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Unleashing the Power of Copilot for Microsoft 365

AGENDA

1	Introduction
2	Learning More
3	Technical Readiness & Scenarios
4	Success Through Adoption
5	Q & A

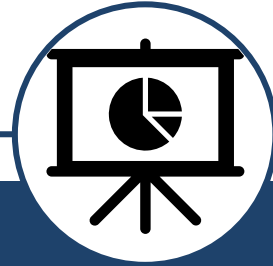# Learning More about Copilot for Microsoft 365

Juan Garcia

What is Copilot for Microsoft 365?

Unleash Creativity

Learning how to interact with Copilot will help you create content faster and more efficiently.
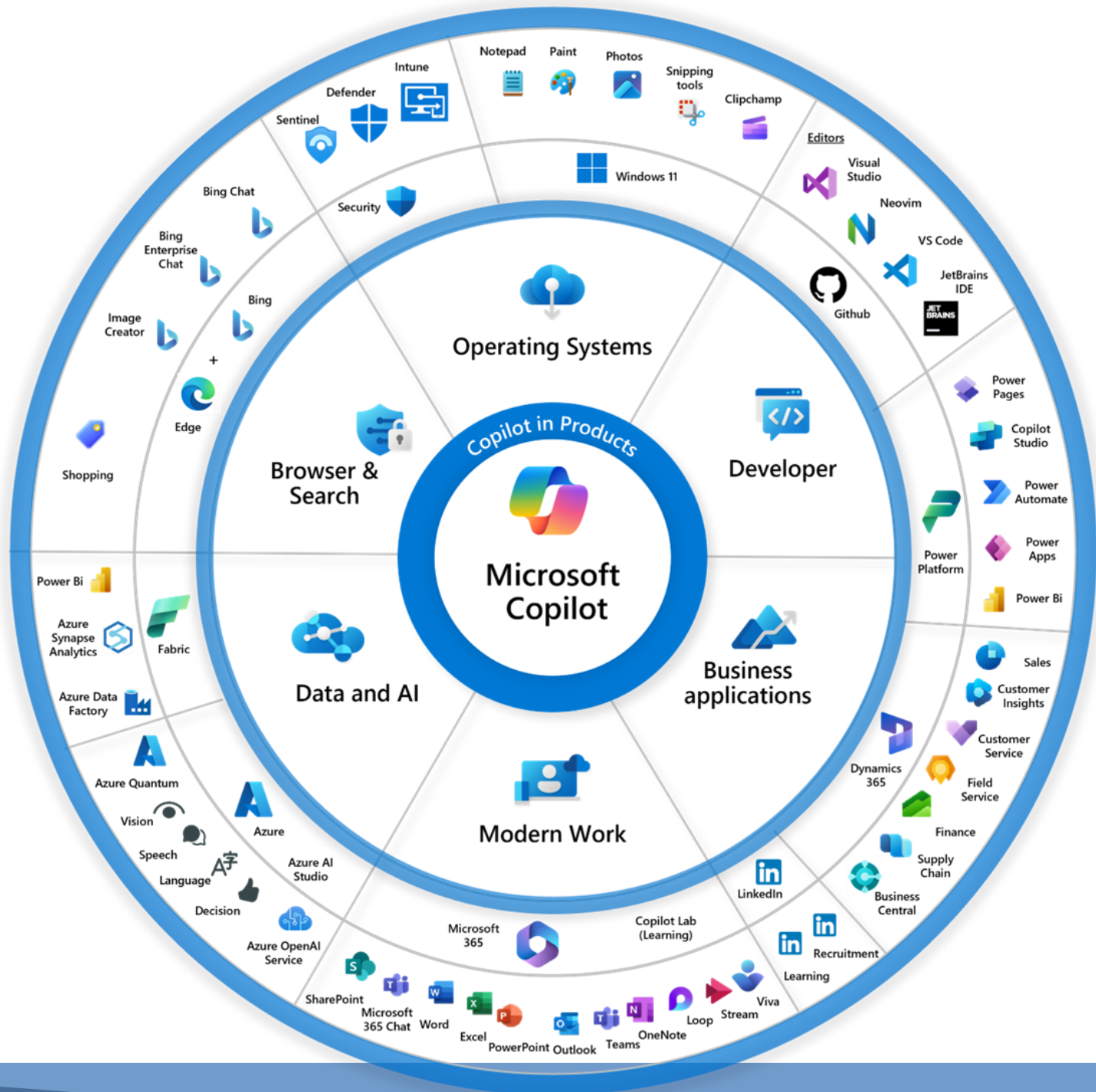
Unlock Productivity

AI-powered summaries and prioritization will help you focus on what matters most.

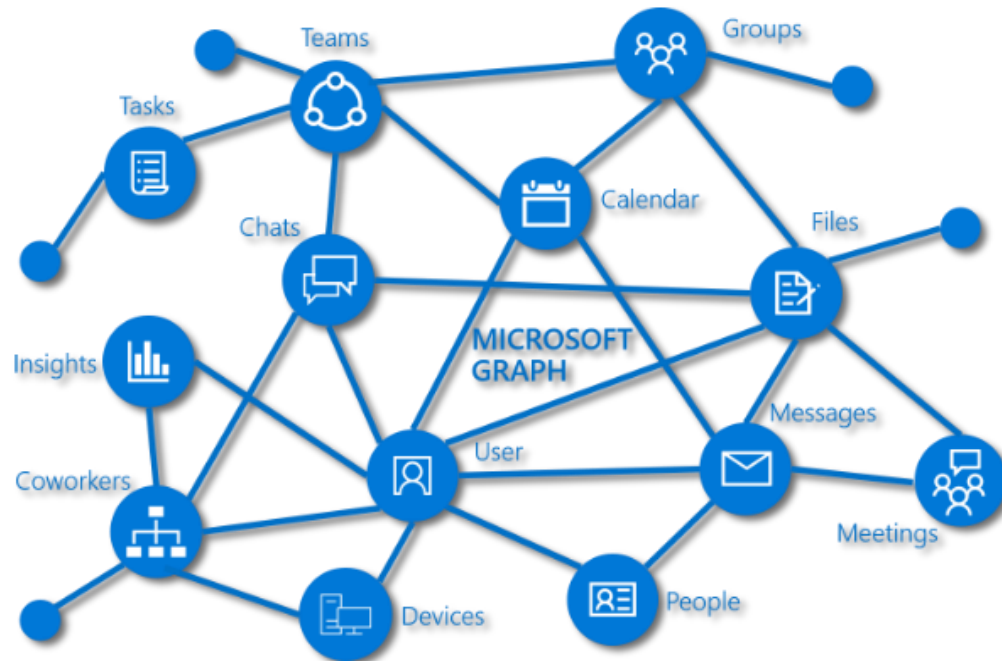## Up-level Your Skills

Because it is a generative AI feature, purposefully interacting with Copilot for Microsoft 365 makes you better at what you're good at and lets you quickly master what you have yet to learn.
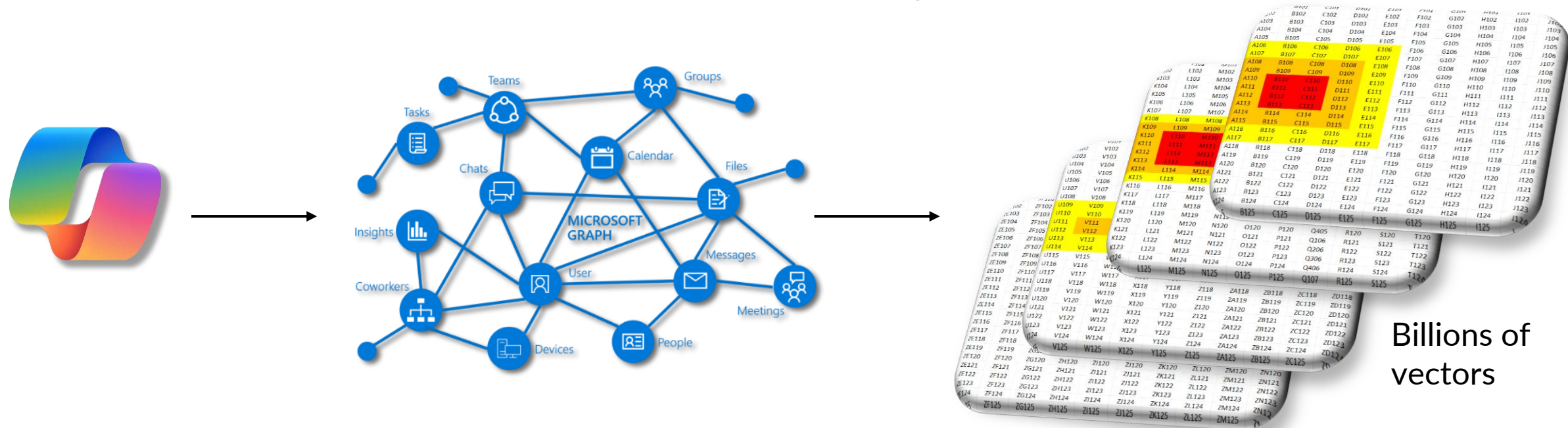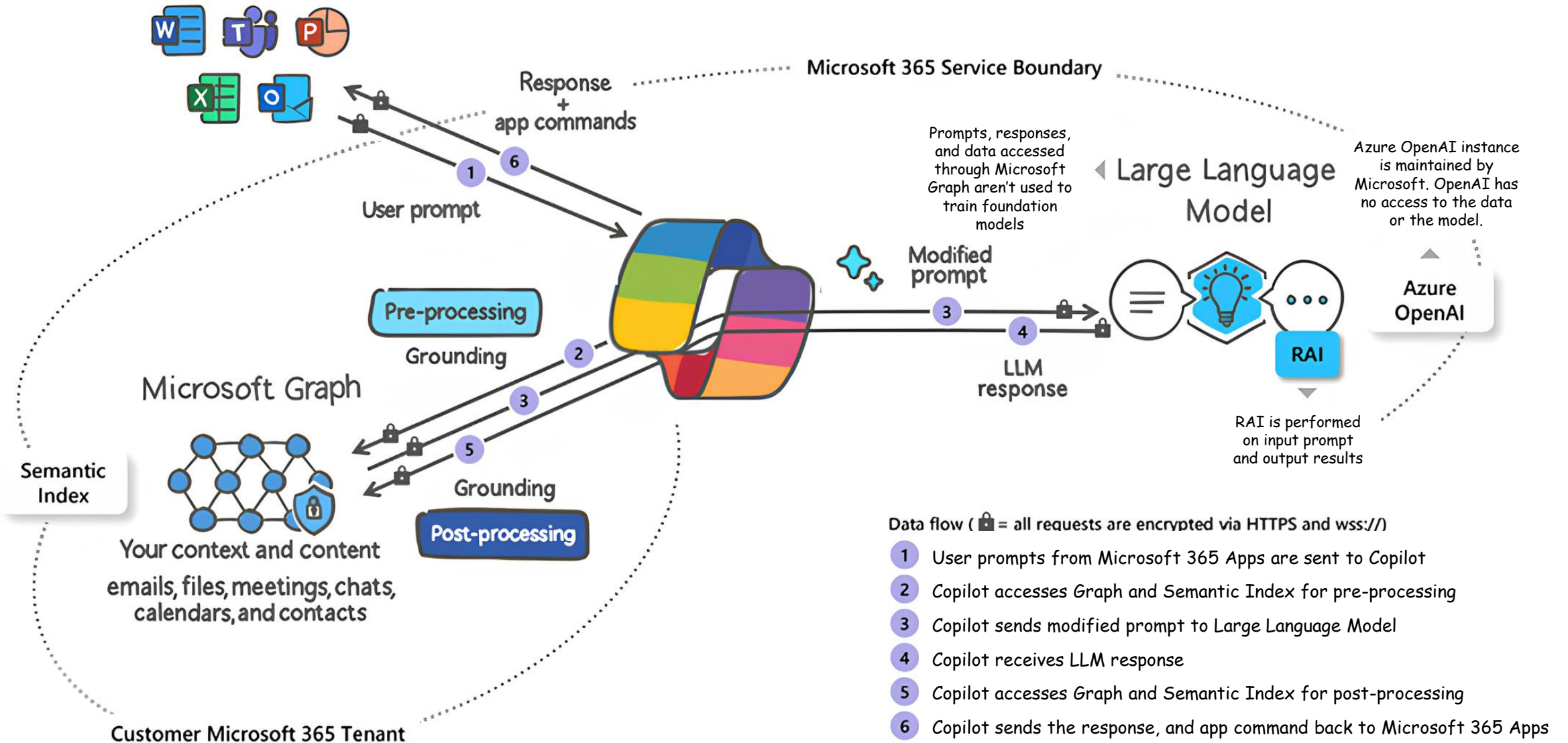
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Microsoft Graph

The "Semantic Index"

Semantic – The study of linguistic meaning
Index – a directory to speed up searching in a database

Billions of vectors

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Microsoft Copilot for Microsoft 365

Microsoft 365 Apps

Microsoft 365 Service Boundary

Response + app commands

User prompt

Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation models

Azure OpenAI instance is maintained by Microsoft. OpenAI has no access to the data or the model.

Large Language Model

Azure OpenAI

Modified prompt

LLM response

RAI

Pre-processing

Grounding

Microsoft Graph

Semantic Index

Grounding

Post-processing

RAI is performed on input prompt and output results

Your context and content
emails, files, meetings, chats, calendars, and contacts

Customer Microsoft 365 Tenant

Data flow (🔒 = all requests are encrypted via HTTPS and wss://)

1. User prompts from Microsoft 365 Apps are sent to Copilot
2. Copilot accesses Graph and Semantic Index for pre-processing
3. Copilot sends modified prompt to Large Language Model
4. Copilot receives LLM response
5. Copilot accesses Graph and Semantic Index for post-processing
6. Copilot sends the response, and app command back to Microsoft 365 Apps

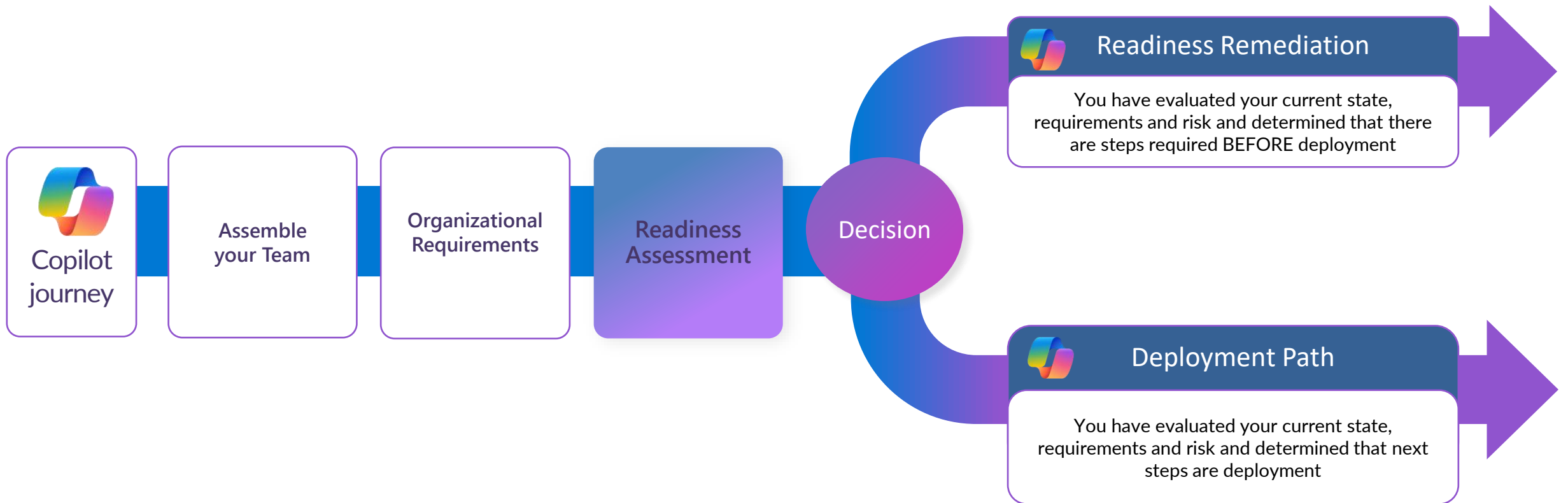CompuNet

How to Think About Copilot For Microsoft 365

Copilot is an assistant… not an Autopilot

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Technical Readiness & Scenarios

Jerryn Bunnell & Kendall Wilson

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Discover & Prepare Phase

Copilot journey → Assemble your Team → Organizational Requirements → Readiness Assessment → Decision

Readiness Remediation
You have evaluated your current state, requirements and risk and determined that there are steps required BEFORE deployment

Deployment Path
You have evaluated your current state, requirements and risk and determined that next steps are deployment

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Discover & Prepare Phase

```
Copilot journey → Assemble your Team → Organizational Requirements → Readiness Assessment → Decision
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Decision branches to:

Readiness Remediation
You have evaluated your current state, requirements and risk and determined that there are steps required BEFORE deployment

Deployment Path
You have evaluated your current state, requirements and risk and determined that next steps are deployment

Assemble your Team:
- Executive Sponsors Nominations
- AI Council
- Center of Excellence
- Project and Adoption Team
  - Risk, Compliance, Legal, IT, Leadership

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Discover & Prepare Phase

Copilot journey → **Assemble your Team** → **Organizational Requirements** → **Readiness Assessment** → **Decision**

- Regulatory Compliance
- Security Frameworks
- Data Management Policies
- Industry Requirements
- Organizational Policies
- Company Culture Guidelines
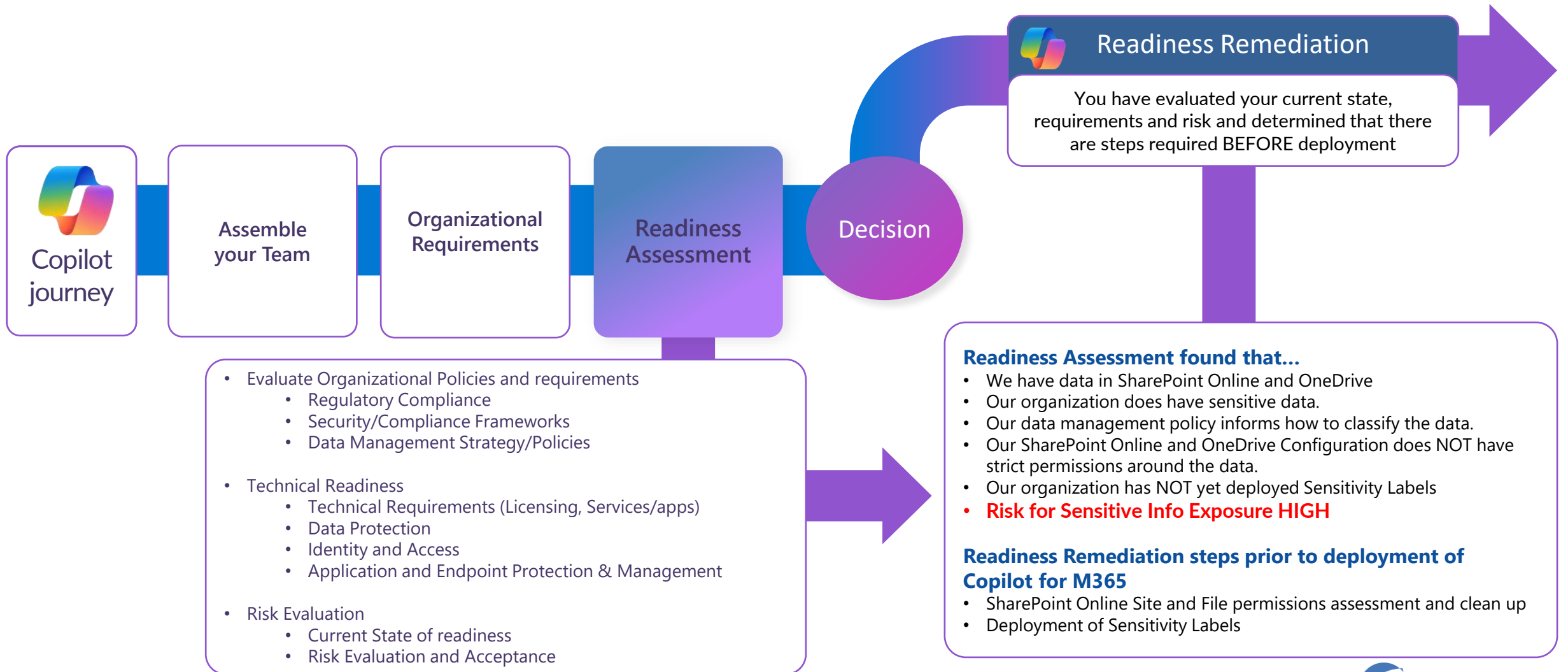
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Discover & Prepare Phase

Copilot for M365 Prerequisites

Copilot journey

Assemble your Team

Organizational Requirements

Readiness Assessment

Decision

Readiness Remediation

You have evaluated your current state, requirements and risk and determined that there are steps required BEFORE deployment

Deployment Path

You have evaluated your current state, requirements and risk and determined that next steps are deployment

- Evaluate Organizational Policies and requirements
  - Regulatory Compliance
  - Security/Compliance Frameworks
  - Data Management Strategy/Policies

- Technical Readiness
  - Technical Requirements (Licensing, Services/apps)
  - Data Protection
  - Identity and Access
  - Application and Endpoint Protection & Management

- Risk Evaluation
  - Current State of readiness
  - Risk Evaluation and Acceptance

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Discover & Prepare Phase

Copilot journey

Assemble your Team

Organizational Requirements

Readiness Assessment

Decision

Readiness Remediation

You have evaluated your current state, requirements and risk and determined that there are steps required BEFORE deployment

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  - Current State of readiness
  - Risk Evaluation and Acceptance

Readiness Assessment found that…
- We have data in SharePoint Online and OneDrive
- Our organization does have sensitive data.
- Our data management policy informs how to classify the data.
- Our SharePoint Online and OneDrive Configuration does NOT have strict permissions around the data.
- Our organization has NOT yet deployed Sensitivity Labels
- **Risk for Sensitive Info Exposure HIGH**

Readiness Remediation steps prior to deployment of Copilot for M365
- SharePoint Online Site and File permissions assessment and clean up
- Deployment of Sensitivity Labels

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Best Practices

Diligent Security Evaluation & Implementation

- Protecting Sensitive Information
- Maintaining Trust and Compliance
- Preventing Disruptions and Losses

Utilize a Limited Pilot Rollout (Champions)

- Risk Mitigation
- Feedback Collection
- Performance Assessment

Leveraging Copilot for Microsoft 365

Continuous Configuration & Optimization

- Adaption to Evolving Business Needs
- Enhanced User Experience and Efficiency
- Staying Ahead of Security and Compliance

Dive Deep Into User Education & Adoption

- Maximizing Tool Utilization
- Reducing Resistance to Change
- Encouraging Innovation and Collaboration

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Productivity Scenarios
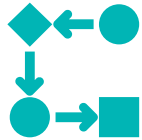
Automating Routine Documentation

Employees spend a significant amount of time on routine documentation tasks such as generating reports or creating standard emails.

Enhancing Customer Support

The customer support team struggles to keep up with high volumes of inquiries, leading to long wait times and decreased customer satisfaction.

Streamlining Code Development

Software development teams face tight deadlines and complex projects, leading to potential delays and increased stress.

Copilot Solution

Streamline Processes for more efficient document generation

Improving productivity and increase time saved for employees

Copilot Solution

Provide real-time suggestions to customer support to make responses more efficient and accurate

Power chatbots for instant responses to common questions

Copilot Solution

Code suggestions, debugging, and providing documentation to developers

Reduce developer burnout

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Copilot For Microsoft 365
Word & PowerPoint

DEMO

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Risk Scenarios

Inadequate Data Handing & Privacy Controls

The organization has not fully assessed or understood Microsoft 365's data handling and privacy settings.

Insufficient User Authentication & Access Controls

The organization implements Microsoft Copilot without robust user authentication and access control measures.

Lack of Security Training & Awareness

Employees are not properly trained on security best practices when using Microsoft Copilot.

Risks

Unintended sharing of confidential information with AI

Severe legal and reputational consequences

Risks

Unauthorized user exploitation of data through AI

Potential data leaks and breaches

Risks

Significant security vulnerabilities

Lack of training can make an organization susceptible to cyberattacks

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Copilot For Microsoft 365
"Just Enough Access" To Data

DEMO

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Building Success through Adoption

Kat DeBrino

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Why Adoption Drives Success

Efficiency & Productivity

Cost-Effectiveness

Change Management

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How much time can people save with Copilot?

Hrs. saved/mo.

2.5 Hours — 180%

2.0 Hours — 124%

1.5 Hours — 68%

1 Hour — 12%

ROI

Example: Saving just **2.5 hours/month** yields an **ROI of 180%***
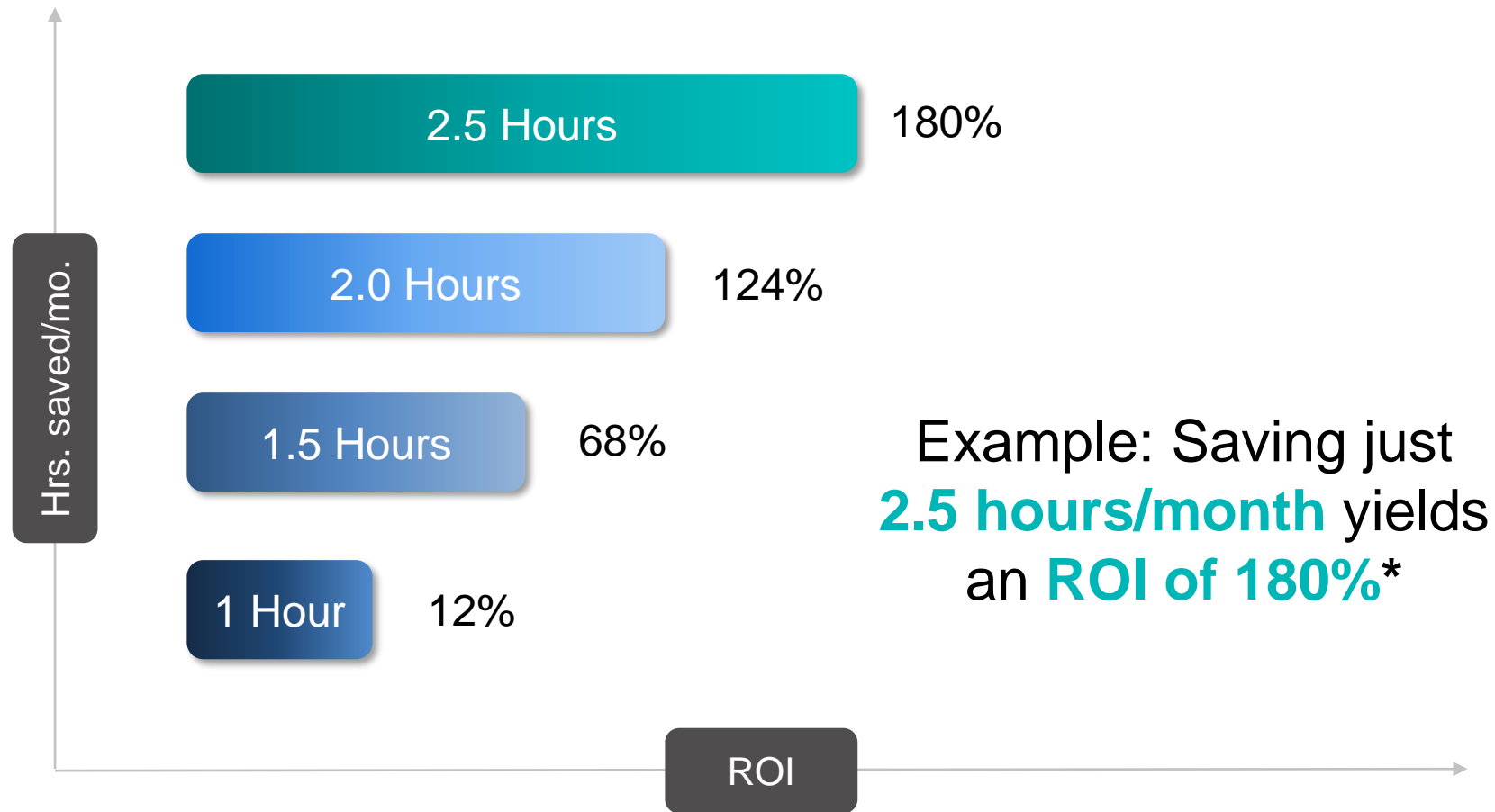
*At $70,000 employee cost per year, 54 minutes per month = $30 of employee's time

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The Art & Science Of Prompting

Prompts are how you ask Copilot for Microsoft 365 to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

✓ **Learn** about projects and concepts:
"What is [Project X] and who are the key stakeholders working on it?"

✓ **Edit text:**
"Check this product launch rationale for inconsistencies."

✓ **Transform** documents:
"Transform this FAQ doc into a 10-slide onboarding guide."

✓ **Summarize** information:
"Write a session abstract of this [presentation]."

✓ **Create** engaging content:
"Create a value proposition for [Product X]."

✓ **Catch-up** on missed items:
"Provide a summary of the updates and action items on [Project X]."

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal
What response do you want from Copilot?

Context
Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

How should Copilot respond to best meet your expectations?

Source

Expectations

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The Art & Science Of Prompting

3. Keep the conversation going

Following up on your prompts helps you collaborate with Copilot to gain more useful, tailored responses.

Generating content ideas
Lead with broader requests, then give specific details about the content.

Enabling insightful meetings
Request a meeting recap, then ask for more information about what you should know.

Storytelling assistance
Ask Copilot to write a story, then guide it by giving more specific, relevant details.

Gaining insights
Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.

Translating languages
Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.

Solving technical problems
Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations
Copilot is limited to your current conversation, so give lots of details.

Use quotation marks
This helps Copilot know what to write, modify, or replace for you.

Be professional
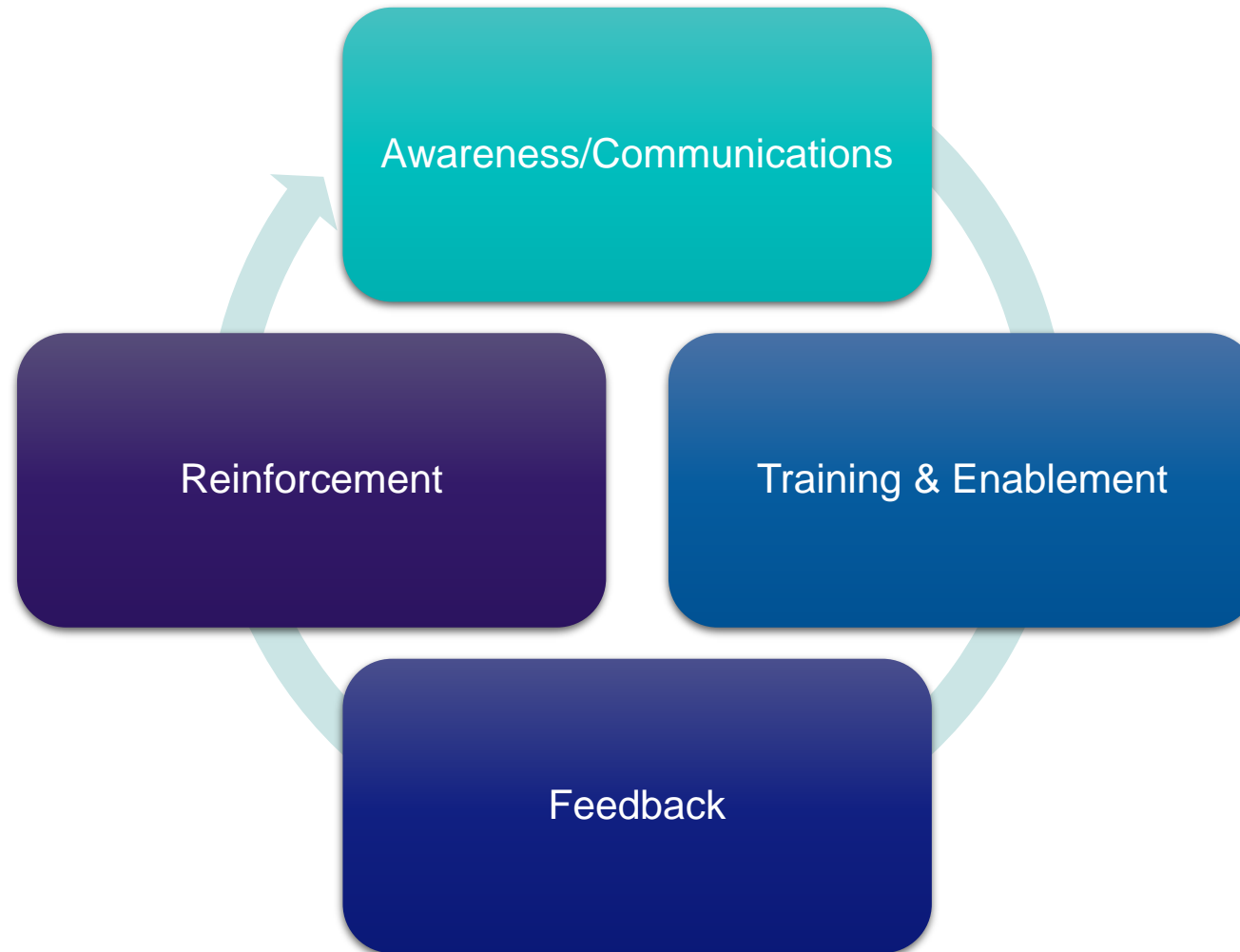Using polite language improves Copilot's response.

Communicate clearly
Pay attention to punctuation, grammar, and capitalization.

Start fresh
Avoid interrupting and type "new topic" when switching tasks.

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Strategies For Effective User Adoption

Q & A

Thank You

We look forward to working with you

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