

Copilot Pilot Planning Template

Plan a limited, accountable test with clear boundaries and an evidence-based decision at the end.

Use this after permissions, identity, sensitive data, and policy gaps have been reviewed. A pilot is a controlled business test.

1. Pilot objective

Business problem, baseline, target, and reason Copilot may help.

2. Pilot users

Names, roles, manager, license, and selection reason.

3. Approved use cases

Name approved tasks and what is outside scope.

4. Data sources involved

Sites, folders, Teams, mailboxes, files, and external sources.

5. Technical prerequisites

Licensing, apps, MFA, device status, permissions, sharing, and logging.

6. Training requirements

Prompting, review, sensitive data, policy, communications, reporting.

7. Human review requirements

Outputs requiring review, reviewer, and evidence checked.

8. Start and end dates

Training, baseline, check-ins, measurement, and decision meeting.

9. Success criteria

Time, quality, risk, adoption, and user-experience targets.

10. Issues encountered

Date, user, use case, severity, response, owner, and resolution.

11. Final recommendation

Expand, revise and retest, pause, or stop, with rationale.

Pilot decision summary

Result	■ Expand ■ Revise and retest ■ Pause ■ Stop
Decision owner	
Decision date	
Conditions or follow-up	

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