Microsoft

Copilot for Microsoft 365
Your AI assistant at work

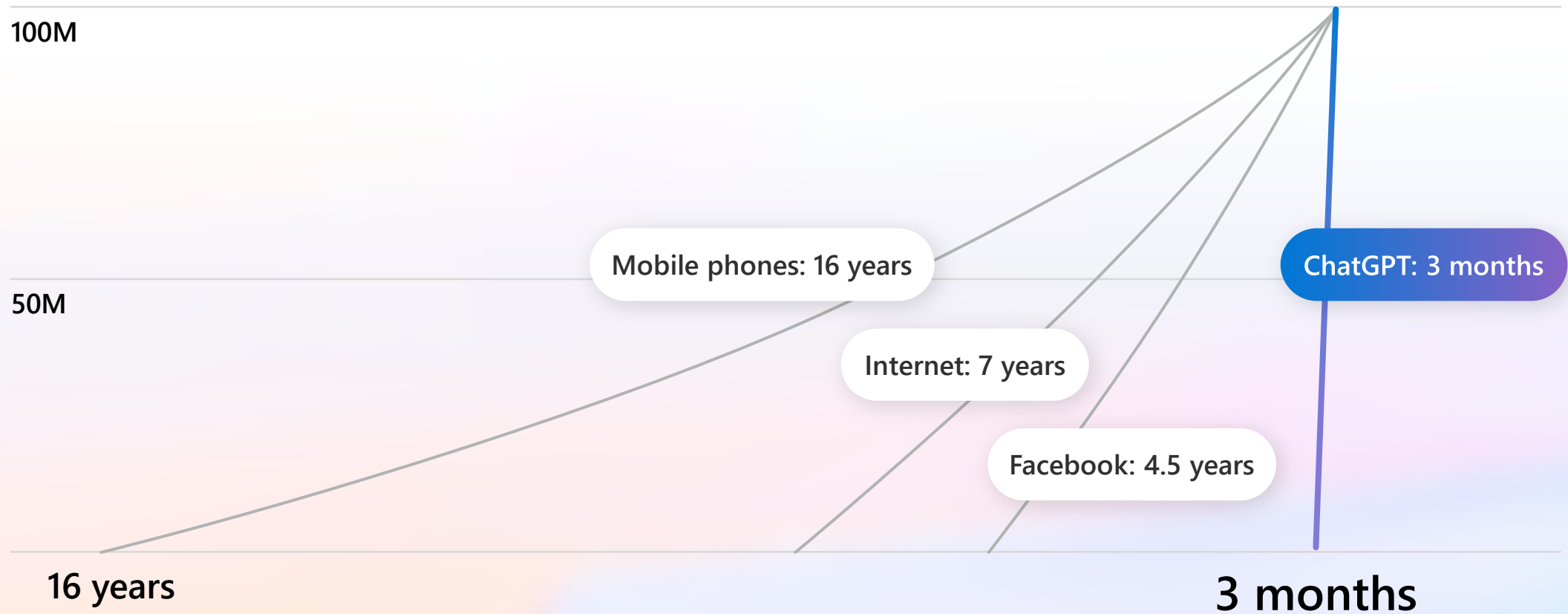Scott Brunton – Solutions Engineer, Arrow ECS

The world
is changing

Industries are transforming rapidly

The drivers for economic growth are evolving

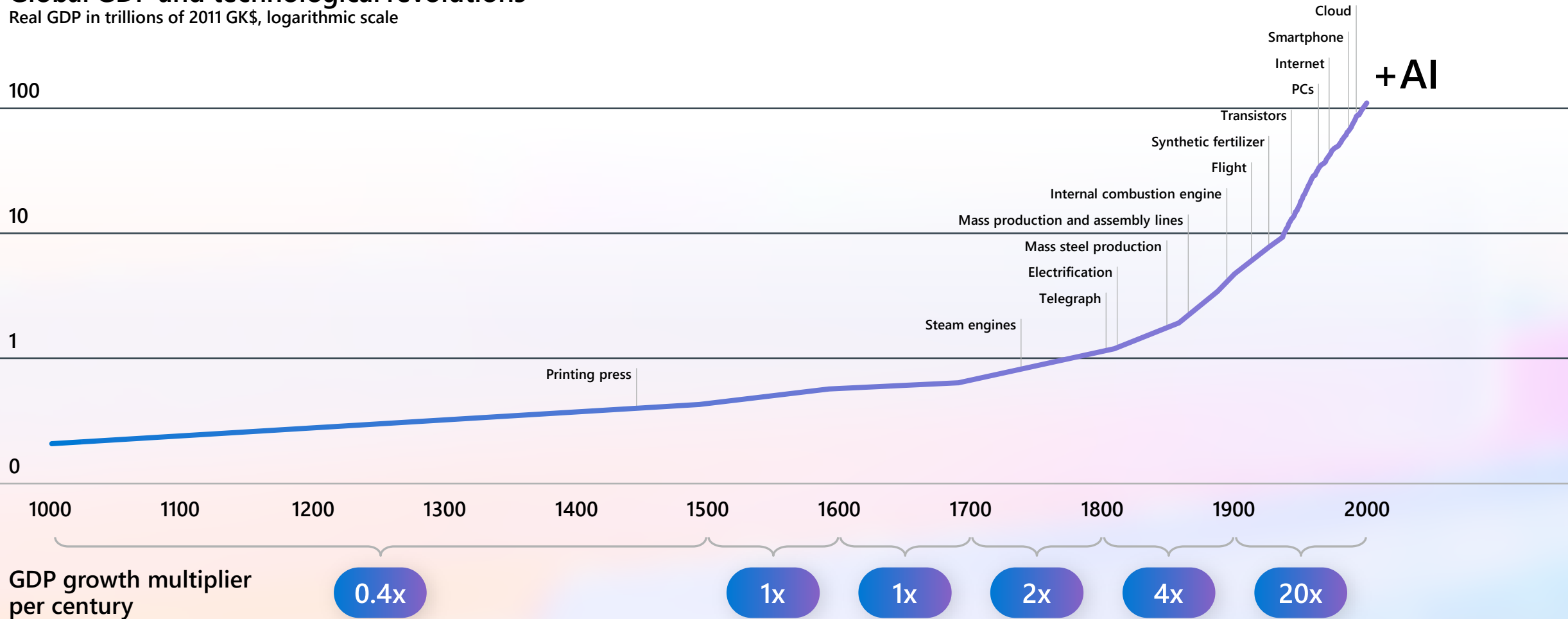Technology is at an inflection point

Generative AI technology is here

Time to reach 100M users

100M

Mobile phones: 16 years

50M

Internet: 7 years

Facebook: 4.5 years

ChatGPT: 3 months

16 years

3 months

And the impact is real

Global GDP and technological revolutions
Real GDP in trillions of 2011 GK$, logarithmic scale

Source: Maddison Project, Ourworldindata

Microsoft 365 Early Access Program survey results

All Up Value

70% are more productive

68% improved the quality of their work

37% feel more fulfilled at work

71% spend less time on mundane tasks

Value by Workflow

64% spend less time processing email

75% spend less time searching for information in their files

84% find it easier to take action after a meeting

3.8x faster at catching up on missed meetings

85% get to a good first draft faster

Value by Role / Function

79% reduced their administrative workload

68% keep their CRM up to date with less effort

67% spend more time with their customers

64% better personalize customer engagements

How much is Copilot worth to users?

77% choose Copilot over free lunch

77% would not want to go back to working without Copilot

30% say access to Copilot would influence their choice of employer

A copilot for every Microsoft Cloud experience
Amplify human ingenuity with the AI-powered future of work

Every employee

Microsoft 365 Copilot
Works alongside you in the apps you use every day.

Learn more >

Bing Chat Enterprise
AI-powered chat with commercial data protection.

Learn more >

Windows Copilot
The first centralized AI assistance on a platform.

Details coming soon

Functional business roles

Microsoft Sales Copilot
Maximize productivity with the AI assistant designed for sellers.

Learn more >

Dynamics 365 Copilot
Turbocharge your workforce with a copilot for every job role.

Learn more >

Security and IT professionals

Microsoft Security Copilot
Defend at machine speed with Microsoft Security Copilot.

Learn more >

Developers and data professionals

GitHub Copilot
Increase developer productivity to accelerate innovation.

Learn more >

Power Platforms Copilot
Imagine it, describe it, and Power Platform builds it.

Learn more >

Copilot for Microsoft Fabric
Infusing the power of large language models into Power BI.

Learn more >

Copilot for Microsoft 365

Your AI assistant at work

Copilot for Microsoft 365

Natural Language

Large Language Models + Microsoft Graph - Your Data - + Microsoft 365 Apps + The Internet

Copilot for Microsoft 365

Built on Microsoft's comprehensive approach

Security + Compliance + Privacy + Responsible AI

Microsoft Cloud
runs on trust

Your data is **your data**

Customer data is **not** used to train the foundation AI models.

Your data is **protected** by comprehensive enterprise compliance and security controls

Microsoft 365 Copilot Perquisites
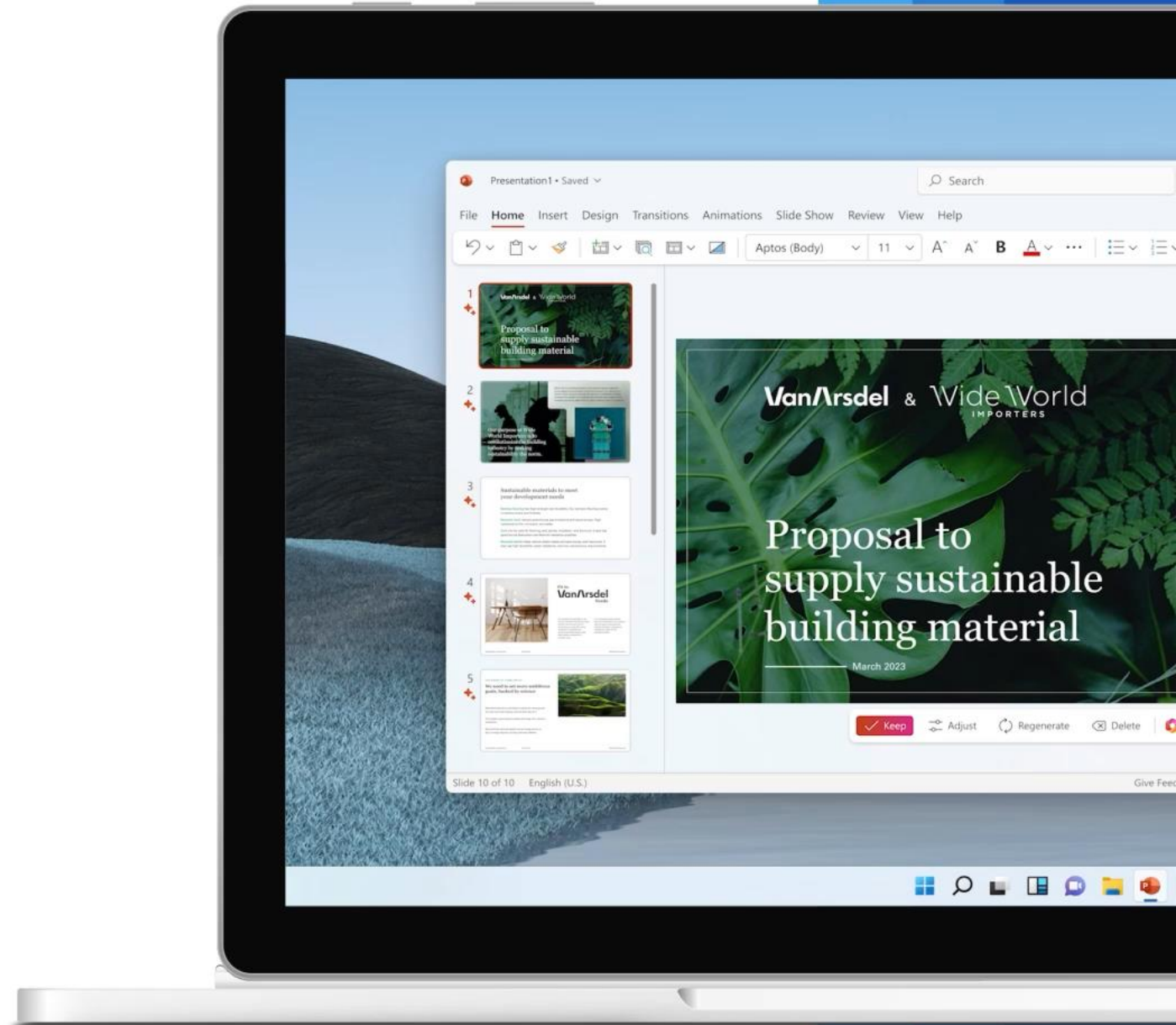
Microsoft 365 is foundational to being AI ready:

- **Microsoft 365 Business Standard/Premium**
- **Office 365 E3/E5**
- **Microsoft 365 E3/E5**

Minimum requirements:

- **Deploy M365 Apps for Enterprise**
- **Update Channel: Monthly Enterprise or Current Channel**

Unlock productivity, unleash creativity, create more value

HR

Sales

Marketing

Finance

IT

A lot goes into closing the deal

Sellers have a lot to manage:

- Prospecting and lead generation
- Sales presentations and demos
- Customer relationships
- Negotiating and closing
- Objection handling
- Competing in market
- Collaboration with marketing
- Continuous learning
- Collaboration with other sellers
- Software utilization
- Achieving sales targets
- Using time effectively

A day in the life of a Sales Lead

8:00 AM

Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.

Microsoft Copilot

Summarize all of the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 AM

Cassandra commands Copilot to create a message to confirm the meeting.

Copilot in Outlook

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 AM

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.

Copilot in Excel

Show all data insights.

4:00 PM

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.

Copilot in Teams

Summarize this chat and make sure to include the key points and who made them.

2:00 PM

It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.

Copilot in Teams

What questions were asked during the meeting that have not been answered?

11:00 AM

Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.

Copilot in PowerPoint

Add a slide based on [copy in annual report summary]

Cassandra is a sales lead at Contoso

The AI-powered organization

01

Foundational productivity

Get AI-ready checklist

✓

Standardize onto Microsoft 365

Enrich your Copilot experience by getting your data into the Microsoft 365 Cloud.

✓

Protect sensitive business data

Protect internal data from accidental leakage. Ensure users have the right access to the right internal content.

✓

Empower employees with secure, AI-powered tools

Start using secure AI-powered web chat for the workplace with Bing Chat Enterprise.

Enrich Copilot for Microsoft 365

User interactions with Copilot will be enriched by migrating to and standardizing on the Microsoft 365 ecosystem.
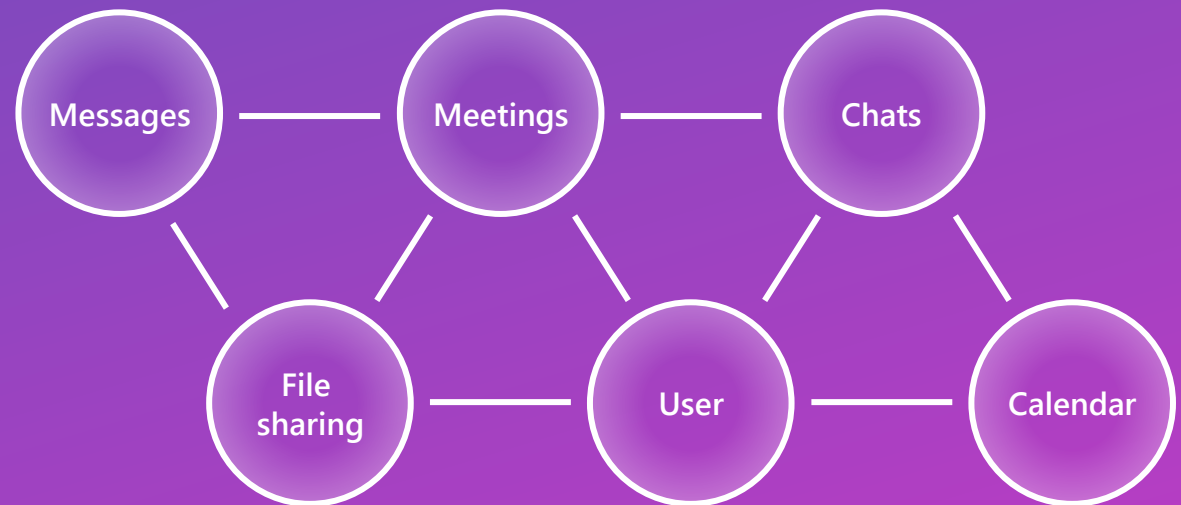
Documents and Information stored on-premise/3rd party solutions cannot be accessed by Copilot for Microsoft 365.

✓ Consolidate apps and software to one solution

✓ Migrate on-premises servers to cloud

✓ Remediate legacy file shares. Use SharePoint/ OneDrive for file storage and sharing
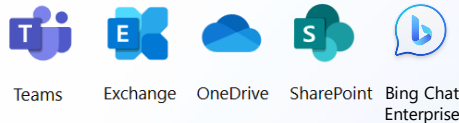
Microsoft Graph

Messages — Meetings — Chats

File sharing — User — Calendar

Standardize onto Microsoft 365

Microsoft 365 Business Standard

For up to 300 seats
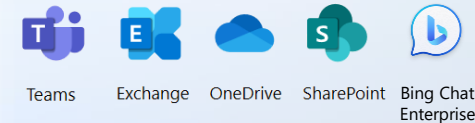
Microsoft 365 Business Premium

Cloud services

Teams | Exchange | OneDrive | SharePoint | Bing Chat Enterprise

Desktop apps

Outlook | Word | Excel | PowerPoint | Publisher | Access

$12.50 per user/month

Cloud services

Teams | Exchange | OneDrive | SharePoint | Bing Chat Enterprise

Desktop apps

Outlook | Word | Excel | PowerPoint | Publisher | Access

Comprehensive security

Intune | Azure Information protection | Azure AD Premium | Windows Virtual Desktop | Microsoft Defender

$22 per user/month

Microsoft 365 Business Standard, Business Premium, E3 and E5 are prerequisites for Microsoft 365 Copilot.

Price is subject to change based on subscription term, currency and region.
Not all features/product logos shown.

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📝 **Foundational productivity**

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Data Governance Considerations for Copilot

Microsoft Copilot for Microsoft 365 has the capability to access data stored within your Microsoft 365 tenant, including mailboxes in Exchange Online and documents in SharePoint or OneDrive.

Exposing sensitive data
- Unauthorised users accessing sensitive data/information
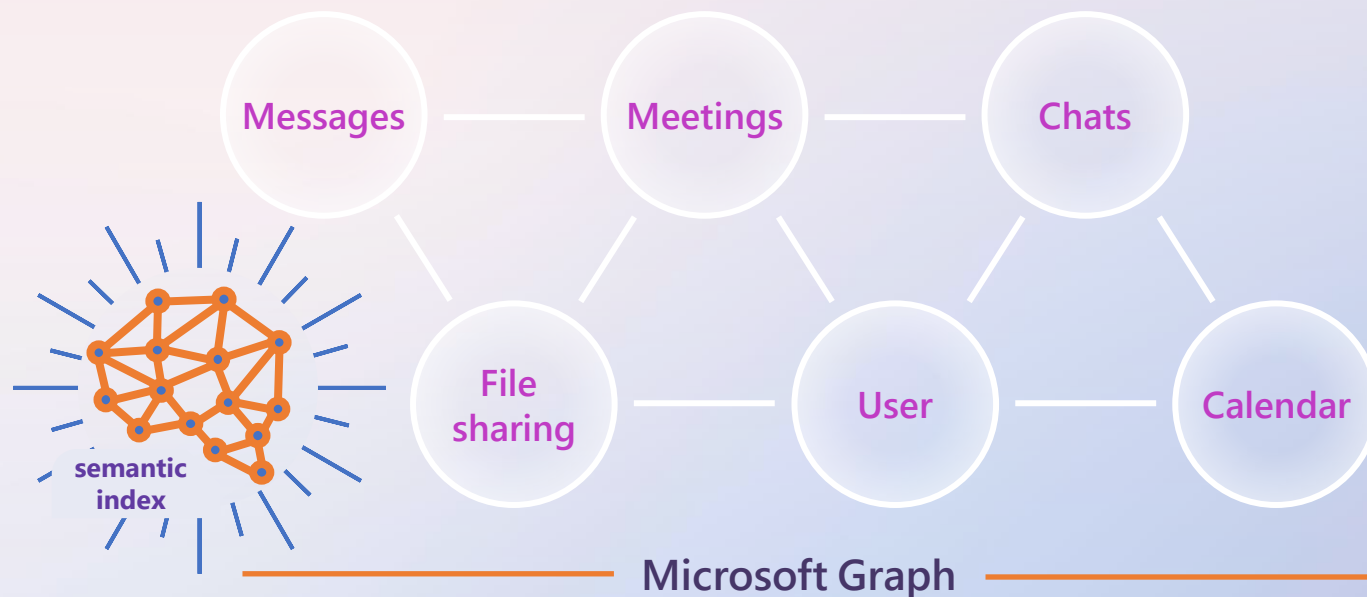- Insider risk

Sensitive data exfiltration
- Local saves/share with unauthorized users internally or externally

Threat actors
- Easier data access and lateral movement with Copilot

Know Your Data - Challenge

Classification is the process of identifying and labeling content, to get a better understanding of your data Landscape.

- Who Owns my data?
- What Type Of Data?
- Where is My Data?
- Why is it A Risk?
- How can I Classify Data?
- How Can I See What Happens ?

What is a **sensitive information type?** Its Defined by a Pattern that can be identified as a regular expression.

- Example of such a type is a Credit Card Number, Driving License etc

- Microsoft includes over 100 built-in types

- You can also create your own **"Trainable Classifiers"**

- **Trainable Classifiers** are more unique to your organization, like contracts or invoice records etc.

- **Labels,** these are thought of a a stamp on a document. e.g. "Confidential or Private"

Understanding Microsoft Features with CoPilot

	Microsoft 365 E5 + Microsoft 365 Copilot or Office 365 E5	Microsoft 365 E3 + Microsoft 365 Copilot	Microsoft 365 E5 Compliance + Copilot[1] Microsoft 365 E5 eDiscovery & Audit + Copilot[1]	Microsoft 365 E5 Compliance, Microsoft 365 E5 eDiscovery and Audit, Office 365 E5/A5/G5	Microsoft Office 365 E3	Microsoft 365 Business Standard	Microsoft 365 Business Premium
eDiscovery (Premium)	Yes	No	Yes	Yes	No	No	No
Premium search for Copilot interactions	Yes	No	Yes	No	No		
eDiscovery content search, legal hold, export search results for Copilot interactions	Yes	Yes	Yes	No	No	No	No – Can only Run Content Search
eDiscovery (Standard) for sites and files	Yes	Yes	Yes	Yes	Yes	No	Yes
eDiscovery (Standard) for email	Yes	Yes	Yes	Yes	Yes	No	No
Sensitivity Labelling	Yes - Automatic	Yes - Manual	Yes - Automatic	Yes - Automatic	No	No	Yes - Manual

The AI-powered organization

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📝 **Foundational productivity**

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Understanding the AI options

AI adoption

	Microsoft Copilot **Personal**	Bing Chat Enterprise **Work**	Microsoft 365 Copilot **Work**
Availability	Available now	**Available now** in Business Standard/Premium, E3/E5	GA in 2024 Business Standard/ Premium and E3/E5 are prerequisites
GPT Large Language Model	✓	✓	✓
AI-powered web search, answers, and content generation	✓	✓	✓
Commercial data protection		✓	✓
Microsoft 365 enterprise security, compliance, and privacy			✓
Microsoft 365 Graph (content and context)			✓
Microsoft 365 apps			✓

The art and science of prompts

Get the most out of Copilot and avoid common pitfalls by learning what to do and what not to do when writing prompts.

Do's

Be clear and specific. Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

Keep it conversational. Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.

Give examples. Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

Ask for feedback. Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.

Check for accuracy. Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

Provide details. Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

Don'ts

Give conflicting instructions. Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.

Check for accuracy. This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

Be vague. When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.

Use slang, jargon, or informal language. This may cause Copilot to give low-quality, inappropriate or unprofessional responses.

Preparing for the era of AI

What are your organization's **goals** for using AI?

What are your organization's **pain points** that AI can address?

What are your organization's **current capabilities** in terms of AI?

Does your organization have a **data strategy** in place?

Does your organization have the necessary **infrastructure and resources** to support AI initiatives?

Microsoft 365 | Thank You!