

# Current Use of Copilot in

# SharePoint



## 1. Are you currently using Microsoft Copilot within your SharePoint environment?

- Yes, we actively use Copilot.
- No, we haven't integrated Copilot yet.

## 2. How frequently do your teams use Copilot for content creation and management in SharePoint?

- Regularly, it's part of our daily workflow.
- Occasionally, we use it for specific tasks.
- Rarely or never.

## 3. Do you use Copilot to automate document management tasks, such as organizing, tagging, and summarizing content?

- Yes, Copilot is used extensively for document management.
- Somewhat, but there is room for more automation.
- No, we haven't explored these features.

## 4. Are your teams leveraging Copilot for real-time collaboration, such as co-authoring documents or providing AI-driven suggestions?

- Yes, Copilot is an integral part of our collaboration process.
- Occasionally, but not consistently.
- No, we are not using Copilot for collaboration.

## 5. Have you integrated Copilot with other Microsoft tools like Teams or Outlook to enhance communication and workflow?

- Yes, Copilot is integrated across our tools.
- Partially, but there's potential for more integration.
- No, Copilot is only used within SharePoint.

# Opportunities for **Custom Workflows**



## **6. Are there routine tasks in SharePoint that could benefit from further automation through custom workflows?**

- Yes, several processes could be automated.
- A few, but we have already automated most tasks.
- No, we haven't identified any tasks for automation.

## **7. Have you customized any workflows in SharePoint to better align with your organization's specific needs?**

- Yes, we have several custom workflows in place.
- Somewhat, but there's potential for more customization.
- No, we primarily use out-of-the-box workflows.

## **8. Do you have a plan in place to regularly review and optimize these workflows to ensure they continue to meet your business objectives?**

- Yes, we regularly review and optimize our workflows.
- Occasionally, but it's not a formal process.
- No, our workflows are rarely reviewed after implementation.

## **9. Are you utilizing Copilot to assist with workflow automation, such as automating approval processes or task assignments?**

- Yes, Copilot is central to our workflow automation.
- We use Copilot for some tasks, but there's room to expand.
- No, we haven't integrated Copilot into our workflows.

## **10. Have you identified any gaps in your current workflows where custom Copilot solutions could add value?**

- Yes, there are several areas where custom solutions could help.
- A few, but we have most needs covered.
- No, we haven't explored custom solutions yet.

# Maximizing **ROI** with **Copilot and Custom Workflows**



## **11. Are you tracking the ROI of using Copilot within your SharePoint environment?**

- Yes, we actively measure the impact on productivity and efficiency.
- Somewhat, but we could improve our tracking.
- No, we haven't established a clear ROI measurement process.

## **12. Have you noticed significant productivity gains since integrating Copilot?**

- Yes, Copilot has significantly improved our productivity.
- Somewhat, but there is potential for more gains.
- No, we haven't seen much change.

## **13. Do you believe that custom workflows could further enhance the ROI of your SharePoint and Copilot integration?**

- Yes, custom workflows could unlock more value.
- Possibly, but we would need to explore the options further.
- No, we are satisfied with our current setup

## **Conclusion and Next Steps:**

Based on your responses, you now have a clearer understanding of how well you are utilizing Microsoft Copilot within SharePoint and where there may be opportunities for improvement through custom workflows. If you identified areas where you could enhance your use of Copilot or implement more automation, it might be time to explore SharePoint AI automation consulting services. Optimizing these areas can lead to significant productivity gains and a higher return on your investment.