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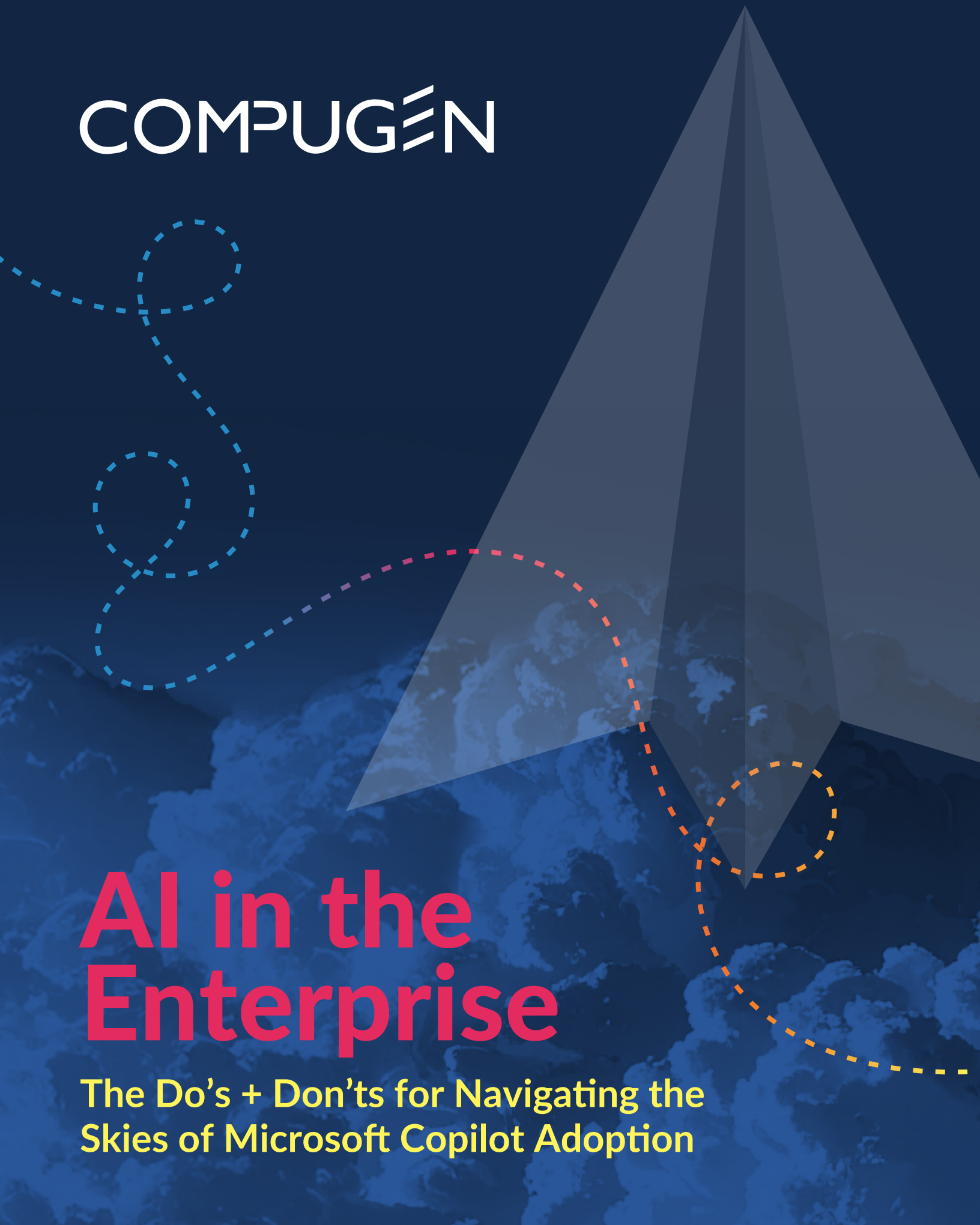

AI in the Enterprise

The Do's + Don'ts for Navigating the Skies of Microsoft Copilot Adoption

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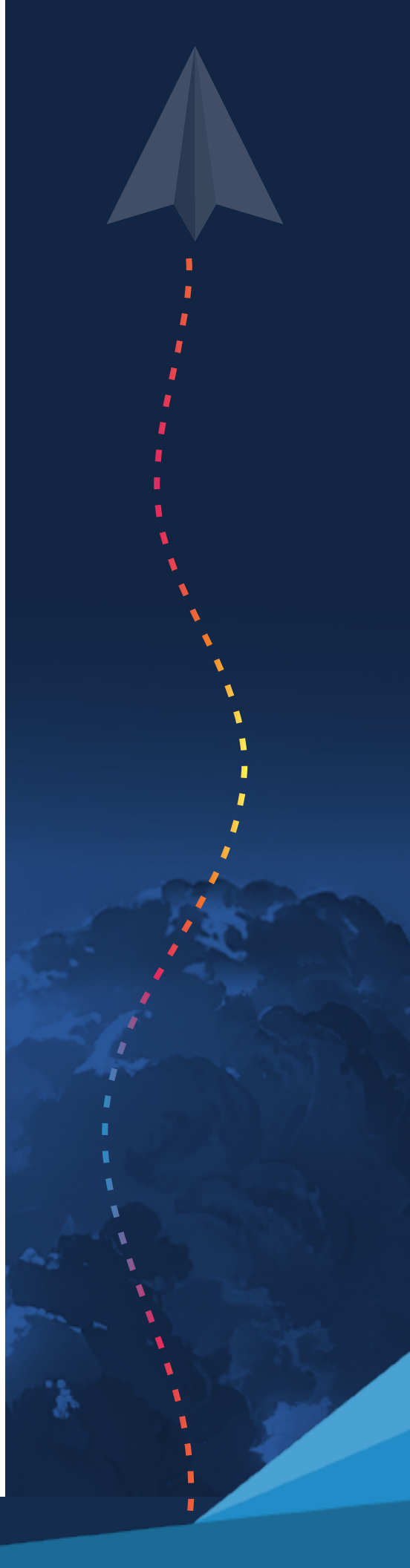


Executive Summary

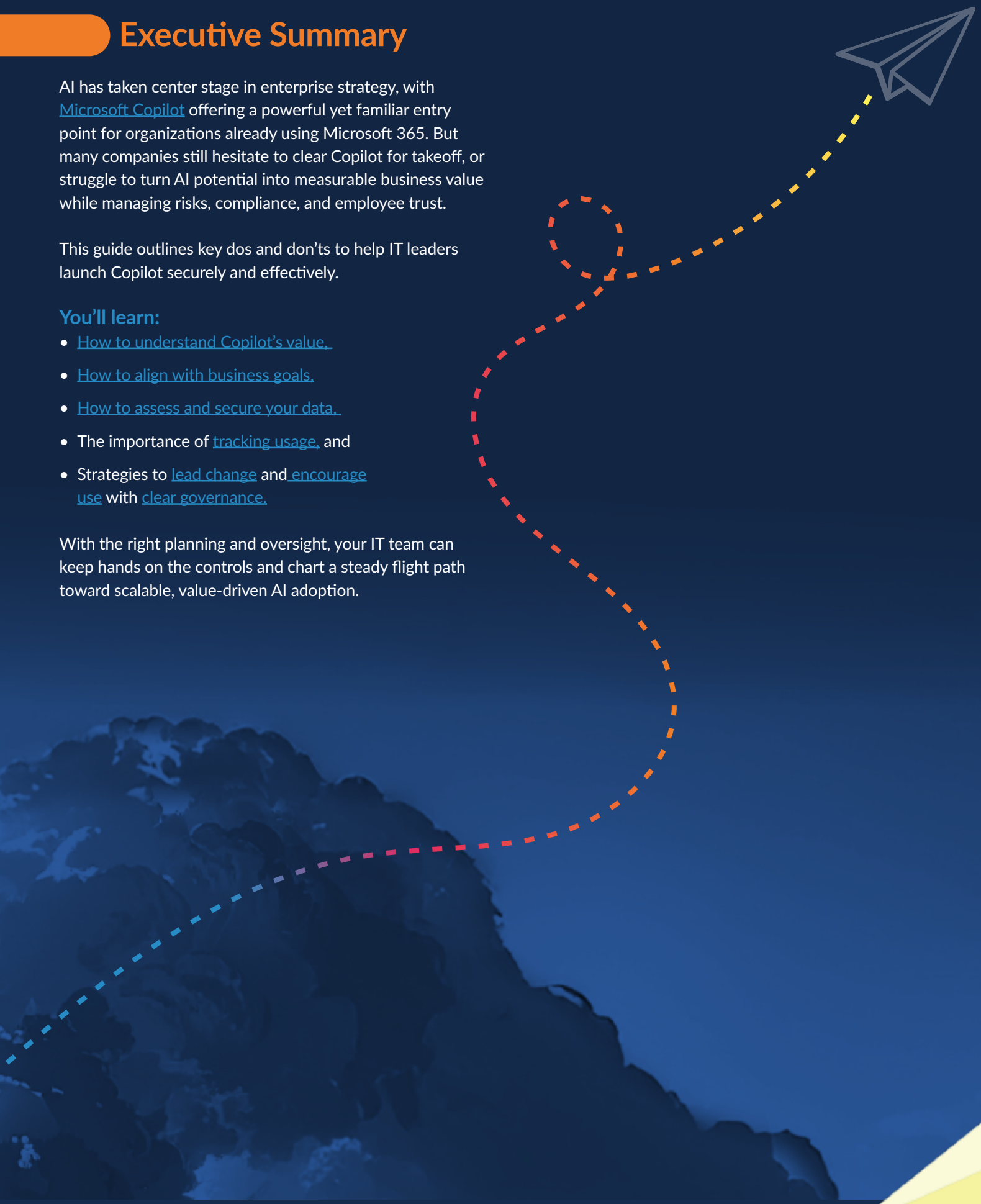
AI has taken center stage in enterprise strategy, with Microsoft Copilot offering a powerful yet familiar entry point for organizations already using Microsoft 365. But many companies still hesitate to clear Copilot for takeoff, or struggle to turn AI potential into measurable business value while managing risks, compliance, and employee trust.

This guide outlines key dos and don'ts to help IT leaders launch Copilot securely and effectively.

You'll learn:

- How to understand Copilot's value,
- How to align with business goals,
- How to assess and secure your data,
- The importance of tracking usage, and
- Strategies to lead change and encourage use with clear governance.

With the right planning and oversight, your IT team can keep hands on the controls and chart a steady flight path toward scalable, value-driven AI adoption.



Introduction

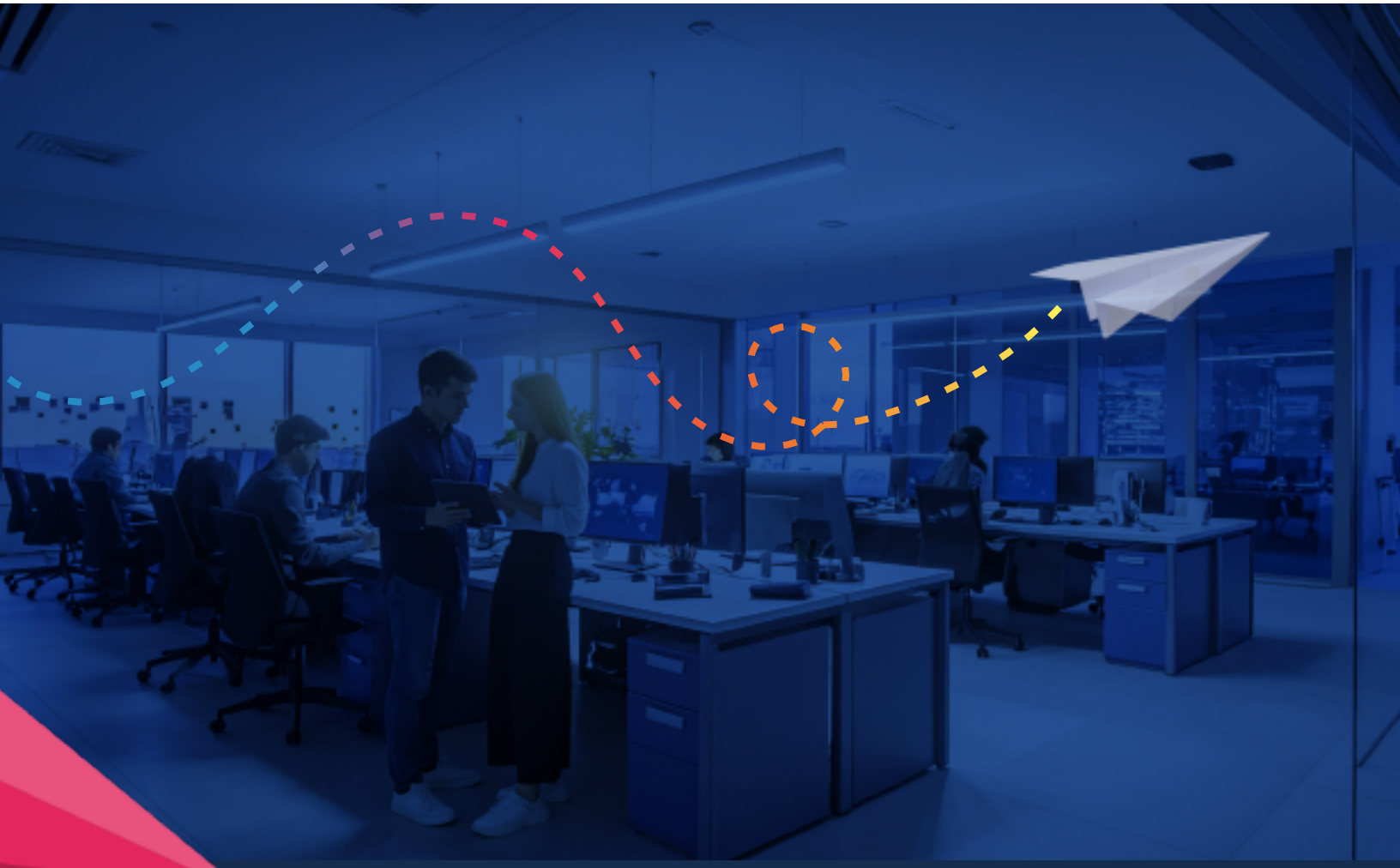
Perhaps unsurprisingly, AI is the most high-profile area of technology investments for 42% of global respondents in Foundry's State of the CIO 2025 survey. 80% of IT leaders reported they are tasked with researching and evaluating possible AI additions to the tech stack.

For organizations already using Microsoft platforms, Microsoft Copilot deserves serious consideration. Embedded in Microsoft 365, Word, PowerPoint, and other productivity tools, Copilot is easy for teams to experiment with and adds a layer of intelligence that can deliver measurable value. Microsoft's long-term investment in advancing Copilot also ensures that this is a stable, supported platform for enterprise adoption—while still moving forward on the leading edge.

Yet even with the familiarity, stability, and support of Microsoft, many IT leaders feel cautious about unleashing Copilot within their organizations. Concerns about compliance, data security, adoption, and integration are valid. Then there's this: for those companies who have already jumped in, an MIT report found that 95% of generative AI pilots are delivering zero returns.

The truth is, AI isn't an autopilot, but it is a capable co-pilot. When your enterprise understands which opportunities to focus on, as well as how to appropriately prepare your environment and teams, you can see success. With IT teams in the cockpit, hands on the controls, and oversight, governance, and coordination from a strategic partner in the tower, your organization can navigate AI adoption safely and effectively deliver real business value.

Ahead, we'll walk you through essential dos and don'ts you can follow to ensure smooth skies for AI adoption.



Do: Understand Copilot's Value

AI itself is at a crossroads, as companies are "finding that [it] is somehow simultaneously ubiquitous and elusive. It's everywhere in conversation, yet difficult to translate into business value." Before your enterprise starts any journey with Copilot, it's crucial to understand what it can realistically achieve and what it can't.

Copilot is a productivity assistant, meaning it augments knowledge work and human expertise rather than replacing it.

With Copilot, this often looks like helping people do what they already do—such as analyzing information or summarizing meetings—faster and with greater clarity.

At the same time, Copilot's output is only as strong as the data and context it's given. As many organizations are realizing, clean, well-governed data is the foundation of reliable AI results.

Ask yourself:

- What kinds of work could be enhanced, not replaced, by Copilot?
- Where does high-quality data already exist that Copilot can safely tap into?
- How can we help employees understand Copilot's capabilities and limitations?

Understanding these fundamentals helps leaders and teams see Copilot not as a shiny new system to "figure out," but as an assistive layer that strengthens the tools they already use.

Do: Align Copilot with Existing Business Goals

Once you understand what Copilot does best, the next step is connecting its capabilities to your organization's goals. Many organizations make the mistake of deploying AI without a concrete plan, hoping that teams will "figure it out." Yet without a clear destination, this often leads to inconsistent adoption, wasted effort, and skepticism among employees, along with security risks.

Others, particularly in highly regulated industries like finance or healthcare, may stay stuck in an experimentation phase, where IT teams are exploring its potential but fail to move anything forward to the broader organization due to concerns about costs and compliance.

However, the most successful enterprises don't roll out Copilot broadly and hope for results. They start small, measure impact, and scale deliberately. Understanding Copilot's capabilities and limitations, a key question to ask is where can your organization's data, powered by AI, deliver business value?

If you begin by mapping Copilot capabilities to business priorities—whether streamlining document creation, automating repetitive workflows, or enhancing collaborative productivity—you can establish a clear flight plan for adoption.

Key Actions:

- Identify two to three high-impact workflows where Copilot can fit in and measurably improve outcomes. These could be opportunities to save time or improve decision quality through drafting documentation for team review, summarizing meetings, or analyzing customer feedback.

- Define clear success metrics: for example, time saved, improved accuracy, faster response time to customer needs, and increased satisfaction.

- While Copilot licenses do add cost to your tech budget, they can deliver ROI when applied strategically. The smartest approach to Copilot licensing is a targeted adoption: identify the right pilot groups, build a value case, and expand adoption once impact is demonstrated, so you invest with confidence, not uncertainty.

- Communicate progress regularly to reinforce trust and engagement across teams.

When you map Copilot's potential directly to existing business priorities, you give AI a clear destination so it can drive tangible value, rather than stay endlessly stuck in the test flight phase.

Then, with your flight plan defined and your destination clear, the next step is ensuring your aircraft (the data that fuels Copilot) is fully ready for the journey.

Poor data hygiene is like taking off with fogged instruments: you may not realize what's wrong until it's too late.

Do: Assess Your Data

AI thrives on context-rich, reliable data. Copilot draws from content across Microsoft 365, so to be flight ready, it's essential to assess the cleanliness, accessibility, and governance of your enterprise data.

From Compugen Systems' perspective in the tower, as an IT partner, we typically see organizations with two broad categories of data:

1. Structured data, for example, relational or sequel data from within key applications or data from highly vetted company-produced manuals, and

2. More conversational data, for example, from PowerPoint presentations and other work documents.

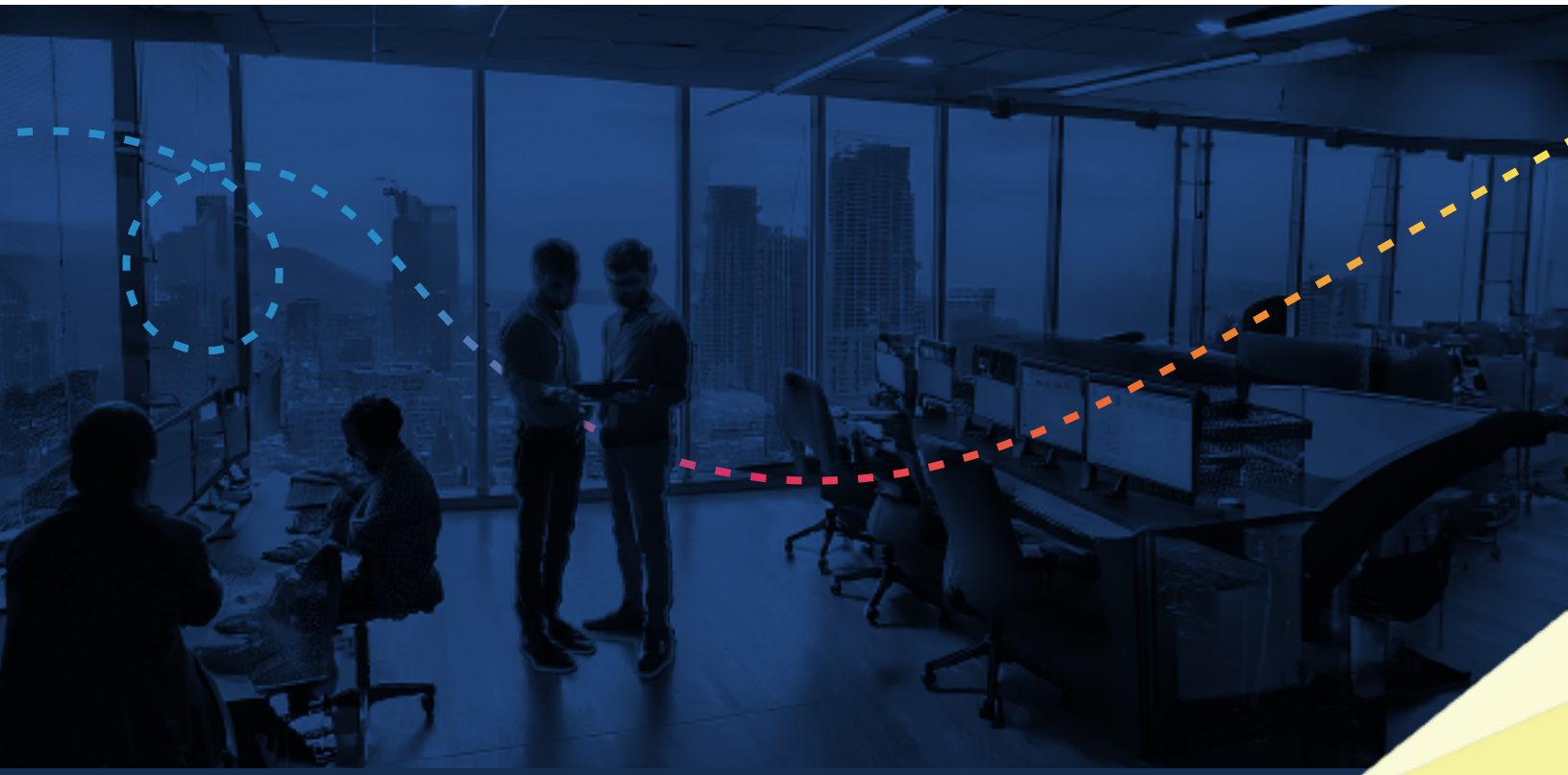
This second category of data is more likely to be lower quality for AI input and therefore less likely to produce anything meaningful.

Incomplete or siloed data can also produce inconsistent outputs, which can erode teams' trust in AI-generated insights. You also need to tighten up access controls, permissions, and data sharing, to mitigate the risk of sensitive or confidential data leaking through AI.

Key Actions:

- Audit data sources and access permissions.
- Clean and normaliz[e] critical datasets to ensure consistency.
- Define policies for data classification and handling to safeguard sensitive information.

Treat this as one of your key preflight safety checks. Rather than jumping straight into Copilot, then attempting a cleanup later, a well-prepared data environment is the runway that ensures Copilot takes off safely.



Do: Know Who in Your Organization is Using It

Good data hygiene also includes knowing who in your organization is using AI, what data they have access to, and what they are sharing. Even before a formal rollout, chances are someone in your organization has already started using Copilot or another AI tool. Like other forms of shadow IT, this early experimentation is often well-intentioned, driven by curiosity or a desire to work smarter. But without visibility, these isolated tests can lead to inconsistent practices, security gaps, or even data exposure.

To steer effectively, IT must first see clearly.

That means identifying where and how Copilot is already in use, understanding the business cases behind it, and bringing those efforts under a coordinated governance structure. Visibility isn't about limiting innovation; it's about channeling it safely and strategically.

Key Actions:

- Survey departments to understand who is experimenting with Copilot or other AI tools.
- Map those activities to specific business functions and data types.
- Bring early adopters into the governance conversation: they're often your best internal champions.
- Develop a centralized inventory or registry of AI tools in use across the organization.

By knowing who's already in the cockpit, IT can better manage permissions, set consistent policies, and harness enthusiasm where it already exists. What begins as isolated innovation can then become coordinated progress, with one clear flight path instead of many unpredictable solo flights.

Don't: Underestimate the Risks

At Compugen Systems, we guide organizations to adopt Copilot and other forms of AI with critical thinking and a healthy sense of skepticism. Every new technology introduces risk, but AI brings a unique mix of visibility, compliance, and reputational exposure that can amplify quickly without guardrails. The risks of ungoverned Copilot use aren't hypothetical, either. They're already emerging in enterprises: sensitive data surfaced in unexpected ways, model "hallucinations" embedded in reports, and teams adopting tools faster than governance can keep up.

The goal isn't to slow down innovation, but to fly with instruments, not instincts.

CIOs and IT leaders must ensure clear access boundaries, establish usage policies, and monitor AI-generated outputs for accuracy and security.

Watch for these early warning signs:

- Employees pasting confidential data into generative AI tools without awareness of risk.
- Inconsistent or unclear messaging about acceptable use.
- A lack of visibility into which departments are actively using AI tools.
- Confusion about accountability when something goes wrong.

Strong governance frameworks—and the culture to support them—keep your organization flying within controlled airspace. You can't remove all risk from AI adoption, but you can make sure it's managed, measurable, and mitigated.

Do: Create a Protected Environment

To balance risks with adoption, it's smart to create a "playground with a fence": a secure, well-governed environment that lets your organization innovate confidently.

For Microsoft Copilot, this means integrating your security, identity, and compliance layers with intentional configuration. Use tools like Microsoft Purview and Entra ID to define access boundaries and ensure that the right users see the right information. Leverage existing DLP (Data Loss Prevention) and sensitivity labeling tools to control what data Copilot can and cannot reference.

Think of this as the equivalent of defining your flight path and altitude limits: innovation can soar, but only within clearly defined airspace.

Your checklist for a protected environment:

- Confirm all compliance and retention policies extend to AI-generated content.
- Implement least-privilege access and conditional access rules.
- Use sensitivity labels and encryption to restrict exposure of sensitive data.
- Establish monitoring and alerting for AI-related data activities.

A secure foundation isn't about slowing flight; it's about ensuring that every takeoff and landing is smooth, predictable, and within safe operational limits.

Don't: Forget to Lead with Change Management

Even the best technology can't fly without the right crew. Successful Copilot adoption depends as much on people as it does on plan and policy

—yet according to an AWS study, only 14% of organizations currently have a change management plan for AI.

Employees who don't understand why AI is being implemented, or how it helps them, may resist it. And as we covered above, others may dive in enthusiastically but use it inconsistently or irresponsibly. That's why structured, ongoing change management is essential.

Effective programs blend communication, education, and hands-on experimentation. They celebrate early wins, surface concerns quickly, and help employees build confidence in new workflows.

Strategies to lead with change:

- Appoint departmental "Copilot Champions" to guide peers and collect feedback. Those early AI adopters you uncovered in your shadow AI survey? They can be easily engaged to share their enthusiasm and influence, securely.
- Offer clear examples of approved use cases to spark adoption (see Do: Create a Recipe Book for Inspiration).
- Provide micro-trainings and quick-reference resources for daily use.
- Reinforce a growth mindset emphasizing augmentation, not replacement.

Cultural readiness is the difference between cautious adoption and confident, sustained transformation. As an IT team, you may pilot the rollout, but your entire organization's people determine whether it truly takes off.

Do: Design Ongoing Training

It's also critical to view training as an ongoing calibration, not a one-time event. As Copilot evolves, so will its capabilities and the expectations of how employees use it.

Develop a structured learning path that evolves with both the technology and your organization's maturity. Blend short, scenario-based learning with deeper sessions on data security and ethical use. Encourage peer sharing and feedback and recognize power users who are driving measurable value.

Just as airplane pilots continually refresh their skills and stay current with new systems, your workforce should have regular opportunities to learn, experiment, and refine.

Consider:

- Monthly "Copilot in Practice" sessions to share new use cases.
- Role-based learning tailored to departments or job functions.
- Continuous feedback loops between IT, security, and business units.

Remember, the goal is not to make everyone an AI expert. It's to make AI accessible, responsible, and beneficial in daily work.

Do: Create a Recipe Book to Inspire

Once the fundamentals are in place, inspiration becomes the next catalyst. A "Copilot Recipe Book" or "AI Playbook" captures proven use cases, templates, and prompts that demonstrate how teams across your organization are using Copilot effectively.

These practical examples turn abstract potential into real productivity and give hesitant teams a starting point. They also help standardize best practices, reduce redundant effort, and accelerate adoption across departments.

Each "recipe" could include:

- The business scenario or challenge
- The prompt or workflow used
- The measurable outcome or benefit
- Lessons learned or tips for improvement

Just as flight crews rely on checklists to ensure consistency, your AI playbook gives every employee a reliable set of tools for safe, effective use.

Ready for Takeoff

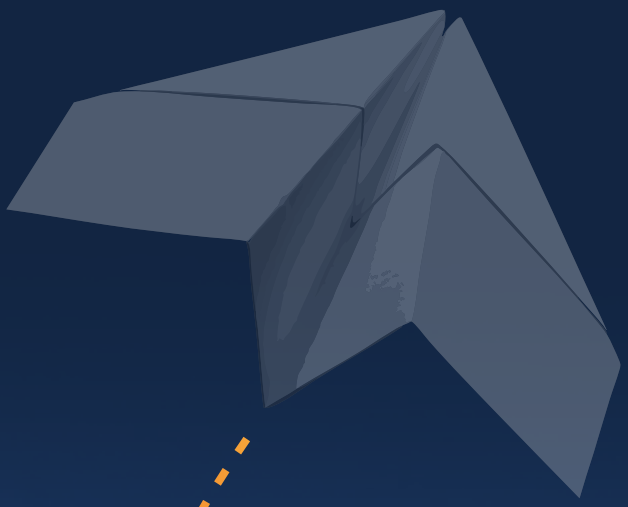
AI is here to stay, and Microsoft Copilot represents one of the safest, most accessible entry points for enterprise adoption. Applied effectively, it can deliver real value and ROI. But smooth skies require skillful coordination.

At Compugen Systems Inc., we believe technology holds limitless potential. By combining the ingenuity of people with the precision of AI, we turn possibility into reality—transforming inspiration into measurable impact. Our Copilot Readiness Assessment is your expert-guided Safety Check, while our Vision + Value Workshop helps your organization define its policies, training, and success metrics, turning AI curiosity into disciplined, measurable value.

Book a Copilot Readiness Assessment or Vision + Value Workshop to confidently chart your flight plan. Learn more here: https://www.compugen.us/microsoft-365-copilot

Schedule Now

Download the Wheels Up Checklist to run your preflight checks.



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