

STRATEGIC TRAINING SERIES

Empowering the Mission

A 12-Week Copilot & M365 AI Adoption Curriculum
Built Around Empathy, Ethical Governance, and Change Management

M365 Copilot Adoption Plan

Session 1 | Series Foundations



1

Defining pressing issues



M365 Copilot Adoption Plan

Slide 2 | Change Foundations

2

What someone may consider when using AI



What they hear

Buzzwords and jargon — plus reassurances like "our data is secure."



What they think & feel

Will this distance me from clients? I'm drowning in admin — I need help.



What they see

Other orgs scaling use, but a "blinking cursor screen" leaves them unsure where to start.



What they say & do

"I'll use it for scanning emails for typos" — then defaults back to manual workflows.

PAIN: Funding guilt, imposter fear

GAIN: Finishing work on time, having more impact

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Audience Empathy Map

3

Navigating the human side of AI

Why tech adoption is an emotional journey, not just a technical one.

The Psychological Barriers

Identity Drag

"Does using AI take the heart out of my mission?"

Ethical Panic

"Am I putting client or donor data at risk?"

Funding Guilt

"Should this money have gone directly to the community?"

The Operational Habits

Habitual Slip-Back

Defaulting to the long way when under deadline pressure.

First Draft Despair

Expecting perfection instead of a rough "clumsy intern" draft.

Muscle Memory

Fingers clicking the old ways before the brain can catch up.

The Goal: We aren't changing who we are or what we do. We are using technology to clear out the administrative noise so we can give more to our mission. Your role and judgment stay central; the tool takes on the repetitive work around it.

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The Human Side of AI

4

Psychological barriers

Let's take a deeper look at some of the psychological barriers to adoption via the questions someone may ask.

Identity Drag

"Does using AI take the heart out of my mission?"

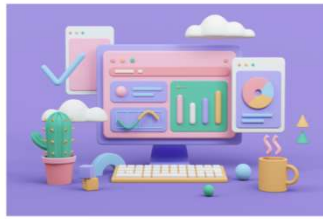


Viewpoint: A case manager feels that letting AI draft client updates "dehumanizes" their advocacy work, even if it saves time.

Copilot drafts the routine paperwork, not the relationship. You stay the author, so it frees up more time for clients rather than less.

Ethical Panic

"Am I putting client or donor data at risk?"



Viewpoint: A development officer avoids using Copilot to sort donor spreadsheets out of fear that the data will leak to the public internet.

Copilot works entirely inside your private tenant; your data is never shared to the public internet or used to train outside models, so it stays as protected.

Funding Guilt

"Should the funding for this go directly to the community I serve?"



Viewpoint: A team member hesitates to use Copilot because they keep thinking about how many client meals that software license could have purchased.

The license earns its keep by giving back hours that flow straight into direct service, so it removes admin drag rather than spending instead of serving.

5

Operational habits

It's easy to revert to old habits when you're not sure about the tool or process.

Habitual Slip-back

Defaulting to the long way when under deadline pressure.



Reality: A program manager has a board report due in two hours. Instead of using Copilot to summarize the transcripts instantly, they spend two stressful hours manually copy-pasting notes because it feels "safer."

Copilot lets you summarize transcripts turning a two-hour task into a few minute one, so you can spend checking the report, not building it.

First Draft Despair

Expecting perfection instead of a rough "clumsy intern" draft.



Reality: Forgetting that Copilot is an intern providing a rough **Level 1 draft** meant to be molded, not a finished product.

Copilot's job is to create a rough draft for you to edit and tailor to your audience's needs. It spares you from the hardest part of overcoming a blank page. You're in control of the finished product.

Muscle Memory

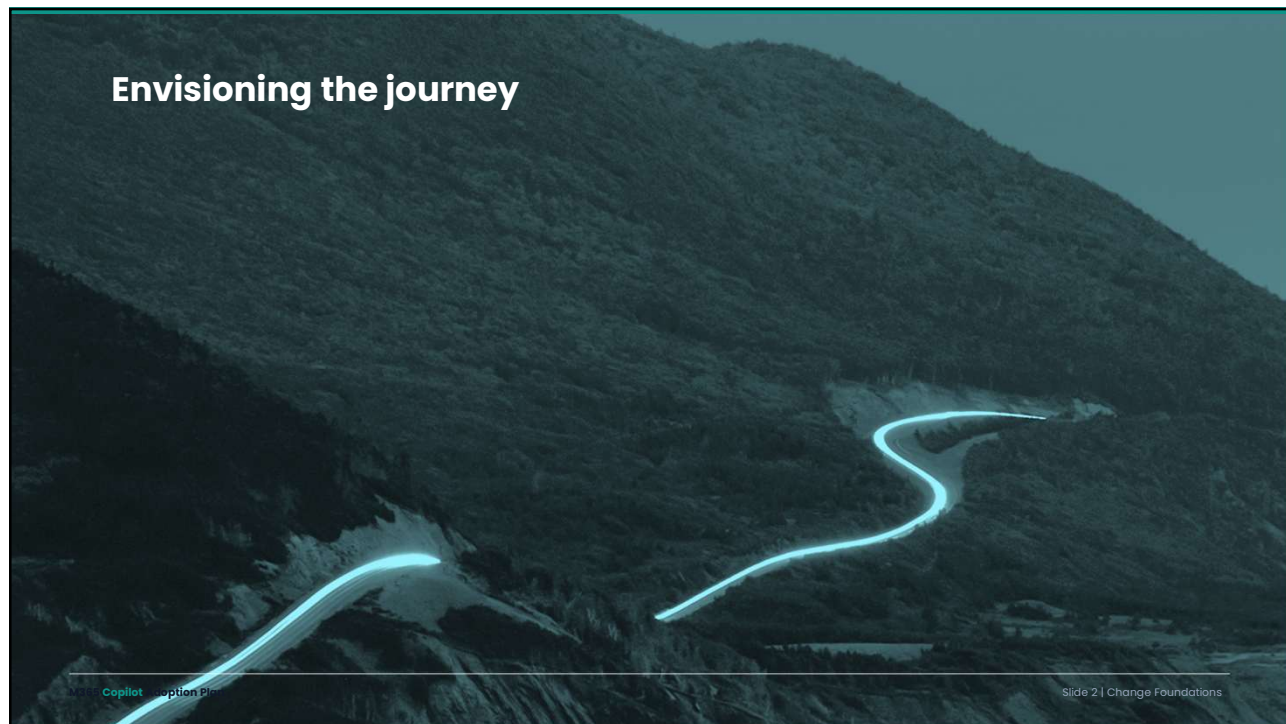
Fingers clicking the old ways before the brain can catch up.



The physical habit loop. Automatic physical actions like navigating menu ribbons or writing Excel formulas manually that your fingers execute under autopilot before your conscious brain remembers Copilot exists.

Each time you pause and let Copilot take the first step, the new shortcut gets easier until it becomes the familiar one.

6



7

Strategic framework alignment

Prosci ADKAR Integration

To secure authentic, long-term tool usage, training milestones are aligned directly with the ADKAR methodology:

- Awareness:** Build the "why" around saving administrative burnout time.
- Desire:** Address ethical, structural, and funding guilt biases head-on.
- Knowledge & Ability:** Build step-by-step contextual prompt skills.
- Reinforcement:** Share prompt writing methods and design champion networks.

The Human Change Curve

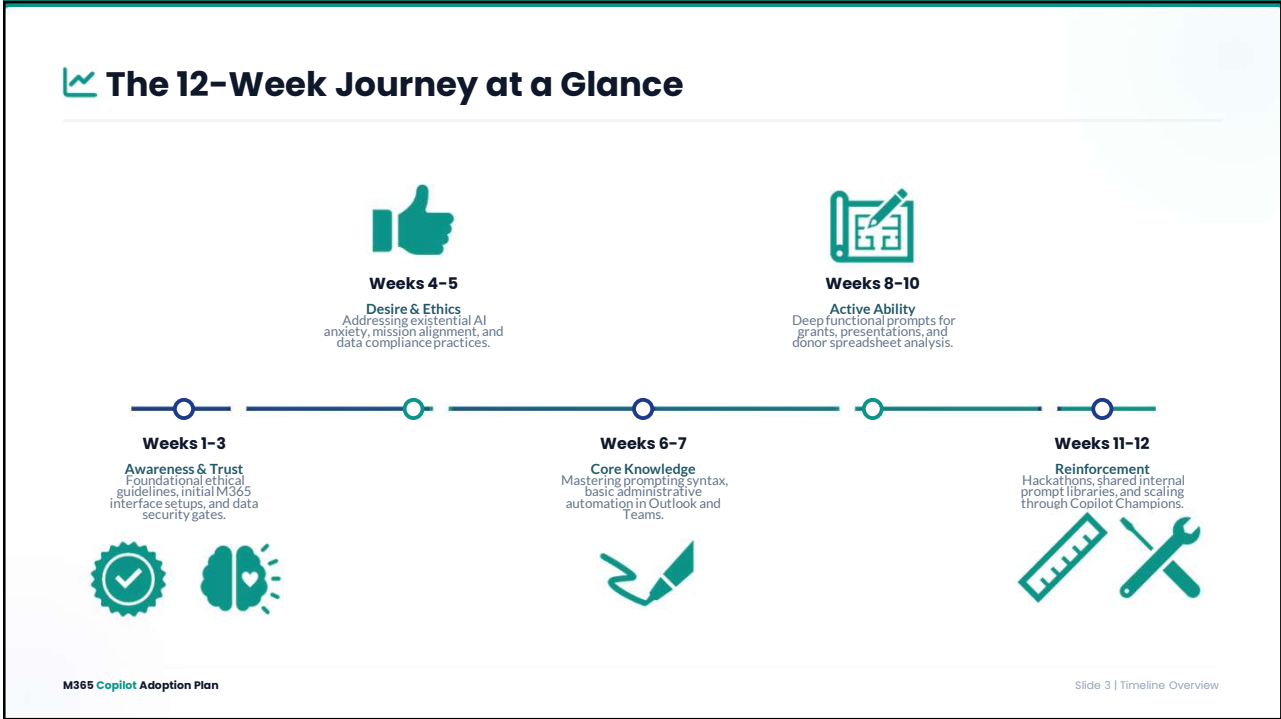
Nonprofit employees bring mission-driven empathy and anxiety to technical changes. Our webinar timeline is designed to resolve distinct psychological emotional responses:

- Denial:** Show how AI can support mission work during weeks 1-3.
- Anger & Fear:** Discuss privacy and job security concerns by week 5.
- Bargaining & Depression:** Address workflow isolation during weeks 8-10.
- Acceptance:** Review and celebrate efficiency gains in the final weeks.

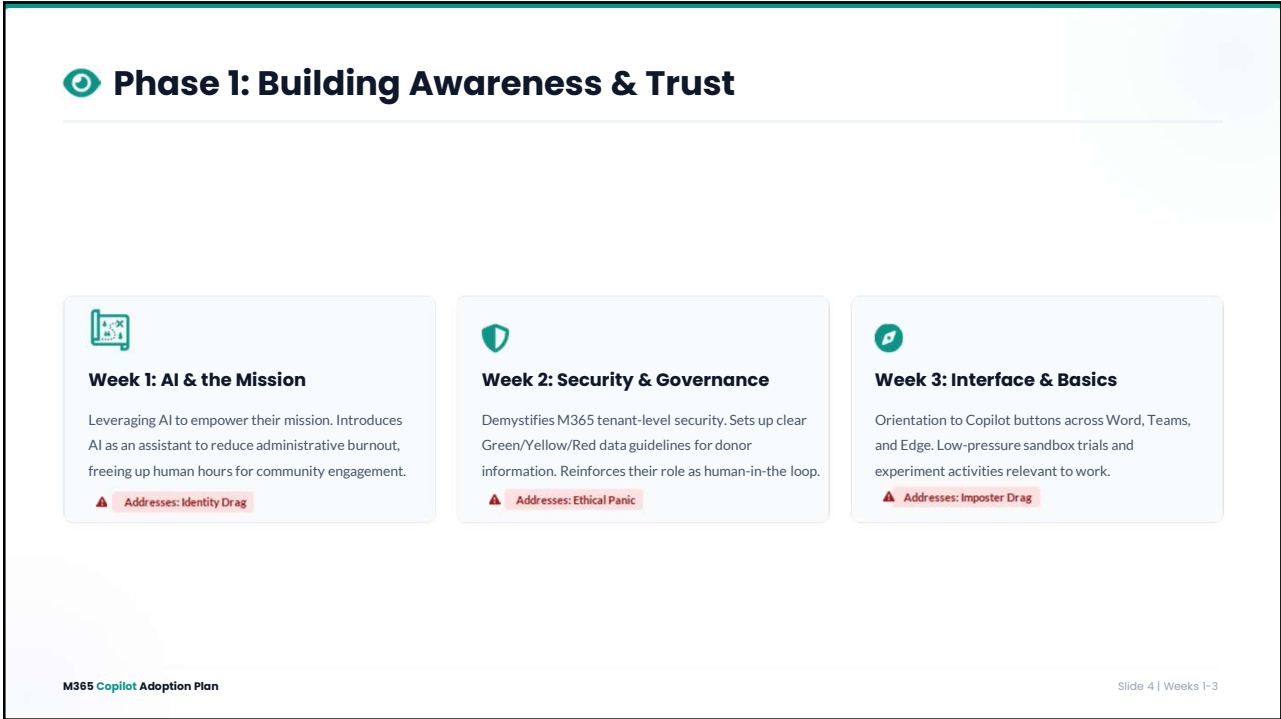
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Slide 2 | Change Foundations

8



9



10

♥ Phase 2: Sparking Desire & Ethical Use

🔗 Week 4: Ethical AI & Social Equity

Explores structural biases in AI and outlines why human expertise is always mandatory to review drafts.

Key Learning: Further exploration on how to utilize the "Human-in-the-Loop" concept specifically to evaluate client narratives for dignity and bias.

⚠️ Addresses: Existential/Funding Guilt

📁 Week 5: Everyday Workflow Savings

A collaborative case-study session showing real examples of Copilot helping overworked coordinators complete reports faster.

Key Learning: Creating a personal "burnout assessment" to pinpoint repetitive daily emails and tasks ready for automation.

⚠️ Addresses: Habitual Slip-back

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Slide 5 | Weeks 4-5

11

📖 Phase 3: Building Core Knowledge

🔗 Week 6: Prompt Construction Essentials

A deep dive into writing effective prompts. Teaches the four key elements of prompt construction: Role, Context, Constraints, and Target

Output.
Key Learning: Translating broad requests (e.g. "write about youth program") into specific inputs to eliminate generic, robotic outputs.

⚠️ Addresses: Vague Ask Friction & First Draft Despair

📁 Week 7: Copilot in Outlook & Teams

Focuses on everyday communication tools. Deep dives into draft revision, email thread summarization, and extracting actionable notes from team meetings.

Key Learning: Staying up-to-date with cross-functional program decisions without getting buried under unread messages.

⚠️ Addresses: Email Overwhelm & Muscle Memory

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Slide 6 | Weeks 6-7

12

Deepening Connection & Overcoming Resistance

Collaborative Adoption Support

Technology transitions shouldn't feel isolating. We actively pair team members to co-develop prompt strategies during the intermediate weeks:

-  **Peer-to-Peer Coaching:** Non-technical team members are paired with digital champions to troubleshoot initial "ugly drafts" together.
-  **Safe Space Feedback Loops:** Monthly roundtables to share awkward AI failures, reducing imposter syndrome and technical shame.
-  **Mission Integration:** Constant tracking of administrative time saved, mapping it directly back to human service hours.



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Slide 7 | Collaboration

13

Phase 4: Cultivating Functional Ability



Week 8: Grant Writing

Utilizes Word Copilot to structure grant applications, synthesize impact tables, and draft initial proposals based on historical records.

 Addresses: Double Work



Week 9: Presentation Slides

Guides staff in using PowerPoint Copilot to generate visual narratives for donor meetings, boards, and outreach events.

 Addresses: Design Fatigue



Week 10: Excel Data

Introduces simple Excel prompts to analyze donor giving patterns, program attendance, and cost metrics without manual calculations.

 Addresses: Excel Anxiety

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Slide 8 | Weeks 8-10

14



Phase 5: Sustaining Reinforcement



Week 11: The Prompt Library Hackathon

A fun, high-energy session where teams share their most successful, time-saving prompts. These are compiled into a shared internal directory.

Key Learning: Crowdsourcing specific prompts tailored to unique nonprofit roles to establish organizational standards.

Addresses: Habitual Slip-back



Week 12: Building a Champions Network

Designating specialized internal points-of-contact across departments to mentor new staff, update guidelines, and lead future training sessions.

Key Learning: Transitioning training responsibility back to the internal team to reduce long-term dependency on consultants.

Addresses: Transition Isolation

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Slide 9 | Weeks 11-12

15



Curriculum Mapping Detail (Weeks 1-6)

Week	Webinar Topic	Learning Objectives (LOs)	Friction Addressed
Week 1	AI & the Mission	Understand how Copilot supports mission goals; identify administrative stressors to delegate to AI.	Identity Drag Identity Drag
Week 2	Security & Governance	Classify organization data using Green/Yellow/Red policies; learn tenant data-isolation boundaries.	Ethical Panic Ethical Panic
Week 3	Interface & Basics	Locate Copilot options in common tools (Edge, Word); execute three low-pressure, basic commands.	Imposter Drag Imposter Drag
Week 4	Ethical AI & Equity	Identify algorithmic bias; apply human-in-the-loop review checks to preserve authentic client dignity.	Existential Guilt Existential Guilt
Week 5	Workflow Savings	Map daily tedious work; run live summaries on standard program documents to measure time saved.	Habitual Slip-back Habitual Slip-back
Week 6	Prompt Construction	Build customized inputs using the 4-part formula (Role, Context, Constraints, and Target).	Vague Ask / Blank Page Vague Ask / Blank Page

M365 Copilot Adoption Plan

Slide 10 | Curriculum Map 1

16

8



Curriculum Mapping Detail (Weeks 7-12)

Week	Webinar Topic	Learning Objectives (LOs)	Friction Addressed
Week 7	Outlook & Teams Hacks	Condense long emails; auto-generate summary tasks from live Teams transcripts in seconds.	Email Overwhelm Email Overwhelm
Week 8	Grant Writing Mechanics	Upload previous proposals; prompt Copilot to frame new applications in approved language.	Double Work Drag Double Work Drag
Week 9	Presentation Creation	Convert meeting notes directly into 10-slide decks using customized presentation templates.	Design Fatigue Design Fatigue
Week 10	Excel Data Literacy	Sort donor files; highlight trend anomalies without manual formulas or coding.	Excel Anxiety Excel Anxiety
Week 11	Prompt Library Hackathon	Publish three successful prompts in a shared Teams directory; vote on best-in-role entries.	Habitual Slip-back Habitual Slip-back
Week 12	Champions Network	Establish cross-functional peer support; transition feedback loops to internal teams.	Transition Isolation Transition Isolation

M365 Copilot Adoption Plan

Slide 11 | Curriculum Map 2

17



Target Outcomes: Projected Weekly Time Reclaimed

Grant Proposal Outlines

75% Time Saved

Email Clearing & Catchup

60% Time Saved

Meeting Transcripts & Recaps

85% Time Saved

Donor Trend Spreadsheets

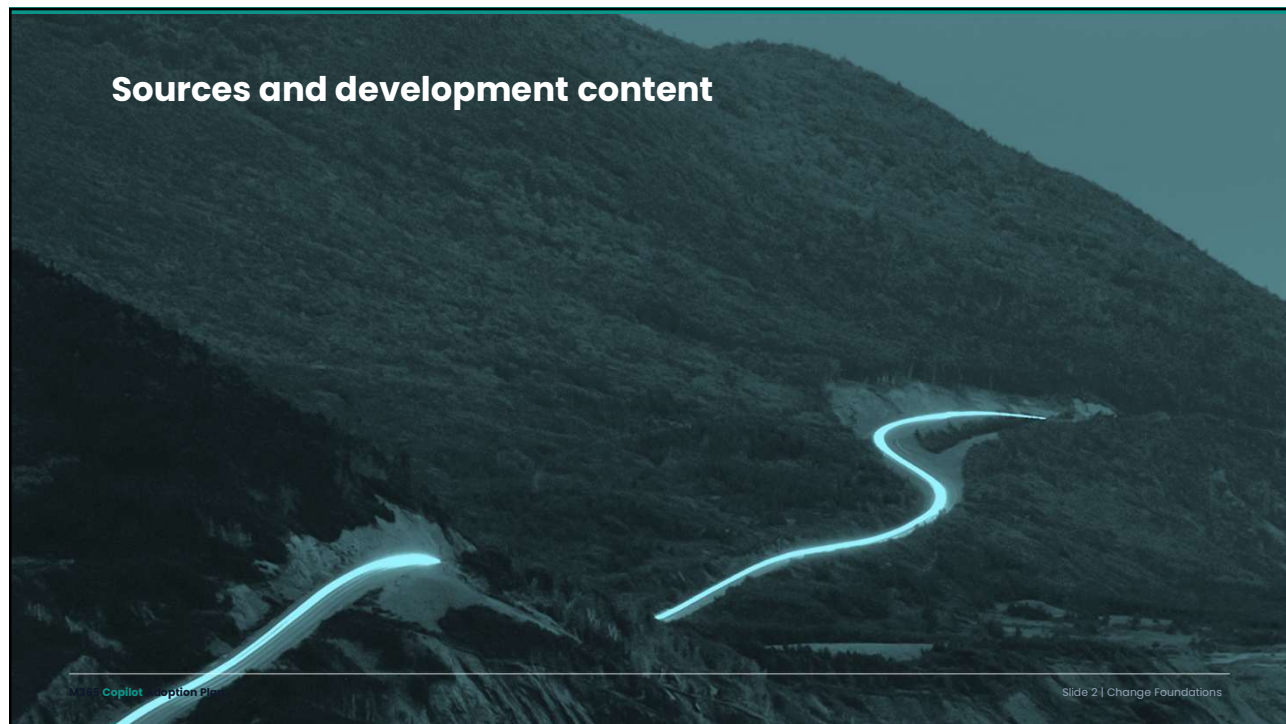
50% Time Saved

Reclaiming these critical administrative hours allows staff to pivot from screen-heavy burnout back to direct community-centered development, safeguarding the human-to-human core of our mission.

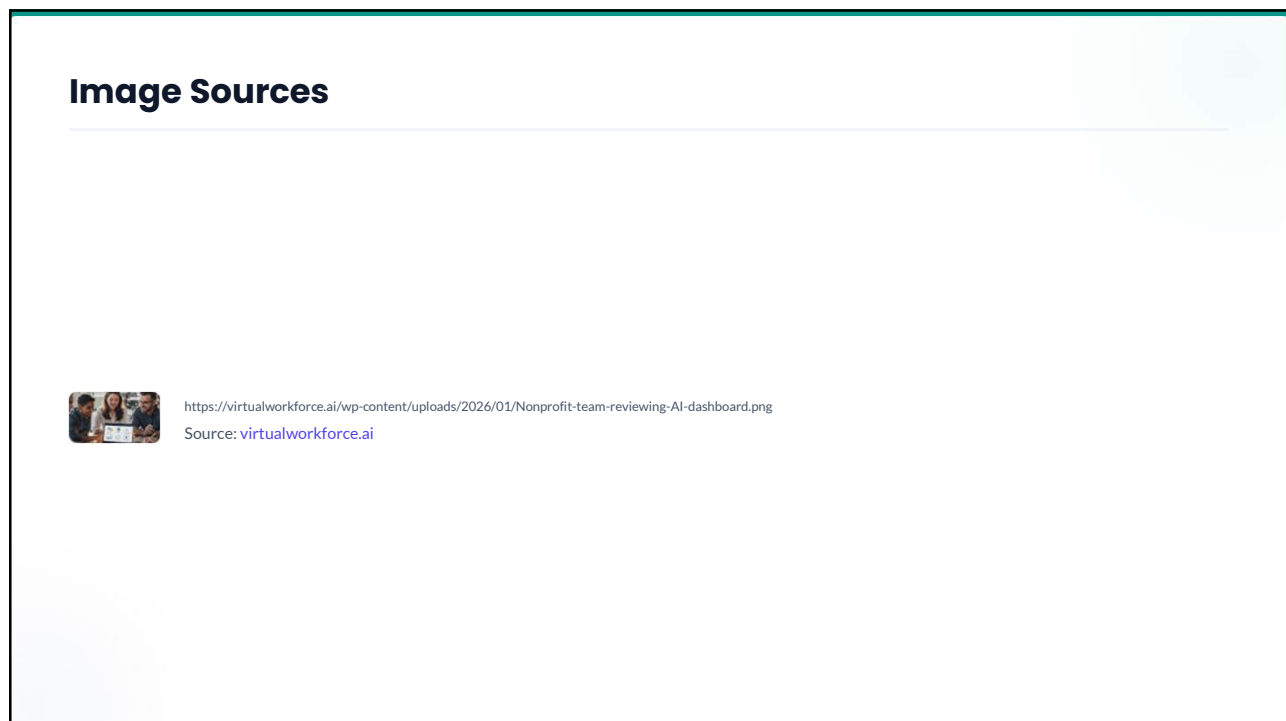
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Slide 12 | Target Outcomes

18



19



20

Learning objectives

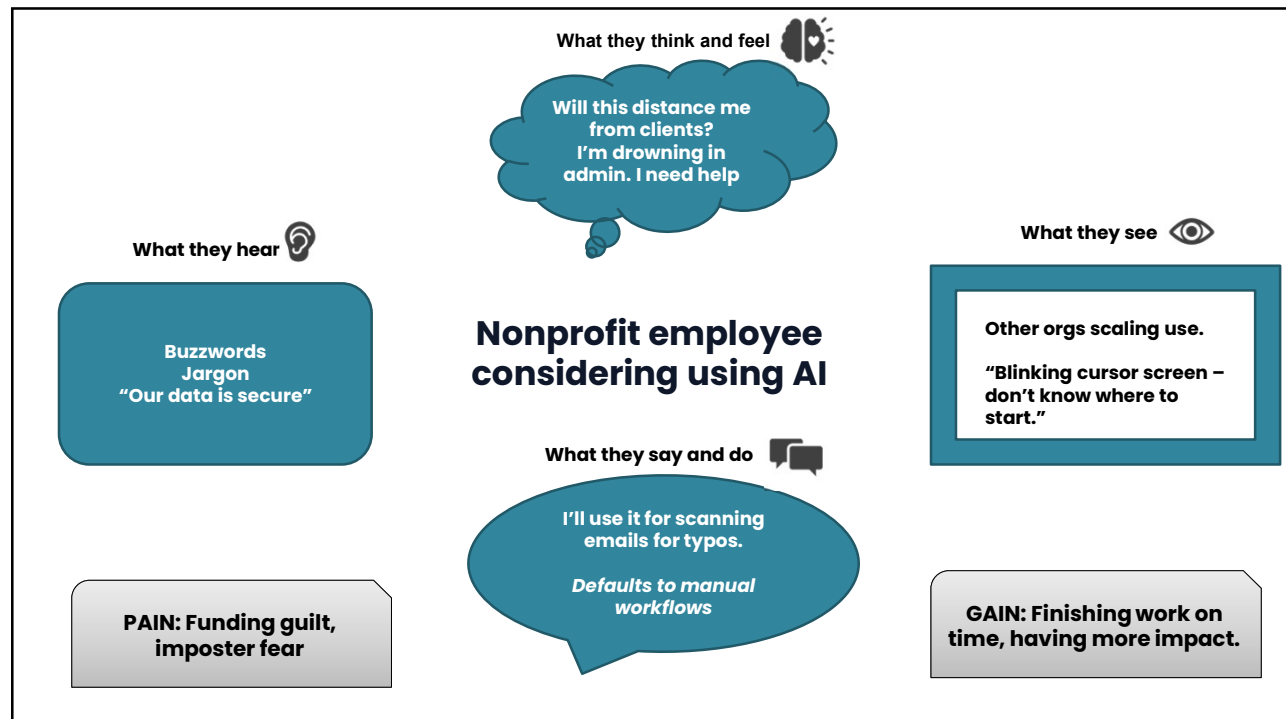
General

1. Identify common areas of hesitation for AI use (nonprofits)
2. Share how Copilot can support mission goals; identify administrative stressors and tasks to delegate to AI.
3. Map daily tedious work; run live summaries on standard program documents to measure time saved.
4. Learn how to identify opportunities to identify, curate, consolidate information across platforms
5. Establish cross-functional peer support; transition feedback loops to internal teams.

Specific

1. Classify organization data using Green/Yellow/Red policies; learn tenant data-isolation boundaries.
2. Identify algorithmic bias; apply human-in-the-loop review checks to preserve authentic client dignity.
3. Locate Copilot options in common tools (Edge, Word, PowerPoint); Identify ways to apply to reduce administrative load.
4. Build customized inputs using the 4-part formula (Role, Context, Constraints, and Target).
5. Learn how to consolidate and curate meeting decisions and info using Copilot in Teams.
6. Upload previous proposals; prompt Copilot to frame new applications in approved language.
7. Sort donor files; highlight trend anomalies without manual formulas or coding.
8. Publish three successful prompts in a shared Teams directory; vote on best-in-role entries.

21



22