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HOW-TO GUIDE

Microsoft Copilot: What It Does, And What It Needs First

An honest look at where AI helps, where it does not,
and why the groundwork matters more than the
licence.

Our position in one sentence: Copilot is a capability within the Microsoft environment you already own, not a separate strategy — and it is only as good as the data and governance underneath it.

BEFORE YOU START

The licence is the easy part.

Buying Copilot takes five minutes. Getting value from it depends almost entirely on work that happens before anyone types a prompt.

Copilot answers questions using your business's own content — your files, emails, meetings and chats. That is what makes it genuinely useful, and it is also why it behaves so differently between two businesses paying exactly the same amount. Where information is well-organised and permissions are sensible, it feels remarkable. Where files are scattered across personal drives and old shares with permissions nobody has reviewed in years, it produces confident answers from the wrong documents.

This guide sets out what Copilot actually does, what it needs in place first, and how to tell whether you are ready. It is deliberately unexcited: AI is a useful capability, not a transformation, and it rewards preparation rather than enthusiasm.

Who it is for. Business owners and managers weighing up whether Copilot is worth it. No technical knowledge assumed.

A word on naming. “Copilot” now covers several different products, from a free chat assistant to a licensed add-on embedded in Word, Excel, Outlook and Teams. Section One separates them, because most confusion starts there.

WHAT WE ARE NOT GOING TO CLAIM

Copilot will not replace anyone, will not fix a broken process, and will not make sense of data nobody has organised. Anyone who tells you otherwise is selling. What it does reliably is remove time from drafting, summarising and searching — which, done across a whole business, is worth having.

WHAT THIS GUIDE COVERS

01 Which Copilot is which

02 Where it genuinely helps

03 Where it does not

04 Getting your data ready

05 Governance & ground rules

06 Are you ready?

Copilot inherits your housekeeping

It can only work with what it can find, and it can find everything the person asking is allowed to see.

That second point is the one businesses underestimate. Copilot respects existing permissions exactly – it will not show someone a file they could not already open. The difficulty is that in most businesses, people can already open far more than anyone intends. Permissions accumulate over years; nobody notices because nobody browses the whole file store looking for things they should not see.

Copilot does browse it, instantly, every time someone asks a question. Salary information in an old HR folder that was shared too widely in 2019 has been technically accessible for years. Now it is one question away from being summarised into a document.

01 Good data in, useful answers out

If your current documents live in one findable place, Copilot is genuinely impressive. If there are four versions of the price list, it will confidently use whichever it finds.

02 It surfaces permission problems rather than causing them

The exposure already existed. Copilot simply makes it visible – which is uncomfortable, and ultimately useful.

03 It drafts; it does not decide

Treat output as a first draft from a capable but unfamiliar colleague. It is often right, occasionally confidently wrong, and always needs reading.

04 Value comes from habit, not licences

Businesses that see a return teach a few concrete uses. Those that simply buy licences find them unused within a month.

THE USEFUL CONSEQUENCE

Preparing for Copilot is mostly just good practice: files in the right place, permissions that reflect reality, one version of the truth. That work pays for itself whether or not you ever buy a licence – which makes it a low-risk place to start.

SECTION ONE

Which Copilot Is Which

Microsoft has applied the name broadly. These are quite different things at quite different prices, and conflating them is the most common source of disappointment.

What it isWhat it doesWorth knowing Copilot (free chat)A general AI assistant in the browser or Windows. Drafting, research, general questions.Does not see your company files. Fine for general work; not a business tool without data protections. Microsoft 365 CopilotThe licensed add-on embedded in Word, Excel, PowerPoint, Outlook and Teams. Works with your own content.This is the one people mean. Priced per user per month, and the one this guide is about. Copilot in Teams meetingsSummarises the meeting, lists decisions and actions, answers questions about what was said.Often the single most valued feature. Requires the meeting to be recorded or transcribed. Copilot Chat (work)Chat that can reference your work content, with commercial data protection applied.Availability and capability vary by plan. Check what yours includes before buying anything. Copilot StudioBuilding your own assistants over specific data or processes.Genuinely powerful, and a project rather than a switch. Not a starting point. Copilot in other productsSecurity, Dynamics, GitHub and more each have their own.Separate products, separate licences. Do not assume one gives you another.

BEFORE YOU BUY ANYTHING

Confirm exactly which product a quote refers to, what it costs per user per year, and whether there is a minimum term. Also check what your existing plan already includes — some AI capability now ships with plans that did not have it a year ago. **Availability depends on your Microsoft 365 licence.**

SECTION TWO

Where It Genuinely Helps

These are the uses that survive first contact with real work. Notice how ordinary they are – that is the point.

☐ Meeting summaries, decisions and actions

The most consistently valued use. A written record produced in seconds, in place of the notes nobody had time to take. Particularly useful for anyone who missed the meeting.

☐ Catching up on a long email thread

“Summarise this and tell me what I need to respond to.” Reliable, and immediately saves time on the mornings that start with forty unread messages.

☐ First drafts of routine documents

Proposals, letters, policies, job adverts, meeting agendas. Not finished work, but a much better starting point than an empty page.

☐ Finding things nobody can remember the name of

“What did we agree with this client about delivery charges?” It reads across files, emails and chats at once, which no person can do quickly.

☐ Making sense of a spreadsheet

Explaining trends, suggesting formulas, describing what a column means. Helpful for anyone who inherited a workbook they did not build.

☐ Turning something long into something short

A twenty-page report into a page for the board; a recorded session into written instructions. Reliable and consistently useful.

☐ Improving what you have written

Shortening, softening, clarifying, checking tone before sending. Especially valuable for anyone who finds writing slow or difficult.

A PATTERN WORTH NOTICING

Every genuinely useful case above involves **drafting, summarising or finding**. Those three verbs are where the time actually is. Uses that require judgement, negotiation or accountability are where it stops helping. One practical note: clear instructions usually produce clearer responses. “Summarise this thread in five bullets and list what I need to decide” gets a far better answer than “summarise this” – no special technique required, just saying what you actually want.

SECTION THREE

Where It Does Not Help

Being clear about this is what makes the rest credible. These are the expectations that lead businesses to conclude AI was oversold.

- ☐ **Anything requiring accountability**
It can draft the advice; it cannot be responsible for it. Where a decision carries legal, financial or safety weight, a person owns it.
- ☐ **Facts you cannot check**
It will occasionally state something plausible and wrong, with complete confidence. Anything consequential needs verifying against the source.
- ☐ **Making sense of disorganised data**
It cannot tell which of five spreadsheets is authoritative. Ambiguity in, ambiguity out — only faster and more fluently expressed.
- ☐ **Fixing a broken process**
A muddled approval process with AI attached is still muddled. Simplify first, automate second, and consider AI third.
- ☐ **Replacing your line-of-business systems**
It works alongside the tools you have. It is not a substitute for an accounts package, a CRM or a job-management system.
- ☐ **Reducing headcount**
In businesses of this size it gives people back time rather than removing roles. Budgeting for staff savings is how these projects come to be judged failures.
- ☐ **Work where the phrasing is the point**
Sensitive messages, difficult conversations, anything where your own voice carries weight. Readers notice, and increasingly they mind.

THE HONEST SUMMARY

Copilot is a very good assistant and a poor decision-maker. Used for the first, it earns its cost quickly. Expected to be the second, it disappoints and gets quietly abandoned — usually blamed on the technology rather than the expectation. **Trust but verify** is the right working habit: assume it is broadly useful, and check anything that carries consequences.

SECTION FOUR

Getting Your Data Ready

The work that decides whether Copilot is impressive or embarrassing. All of it is worth doing regardless.

- ☐ **Move shared files out of personal OneDrive**
Business content belongs in SharePoint or Teams. Anything important sitting in an individual's drive is invisible to colleagues and vanishes when they leave.
- ☐ **Review who can see what – properly**
The single most important step. Look especially at HR, finance, payroll and anything historically shared “with everyone” for convenience.
- ☐ **Remove or archive obviously superseded content**
Old price lists, previous policies, drafts of documents long since issued. If a person would be misled by it, so will Copilot.
- ☐ **Establish one authoritative version of key documents**
The current price list, the current template, the current policy. One copy, in a known place, that everyone uses.
- ☐ **Tidy up guest and external access**
People invited for a project years ago often still have access. Worth resolving before you make search across everything effortless.
- ☐ **Check your retention settings**
Know how long content and meeting transcripts are kept. Copilot makes old material easier to surface, so retention decisions start to matter more.
- ☐ **Label genuinely sensitive material**
Where your plan supports sensitivity labels, use them on the small number of things that truly warrant it – not on everything, which people quickly ignore.

HOW LONG THIS TAKES

For a business of twenty to fifty people with a reasonably tidy environment, a few days of focused work. For one migrating off an old file server, it belongs inside that project rather than after it. Either way, it is preparation you would want done anyway.

SECTION FIVE

Governance & Ground Rules

Staff are already using AI, whether or not you have decided anything. A short, clear position is better than silence.

The practical risk in most businesses is not Copilot inside your tenancy — it is someone pasting client data into a free public tool because nobody said not to. A one-page position resolves that.

WORTH WRITING DOWN

- ☐ **Which tools are approved**
Name them. “Copilot inside our Microsoft environment, yes. Public AI tools with company or client information, no.” That sentence alone prevents most incidents.
- ☐ **What must never be pasted into a public tool**
Client data, personal data, contracts, pricing, anything commercially sensitive. Be specific; people follow rules they understand.
- ☐ **That output must be checked before it is used**
The person sending it owns it. AI drafted it; that is not a defence if it is wrong.
- ☐ **Where disclosure is expected**
Some clients and sectors now ask whether AI was used in work delivered to them. Decide your position before you are asked.
- ☐ **Who to ask**
One named person for “can I use this for that?”. Without it, people either avoid useful tools or use them invisibly.

ON DATA AND TRAINING

With Microsoft 365 Copilot, your business content stays within your tenancy and is not used to train the underlying public models — a meaningful difference from pasting the same text into a free consumer tool. Terms do change, so confirm the current position for your plan rather than relying on a document, including this one.

A note on regulated work: if you handle personal data at any scale, AI use sits within your existing data-protection obligations rather than outside them. Nothing here removes the need to think about lawful basis, retention and transparency — it simply means those questions now apply to a new tool.

SECTION SIX

Are You Ready?

Six questions. Answer them honestly and the decision usually makes itself.

YesNoUnsure Are shared files in SharePoint or Teams, not personal drives? Have permissions been reviewed in the last year? Is there one clear current version of key documents? Is multi-factor authentication on for everyone? Do you know which plan you have, and what it includes? Can you name three tasks you would use it for?

Mostly yes

Start with one team rather than licensing everyone – management, sales or administration are usually the best first choice, because they write, summarise and sit in meetings all day. Measure for a month before buying more.

A mix

Do the Section Four work first. It is a few days and it is the difference between a good result and an expensive disappointment.

Mostly no

Do not buy licences yet. Sort files, permissions and MFA first – you will get more from that alone than from Copilot on top of it.

Mostly unsure

Establish the facts before spending anything. Not knowing who can see what is itself the finding, and it is quick to resolve.

THE LAST QUESTION MATTERS MOST

If nobody can name three specific tasks, the licences will go unused whatever the state of your data. Start from the work, not the tool – the same rule that applies to every other piece of technology.

TO FINISH

Five Habits Worth Keeping

If these five become normal, Copilot stays useful rather than becoming a licence nobody thinks about. None of them requires training or a policy document.

☐ **Verify anything that matters**

Trust but verify. It is broadly reliable and occasionally confidently wrong, so check figures, names, dates and anything a client or auditor will read.

☐ **Use it to draft, not to decide**

It produces a starting point. The judgement, the sign-off and the accountability stay with the person sending the work.

☐ **Keep documents organised**

Everything it can do depends on finding the right file. Good information management is not preparation for AI – it is the thing that makes AI work.

☐ **Ask specific questions**

Say what you want, in what form, and how long. Clear instructions produce clearer responses, and vague prompts are the most common reason people conclude it is not very good.

☐ **Save the prompts that work**

When something produces a genuinely good result, keep the wording. A short shared list of proven prompts spreads value across the business far faster than training does.

MAKING THEM STICK

As with any tool, habits spread by example. If the people others watch use it for drafting and check the output, that becomes normal. If it is bought, announced and never mentioned again, the licences quietly go unused – which is how most AI spending is wasted.

NEXT STEPS

Do the groundwork. Then decide.

Everything in Section Four is worth doing whether or not you ever buy a Copilot licence. That is the honest reason to start there rather than with a purchase order.

If you would like help preparing – permissions, structure, governance – or a second opinion on whether Copilot is worth it for your business, we are happy to talk it through. No commitment.

And if our honest view is that you would get more from tidying your file structure than from AI licences, we will say so.

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