



M365 Adoption Workshop: A Recap

Hosted by: ILTA Events Committee

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Overview

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In an era where IT teams are expected to do more with less—and do it faster, smarter, and more strategically—driving technology adoption across a law firm requires more than rolling out tools. It demands relationship-building, data literacy, and change management. To help legal technology professionals navigate this challenge, ILTA convened an interactive virtual workshop focused on Microsoft 365 adoption and the strategies that make it stick.

This 4-hour event brought together IT professionals, knowledge management leaders, training staff, and legal operations practitioners from across the legal industry. Guided by subject matter experts from Microsoft, K&L Gates, Harbor Global, and Littler, participants worked through real-world challenges and left with a tangible action plan they could bring back to their organizations.

A massive thank you to all of our participants, SMEs, the team that organized and facilitated the workshop, and the ILTA staff who helped make this a successful experience for all!

Workshop Flow & Structure

Purpose:

To equip legal technology professionals with practical strategies, tools, and frameworks for driving Microsoft 365 adoption—and to give each participant a customized action plan they could implement within 90 days.

Structure:

The 4-hour workshop was organized into four sequential parts, each building on the last:

- **Part 1: Business Relationship Management (BRM)** — Framing the challenge of IT-business alignment and exploring how BRM can bridge the gap
- **Part 2: M365 Adoption Score** — A hands-on walkthrough of the Adoption Score dashboard and how to interpret and act on its data
- **Part 3: Organizational Messaging & Champions Network** — Two parallel deep dives on driving change through communications and peer-to-peer learning
- **Part 4: Action Plan Development** — Structured breakout sessions where each participant drafted a personalized 90-day adoption roadmap

Each part included a presentation by an expert speaker, interactive polls, and a breakout session with a dedicated facilitator. The workshop culminated in participants sharing highlights from their action plans, with cross-firm peer feedback offered in real time.

What Follows in This Report:

This report is organized into the following sections:

- **Top 5 Takeaways** — The most important themes that emerged across the full day, distilled into five actionable principles for legal technology professionals.
- **Session Summaries** — A recap of each workshop segment, including the key frameworks, strategies, and insights presented by our subject matter experts, along with highlights from breakout room discussions.

Please note: The following recap summarizes the output of a 4-hour interactive workshop. Breakout room discussions represent a range of participant experiences and perspectives and are not exhaustive. The action plans developed are intended to serve as starting points for attendees and inspiration for peers who face similar challenges.

Top 5 Takeaways

1. BRM IS THE FOUNDATION OF SUCCESSFUL ADOPTION

Every session reinforced the same message: technology doesn't drive change—relationships do. Without trust between IT and the business, even the best tools will sit unused. Start by investing in relationships before deploying solutions. Attend practice group meetings, map your internal allies, and measure maturity over time.

Takeaway: *Invest in relationships before deploying solutions. BRM is not a role—it's a mindset.*

2. THE ADOPTION SCORE IS A STARTING POINT, NOT A VERDICT

Participants consistently reported low Meeting scores—not because their firms have bad meeting habits, but because law firm policies prevent the behaviors Microsoft uses to calculate that score. Don't panic at a low number. Understand how it's calculated, level-set it against your firm's reality, and focus on categories where you have real influence.

Takeaway: *Don't chase the score—understand what it measures and focus where you have real influence.*

3. PEER-TO-PEER LEARNING OUTPERFORMS MANDATES EVERY TIME

Whether through a formal Champions Network or informal peer spotlights, participant after participant confirmed that people adopt technology when they see a colleague use it effectively—not when IT tells them to. Build communities that make learning social, fun, and relevant to daily work. Start small, prove value, and let it grow organically.

Takeaway: *Build communities that make learning social, relevant, and peer-driven. Start small, scale with success.*

4. SPECIFICITY IN GOAL SETTING IS EVERYTHING

Vague goals produce vague results. The action planning session surfaced this clearly: “increase Teams use” is not an action. “Launch two pilot Teams channels with the litigation group by May 1st” is. Before leaving any planning session, push yourself to name the exact behavior you’re trying to change, who owns it, and how you’ll know it worked.

Takeaway: *Name the exact behavior you want to change, assign ownership, and define how you’ll measure success.*

5. ROI STARTS WITH THE LICENSE COST CONVERSATION

Multiple participants noted that one of the most powerful ways to get leadership buy-in for adoption work is to reframe it as license ROI. Firms are spending significant amounts on E3 and E5 licenses—and if employees are only using PowerPoint and email, that’s a business problem, not just a technology problem. Connecting adoption metrics to license utilization can unlock executive attention and investment.

Takeaway: *Reframe adoption as license ROI to unlock executive attention and investment.*

NOTE: *AI was leveraged throughout the coordination of this event and the creation of this recap. Several of these takeaways were informed by AI-assisted synthesis of participant notes, facilitator guides, and session transcripts.*

Part I: Business Relationship Management

Summary & Key Themes

Presented by Mary Weatherbee, Senior Business Relationship Manager at K&L Gates, the opening session established the foundational challenge facing IT teams in law firms: the persistent divide between IT and the business. The session drew a clear picture of the reactive mode many IT teams find themselves in—fulfilling requests without understanding the underlying problem—and introduced Business Relationship Management (BRM) as a discipline that moves IT from a service provider to a strategic partner.

Mary introduced the Relationship Maturity Model, which maps the current state of IT-business relationships on a five-level continuum: from reactive and ad hoc at the bottom, through service provider and collaborative, to strategic partner at the top. A live poll revealed that no attendees identified their firm as a Level 5, reflecting a candid and realistic picture of where the industry stands today. The session emphasized that movement up this model is slow, requires consistent relationship-building, and is never truly finished—a gap can reopen any time people, priorities, or technology change.

Participants were encouraged to reflect on four BRM “partnering mindsets” that can be applied to any interaction: Connector, Cultivator, Explorer, and Investor. Each mindset asks a different question: Are we getting the right people in the room? Are we improving what we have before seeking something new? Are we imagining the art of the possible? Are we sharing ownership in outcomes?

Breakout Discussion Highlights

- Most firms reported that BRM happens in an informal, ad hoc way—often through individuals who informally act as IT liaisons without the formal title or structure.
- A common frustration: the business still tends to arrive at IT with a predefined solution rather than a problem to solve collaboratively. Progress is happening, but slowly.
- Small, consistent gestures—attending practice group meetings, doing deskside visits, sharing roadmaps—were cited as the most effective ways to build trust over time. One participant described this as “donut diplomacy.”
- A practical tip shared by Perla Ramirez: document every “friend of IT” in each department as a starting point for formalizing relationship networks.
- The session closed with a commitment to explore a dedicated BRM community within ILTA—watch for an announcement.

Resources & Technology Mentioned

- **Viva Engage:** Used for IT-business community building and informal engagement
- **Copilot Corner:** Internal community concept for surfacing AI use cases
- **BRM Institute:** Referenced as a professional framework and certification resource

Part 2: M365 Adoption Score

Summary & Key Themes

The second session featured two speakers: Amy Ceurvorst from Microsoft Digital, who shared how Microsoft drives adoption internally across its 300,000+ employees, and Jeffrey Roach, Managing Director at Harbor Global, who provided a live walkthrough of the M365 Adoption Score dashboard.

Amy framed Microsoft's internal approach around two core principles: drive change with purpose and measure what matters. She walked through Microsoft's layered change management model—from enterprise-wide messaging, to organization-specific content, to geography and culture considerations, to the most powerful level: peer-to-peer learning. She introduced the concept of the CHAMPS community (now 10,000+ members at Microsoft) and shared an example called "Camp Copilot," a gamified, 3-week global learning initiative delivered by champions that resulted in a measurable increase in AI assistance scores.

Amy also drew an important distinction: usage (did someone open the tool?) versus adoption (has it changed their behavior and workflow?). It's adoption—not usage—that drives business value.

Jeffrey then walked attendees through the Adoption Score directly in the M365 Admin Center, covering the scoring categories: Communication, Meetings, Content Collaboration, Teamwork, Mobility, and AI Adoption. Note: As of January–February 2026, Microsoft updated the Adoption Score—the maximum score is now 600 and the Technology Experiences category has been retired. He urged participants not to panic at low scores in areas that don't reflect firm-specific workflows (e.g., Meeting scores are almost always low in law firms because policies often prohibit recording and transcription). Instead, he advised participants to look beneath the number, understand how each score is calculated, and focus on the areas where they have the most influence.

Live chat participation during this session generated a real-time benchmark: Communication scores ranged from 61 to 85+, while Meeting scores across the group ranged from 4 to 37—illustrating just how low the baseline is and why context matters.

Breakout Discussion Highlights

- Meeting scores were consistently low across firms, often because law firm policies prevent recording, AI notes, and transcription—behaviors that directly affect the score.
- Several attendees noted that their highest-scoring category was either Communication or AI Adoption, the latter reflecting active Copilot rollouts.
- A recurring suggestion: create law-firm-specific benchmarks for adoption scores, rather than comparing to a general industry average. Multiple facilitators noted this as a potential future ILTA survey question.
- Participants discussed how group-level analytics (available when Azure AD integration is enabled) can make the data more actionable—helping identify high-performing departments and sparking healthy competition.
- The consensus was that the Adoption Score is most valuable not as a report card, but as a tool for identifying where to focus training and communications.

Resources & Technology Mentioned

- **M365 Adoption Score:** Available in the M365 Admin Center; tracks Communication, Meetings, Content Collaboration, Teamwork, Mobility, and AI Adoption (max score updated to 600 as of Jan–Feb 2026; Technology Experiences category retired)
- **Roles to Request:** User Experience Success Manager (least privileged) or Report Reader for adoption-focused staff
- **Group-Level Analytics:** Requires Azure AD integration; enables comparison across departments, geographies, and practice groups
- **Microsoft Learn:** <https://learn.microsoft.com/en-us/microsoft-365/admin/adoption/adoption-score>

Part 3: Organizational Messaging & Champions Network

Summary & Key Themes

Organizational Messaging — Summary & Key Themes

Skye Lyles, Senior Content PM at Microsoft (accompanied by Susanne Smith, Principal Content PM), presented how Microsoft's internal communications team uses Organizational Messages to drive employee behavior change at scale. Org Messages are lightweight, in-context notifications that appear in Teams, the Windows Taskbar, Windows Notification Center, or Windows Spotlight—without relying solely on email.

Key insights from the session included the importance of treating org messages like UI writing rather than email copy: a tight character limit forces clarity, a single headline, and one focused call to action. The team has found that more conversational, human-sounding language (including carefully chosen emojis) consistently outperforms corporate messaging. One campaign achieved an 80% view rate for an org message compared to 37% for a traditional email.

Best practices emphasized: use org messages as a complement to broader communication strategies (not a standalone channel), be selective and intentional about when to use them, and always consider launching a brief awareness campaign before introducing org messages for the first time.

Champions Network — Summary & Key Themes

Travis Pirtle, Senior Manager at Littler, presented a compelling case study on building and sustaining a Champions Network to drive M365 adoption without top-down mandates. Travis has built champions programs at two major organizations, and at Littler, the network has grown to approximately 160 members across departments.

Travis framed his approach around three C's: Community, Cadence, and Content. Champions are not IT experts—they are curious, motivated individuals who want to share how technology improves their own workflow. They receive early access to new features, participate in monthly calls (with recorded sessions, show-and-tell spotlights, back-to-basics reviews, and themed sessions), and get a hands-on sandbox to experiment safely.

Travis shared impressive results: when rolling out Microsoft Teams at Commerce Bank, the Champions Network drove a 96% adoption rate within six months. For Yammer (now Viva Engage), it achieved an 87% adoption rate in the first month. At Littler, the same playbook was extended to Copilot, with separate channels for legal and corporate staff to address different workflows.

Breakout Discussion Highlights

- **Org Messaging:** Attendees raised the importance of a brief awareness campaign before launching org messages to avoid confusion or security concerns about unexpected notifications.
- **Champions Network:** Participants discussed the value of rebranding “training” as “learning” to change the feel of adoption efforts and make them more approachable and peer-centered.
- Several attendees noted success stories from using the Champions Network to consolidate tools (e.g., replacing Webex with Teams), with cost savings serving as a compelling ROI story for leadership.
- Champions tend to grow organically—when individuals see strong results, they want to join and replicate them. Starting small (one to two departments) and scaling based on success was a recurring theme.
- Incentive programs (such as designated “Development and Innovation” hours for associates) were cited as one way to encourage participation in champion activities.

Resources & Technology Mentioned

- **Org Messages:** Available in M365 Admin Center; surfaces in Teams, Taskbar, Notification Center, Windows Spotlight
- **Viva Engage:** Recommended platform for Champions community-building and peer communication
- **Microsoft Adoption Hub:** “Become a Champion” resources available at <https://adoption.microsoft.com/en-us/>
- **Gamification:** Badges, themed sessions, polls, and sandbox environments used to sustain engagement

Part 4:

Action Plan Development

Summary

The final hour of the workshop was dedicated to independent action planning. Attendees broke into small groups, each with a facilitator, and used a structured template to draft their own 90-day M365 adoption roadmap. The template guided participants through four areas: goal setting (tied to a specific business outcome and M365 behavior), stakeholder identification, near-term actions (two to three concrete commitments within 90 days), and success metrics.

Facilitators were asked to push for specificity: broad goals like “increase Teams use” were redirected to concrete actions like “launch two pilot Teams channels with the litigation practice group.” Participants were reminded that these plans are drafts—the goal is progress, not perfection.

Sample Action Plan Themes from Breakout Rooms

- Increasing Teams channel activity by creating a social “water cooler” channel and introducing the Praise feature to build platform engagement—then measuring response time shifts as a behavioral signal.
- Establishing Microsoft Purview and sensitivity labeling as a prerequisite to safely enabling SharePoint Online and Copilot, with a goal of identifying an internal data governance champion.
- Attending one to two practice group meetings per quarter to demonstrate a 15-minute AI use case, supported by an SME group to handle specific questions.
- Using the Adoption Score’s group-level analytics to identify high-performing departments and using their results to spark adoption conversations with underperforming groups.
- Extending the Champions Network playbook to Copilot by creating separate attorney and corporate channels to address the distinct workflows of each group.

Action Plan Framework

Phase	Key Activities
1. Goal Setting	Define a specific business outcome tied to M365 behavior change. Connect the goal to the Adoption Score. Articulate how it advances IT as a strategic partner.
2. Stakeholder Mapping	Identify who owns the business outcome. Determine where IT needs a stronger relationship. Anticipate sources of resistance and address them proactively.
3. 90-Day Roadmap	Commit to two to three specific, realistic actions. Assign ownership for each action. Identify required approvals or dependencies.
4. Metrics	Define both quantitative KPIs (Adoption Score improvements, ticket volume, training attendance) and qualitative measures (narratives, feedback surveys, stakeholder quotes).
5. Review & Refine	Plan a checkpoint at 30 days and a full review at 90 days. Adjust based on feedback and early data. Report progress to leadership using the language of business outcomes.

Thank You to Our Subject Matter Experts



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