverage and encourage sustained community engagement via UW AI CoP, RAISE, UW-Med, UW Bothell AI CoP and other forums for Copilot discussions, support, etc.
- Develop team of Copilot Champions trained and empowered to provide support & training, assist users with adoption and realizing benefits

Rationale *(Recommendation #3)*

- While most pilot participants reported Copilot was easy to learn, they also reported persistent challenges with:
  - Understanding what M365 Copilot can/cannot do
  - Learning to write effective prompts
  - Integrating Copilot into their regular workflow
- Almost all pilot participants reported individual trial and error and actively exploring as primary methods of learning
- Participants also valued learning via Q&A sessions, community discussions and testing prompts
- Quality of results improved with experience
  - **Gartner:** Employee-facing change management is a persistent issue, given the constant flow of changes to existing features and the introduction of the new features expected over the next year. Since reaching general availability, M365 Copilot has had over 740 product changes and over 125 new features added.

Risks *(Recommendation #3)*

- Users do not share information with each other and the community engagement is low
  - **Mitigation:** Collaborate with the AI CoP to promote and encourage participation. Encourage UW-IT staff to participate and share information
- Users do not utilize the Copilot Champions or other help resources
  - **Mitigation:** Encourage Copilot Champions to share relevant, helpful resources such as user prompts
- User support content becomes irrelevant when Copilot is updated
  - **Mitigation:** Encourage the AI CoP to test new releases following the Microsoft product roadmap and share their findings

Recommendation #4:

Provide Licensing Option

Recommendation #4

Provide standard Microsoft Premium licensing

- Allow departments to choose to purchase licenses based on business needs, just as we do with other Microsoft product like Visio and Project.
- $475 per user per year (License Cost + Tax + 20%) is the current standard upcharge for UW-IT administration and support.

Rationale *(Recommendation #4)*

- Given the mixed response on the value of M365 Copilot, we do not currently recommend broad central funding
- Gartner expects AI to become more affordable due to advances in technology and increased competition; cloud-based services and open-source tools are also helping to lower costs
- **Gartner:** Because M365 Copilot results have been mixed, and because enablement is far more complex than expected, respondents are concluding two things:

    1. Buying a large volume of licenses in hopes of generating value is not the right approach.

    2. Because enablement is role- and business-unit-specific, it would be better for the business to fund and drive enablement.

Risks *(Recommendation #4)*

- Licenses can only be purchased on an annual basis and are not prorated
  - **Mitigation:** Inform users of the license agreement before purchase
- The license purchase process is not instant which may produce negative customer feedback
  - **Mitigation:** Inform users of the license purchase processing time before purchase
- Requests to transfer licenses between users may not be manageable
  - **Mitigation:** Track license transfers and develop a better solution if the issue becomes unmanageable

Recommendation #5:

Provide Light-weight Operational Support

Recommendation #5

Provide light-weight operational support via existing UW-IT resources

Utilize the Technology Service Center (TSC) for answering basic questions and the User Consulting & Support (UCS) supporting deployment of licenses. UW Med Service Desk to follow standard operating procedures.

- Leverage general UW Copilot information with deep links to Microsoft provided support information
- Leverage Microsoft Unified Support that UW already owns to assist with adoption and to uncover new Copilot insights
- Refrain from hosting workshops or building prompt libraries by UW-IT; refrain from hiring additional new support staff

Rationale *(Recommendation #5)*

- Copilot updates are difficult to predict and are coming fast, are generally vague, and are released with limited warning making it challenging for us to keep our customers informed of the latest changes
- Continue building on longstanding partnership with Microsoft and possible post sales investments by Microsoft
- Pilot participants primarily used non-UW-IT resources to learn how to use Copilot
- The AI CoP is an organic way to keep up with the ever-changing landscape of AI. CoP participants are encouraged to connect with each other to share best practices and resolve Copilot issues

Risks *(Recommendation #5)*

- UW-IT Service Desk will not be equipped to answer Copilot technical questions not centered around the license.
  - **Mitigation:** Point users with technical questions to Microsoft support materials
- The PPLAT team will not be equipped to handle escalated questions about features and functionality if there is a large influx of new Copilot support requests.
  - **Mitigation:** Monitor the amount of Copilot support requests to enable future resource decision making
- A lack of workshops and a library of information may create a frustrating user experience.
  - **Mitigation:** Encourage the AI CoP to share information with users. Encourage others to join the AI CoP.

Additional Project Benefits

Appendix

Success Criteria

We considered the following criteria in generating our recommendations:

User Experience

- User Adoption & Engagement
- User Satisfaction
- Performance Improvement
- Learning Curve
- Issue Resolution
- Quality of Output
- Business Value Analysis
- Scalability
- Accessibility

Risk Management

- Existing data exposure (e.g., overshare) reduction and trajectory
- New exposure (e.g., Copilot log data, Varonis data & permissions) analysis and planning
- Output accuracy (e.g., hallucination) analysis

Data Sources

We collected data related to our success criteria via the following methods:

User Experience

- Three check-in surveys (late May, early June)
- Three focus groups (mid-August)
- Closing survey (Sept. 12-30)
- Voluntary prompt testing & reporting
- Questions/issues raised in Teams for pilot participants and learning opportunities (Project Team Q&A, MS Prompt-a-thons, etc.)

Risk Management

- Project team testing
- User reporting of data/security concerns
- ...?

Data supporting Recommendation #1:

Advance M365 Copilot deployment among self-selected/targeted users most likely to benefit

User Adoption & Engagement

Among the 100 pilot participants who responded to our closing survey, users were split 51/49 between non- and occasional users vs. regular and expanded users of M365 Copilot.

1. **Which of the following best describes your current use of Copilot for M365?**

More Details Insights

I do not use it	4
I occasionally use it	47
I regularly use it	27
I'm continually expanding my use	22

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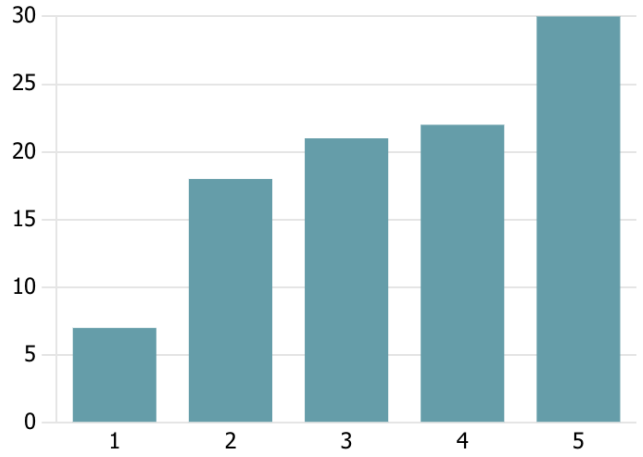
User Satisfaction

Regardless of use, almost all survey participants reported getting value from Copilot for their work, with many indicating the tool was "extremely valuable."

13. **On a scale of 1-5, how would you rate the value of Copilot for M365 for you and the work you do? (1=of little value, 5=extremely valuable)**

More Details Insights

3.51
Average Rating



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Performance Improvement

Three times as many users reported spending less time on tasks with Copilot than those who reported spending more time, or the same amount of time while using the tool.

14. **Overall, did you spend less, more, or about the same amount of time to complete a task with Copilot for M365 than without?**

More Details Insights

Less time	57
More time	17
About the same amount of time	20
Not sure	5

Time Saved

Of those who reported saving time, over half (**54%**) reported saving an **hour or more each week**

15. **About how much time per week would you say you saved by using Copilot on tasks?**

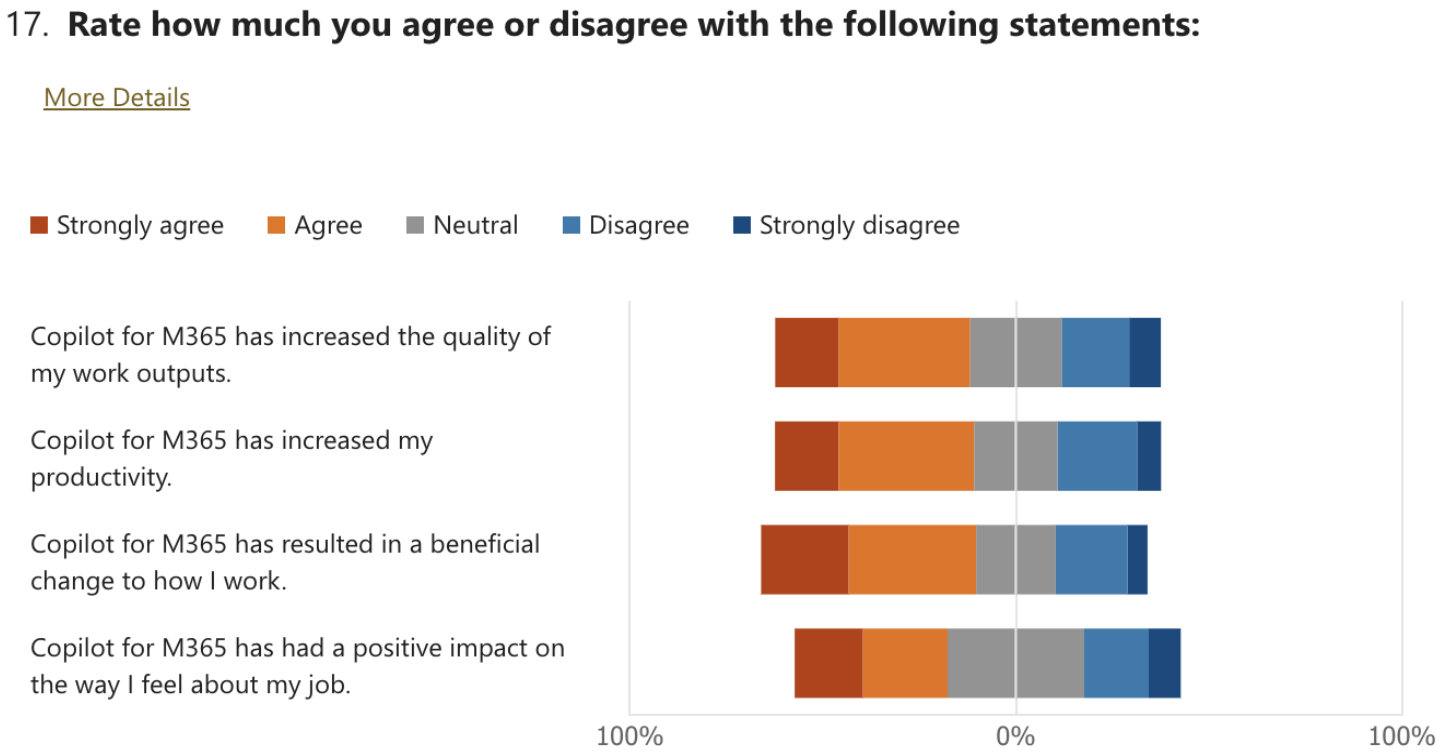
More Details

Less than 30 mins	6
30-60 mins	20
1-2 hours	17
More than 2 hours	13

Additional Performance Impacts

Closing survey participants had mixed responses regarding how use of Copilot impacted:

- Quality of work
- Productivity
- Work processes
- Feelings about job



User Experience by Value Rating

Survey respondents who rated the value of Copilot for their work low (1 or 2) vs high (4 or 5) reported differences in experience in several areas:

	Low raters (1-2)	High raters (4-5)
Time impact	Spent more time, or did not experience time savings using Copilot on tasks	Frequently mentioned time savings, often 1-2 hrs/week or more
Tool integration	Struggled to integrate Copilot into current workflows	Found beneficial ways to incorporate Copilot into daily tasks
Quality of output	Found output unreliable or requiring significant editing	Reported improved quality of outputs
Specific use cases	Struggled to find consistent applications for tool	Identified use cases where Copilot excelled (e.g., meeting summaries, email composition)
Learning curve	Some mentioned difficulties learning how to create effective prompts	Had overcome this challenge and were able to use tool more effectively

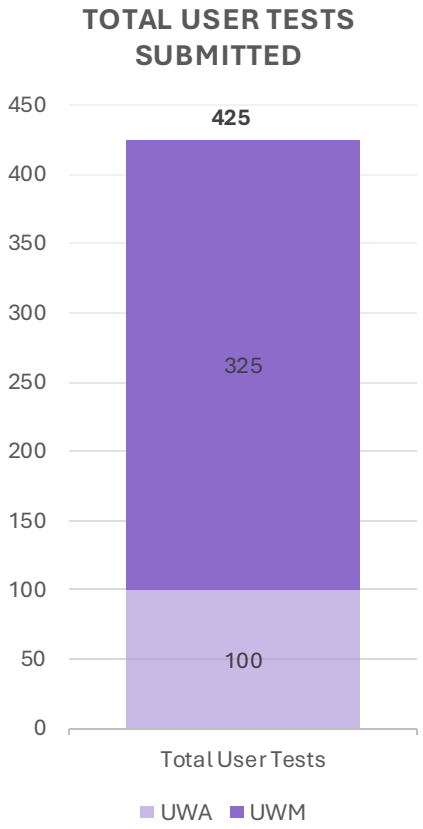
User Satisfaction *(Data supporting Recommendation #1)*

Low raters (1-2)	High raters (4-5)
"The product was ultimately disappointing. Because I rarely benefitted from the responses, my use tapered off significantly over the course of the pilot." *"I found Copilot pretty much useless and spent a lot of time frustrating myself trying to get it to perform."*	*"Co-pilot meeting and action item summary capabilities have saved [our team] hours per week and provided us an opportunity to engage in meetings vs. a focus on taking accurate notes."* *"Tremendous impact on time savings and overall utility - generating clear, concise and consistent content, specifically associated with email communications and document assembly."*

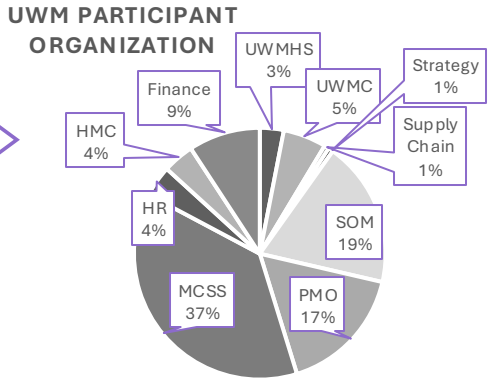
User Testing

- Focus: learn about the efficacy of Copilot through User Testing of prompts
  - UWM began inviting users to perform prompt testing 5/14/24
    - Users entered prompts manually into Excel spreadsheet
    - Fields included: test case, application, expected and actual result, pass/fail, minutes saved, and steps to reproduce
  - UWA began with "discovery" approach, moved to structured testing 7/9/24 with Wave 2 participants
    - Users completed a MS Form for each prompt test
    - Used UWM basic test structure and added questions re: computer operating system, application modality used (desktop/browser/web), and browser used

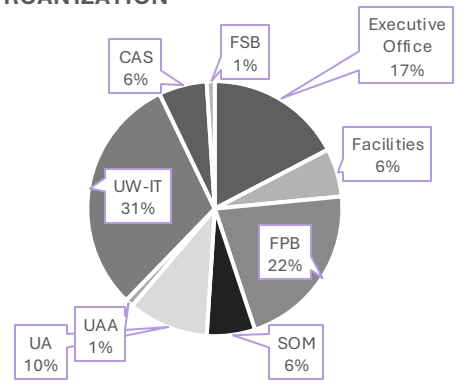
User Adoption and Engagement *(1 of 2)*



48 Unique Testers



14 Unique Testers



Sources: CoPilot Testing Scenarios & Results xlsx (UWM), Copilot User Testing Form xlsx (UWA)

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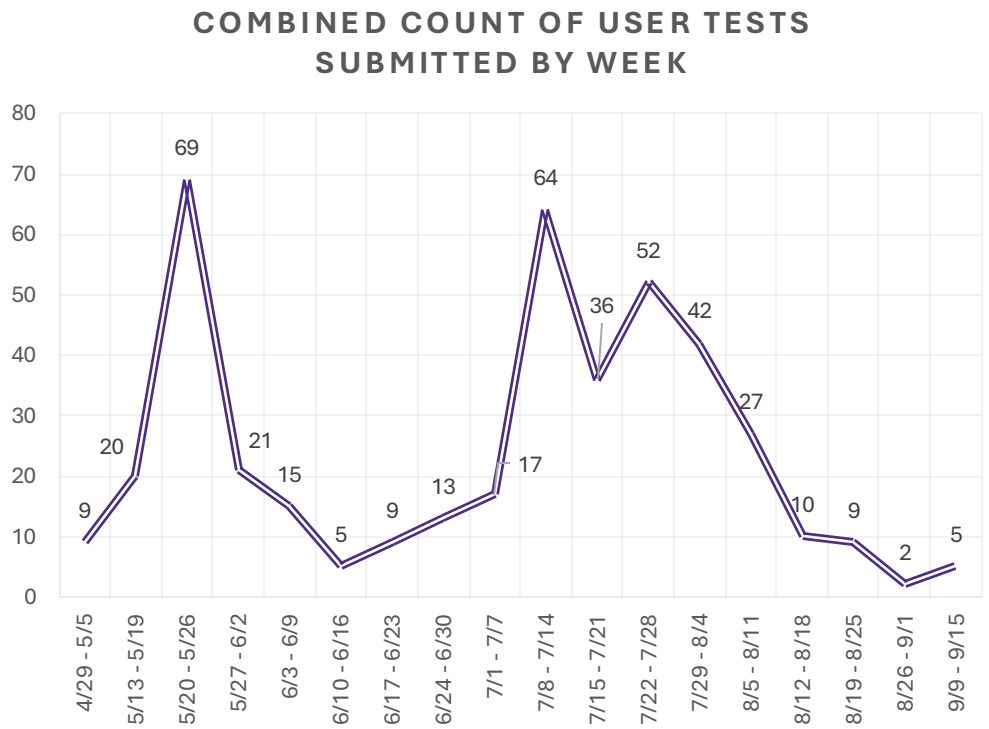
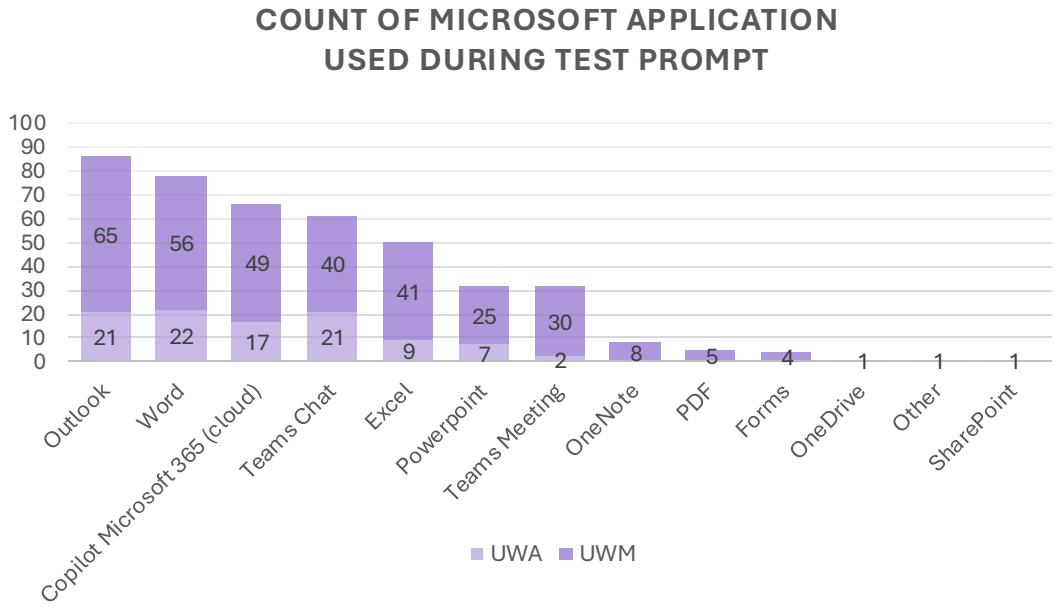
User Adoption and Engagement *(2 of 2)*





Sources: CoPilot Testing Scenarios & Results xlsx (UWM), Copilot User Testing Form xlsx (UWA)

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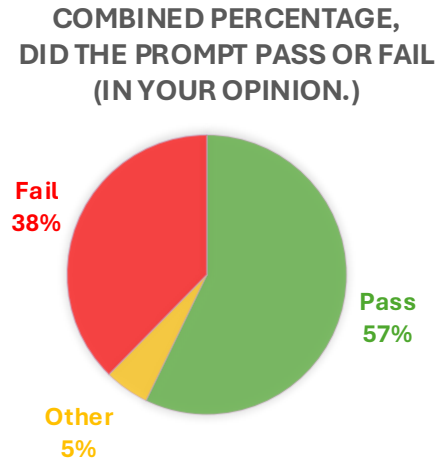
Time Saved *(Data supporting Recommendation #1)*

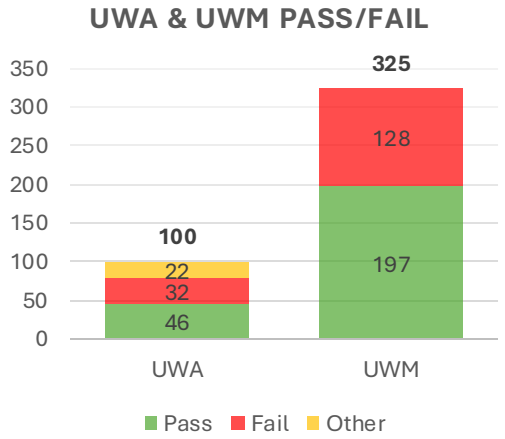
Of the 243 prompts reported as “Pass”, users self-reported an average time savings of **21 minutes and 30 seconds**.

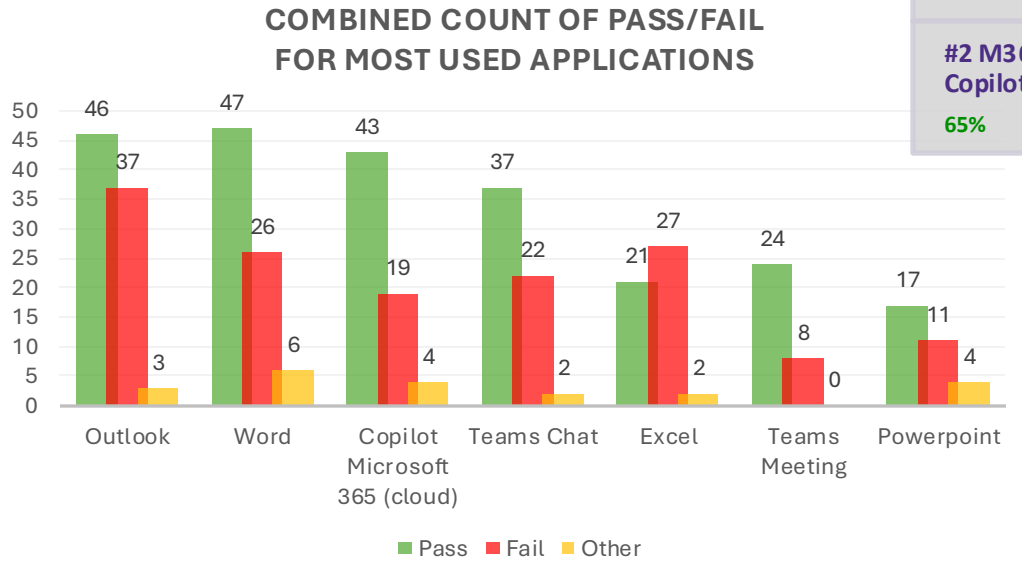
Of the 160 prompts reported as "Fail", users self-reported Copilot took an average of **1 minute and 8 seconds** to deliver a prompt.

If you subtract the “time loss” of Copilot producing a failed prompt from the time saved average, there remains a significant overall time savings of **20 minutes and 22 seconds**.

Quality of Output *(1 of 2)*







Top 2 Pass Rates

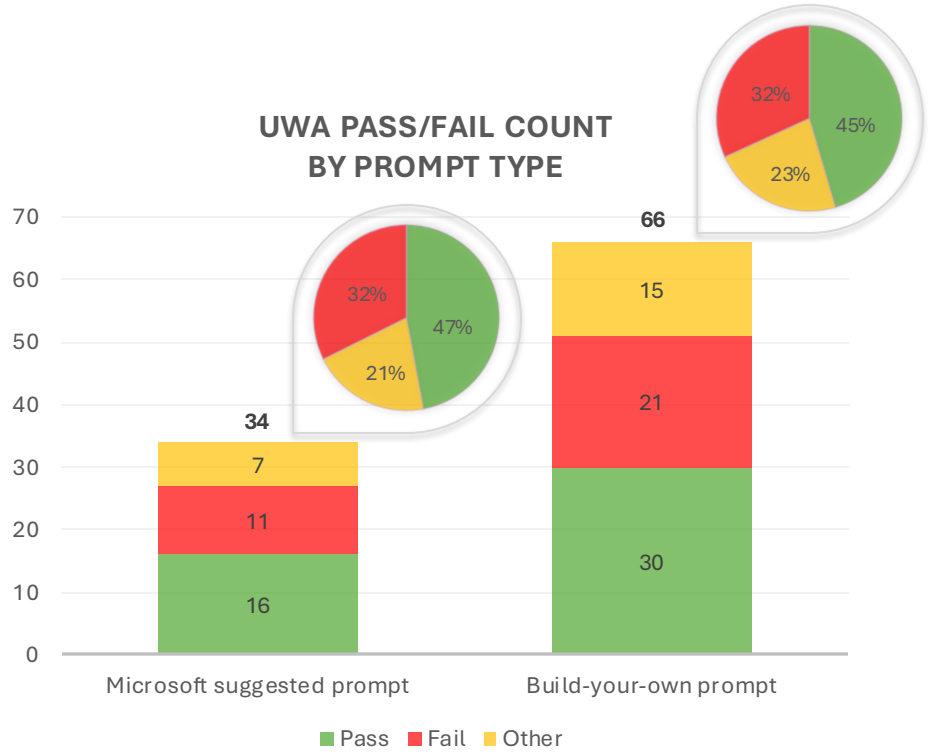
- #1 Teams Meeting — 75%
- #2 M365 Copilot — 65%

Top 2 Fail Rates

- #1 Excel — 54%
- #2 Outlook — 43%

Sources: CoPilot Testing Scenarios & Results xlsx (UWM), Copilot User Testing Form xlsx (UWA)

Quality of Output *(2 of 2)*



UWA PASS/FAIL COUNT AND PERCENTAGE BY TYPE OF APPLICATION

Desktop Application	Pass/Fail	Count of Pass/Fail	Percentage
	Pass	28	46%
	Fail	20	34%
	Other	12	20%
	Desktop Total	**60**	**60%**
Browser Application	**Pass/Fail**	**Count of Pass/Fail**	**Percentage**
	Pass	18	45%
	Fail	12	30%
	Other	10	25%
	Browser Total	**40**	**40%**
Mobile Application	**Pass/Fail**	**Count of Pass/Fail**	**Percentage**
	Pass	1	50%
	Other	1	50%
	Mobile Total	**2**	**2%**

Source: Copilot User Testing Form xlsx (UWA)

Higher Ed

Use case | Dynamic course orchestration

Potential benefits

- Customized learning
- Accelerated lesson development
- Increased adaptability

1. Identify learning objectives

Dr. Jones is the Dean of International Business at a state university's business school and is focused to create an inclusive learning environment for all students in his International Business course

Microsoft 365 Chat

Extract information from course curriculum, syllabus, diverse audience needs, disability support services, and other pre-determined resources

2. Content selection

Select appropriate content such as course materials, literature, multimedia resources, and other education materials based on identified learning objectives

Microsoft 365 Chat

Identify and get suggestions on diverse course content and learning styles (visual and auditory) to ensures all students have multiple pathways to understanding

3. Collaborative content creation

Partner with the University's disability services support to create interactive and accessible contents (e.g., captioning services, speech functionality, inclusive discussion forums)

Copilot in Word, PPT, and Teams

Generate first drafts of lecture slides, handouts, alternative presentations formats, and translations to foster an inclusive, accessible, and respectful learning environment

4. Delivery

Deliver lesson lectures, activities, and presentations through in-person or online learning

Microsoft 365 Chat

Utilize chat to quickly explore and answer additional queries related to the presentation

5. Reflect and evaluate

Recap the lesson highlights, share templates, materials, and reflect on areas for improvement

Copilot in Word
Copilot in Outlook
Microsoft 365 Chat

Create a feedback request form or polls, draft relevant communications with recap, and analyze results

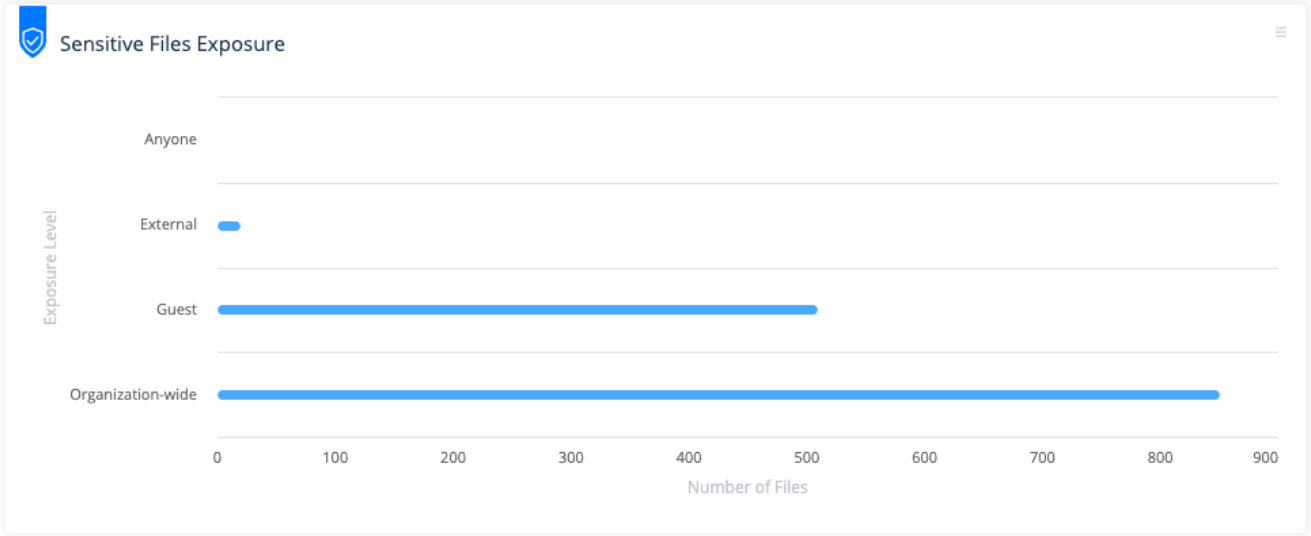
Dynamic course orchestration stages

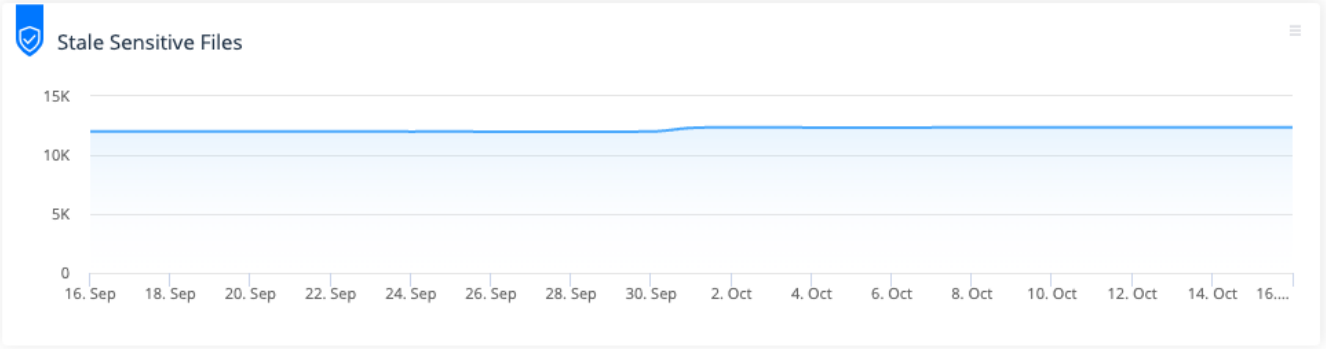
Note: All assumptions are based on secondary research. Should some assumptions change for the prospect, please update the assumptions and the total cost savings will correspondingly change.

Data supporting Recommendation #2:

Mature security, privacy, and data governance controls to support the current deployment of Copilot *and* future AI implementation across UW

Data type and exposure detection – SharePoint and OneDrive





Varonis has scanned curated sites in SharePoint and OneDrive, accounting for >1% of total data by volume. Due to selection criteria, the sample may not be representative.

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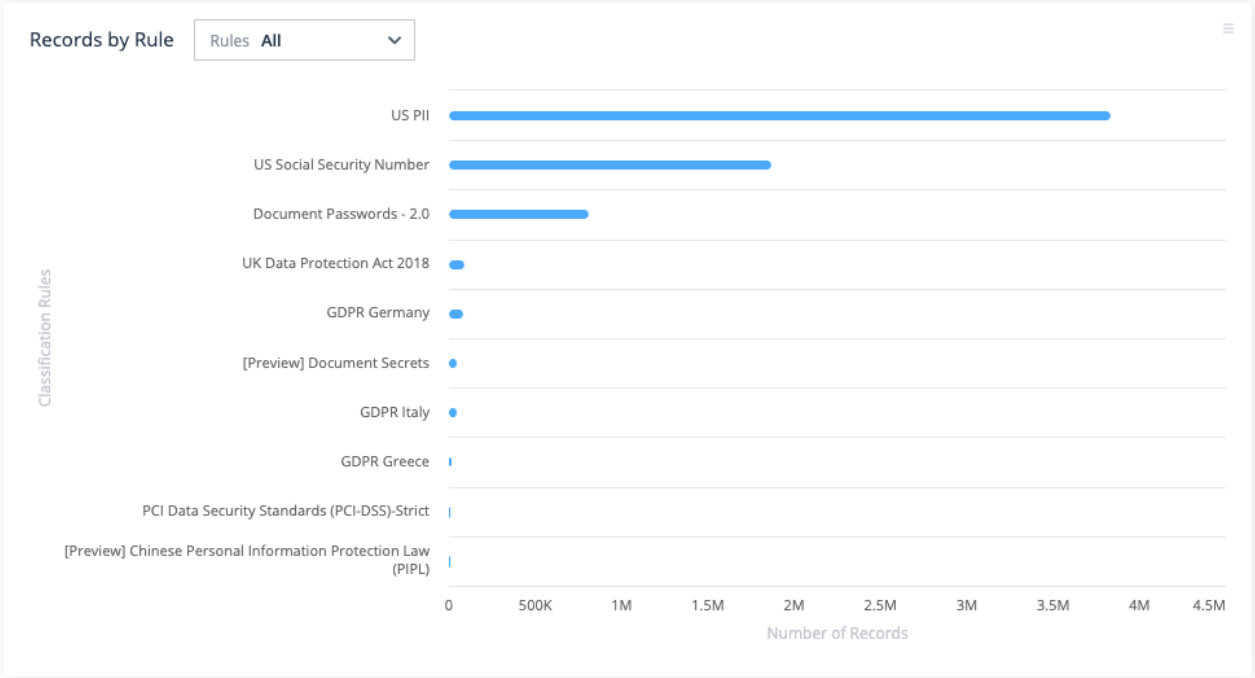
Data type and exposure detection – Exchange



Varonis has scanned ~27.4tb of our Exchange tenant, accounting for <1% of total data by volume.

Detectors related to foreign privacy regulation currently demonstrate inferior selectivity and will require tuning to contain the need for manual intervention.

Data exposure remediation

Varonis

> Provides out-of-box, customizable remediation automation.
> Anticipated scheduling limited by automated data identification process rate and change management.

Microsoft

> Claims higher data identification process rate.
> Anticipated scheduling limited by development of automated remediation tooling and change management.

Varonis is likely to deliver remediation capability on a more predictable timeline.

Untruthful results

- *Hallucination* - Results to prompts such as “What did I work on yesterday?” consistently produced inaccurate results early in the pilot, referencing documents not worked on. Result accuracy has improved steadily and showed a marked improvement with Wave 2 in September.
- *Poisoning* - Copilot incorporated as true even blatant fabrications in early use. It now presents these fabrications with appropriate caution and context. Subtle poison is still consumed.

Both risks are endemic to current generative AI and a comprehensive approach must address them. Examples of other providers’ efforts are visible at https://openai.com/index/introducing-openai-o1-preview/ and https://blog.google/products/gemini/gemini-image-generation-issue/.

UW Medicine Security Review key points

Remarks

- Copilot collects data from non-authoritative sources such as email, web browsers, and arbitrary files in OneDrive.
  - Some UWM devices sync files to OneDrive, making those files available to CoPilot.
  - Some of this data may be sensitive, resulting in exposure of data to individuals without a need to know.
  - Many untrusted and malicious emails are received at UW Medicine every day.
- Inputs and outputs lack clear definition.
- A Business Associate Agreement (BAA) has been signed with the vendor.
- "Web" tab on Copilot web-site lacks critical assurances.
- Users may be prompted to share data with Microsoft in relation to feedback.
- Scant documentation of Copilot's security controls.
- Risk of using Copilot without technically enforced data lifecycle management exceeds organizational risk tolerance and appetite.

Recommendations

- Implement an automated tool to identify and protect sensitive data in the O365 environment—Varonis or another, comparable solution.
- Implement Data Loss Prevention (DLP) policies to prevent the accidental or intentional sharing of data.
- Establish permanent process for users to report oversharing and other issues.
- Ensure that all Copilot functionality is covered under a BAA. If this is not possible then train users how to use the tool within the scope of the BAA.

Data supporting Recommendation #3:

Support user adoption through broad network of AI help resources and learning opportunities across departments

Learning Curve

Most respondents to the closing survey (44%) rated M365 Copilot either "easy" or "very easy" to learn to use effectively.

8. **How would you rate the overall ease/difficulty of learning to use Copilot for M365 effectively?**

More Details

Very difficult	3
Difficult	13
Neutral	38
Easy	31
Very easy	12

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Persistent Challenges

Survey respondents reported still experiencing challenges at the end of the pilot with:

- Understanding what Copilot can/cannot do in different apps
- Integrating use of Copilot into work
- Writing effective prompts

11. **Which of the following, if any, do you currently experience as challenges in using Copilot for M365?** Select all that apply.

More Details

Understanding what Copilot for ...	63
Writing effective prompts	35
Integrating use of Copilot for M...	49
None of these are current challe...	16
Other	7

Learning Path

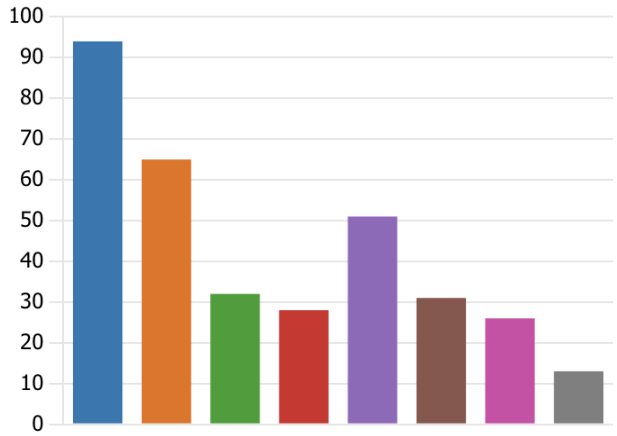
The top 3 methods and/or support resources survey respondents reported using to learn Copilot were:

- Individual trial and error
- Actively exploring the capabilities of Copilot in different apps
- Searching for text resources on the web

9. **Which of the following methods and/or support resources did you use in learning to use Copilot for M365?** Select all that apply.

More Details

Individual trial and error	94
Actively exploring the capabiliti...	65
Copilot for M365 Community Te...	32
Copilot for M365 Community Te...	28
Other text resources found by s...	51
Other video sources found by s...	31
Colleague in my unit or depart...	26
Other	13



Less than one third reported using the curated MS resources on the M365 Copilot Community Team site created for the pilot.

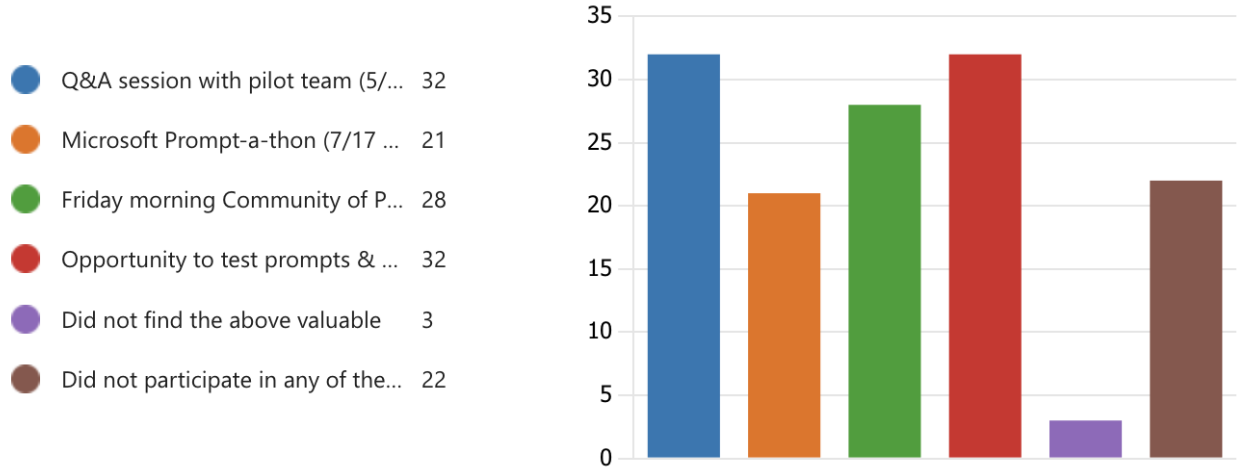
Learning Opportunities

The top 3 learning opportunities survey respondents reported as valuable for learning to use Copilot were:

- Q&A session with the project team
- Opportunity to test prompts
- Friday morning CoP meeting (School of Medicine)

10. **The pilot team also provided various opportunities to learn about Copilot for M365. Which of the following, if any, did you find valuable?** Select all that apply.

More Details



Data supporting Recommendation #4:

Provide standard Microsoft Premium licensing

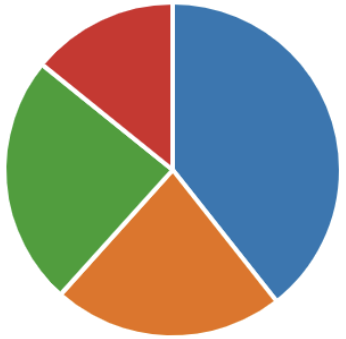
Licensing Cost/Benefits

Survey respondents were divided on whether the benefits received from Copilot are worth $30/person/month. Comments from those who selected "Other" suggest that for that price, they would expect better support and more consistent, reliable results.

19. **The cost of Copilot for M365 is $30 per person per month. Would you say the benefits you receive using Copilot are worth this cost or could be worth this cost?**

More Details Insights

Yes	39
No	22
Maybe	24
Other	14



Quality of Output

Over half (57%) of closing survey respondents reported that Copilot provided incorrect or faulty results or guidance about ¼ of the time or more.

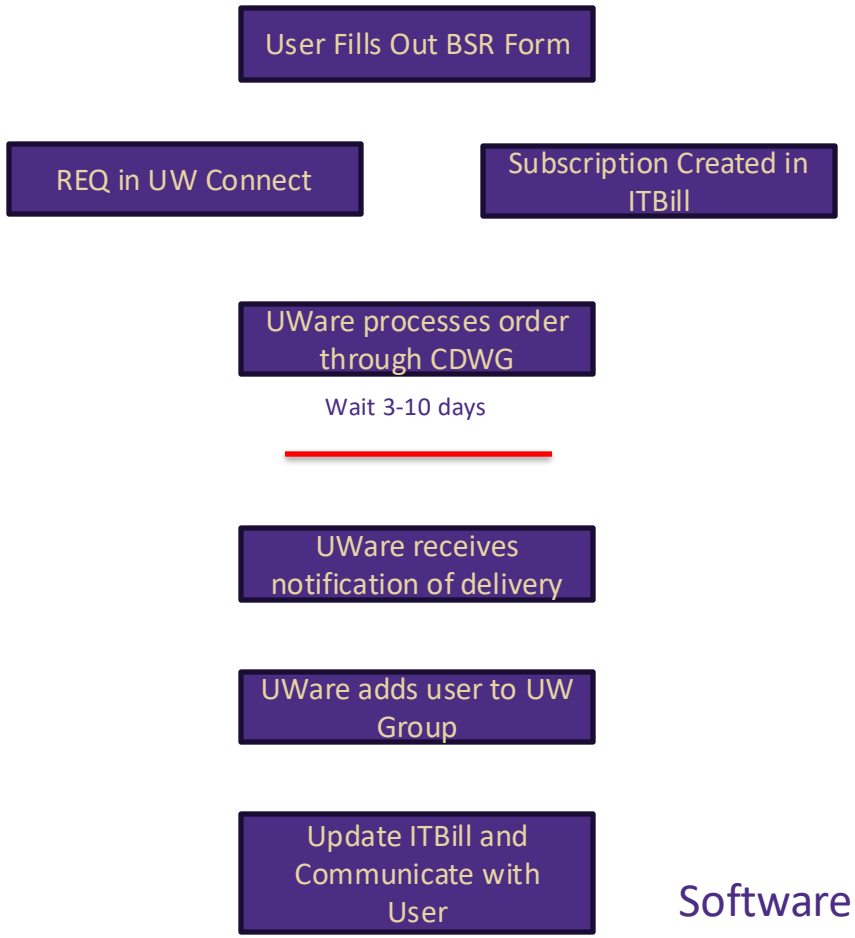
6. **Did Copilot for M365 provide you with incorrect or otherwise faulty results or guidance? If so, how often?**

More Details Insights

I did not experience any incorre...	11
Rarely (less than 10% of the time)	31
Some of the time (about 1/4 of ...	37
Frequently (about 1/2 the time)	13
Most of the time (about 3/4 of t...	6

Licensing Process

Non-Buffer Purchase on Demand



UWare sells all software for Cost + Tax + 20%
UWare purchases software on a pro-rated basis
UWare cannot sell software on a pro-rated basis

$475 dollars for a 12-month license

Software auto-renews unless user opt-outs

Business Value Analysis

COMBINED SUM & COUNT,
PASS/FAIL AND TOTAL TIME SAVED/LOST

Pass/Fail	Sum of Time	Count of Pass/Fail
Pass	+21:30:42	243
Fail	-8:19:41	160
Other	12:53:44	22
Grand Total	**18:44:07**	**425**

COMBINED AVERAGE, TIME SAVED BY
APPLICATION WITH 'PASS' VALUE

M365 Copilot Cloud
Average time saved per passed prompt: **29:08**

Teams Chat
Average time saved per passed prompt: **22:06**

Word
Average time saved per passed prompt: **20:06**

Teams Meeting
Average time saved per passed prompt: **19:51**

PowerPoint
Average time saved per passed prompt: **7:48**

Sources: CoPilot Testing Scenarios & Results xlsx (UWM), Copilot User Testing Form xlsx (UWA)

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Data supporting Recommendation #5:

Provide light-weight operational support via existing UW-IT resources

Pilot User Data

- Final data on pilot participants
- Total count, Academy and Medicine
- Summary of roles

Microsoft’s UW Copilot Pilot Takeaways & Recommendations:

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Key Recommendations from AI Task Force

Leverage AI to…

… Develop Faculty

- Prize postdoctoral AI fellowships
- Faculty cluster & disciplinary hires in AI
- Investment in human resources

… Enhance Student Experience

- Personalized learning experience
- Identify struggling students
- Help students find and create community

…Drive Research Innovation

- Enhance UW's reputation as a hub for advanced AI research
- Attract researchers to bring cutting-edge skills

… Streamline Operations

- Improve operational workflows and user experiences
- Accelerate UW's competitive edge
- Translated into best practices

…Reinvent Public Higher Education

- Enable faculty to transform teaching
- Integrate AI into curriculum
- Promote AI literacy
- Emphasize equity & access
- Invest in computational and data infrastructure to support AI use in education
- Individualized and highly supportive education

Potential Story Headlines

The UW of the 21st century…

… is more competitive

"UW unleashes Copilot to advance research breakthroughs…"

… is more collaborative

"UW transforms how employees collaborate, plan, and learn with Copilot…"

… is nimbler, leading through change

"UW is the leading public institution in Generative AI…"

… is more technology reliant

"Copilot provides student 24/7 tutoring support"

… is supported by diversified funding

"UW Advancement transforms outreach efforts with Copilot…"

Higher Education Use Cases

Student Life Cycle Use Cases	Smart Enrollment	Personalized learning & accessibility	Course recommendation	Predictive Analytics for Success	Wayfinding
Departmental Use Cases	Course design	Intelligent course scheduling	AI-powered Admissions	Student Engagement	Automated Grading
Event Use Cases	Personalized Marketing / Promotion	Event scheduling	Resource allocation	Event Feedback	Predictive Analytics
Support Services Use Cases	AI-Powered Student Support	Academic Advising	Intelligent Resourcing	Accessibility services	Feedback analysis

UW Leadership

As highlighted in the UW AI Task Force's recommendations, the University of Washington is dedicated to leveraging AI to enhance education, research, and operations. Therefore, it is crucial for university leaders, including the president, VPs, deans, and provosts, to utilize M365 Copilot to lead by example and position UW at the forefront of AI in higher education.

Personas

- President & EVPs (3)
- Deans (23)
- Vice Presidents (7)
- Vice Provosts (7)

Use Cases

- Efficient policy drafting
- Workforce planning
- Curriculum Planning
- Productive Meeting Management
- Program redesign

Value & KPI

- Increased faculty engagement
- Improved program effectiveness
- Improved teaching quality
- Improved data-driven decision making
- Enhanced administrative efficiency

Finance, Planning, and Budgeting

As highlighted in the UW AI Task Force's recommendations, AI applied to UW business processes will create a competitive advantage for the UW in key areas such as strategic financial management.

Personas

Accountant
Analyst
Auditor
Procurement

Use Cases

> Accelerated data analysis and reporting
> Accounting document evaluation
> Contract accounting guidance
> Budget variance analysis

Value & KPI

> Reduce Outsourcing Spend
> Improve Risk management
> Reduce cost per analysis request

Admissions

The AI Task Force emphasizes the importance of seeking opportunities to apply AI in processes such as admissions. Equipping admissions staff with copilot will help them considerably enhance productivity and evaluation process of student applicants.

Personas

Admissions Counselor
Recruitment Coordinator
Admissions Director

Use Cases

> Automate initial screenings of applicants, identify key metrics, and generate summary reports
> Segment prospective students and create targeted outreach campaigns
> Trace admissions trends, forecast enrollment numbers, and develop strategic plans

Value & KPI

> Reduction in time taken to review applicants
> Increase accuracy of application assessments
> Increase response rate to recruitment campaigns
> Enhance diversity of application pool
> Increase accuracy of enrollment forecasts
> Improve strategic alignment

HR

As highlighted in the UW AI Task Force's recommendation, AI applied to UW Business processes will create a competitive advantage for the UW in key areas such as HR.

Personas

HR Manager
Talent Acquisition
Benefits Manager
HR Compliance
Employee Development

Use Cases

> Improve quality of recruitment experience-job descriptions, interviews, communication with candidates
> Enhance employee meetings with meeting recap and summaries
> Create onboarding and professional development materials
> Streamline benefits and compensation
> Assist employees with special needs

Value & KPI

> Reduce onboarding time
> Increase employee retention
> Reduce cost per hire
> Improve eNPS scores and increase benefit usage
> Reduce overtime requirements
> Accelerate upskilling for current employees

Medical Centers Shared Services (MCSS)

UW Medicine's Medical Centers Shared Services (MCSS) division should use M365 Copilot to enhance interdisciplinary collaboration, streamline administrative tasks, and leverage AI-driven tools for innovation healthcare management and patient care.

Personas

Clinical Data Analyst

Healthcare Administrator

Patient Services Coordinator

Use Cases

- Process patient data, generate reports, and perform statistical analysis to support clinical decision making
- Manage schedules, coordinate staff and handle communications across medical centers
- Manage patient appointments, send reminders, and handle patient inquires

Value & KPI

- Reduction in time taken for data collection and admirative tasks
- Increase in accuracy of data analysis results
- Increase number of research papers published
- Increase student engagement and quality of course materials

Clinical Operations

UW Medicine's Clinical Operations organization should use M365 Copilot to enhance interdisciplinary collaboration, streamline administrative tasks, and leverage AI-driven tools for innovative healthcare delivery and patient care.

Personas

Clinician

Clinical Operations Manager

Nurse Coordinator

Use Cases

- Access patient records, document clinical notes, and manage treatment plans
- Optimize scheduling, manage staff assignments, and monitor workflow efficiency
- Track patient care plans, coordinate with multidisciplinary teams, and ensure timely follow-ups

Value & KPI

- Reduction in time on clinical documentation
- Improvement in patient car and satisfaction
- Reduction in time on scheduling and staff management
- Increase clinician and staff satisfaction with administrative work
- Increase adherence to patient care plans

School of Medicine

Given how AI is disrupting the medical field, UW's School of Medicine should use M365 Copilot to enhance interdisciplinary collaboration, streamline administrative tasks, and leverage AI-driven tools for innovative medical research and education, aligning with the AI Taks Force's vision of integrating AI to drive excellence and efficiency across the university.

Personas

Medical Researcher

Medical Professor

Clinical Program Coordinator

Clinician

Use Cases

- Process clinical trial data, perform statistical analyses, and generate research reports
- Update lecture materials, develop interactive content, and provide personalized feedback to students
- Manage clinical program schedules, track student progress, and coordinate clinical rotations
- Access patient records and document clinical notes

Value & KPI

- Reduction in time to process and analyze clinical data
- Increase research report accuracy and publication rate
- Improve student engagement and feedback quality
- Reduction in time managing clinical programs
- Increase patient car quality and satisfaction