



# Microsoft 365 Copilot Implementation Guide for Small and Medium Business

Creating the AI-powered organization

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## Get ready

### Technical readiness

- Establish security policies
- Deploy Microsoft 365 apps and configure update channels
- Assign licenses

### User enablement

- Driving successful change through leadership
- Identify target scenarios and Flight Crew team
- Share training content and onboard users

### Measure success

### Extend and optimize

### Resources

# Microsoft 365 Copilot implementation



# Essentials for Copilot success



Nominate and activate your Copilot executive **sponsors**, in partnership with your AI Council



Define initial high value **scenarios** and target a critical mass of users for rapid value



Define your path to **secure** your data for compliance and peace of mind

# Microsoft 365 Copilot

## Implementation framework

### 1 Get ready

- ✓ Identify your success team
- ✓ Be intentional with assignment and concentrate seats

### 2 Onboard & engage

- ✓ Deploy training and Champion programs, engagement community
- ✓ Make ongoing training the standard

### 3 Deliver impact

- ✓ Quantify impact including growth, cost savings and employee benefits
- ✓ Build momentum with success stories and knowledge sharing

### 4 Extend & optimize

- ✓ Identify new high value functional and cross-org scenarios
- ✓ Recognize and reward success

USER  
ENABLEMENT

TECHNICAL  
READINESS

- ✓ Address data security, governance, and data access questions
- ✓ Build shared Copilot implementation plan with User Enablement team

- ✓ Ensure appropriate Data Security controls are in place
- ✓ If needed, deploy additional Microsoft 365 apps

- ✓ Establish service management plan
- ✓ Review Admin usage reports and the [Copilot Dashboard](#) to analyze user retention and engagement

- ✓ Design, build, and publish plugins to deliver unique experiences
- ✓ Build your own agents

Leadership guides AI transformation for business outcomes

Download our checklist for success: [CopilotSMB/ChecklistforSuccess](#)



# Microsoft 365 Copilot

How it works

# Ensure appropriate Data Security controls are in place

## Security and compliance for Microsoft 365 Copilot in SMB



### Foundational security controls

Microsoft 365 Business Basic or Business Standard  
+ Microsoft 365 Copilot

- Multi-factor authentication (MFA) for secure access to M365 applications with Copilot
- Search and export Copilot prompts and interactions
- Audit logs for Copilot interactions
- Retention or deletion policies for Copilot interactions and generated content
- Restricted SharePoint Search for Copilot interactions and generated content



### Comprehensive security controls

Microsoft 365 Business Premium  
+ Microsoft 365 Copilot



- Multi-factor authentication (MFA) with conditional access based on identity, device, location, and network
- Search, export, eDiscovery case management, and legal hold for Copilot prompts and interactions
- Audit logs for Copilot interactions
- Retention or deletion policies for Copilot interactions and generated content
- Manual sensitivity and retention labels for content processed by Copilot in files and emails
- Data loss prevention policies to help protect sensitive data from Copilot in files and emails

# Setup guide

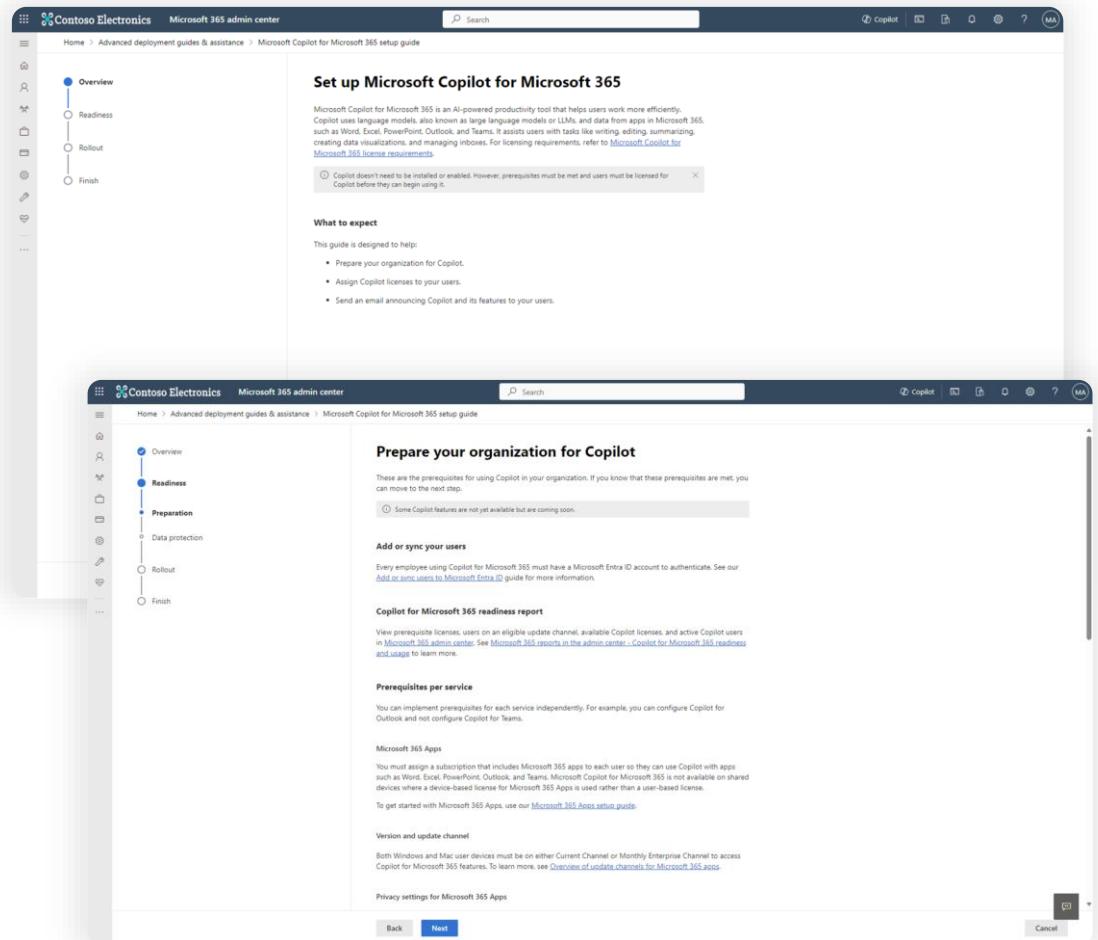
## Wizard-based guide covering deployment activities

Use the new Microsoft 365 Copilot setup guide, a wizard-based experience in the Microsoft 365 admin center, to help prepare your organization for Copilot.

Find this wizard in the admin center > Home > Setup page > Apps and Email > [Get ready for Microsoft 365 Copilot](#).

**Note:** Do this in parallel with the steps in the User Enablement section to ensure you're driving effective change. Look for the "Shared activity" label.

- Ensure you have the right prerequisites and apps deployed
- Confirm that your user devices are on either the Current or Monthly Update Channels
- Assign Microsoft 365 Copilot licenses to your users and initiate welcome email using templates provided to support onboarding



# Reference: Ensure foundations are set with Microsoft 365 Copilot

Here is a summary of security configurations to get ready for Microsoft 365 Copilot if you have **Microsoft 365 Business Basic** or **Business Standard**.

Product	Deployment outcomes	Get started activities
Microsoft 365	Ensure security baselines are established	<ol style="list-style-type: none"><li>1. Sign in to the <a href="#">Microsoft Entra admin center</a> as least a Security Administrator.</li><li>2. Browse to <b>Identity</b> &gt; <b>Overview</b> &gt; <b>Properties</b>.</li><li>3. Select Manage security defaults.</li><li>4. Set Security defaults to Enabled.</li><li>5. Select Save.</li></ol>
	If enabled, update Restricted SharePoint Search allow list	<ul style="list-style-type: none"><li>• Use <a href="#">Restricted SharePoint Search</a> to configure up to 100 sites to be on the allow list of sites. Extend to sites containing highly used, low risk content</li></ul>
	Evaluate sharing controls that govern who can share and how broadly	<p><b>Note:</b> Restricted SharePoint Search should be used as a temporary solution to secure data while you configure permissions. This feature affects <a href="#">modern search</a> and Copilot experiences.</p> <ul style="list-style-type: none"><li>• Ask site owners to manually <a href="#">review SharePoint site permissions and correct as needed</a></li><li>• Ask OneDrive for Business (ODB) owners to <a href="#">run sharing reports</a> in their ODB and <a href="#">correct settings</a> if needed</li><li>• Set <a href="#">default sharing link type</a> on tenant, and optionally set the sharing link type on specific sites</li><li>• Set <a href="#">sharing link expiration</a> on anyone links</li><li>• Set <a href="#">site owner sharing approval</a> on sensitive sites</li></ul>
Microsoft SharePoint	Identify inactive sites, restrict access, and move sites to Microsoft 365 Archive or deleted	<ul style="list-style-type: none"><li>• Implement <a href="#">Inactive Site Policy</a></li></ul>
	Identify potentially overshared content, restrict site access, initiate site owner review	<ul style="list-style-type: none"><li>• Run <a href="#">Data Access Governance (DAG) reports</a></li><li>• <a href="#">Apply RAC</a> on sites based on DAG reports</li><li>• Manually contact top shared site owners from DAG reports and ask them to attest to permissions and sharing configuration</li></ul>
	Set restricted access control and block file download policies on business-critical sites	<ul style="list-style-type: none"><li>• Apply the <a href="#">BlockDownloadPolicy on sensitive sites</a></li><li>• Apply the <a href="#">BlockDownloadPolicy on Teams Meeting Recordings</a></li></ul>

# Reference: Maximize for comprehensive security

Here is a summary of security configurations to get ready for Microsoft 365 Copilot if you have **Microsoft 365 Business Premium** or higher.

Product	Deployment outcomes	Core activities
Microsoft SharePoint*	If enabled, update Restricted SharePoint Search allow list	<ul style="list-style-type: none"><li>Configure up to 100 sites to be on the allow list of sites. Extend to sites containing highly used, low risk content</li></ul> <p><b>Note:</b> Restricted SharePoint Search should be used as a temporary solution to secure data while you configure permissions. This feature affects <a href="#">modern search</a> and Copilot experiences.</p>
	Evaluate sharing controls that govern who can share and how broadly	<ul style="list-style-type: none"><li>Ask site owners to manually <a href="#">review SharePoint site permissions and correct as needed</a></li><li>Ask OneDrive for Business (ODB) owners to <a href="#">run sharing reports</a> in their ODB and <a href="#">correct settings</a> if needed</li><li>Set <a href="#">default sharing link type</a> on tenant, and optionally set the sharing link type on specific sites</li><li>Set <a href="#">sharing link expiration</a> on anyone links</li><li>Set <a href="#">site owner sharing approval</a> on sensitive sites</li></ul>
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Microsoft Purview	Gain visibility into how users are interacting with data in the organization and with Microsoft 365 Copilot	<ul style="list-style-type: none"><li>Confirm that <a href="#">Microsoft Purview Audit</a> is enabled, if not <a href="#">enable it</a></li></ul>
	Enable citations and protections for sensitive data access by Microsoft 365 Copilot	<a href="#">Manually Label emails and documents with out-of-the-box sensitivity labels</a> using one-click or <a href="#">previously created policies</a>
	Protect sensitive information from being shared beyond its intended audience and reduce the risk of oversharing	<a href="#">Create and deploy Data Loss Prevention (DLP) policies</a> for SharePoint, Exchange, and OneDrive for Business
	Retain the data you need to keep and remove data that no longer has business value to reduce data surface for oversharing	<a href="#">Create and Configure retention policies</a> to archive or delete content exceeding data retention guidelines or maximum retention date
	Gain additional understanding of content used and shared in Copilot interactions	Use <a href="#">Microsoft Purview eDiscovery Content search</a> to find email in search for in email, documents, and instant messaging conversations

**\*Note:** If applicable, SharePoint Advanced Management capabilities can help you secure your environment in lieu of the manual configurations listed here.

# 3 essentials for user enablement



## Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** AI Council or Steering Committee



## Scenarios

Define business objectives, target scenarios, and measures of success

- ✓ Identify Flight Crew team
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Scenario Library, use case materials, planning worksheet



## Enablement

Leverage training and onboarding materials to upskill users

- ✓ Provide onboarding materials
- ✓ Check in regularly
- ✓ Encourage peer-learning
- ✓ **Best practice:** Prompt Gallery, onboarding email templates, Community of Practice

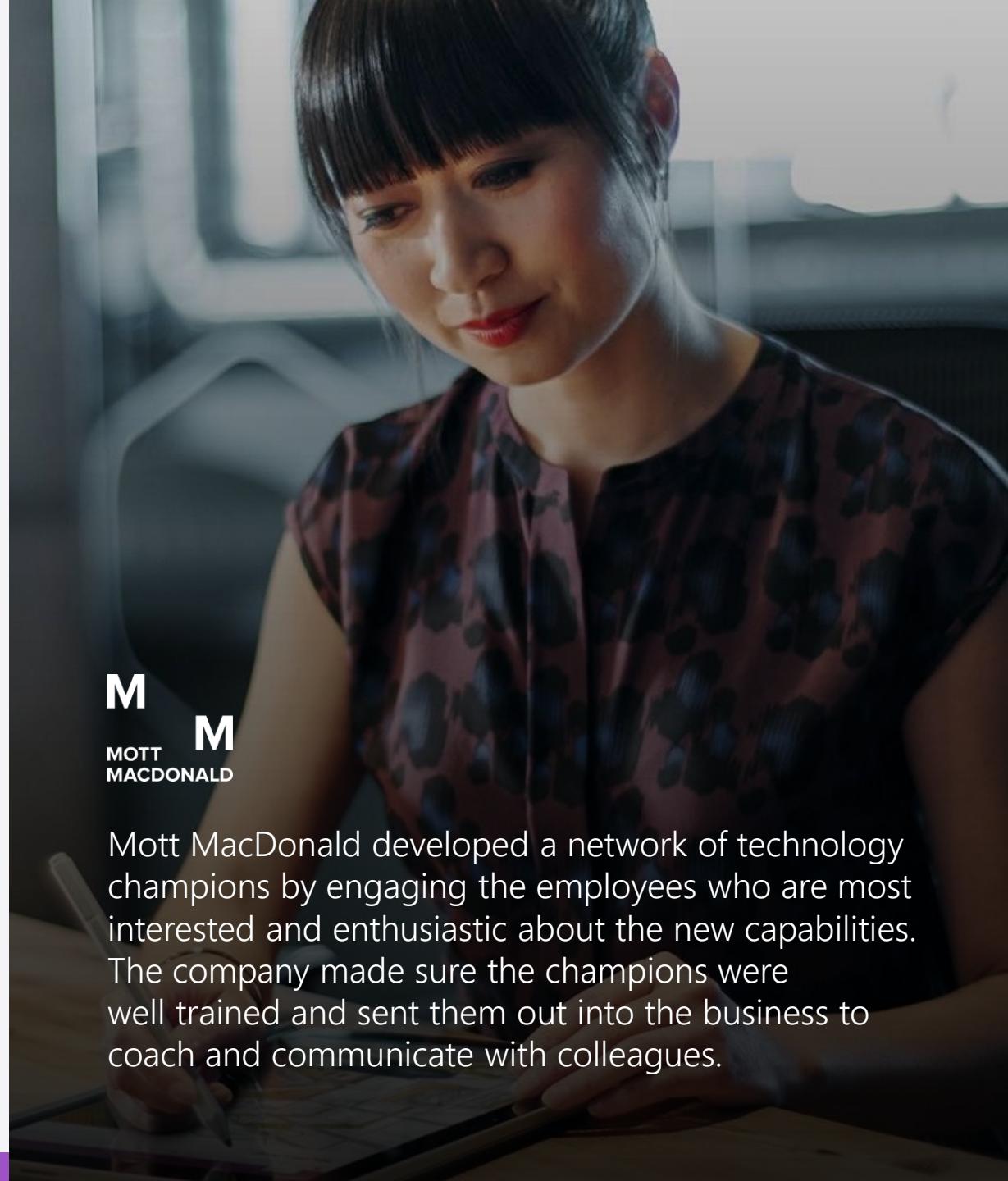
Responsible AI principles

# Who should be involved in your user enablement effort?

Transforming to this new way of working requires buy-in and support from across the business. We have identified four key groups who will bridge technology and business outcomes that matter to your organization

Each group has a specific role in implementation and should be engaged early and often. The next few pages will outline the specific role these **Flight Crew** members will play.

- 1 Executive Sponsors
- 2 Success Owner
- 3 Early Adopters
- 4 Champions
- 5 Technical team



Mott MacDonald developed a network of technology champions by engaging the employees who are most interested and enthusiastic about the new capabilities. The company made sure the champions were well trained and sent them out into the business to coach and communicate with colleagues.

# Secure exec sponsorship

Ensure they understand the **ABCs**:

**A**

Active, visible, and consistent participation

**B**

Build a coalition with their executive peers

**C**

Communicate directly with employees to support landing the change

**Executive Sponsors should:**

- Help the project team identify and prioritize their top business needs. Encourage shared planning between user enablement and technical implementation teams.
- Play a role in communicating the vision to leaders across the organization.
- Actively participate in and use the Copilot capabilities to help drive and reinforce enablement.
- Promote the enablement program. Studies show engaged employees are **2.6x<sup>1</sup>** more likely to fully support a successful AI transformation.

**Executive Sponsors may:**

- Lead or participate in the organizational AI Council.
- Have purchasing authority for licenses or services from supporting suppliers.
- Be directly accountable for Microsoft 365 or broader digital workplace initiatives.



Shared activity

# Identify Flight Crew team members

Key roles	Responsibilities	Department	Team member identified for role
Executive Sponsor	<i>Send Microsoft Launch announcement. Help identify and prioritize top HR needs. Connect monthly with HR and IT leaders across the organization. Actively participate in and use the Microsoft 365 capabilities to help drive and reinforce adoption</i>	VP, HR	[Name], [name], [name]
Success Owner			
Program Manager			
Champions			
Training Lead			
Department Leads (Stakeholders)			
IT Specialists			
Communication Lead			
HR Manager			
Community Manager			

**NOTE:** These roles may be held by the same person on the Flight Crew

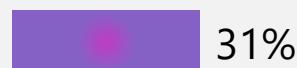
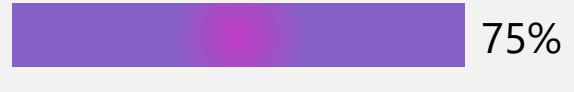
# Keys to user enablement success

Research results below support suggested approach for building your adoption plan.

Top reported activities for driving successful product adoption\*:

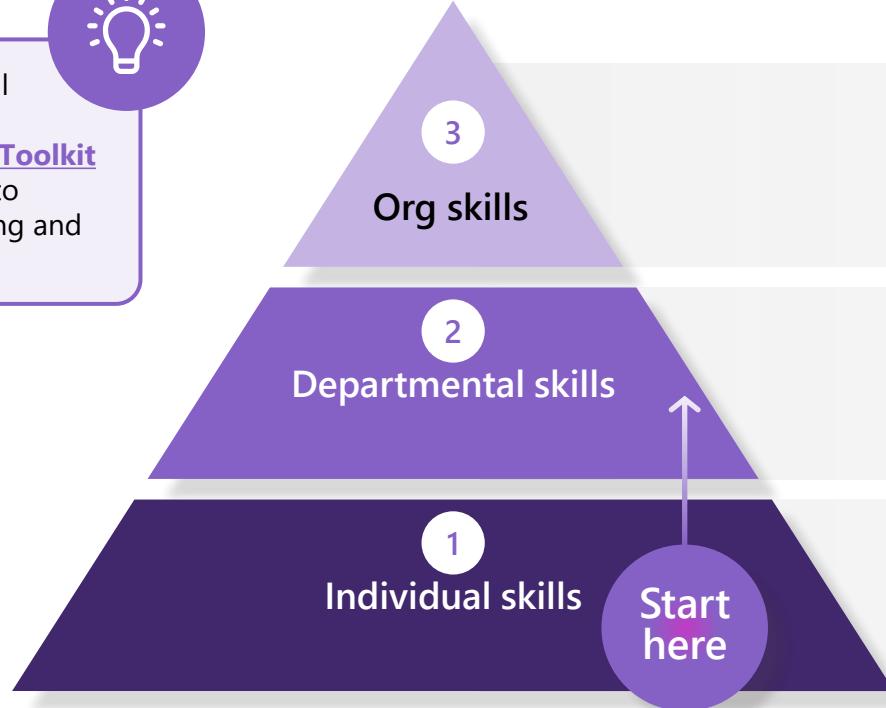
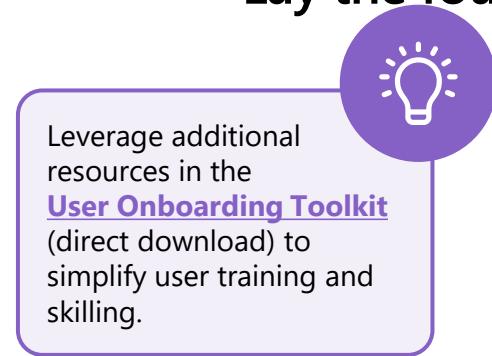
- 1 Define a vision and identify how target product will be used
- 2 Obtain proactive support from key roles to accelerate use of Copilot including senior leadership, legal, ITDMs, and key BDMs
- 3 Enable Champions and provide business **relevant, snackable, and on-demand** training for business users
- 4 Raised awareness through launch event and omni-channel communications planning

% of respondents that rated activity as having above average importance



# Onboard & engage

Lay the foundation for continuous learning and an intelligent progression of AI skills



For organization:

Generate synergies across departments with extensibility  
Streamline and automate cross-business process flows

For teams:

Use role-specific and multi-step prompts  
Extend usage to role-based processes

For users:

Inspire quick wins to reach value tipping point  
Master basic prompts (e.g., summarization, revision)

1 Start with top 10 generic skills from [Prompt Gallery](#) that deliver immediate success (e.g., summarize a meeting, email thread).

2 Use the [Microsoft Scenario Library](#) to train users on new departmental use cases and process improvement to impact departmental KPIs.

3 Extend to line of business systems to streamline and automate for organizational level impacts on revenue and costs.

Prioritize peer-to-peer learning through community engagement and knowledge sharing.



Shared activity

# Identify key scenarios and users

Department	Key scenarios you want to leverage Copilot for	Activities to use Copilot	Team member identified for role
Sales	Use Copilot to accelerate customer research and sales preparation	<ul style="list-style-type: none"><li>Use Copilot to draft customer outreach emails</li><li>Prompt Copilot to search for information on a customer, pulling from their company website and annual reports</li><li>Use Copilot to create meeting agendas with exploratory questions to identify customer needs, pain points, and possible solutions</li></ul>	[Name]
Marketing	Use Copilot to help accelerate marketing campaign conceptualization and content creation	<ul style="list-style-type: none"><li>Use Copilot to brainstorm a list of assets to support an upcoming announcement</li><li>Prompt Copilot to come up with clever taglines and campaign concepts</li><li>Jumpstart a messaging framework by using Copilot to get start a draft by referencing key documents</li><li>Summarize meetings with internal teams or customers to synthesize requirements</li></ul>	[Name]
Customer Service	Use Copilot to improve customer service and reduce customer response times	<ul style="list-style-type: none"><li>Use Copilot to review customer history by summarizing email threads and customer meetings, as well as past interactions.</li><li>Gather product information from internal and external sources and historical resolutions to aid issue diagnosis</li><li>Draft proposed responses to customers with Copilot</li><li>Leverage Copilot to summarize meetings, compile notes and action items</li></ul>	[Name]

Use the [Scenario Library](#) to help identify target scenarios.

# AI transformation roadmap

	Quick wins 0 to 1 month	1 to 2 weeks	2 to 3 weeks	4 to 6 months	12 months
Scenario 1	<ul style="list-style-type: none"> <li>Purchase 20 seats of Microsoft 365 Copilot, deploy to the first set of employees and send welcome email</li> </ul>	<ul style="list-style-type: none"> <li>Introduce Copilot-relevant Microsoft 365 apps and train employees on use case scenarios</li> </ul>	<ul style="list-style-type: none"> <li>Monitor progress and send regular communications to build new working habits</li> </ul>	<ul style="list-style-type: none"> <li>Expand scenario use cases and assign more licenses to rest of team</li> </ul>	<ul style="list-style-type: none"> <li>Build plugins or custom agents to personalize use cases</li> </ul>
Scenario 2					
Scenario 3					

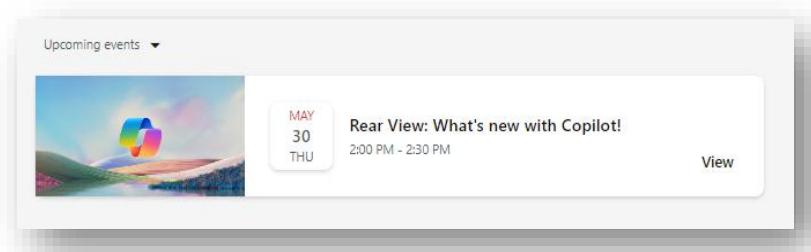
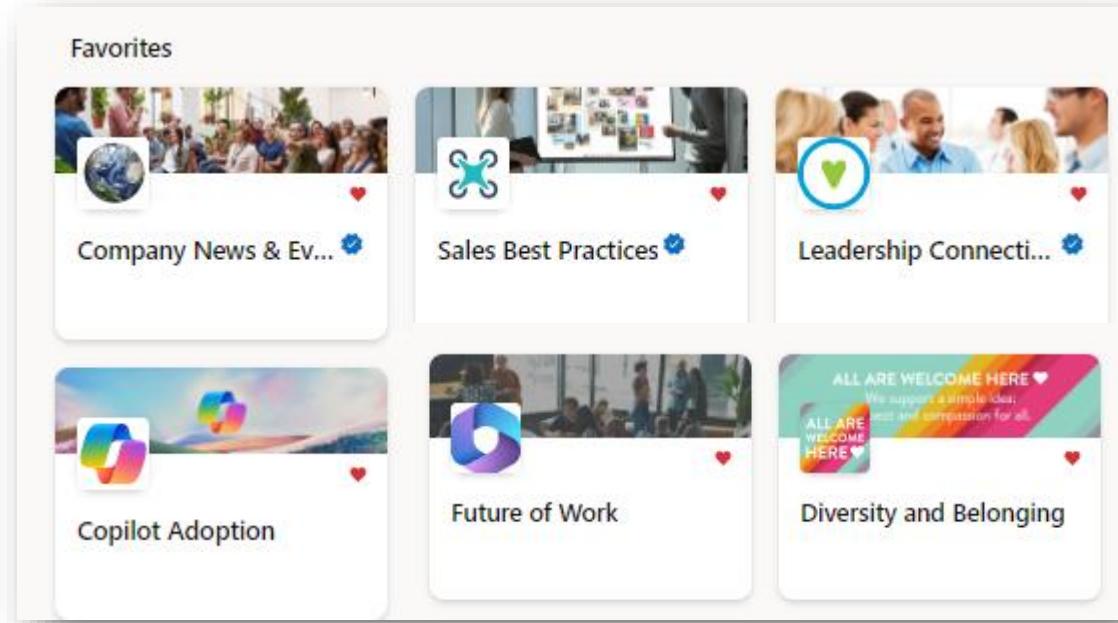
# Build your Community of Practice

## Connect and empower employees

Create a community in Microsoft Teams or other community chat tools to generate excitement, share learning, and support Copilot Champions and experts.

Give employees a place to:

- Share best practices, such as prompts
- Share success stories of Copilot saving time and driving productivity
- Access company announcements on AI usage, direction, and mission
- Facilitate peer to peer learning and Champion engagement



Get ready

Onboard & engage

Deliver impact

Extend & optimize

# Workday efficiencies with Copilot

## Summarize a long PDF



Turn a 20-page, jargon-filled PDF into 5 bullets using Copilot in Edge

## Draft emails and social content



Use it as your professional writer on call to draft emails, captions, and more

## Generate images



Leave behind stock images and text-only reports in favor of custom-generated images for emails, on social, and more

## Learn new skills



Ask questions tailored to your needs and interests to get consolidated key points from the internet for you

## Get answers for specific, complex questions



Get answers to questions that require multiple data points or a degree of analysis

# Differentiating between chat experiences

## Work vs. web

When signed in with your Entra ID, you'll see a toggle at the top left of your screen.

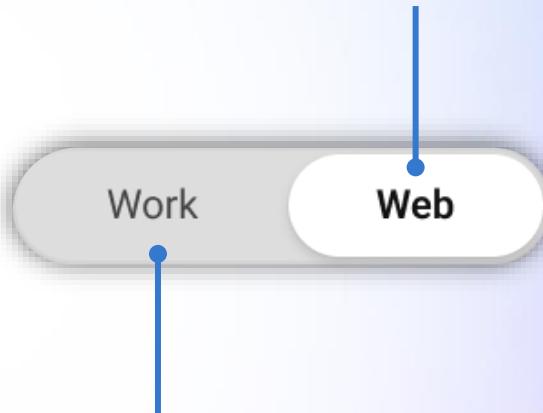
- 1 When the **web toggle** is selected, you'll get GPT-4o plus web grounding plus Enterprise Data Protection – meaning your user and business data are protected and will not leak outside the organization.

Copilot's web experience has no knowledge cut off and is ideal for finding answers to your questions, expanding your knowledge, creating images, and summarizing web pages in Edge.

- 2 When the **work toggle** is selected, you get **graph** grounding plus Enterprise Data Protection – which means that all your data stays inside the tenant boundary.

Copilot's work experience is truly your personal AI assistant at work. This experience is ideal when working with meetings, emails, Microsoft 365 suite applications, and confidential work data.

*Use Copilot to get answers from current web data  
(e.g., latest news, announcements)*



*Use Microsoft 365 Copilot to get answers from your internal work data  
(e.g., your emails, meetings, files)*

Start at [copilot.microsoft.com](https://copilot.microsoft.com)

# Prompt Ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

## Goal

What response do you want from Copilot?

## Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

## Source

How should Copilot respond to best meet your expectations?

## Expectations

# Top 10 to "Try First"

## with Microsoft 365 Copilot

Foundational skills for new users



1

### Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from [meeting](#)



2

### Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

### Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

### Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from [file](#)



5

### Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about [topic](#) organized by emails, chats, and files?



6



7

### Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on [file](#)



8

### Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



9

### What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did [person](#) say about [topic](#)



10

### Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot

→ Translate the following text into French:

For more prompts, visit the Prompt Gallery at:  
<https://copilot.cloud.microsoft/prompts>



# Deliver impact: Analyze usage reports

## Interpret the Microsoft Copilot Dashboard data

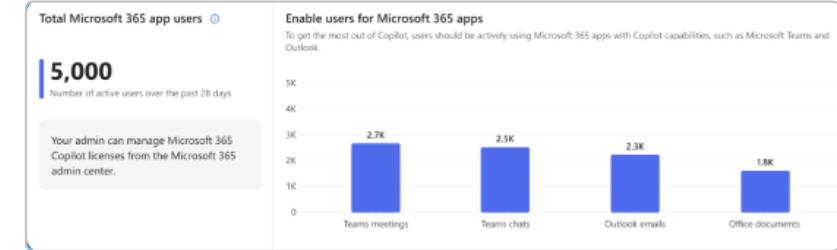
In the [Readiness tab](#), you assess your organization's overall readiness for Copilot rollout based on technical eligibility requirements and overall Microsoft 365 app usage.

In the [Adoption tab](#), you track user adoption trends per Microsoft 365 app and understand how employees are using Copilot features.

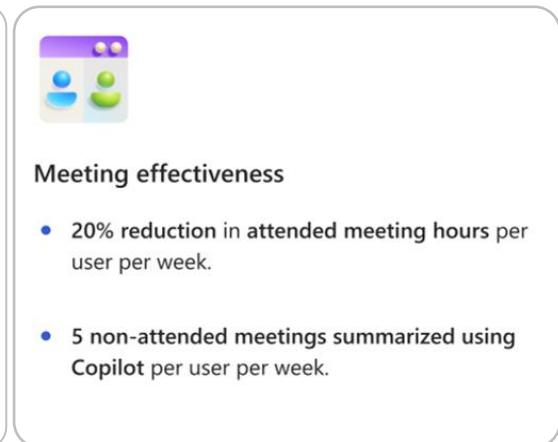
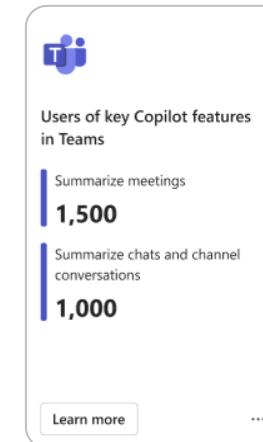
In the [Impact tab](#), you gain visibility into total Copilot assisted hours, time savings and behavioral changes between active Copilot users and non-Copilot users.

The [Learning tab](#) provides information research around the impacts of AI on workplace productivity.

- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Impact tab under Sentiment section to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them displayed in the Microsoft Copilot Dashboard
- Analyze insights on how users feel about the AI assistance they receive from Copilot



## Readiness



## Adoption

## Impact



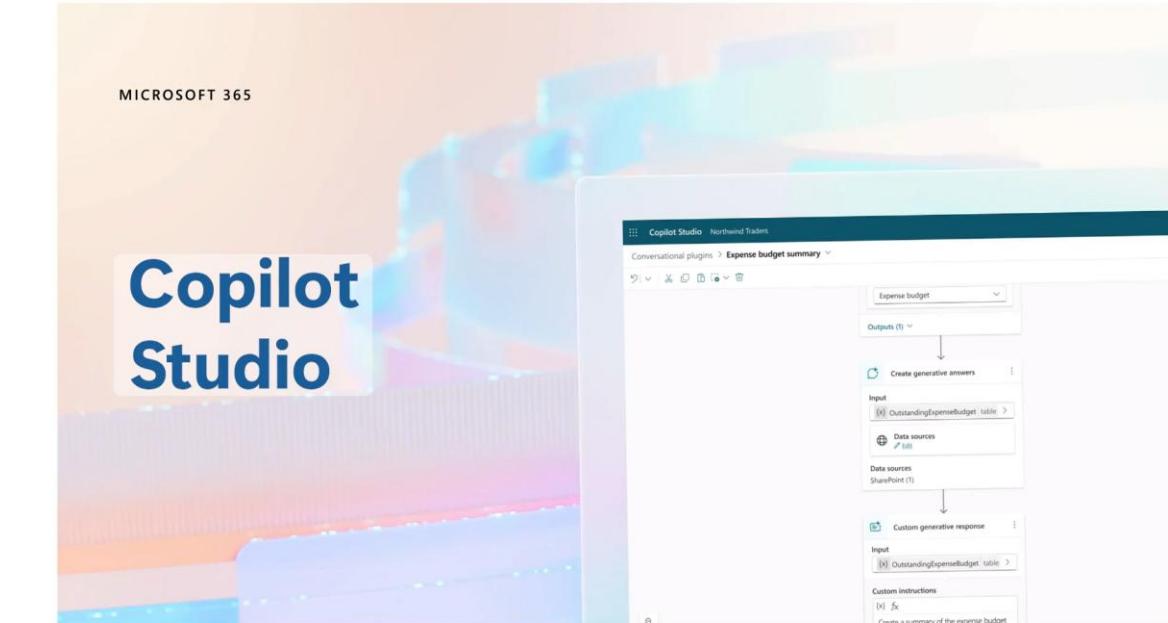
Shared activity

# Extend & optimize: Design, build, and deploy custom agents

## Design and build custom agents

To enhance the Microsoft 365 Copilot experience and cater to specific business requirements, you can create agents through connectors and plugins. Microsoft 365 Copilot Studio allows you to customize Copilot to work the way you need:

1. **Quickly and easily create your own conversational agents** for customers or employees with an intuitive low-code tool
2. **Connect Copilot to your data in CRM, ERP, HCM, and more** using 1,000+ Copilot connectors
3. **Ground Copilot in your business data by enabling pre-built agents** from the store
4. **Configure Copilot responses to specific questions** on topics like compliance, HR policies and more



- Determine the path forward for extensibility with our [decision guide](#)
- Try Teams toolkit with Teams AI Library at [aka.ms/TryTeamsToolkit](https://aka.ms/TryTeamsToolkit)
- Don't miss a thing! Express your interest to receive an alert when extending Microsoft 365 Copilot with custom agents built with Microsoft Copilot Studio is in Public Preview and try it out yourself. Sign up here: [aka.ms/TryCopilotAgents](https://aka.ms/TryCopilotAgents)
- To learn more, go to [Extend Microsoft Microsoft 365 Copilot | Microsoft Learn](#)



# Extend & optimize: Build your own agents

## Copilot Studio

### Copilot Studio in a Day

½ day to 1 (one)-day hands-on workshop for subject matter experts and business users, covering the breadth of Microsoft Copilot Studio.

**The goal is for customers to:**

- Have enough experience with the product to be able to understand the value and features currently in preview and how they could begin to use it
- Understand how Copilot Studio differentiates from the competition and become Copilot Studio advocates in their organization
- Know what the next steps are to learn more about Copilot Studio and become part of the community
- To develop your own copilot for high-value scenarios



- The latest workshop materials are published on GitHub at [aka.ms/CopilotStudioWorkshop](https://aka.ms/CopilotStudioWorkshop)
- Access the learning path at [aka.ms/CopilotStudioTraining](https://aka.ms/CopilotStudioTraining)
- Sign up and attend Copilot Studio in a day events at [aka.ms/CopilotStudioInADay](https://aka.ms/CopilotStudioInADay)
- Check for latest content on [Microsoft Power Platform Partner Hub](https://www.microsoft.com/power-platform/partner-hub)



# Security and compliance add-ons available for Business Premium

Microsoft 365 Business Premium meets the security and compliance needs for most SMBs when using Microsoft 365 Copilot. For those needing extra protection, additional add-ons can be purchased with a Business Premium license.

## Information Protection and Governance (\$7pupm)

- **\*Microsoft Defender for Cloud Apps** assists in discovering SaaS apps and protects users from accessing risky ones
- **Communications DLP (Teams chat)** blocks sensitive content when shared with Teams users
- **Endpoint DLP** prevents data leaks of sensitive items stored on Windows 10/11 and macOS devices
- **Automatic sensitivity labels (client side)** automatically discovers, classifies, labels, and protects sensitive data
- **Machine learning-based sensitivity labels** uses trainable classifiers to identify items and assign labels
- **Records management** helps manage legal obligations for businesses
- **Advanced message encryption** helps to control sensitive emails shared outside the organization

## Insider Risk Management (\$6pupm)

- **Insider risk management** helps minimize internal risks by responding to malicious activities
- **Communication compliance** helps detect business code of conduct violations

## eDiscovery and Audit (\$6pupm)

- **eDiscovery (premium)** end-to-end workflow for managing eDiscovery cases and investigations
- **Audit (premium)** featuring longer record retention and intelligent insights policies



# Copilot and Microsoft 365 SMB Community

The **Copilot and Microsoft 365 SMB Community** is for small and medium business members will get exclusive and direct access to Microsoft product teams.

- Members' feedback will contribute to the prioritization of our engineering efforts this upcoming fiscal year
- Attend our monthly calls, where we will share tips and tricks to help accelerate your business
- Members are nominated to exclusive NDA insider programs within Microsoft and invited to experience features before they're released to the public

Visit <https://aka.ms/SMBCommunitySignUp> or scan the QR code to join the Copilot and Microsoft 365 SMB Community.

# Copilot for Small and Medium Business resources on Microsoft Adoption

One site for all your Copilot needs

<https://adoption.microsoft.com/copilot/smb>

- Resources by role
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Microsoft Teams for SMB, Microsoft Viva, and more
- Call us: +1-919-364-8621
- Email: info@MyITTeam.pro

The screenshot shows the Microsoft 365 Copilot for Small and Medium Business website. The top navigation bar includes links for Home, Rocksteady, Microsoft 365 Copilot, and Microsoft 365 Copilot for Small and Medium Business. The main content area features a hero section with a photo of two people working together, followed by three main call-to-action buttons: 'Copilot for SMB Success Kit', 'Register for live training', and 'Join the Community'. A sidebar on the right provides leadership tips, including a section titled 'Leadership' with sub-points: 'Ensure they understand the ABCs', 'Active, visible and consistent participation', 'Build a coalition with their executive peers', and 'Communicate directly with employees to support landing the change'.