

Name of Offer: Copilot for Microsoft 365 Readiness (Briefing)

Company Name: Calian Digital Solutions Ltd. (CDS)

Duration: Up to 2-hours

Purpose Summary:

This briefing ensures your organization is ready to leverage Copilot for Microsoft 365, offering insights for enhancing productivity and streamlining your suite.

Description:

Microsoft 365 Copilot integrates advanced AI capabilities directly into the Microsoft 365 suite, enhancing productivity and efficiency for users. By leveraging OpenAI's language models, Microsoft 365 Copilot assists with a range of tasks, from drafting documents to managing schedules, within familiar Microsoft applications such as Word, Excel, Outlook, and Teams.

Some of its key features include:

1. AI-Powered Assistance:

- **Content Generation:** Drafts emails, documents, and presentations with minimal input.
- **Data Insights:** Analyzes data in Excel, generates summaries, and creates visualizations.
- **Meeting Summaries:** Provides concise meeting notes and action items from Teams meetings.

2. Seamless Integration:

- **Embedded AI:** Works within Word, Excel, Outlook, Teams, and other Microsoft 365 apps without the need for additional installations.
- **Contextual Suggestions:** Offers relevant suggestions based on the context and content of your work.

3. Enhanced Productivity:

- **Task Automation:** Automates routine tasks like scheduling meetings, setting reminders, and sorting emails.
- **Collaboration Tools:** Facilitates collaboration by suggesting edits, generating real-time feedback, and summarizing shared documents.

4. Security and Compliance:

- **Data Privacy:** Ensures that user data is handled with utmost confidentiality and adheres to Microsoft's stringent security protocols.
- **Compliance:** Complies with industry standards and regulations, ensuring safe and lawful use of AI capabilities.

Integration & Configuration:

1. Pre-Requisites:

- **Licenses:** Copilot for Microsoft 365 needs Microsoft 365 E3 or E5 for Enterprise, A3 or A5 for Faculty, or Microsoft 365 Business Standard or Premium.
- **Microsoft Entra-based accounts:** All users must have Entra-based accounts to authenticate. Legacy local accounts that can't authenticate to the cloud limit Copilot for Microsoft 365 functionality.

2. Current Microsoft 365 Implementation:

- Microsoft Purview: Evaluate DLP, AIP, Sensitive Label policies
- Just-In-Time-Access: Evaluate Privileged Identity Management
- SharePoint Site & OneDrive: Evaluate permissions and provision OneDrive space to collaborate on content.

3. Configuration & Customization:

- Assign Add-On License: Purchase & assign licenses
- Auditing: Develop plan to audit Copilot data
- Customization: Configure custom controls for Copilot to personalize experience

Implementation Roadmap:

Refer to our Implementation brief for detailed plan. Below is the generic timeline for most of the implementations.

Topic/Weeks	Week 1	Week 2	Week 3	Week 4
Assessment				
Configuration				
Training & Adoption				