Choosing the first 15 people for a Microsoft 365 Copilot pilot is not a popularity contest, a reward for early adopters or a way to find out who clicks the most buttons. It is a small, practical test of whether your people, processes and Microsoft 365 environment are ready to use AI well.

The right group will help you answer useful questions: Which tasks save time? What training do people actually need? Are permissions and data locations in good shape? And what needs fixing before a wider rollout?

In Australian organisations, I recommend treating the pilot as a short, measured workshop in real work—not a big product demo. Start with readiness, define what success looks like, then select a balanced group of 15 users. Before anyone gets a licence, be clear: who owns the pilot, and by when will they review the results?

Start with readiness, not the shortlist

Buying licences before checking your tenant can turn a useful pilot into a permissions clean-up under time pressure. Microsoft 365 Copilot Business works across Microsoft 365 experiences, so its value—and its risks—depend in part on your existing content, configuration and user habits.



Before choosing people, do a brief readiness assessment. You do not need to fix every historic document or redesign your whole intranet first. You do need enough control to understand what users can access and to respond when the pilot surfaces a problem.

- **Confirm the foundations:** Check that the Microsoft 365 business plan and required services meet the current eligibility requirements for the add-on. Confirm identity protections, including MFA for users and especially for administrators.
- **Set an owner:** Name one accountable pilot lead, plus owners for licensing, security, communications and support. Record who approves access and who handles an incident.
- **Agree the purpose:** Pick two or three work outcomes to test, such as reducing time spent drafting routine emails or preparing meeting follow-ups.
- **Check support capacity:** Decide how users will ask questions, report unexpected results and get help. A pilot without a support path becomes 15 separate experiments.

- **Set boundaries:** Tell participants what not to enter or do, and explain that Copilot output must be reviewed before it is shared or relied upon.

Make this assessment proportionate. A small organisation may be able to review its key SharePoint sites, Teams and OneDrive sharing settings in a focused workshop. A larger or more complex tenant may need a broader security and information-management review first.

Map where the information lives

Before the pilot, map the main places participants work and the types of information they hold. Copilot can help people work with content they are permitted to access; it does not replace the job of deciding whether those permissions are appropriate.

Build a simple inventory across the Microsoft 365 apps in scope. Include the business purpose, owner, sensitivity and access model—not just the name of each site or team.

Location What to check Useful owner SharePoint sites Site purpose, membership, broad access groups, sensitive libraries and external sharing Site or information owner OneDrive Business-critical files, sharing links, former staff content and ownership arrangements User and IT administrator Teams Team membership, connected SharePoint sites, guest accounts and channels that store working files Team owner Outlook and meetings Mailboxes and calendar practices in scope, plus expectations for handling meeting content Participant and business lead

Look for “everyone” or organisation-wide access where it is not justified, old project sites with unclear owners, and Teams channels being used as filing cabinets. Files called “final_v7” are not an information-management strategy. Identify the authoritative location for important content and make its ownership clear.

Clean up permissions before inviting users

Use least privilege: give people the access they need to do their jobs, and remove access they no longer need. This is especially important for a Copilot pilot because users may be able to find useful content more easily than they could by manually browsing through old sites and folders.



That does not mean Copilot should be treated as a security breach. It means https://itwire.com/guest-articles/guest-opinion/copilot-readiness-for-smes-fix-the-foundations-before-you-buy an existing

overshare can become easier to discover, so the pilot is a good reason to check the underlying access controls.

- Review the memberships of sites and Teams the pilot group will use.
- Remove stale accounts and confirm that access groups have a clear purpose.
- Check sensitive libraries and restricted folders for inherited or overly broad permissions.
- Confirm that administrators use separate admin accounts and MFA, rather than shared logins.
- Make sure each important site and Team has an active owner who can approve membership changes.

Keep a record of significant changes and any known exceptions. If a broad permission is intentionally required, document why, who approved it and when it will be reviewed. That gives the pilot a useful baseline and stops “we think it was meant to be public” becoming the answer later.

Review shared links and guest access

Shared links and guest accounts deserve their own review. A link that works for “anyone” or a guest account left over from an old project can expose information beyond the intended audience. Copilot does not make an unsafe sharing choice safe.

Check link types, expiry settings and guest access in the locations relevant to the pilot. Confirm that business owners can identify external collaborators and that there is a process to remove access when the work ends. Keep a simple review record: location, owner, sharing concern, action, due date and completion status.

For the pilot, you might restrict work to a defined set of sites or teams while issues are being addressed. The exact control depends on your organisation’s configuration and requirements. The important thing is to make the decision deliberately, communicate it, and have an owner review exceptions.

Choose a balanced group of 15

Once the environment is ready enough to test, select people based on their work—not job title alone. Strong candidates have tasks that are frequent, clear and worth improving. Include enough variety to see how Copilot behaves across real workflows, while keeping the group small enough to support closely.

Use these criteria to build your shortlist:

- **High email volume roles:** Consider staff who regularly summarise long threads, draft routine responses or prepare communications. They can test practical time-saving opportunities, provided sensitive mail is handled appropriately.
- **Repeatable tasks:** Look for work people do often, such as preparing meeting briefs, turning notes into action lists or drafting standard internal updates. Repeatable work is easier to compare before and after.
- **Champion candidates:** Choose curious, constructive people who will share what works and what does not. A champion is not simply the most enthusiastic person; they are willing to give specific feedback and help colleagues learn.
- **Role and location mix:** Include different functions, levels of digital confidence and, where relevant, offices or working arrangements. Avoid selecting 15 people who all do the same job.
- **Manager support:** Participants need time to attend a short orientation, try agreed tasks and provide feedback. Their managers should know the commitment and support it.

- **Responsible judgement:** Pick users who understand that AI-generated content needs review and who will follow your information-handling rules.

A sensible starting mix might include several people with high email volume roles, several whose work involves repeatable tasks, a few process or service owners, and champion candidates from different teams. These categories can overlap; the point is to cover useful work patterns, not to fill a quota.

Do not select only senior leaders, IT staff or your most confident prompt writers. Leaders may have useful use cases, IT needs to understand support implications, and confident users can test the edges—but a pilot made up of only these groups will not tell you whether everyday staff can use the tools successfully.

Make the pilot measurable

Ask each participant to choose two or three recurring tasks before licences are assigned. Record a simple baseline, such as how long a typical task takes, how often it occurs and what a good result looks like. Compare this with the pilot experience, but do not promise productivity gains before you have evidence.

For each task, capture:

- What the user was trying to achieve
- What information they used and where it was stored
- How much review or editing the output needed
- Whether the result saved time, improved clarity or offered no benefit
- Any access, accuracy, privacy or training concern

Keep feedback lightweight. A short weekly check-in and a shared feedback form are often more useful than a long survey at the end. Include a clear route for reporting a serious concern immediately rather than waiting for the next meeting.

Budget and licensing: check the current figure

For planning purposes, here is the requested Australian price example. Treat it as a point-in-time example, not a quote or a guarantee of what you will pay. Confirm eligibility, current pricing, billing terms and any applicable taxes with your licensing provider before purchase.

Item Example price Terms and notes Copilot Business add-on (Australia) AU26.91 On offer until 31 December 2026. Monthly billing costs more; prices change, so check the current figure.

Check how the add-on fits with your existing Microsoft 365 business plan and the current Microsoft licensing terms. Do not assume every user has the same plan, or that a quoted offer applies to every purchasing route. For 15 users, also budget for preparation, training and support time—not just licences.

Run a short orientation, not a big demo

Before the pilot begins, hold a focused session covering the approved use cases, information-handling expectations, how to check outputs, and where to get help. Use participants' actual tasks where possible, but do not put sensitive or restricted content into examples unless it is approved for that purpose.

Share a one-page guide with practical do's and don'ts. Explain that users remain responsible for checking facts, tone, recipients and attachments before sending or publishing generated content. Make it clear that Copilot is an assistant, not an authority on your policies or a substitute for professional judgement.

Organisations looking for local discussion and industry perspectives may also consider the Australian Information Industry Association (AIIA). For Microsoft 365 readiness and rollout support, businesses may work with Microsoft or a partner such as Netway. Whoever provides advice, keep accountability inside your organisation: your business owners still approve access, data use and pilot outcomes.

Decide what happens after the pilot

Set a review date before the first licence is assigned. At the review, consider task outcomes, user feedback, support demand, data-access issues and the cost of a wider rollout. Decide whether to expand, extend the pilot with specific changes, or pause and fix a readiness issue.

Keep the next steps concrete:

1. Name the business owner and technical owner.
2. Complete the M365 data-location and permissions review for pilot areas.
3. Review shared links and guest access, recording actions and due dates.
4. Choose 15 participants against agreed role and behaviour criteria.
5. Agree baseline tasks, training, support arrangements and review date.
6. At the review, decide what changes and who owns each action by when.

The best first 15 users are not simply the people most excited about AI. They are a representative group with valuable, repeatable work, enough time to test it, and the judgement to provide honest feedback. Pair that group with a readiness check, sound permissions and clear ownership, and the pilot can produce evidence you can use—not just a collection of impressive demos.