

Copilot Evaluator

Decide where Microsoft Copilot is actually worth a pilot before you spend a dollar or a sprint on it.



Copilot can save real time inside Microsoft 365, Dynamics 365, and Power Platform, but it works best when the **use case is clear, the data is reliable, and the risk is manageable.**

Use this evaluator to decide where Copilot can help now, where the process or data needs cleanup first, and what is worth testing in a focused 30-day pilot. Score your top opportunities, keep a human in the review loop, and start where the value is real.

STEP 1 Pick your top five Copilot opportunities

Choose up to five tasks where Copilot, a Copilot feature, or a Copilot Studio agent might help your team. Good candidates share three traits:

<p>01</p> <p>They happen often</p>	<p>02</p> <p>They use information that already exists</p>	<p>03</p> <p>A human can review the result first</p>
<p>Summarizing Customer Service cases, conversations, or knowledge articles in Dynamics 365</p> <p>First-draft Business Central content, including item descriptions, purchasing notes, and customer copy</p> <p>Building or improving Power Automate flows with Copilot</p> <p>A Copilot Studio agent that starts a defined process, such as a request, intake, approval, or service workflow.</p>		<p>Drafting first-pass Sales follow-ups, meeting prep, or opportunity summaries</p> <p>Summarizing Teams meetings into CRM updates or tasks</p> <p>A Copilot Studio agent answering internal questions from approved sources</p>

STEP 2 Score each use case from 1 to 5 in three categories

<p>CATEGORY 1</p> <p>Time saved / week</p> <p>How much time could this realistically save?</p> <ul style="list-style-type: none"> 1 Less than 1 hour 2 1–3 hours 3 4–6 hours 4 7–10 hours 5 More than 10 hours 	<p>CATEGORY 2</p> <p>Quality of inputs</p> <p>How clean, consistent & available is the data Copilot needs?</p> <ul style="list-style-type: none"> 1 Messy data, unclear process, scattered files 2 Some usable data, frequent gaps or conflicts 3 Mostly usable, known cleanup needs 4 Clean inputs, mostly clear process 5 Clean data, clear ownership & permissions 	<p>CATEGORY 3</p> <p>Risk of a wrong output</p> <p>What happens if Copilot gets it wrong?</p> <ul style="list-style-type: none"> 1 High-stakes financial, legal, or safety call 2 Meaningful risk if reviewed too quickly 3 Moderate risk, but review steps are clear 4 Low risk, easy human review 5 Very low — drafting, summarizing, organizing
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Score your five use cases

= STRONG PILOT CANDIDATE

11+

USE CASE write in your top five	TIME circle 1-5	INPUTS circle 1-5	RISK circle 1-5	TOTAL
EX Summarize Customer Service cases	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	13 ★ PILOT
_____	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
_____	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
_____	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0
_____	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0

Score each use case 1-5 in all three categories, then add them up. A total of 11+ is usually a strong pilot candidate. Print this sheet and circle your scores by hand.

STEP 4 Not ready yet?

Copilot is not a shortcut around broken processes or bad data. These rarely make good first pilots:

- ✗ High-stakes financial judgment
- ✗ Legal, compliance, or policy decisions without expert review
- ✗ Cleanup of bad master data
- ✗ Complex inventory, production, or supply-chain decisions
- ✗ Workflows nobody owns, or that change every time
- ✗ Automations with unclear approval rules
- ✗ Reports leadership already does not trust
- ✗ Replacing a process owner or subject-matter expert

STEP 5 Choose your pilot

IF TWO OR MORE SCORE 11+

Run a focused 30-day pilot

Pick the highest-scoring use case. Before you start, define:

- The task Copilot supports
- The users involved
- The source data / files
- M365, D365, Chat, or agent
- The output it creates
- The human review step
- Expected time savings
- Your 30-day measure

IF NOTHING SCORES 11+

Fix the blocker first

Clean the data, clarify the workflow, define ownership, review permissions, and document the review step. Then re-evaluate in 90 days.

Ready to turn your Copilot idea into something real?

TruNorth Dynamics helps teams find practical use cases, prepare the right data, and build low-risk pilots across Dynamics 365, Power Platform, Microsoft 365, and Business Central.

LET'S TALK

Talk Through Your Copilot Opportunity

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- Identify your best first Copilot use case
- Build your first Copilot Studio agent
- Use Copilot inside apps your team already relies on
- Clean up data before launching an AI pilot
- Connect Copilot to the right business processes
- Measure whether the pilot is worth expanding