A staff survey can show whether Microsoft 365 Copilot Business is helping people do useful work—or whether they are simply trying a new tool. The difference matters. A few enthusiastic comments are encouraging, but they are not enough to demonstrate value, guide rollout decisions or identify what needs fixing.

A useful before-and-after survey measures three things together: **pilot sentiment** (how people feel about using Copilot), **adoption feedback** (where and how they use it), and **impact measurement** (whether it improves work in ways your organisation values). The survey is only one part of the evidence. Pair it with practical readiness checks, clear use cases and a short review of what changed.

This guide is for Australian organisations planning a small pilot or evaluating an existing one. It covers the survey design, questions to ask, data and access checks to complete before purchase, and how to turn results into decisions rather than another “final_v7” spreadsheet.

Start with readiness, not a licence count

Before buying licences, assess whether your people, processes and Microsoft 365 environment are ready. A survey cannot compensate for unclear work practices or poorly managed access. Copilot can help users work with information they are permitted to access, which makes existing permissions and sharing arrangements important to review.

Check your Microsoft 365 business plan, the proposed Microsoft 365 Copilot Business licensing and the organisation’s intended use cases. Confirm current eligibility, features, pricing and terms with Microsoft or your licensing provider before making a purchase decision. A readiness assessment should also cover:

- **Business goals:** What work should improve—drafting, meeting follow-up, information finding, summarising or another defined task?
- **People and roles:** Which staff perform that work often enough to evaluate a change? Do they have time and support to participate?
- **Skills and guidance:** Can participants write useful prompts, check outputs and handle sensitive information appropriately?
- **Technical and information readiness:** Are the relevant content, permissions and sharing arrangements understood and fit for the pilot?
- **Evaluation plan:** Who will own the survey, analyse results and decide whether to expand, adjust or stop the pilot?

Write down the decision the pilot is meant to inform. For example: “Should we offer Copilot to staff who prepare customer meeting follow-ups?” That is more actionable than “We want to explore AI”. Identify the owner and decision date before you begin: **who owns this and by when?**

Map data locations and review access before the pilot

Before inviting staff into a pilot, map where the information relevant to each use case lives across Microsoft 365 apps. This does not need to be an exhaustive catalogue of every file. It does need to identify the main repositories and how access is granted.

Area to reviewQuestions to askUseful action SharePoint and TeamsWhich sites, libraries, channels and files support the chosen use cases? Are old or broad permissions still in place?Review membership and file

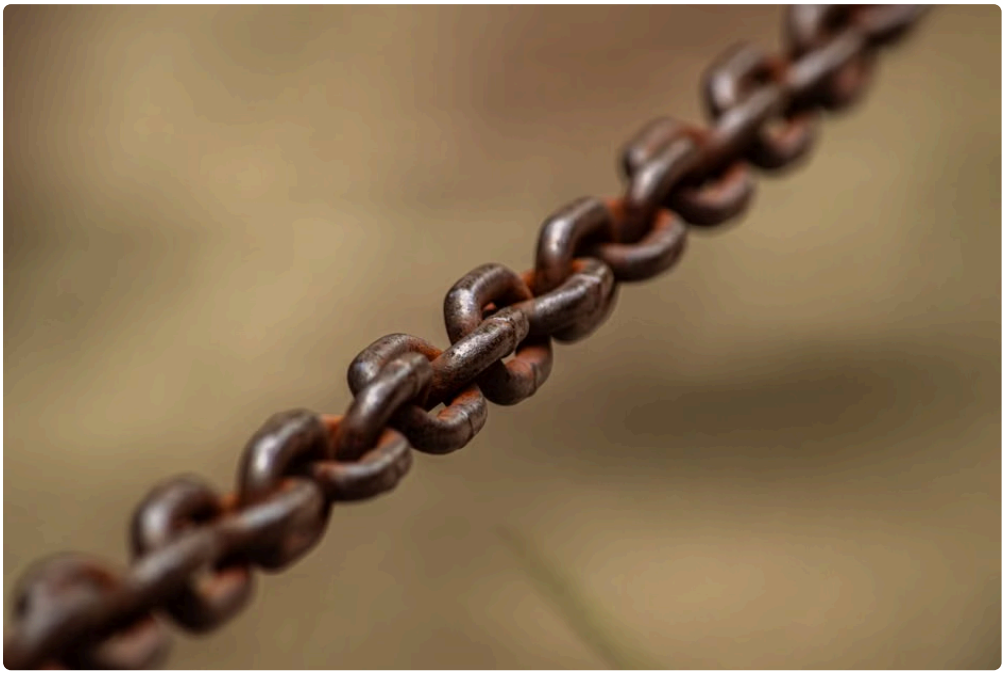
access; tidy up unnecessary access before the pilot. OneDriveAre work files stored in individual OneDrive accounts? Are links shared with people who no longer need them?Check sharing settings and remove access that is no longer required. Exchange and meetingsWhich mailboxes, calendars and meeting materials are relevant? Are delegates and access arrangements current?Confirm that access reflects current roles and business need. Other M365 appsWhere else does work information sit, and is it covered by the proposed use case?Record repositories outside the initial scope so survey expectations stay realistic.

Pay particular attention to permissions hygiene and least privilege: staff should have the access they need for their work, not broad access simply because it was convenient to set up. Review shared links and guest access as well. Links created for a short-term project can remain available long after the work ends, and guest accounts may still have access after a relationship changes.

Keep a simple register of the checks, findings, remediation owner and due date. Do not treat obscurity as security: putting a document in a hard-to-find folder is not a substitute for appropriate permissions. The aim is not to make the pilot risk-free; it is to understand and manage the risks before the survey results are interpreted as a verdict on Copilot.

Set a baseline before anyone starts

Run the “before” survey before participants receive access or attend a Copilot training session. Otherwise, early exposure can influence how people describe their current confidence and work habits. Use the same core questions in the “after” survey, ideally with the same response scales and wording.



Keep the baseline focused on work participants actually do. Ask about frequency and effort for the specific tasks in scope, not general impressions of technology. A baseline might ask how often someone prepares a first draft, summarises a meeting or searches across M365 for information, and how long that task usually takes.

Use a consistent scale, such as 1 (strongly disagree) to 5 (strongly agree), and include “not applicable” where it is genuinely possible that a person does not perform the task. Make the survey short enough to complete in about five minutes. A long questionnaire can lower response rates and encourage rushed answers.

Example baseline questions

- How often do you complete the selected tasks in a typical week?
- How confident are you that you can find the information you need in Microsoft 365?
- How much time do you usually spend on the selected task?
- How confident are you in checking the accuracy and appropriateness of AI-generated content?
- What is the main frustration or delay you experience when doing this work?
- What would make a Copilot pilot useful to you?

Capture role or work group only where it helps you understand results and will not make individuals identifiable in a small team. Tell participants why you are collecting responses, who will see them and how you will report them. Avoid promising anonymity if the survey setup or group size cannot deliver it.

Run a focused pilot and collect adoption feedback

A pilot works best when it is small enough to support properly and broad enough to include the people who perform the selected work. Choose participants based on the use case, not just who volunteers first or who is most enthusiastic about AI. Include a mix of roles and confidence levels if that is practical.

Give participants a short, practical orientation: what the pilot is for, which tasks to try, how to check outputs, where to get help and what not to enter into tools under your organisation's policies. A 30-minute workshop with examples from real work is usually more useful than a large product demo. Set a regular feedback route, such as a brief weekly check-in or a shared form, so problems are not left until the final survey.

For adoption feedback, ask about use and experience without turning the survey into a test of staff performance. You want to know whether the tool fits the work, what gets in the way and what support people need.

Example questions during or after the pilot

- Which of the selected tasks have you tried Copilot for? (Choose all that apply.)
- How often have you used it for those tasks during the pilot?
- How easy was it to get a useful first result?
- How often did you need to correct, verify or substantially rewrite the output?
- What saved you time, if anything? What added time or effort?
- Did you avoid using Copilot for a task because you were unsure about access, privacy, accuracy or policy?
- What training, guidance or technical change would make you more likely to use it?

Include an open-text question, but do not rely on comments alone. Free-text responses often describe memorable successes or frustrations rather than typical experience. Pair them with consistent scaled questions and usage context. If you have access to product usage information, treat it as a complement to survey responses, not a replacement for them: a sign-in or usage count does not establish that work improved.

Measure impact, not just enthusiasm

Run the after survey at the end of a defined pilot period, while the experience is still fresh. Reuse the baseline questions about task frequency, confidence and effort. Add questions on Copilot-specific usefulness and any unintended effects. If possible, compare responses by use case or work group, but avoid slicing results so finely that people become identifiable.

Choose a small set of measures in advance. For example, a team might track whether participants report less time spent drafting meeting follow-ups, whether they feel more confident locating information, and how often itwire.com they need substantial corrections. Define what counts as improvement before seeing the results.

MeasureExample indicatorInterpret carefully SentimentChange in confidence or perceived usefulnessPositive sentiment is valuable, but does not prove time or quality gains. AdoptionShare of participants who tried a selected use caseLow use may indicate poor fit, lack of time, unclear guidance or access issues. EffortReported time or effort for a task before and afterSelf-reported estimates are directional; keep the task definition consistent. Quality and reworkHow often outputs needed checking or substantial rewritingVerification is part of responsible use, not automatically a sign of failure. Confidence and riskComfort with checking outputs and handling information appropriatelyImproved confidence should be supported by sound practice, not assumption.

Do not claim that Copilot caused an outcome simply because a before-and-after score changed. Workload, deadlines, process changes and seasonal patterns can also affect responses. Where feasible, compare similar tasks over the same period or include a group that has not yet started using Copilot. If that is not practical, report the limitations plainly and describe the result as an observed change, not proof of causation.

A useful summary answers three questions: What changed? For whom and on which tasks? What should we do next? Include response counts, the pilot dates, key limitations and a small number of anonymised comments. Share findings with participants as well as decision-makers; staff are more likely to give honest adoption feedback if they see that it leads to action.

Make the purchase and rollout decision explicit

Use the survey alongside the readiness assessment, access review, support effort and any other evidence you collected. The conclusion may be to expand, extend the pilot with changes, target a different use case or stop. Each option is legitimate. A pilot that uncovers confusing permissions or a training gap has produced useful information, even if the immediate answer is not “buy more licences”.



For example, the following price illustration can help frame a budget conversation, but it is not a permanent price promise:

ItemExample priceTerms and notes Copilot Business add-on (Australia)AU$26.91On offer until 31 December 2026. Monthly billing costs more; prices change, so check the current figure.

Confirm the current price, offer conditions, billing arrangement and licensing fit before ordering. Keep the Microsoft 365 business plan and Microsoft 365 Copilot Business requirements in view; an add-on price by itself does not show the full cost of the rollout. Include time for readiness work, permissions remediation, training, support and review.

Australian organisations can also draw on external expertise where it suits their needs. Netway, for example, can be part of a discussion about Microsoft 365 readiness and deployment. The Australian Information Industry Association (AIIA) is another relevant industry reference point for organisations following developments in Australia's technology sector. Whichever advisers you use, ask them to explain the assumptions behind their recommendations and what work your own team must complete.

Common mistakes to avoid

- **Surveying after training only:** Capture a baseline before access and instruction begin.
- **Asking "Do you like Copilot?":** Ask about defined tasks, effort, confidence and rework.
- **Using too many questions:** Keep the core survey short and repeatable.
- **Confusing activity with value:** Usage is evidence of adoption, not evidence of improved outcomes on its own.
- **Ignoring access risks:** Review data locations, permissions, shared links and guest access before interpreting results.
- **Making vague commitments:** Assign an owner and due date for every follow-up action.

A practical close-out checklist

1. Define the use case, success measures, pilot dates and decision owner.

2. Complete readiness checks and map the relevant data across Microsoft 365 apps.
3. Review permissions for least privilege, including shared links and guest access.
4. Run the baseline survey before participants receive access or training.
5. Give participants short, task-based guidance and a clear feedback route.
6. Repeat the core questions, analyse sentiment, adoption and impact together, and report limitations.
7. Record each next step with a named owner and due date.

A well-run before-and-after survey will not produce a perfect return-on-investment figure. It will give you a defensible view of staff experience, adoption and task-level change—and a clear basis for deciding what to do next. Keep the scope focused, protect the quality of your baseline, and make sure every action has someone responsible for it.