

The Magic of Microsoft Copilot: Leveraging Copilot in your Business

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Agenda



What is Microsoft Copilot?

What are the versions of Microsoft Copilot?

How much does Microsoft Copilot cost?



What are the business benefits to using Microsoft Copilot?

How does Microsoft plan to integrate Copilot into its applications? (Word, Excel, PowerPoint, Outlook, etc.)

What are potential problems and caveats with Microsoft Copilot? (Security, Data)

Which businesses should consider Microsoft Copilot, and which should not?

What is MS Copilot?

Vendor custom integrations for Copilot

- CRMs and ERPs vendors can leverage custom AI in a more focused way
- Zoom AI Companion
- Dynamics Viva Sales and DialoguePrime

Versions of Copilot

- Co-Pilot Free (Copilot for the web (Designer), Windows OS Copilot)
- Co-Pilot Pro – paid consumer version
- Co-Pilot 365 – For business, Word, Excel, PowerPoint, Outlook, Teams
- Co-Pilot Finance - Dynamics 365/ Business Central, Supply Chain, Sales
- Many other versions of copilot across many Microsoft products

Word (VIDEO DEMO)



DRAFT A THREE-PAGE
EMPLOYEE REVIEW
DOCUMENT.

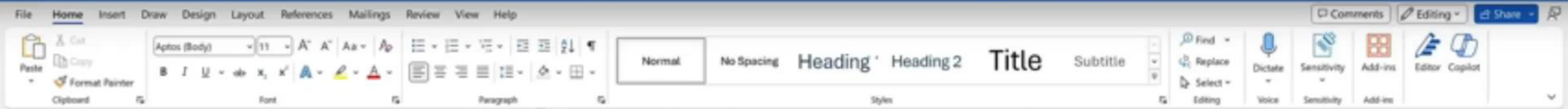


MAKE THE LAST
PARAGRAPH AND
CHECKLIST MORE
CONCISE AND
CHANGE THE TONE
OF THE DOCUMENT
TO BE MORE CASUAL.



FINALIZE AND
REVIEW THE DRAFT
FOR ACCURACY.





Draft with Copilot [Close]

As an HR specialist create a guidance documents for managers about how to run an effective annual review with employees. Remember to not just focus on historic performance but also about development and future goals. Produce a checklist for managers that they can use to ensure they've hit all the points in their review.

325,0000

[Generate](#) [Reference a file](#)

Excel (VIDEO DEMO)

Break down this sales data by type and channel and then insert a table.

Project the impact of a variable change in this data and then generate a chart to help visualize it.

Model how a change to the growth rate for a variable would impact my gross margin.



Font: Calibri 11, Bold, Italic, Underline, Text Color, Background Color, Font Color, Font Size, Font Style, Font Color, Font Size, Font Style

Alignment: Left, Center, Right, Justify, Indent, Decrease Indent, Increase Indent, Merge & Center, Unmerge Cells, Wrap Text, Merge Cells, Unmerge Cells

Number: General, Currency, Percentage, Thousands Separator, Accounting, Accounting (Right), Accounting (Left), Accounting (Right), Accounting (Left)

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: Sum, Sort & Filter, Find & Select

Add-ins: Add-ins, Analyze Data, Copilot

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Sale Date	Product	Units Sold	Unit Price	Sales Revenue												
023-01-01 00:00:00	Widget B	6	91.13	546.78												
023-01-01 00:00:00	Widget D	10	73.71	737.1												
023-01-01 00:00:00	Widget A	1	67.51	67.51												
023-01-01 00:00:00	Widget A	10	71.66	716.6												
023-01-01 00:00:00	Widget D	10	20.24	202.4												
023-01-01 00:00:00	Widget B	18	66.8	1202.4												
023-01-02 00:00:00	Widget B	6	93.31	559.86												
023-01-02 00:00:00	Widget C	17	59.98	1019.66												
023-01-03 00:00:00	Widget B	9	36.97	332.73												
023-01-03 00:00:00	Widget B	4	97.49	389.96												
023-01-03 00:00:00	Widget A	16	58.52	936.32												
023-01-04 00:00:00	Widget B	13	98.16	1276.08												
023-01-04 00:00:00	Widget B	4	44.81	179.24												
023-01-04 00:00:00	Widget C	3	89.85	269.55												
023-01-05 00:00:00	Widget D	14	20.45	286.3												
023-01-05 00:00:00	Widget B	11	36.66	403.26												
023-01-06 00:00:00	Widget B	5	39.2	196												
023-01-Q7 00:00:00	Widget A	2	96.42	192.84												
023-01-10 00:00:00	Widget B	10	71.52	715.2												
023-01-10 00:00:00	Widget D	17	44.36	754.12												
023-01-10 00:00:00	Widget D	8	56.18	449.44												
023-01-11 00:00:00	Widget B	14	75.17	1052.38												

Select a location

Just a moment. We're uploading a copy of your document.

You will continue to work on the uploaded copy.



Outlook (VIDEO DEMO)

Summarize

- Summarize the emails missed while out of the office last week and flag any important items.

Draft

- Draft a response thanking the senders of an email and asking for more details about their second and third points.

Shorten

- Shorten a draft email and make the tone more professional.

Invite

- Invite everyone to a lunch-and-learn about new product launches next Thursday at noon. Mention that lunch is provided.



Outlook ribbon with various action buttons:

- New:** New, Block, Delete, Archive, Report
- Respond:** Reply, Reply all, Forward
- Move:** Meeting, Move, Sweep, Rules
- Quick steps:** Follow up ...
- Tags:** Read / Unread, Categorize, Flag, Pin
- Print:** Print, Discover groups, Undo
- Other:** Snooze, Policy

Focused Other

- Microsoft 365 Copilot**
Copilot for Microsoft 3... Mon 2/26
Copilot for Microsoft 365 updates...
- Ashton**
You're invited to share t... Sun 2/25
You'll be able to see all details of ...
- Kathy**
You're invited to share t... Sun 2/25
You'll be able to see all details of ...
- Kathy; Ashton**
Status of Project Sun 2/25
Hi Jamie and all, Thanks, Jamie, fo...
- Jamie Keet**
Microsoft Copilot - you... Sun 2/25
Get using it!

Status of Project

Summary by Copilot

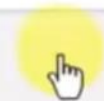
Jamie Keet
Thank you for your feedback and suggestions. I think a pre-meeting chat to discuss resource alloc... Sun 2/25/2024 9:21 AM

Kathy
To: **Jamie Keet**; **Ashton**
Sun 2/25/2024 9:13 AM

Hi Jamie and all,

Thanks, Jamie, for the update and for leading the charge on our project. It's great to hear about our progress and how we've managed to navigate the challenges that came our way.

I second Ashton's suggestion to review the timeline and discuss potential optimizations. I also want to bring up the need to reassess our current resource allocation, especially considering the unforeseen challenges we've recently encountered. I believe there might be an opportunity to streamline our efforts more effectively.



Powerpoint (VIDEO DEMO)

Draft	Draft a PowerPoint Presentation using information created from a Word document
Apply	Apply sensitivity settings to the PowerPoint
Use	Use stock images from the web to help enhance the presentation





Copilot

I can chat, respond to questions, and help you draft this presentation. Here are some things you can try...

- Create a presentation...
- Create presentation from file...
- Add a slide about...

Ask a question or make a request.

0/2000

Potential problems and caveats with Microsoft Copilot

- Security
 - You will need strong business policies surrounding data governance and AI
 - Copilot should only be used with low-risk data, or data that would have no adverse impact on the org
 - Do not use Moderate/High Risk Data - HIPAA, personally identifiable information (PII), financial information
 - Data Leaks - External
 - Microsoft provides Commercial Data protection only when signed in with EntraID (careful of web version)
 - There are real-world scenarios in which Copilot drafts a proposal for a client and includes sensitive data belonging to a completely different client.
 - Data Leaks – Internal
 - Copilot for Microsoft365 also provides Enterprise Grade Data protection
 - Microsoft Copilot for Microsoft 365 only surfaces organizational data to which individual users have at least view permissions.
 - Copilot could potentially access and expose sensitive information to internal staff

How to mitigate Copilot 365 Risks

What Microsoft handles for you:

- Tenant isolation. Copilot only uses data from the current user's M365 tenant.
- Training boundaries. Copilot does not use any of your business data to train the foundational LLMs that Copilot uses for all tenants.

What you need to manage

- Humans. Copilot's responses aren't guaranteed to be 100% factual or safe; humans must take responsibility for reviewing AI-generated content.
- DNS configurations to enforce Commercial Data protection
- Make sure Sharepoint and OneDrive data is setup so that users access follows the least privilege policy
- Use encryption based off sensitivity labels by using Information Rights Management (IRM)
- Create custom DLP policies that specify rules and conditions for detecting and protecting sensitive data

Which businesses should consider Microsoft Copilot, and which should not?



Who should consider Copilot

Employees who perform repetitive tasks - spend a lot of time writing documents, taking notes in meetings, following meetings, processing emails

Businesses that have invested in data management and security



Who should not consider Copilot

Businesses that rely heavily on Excel – copilot can assist with simple tasks, formula help

Businesses that may have trouble meeting compliance requirements

Businesses that are concerned about data privacy

How much does Copilot for Microsoft 365 cost?

Copilot for Microsoft 365

\$30.00

user/month with an annual subscription

Pay yearly, \$360.00user/year¹

Achieve more than ever before using AI.

- ✓ Integrated with Teams², Word, Outlook, PowerPoint, Excel, Edge for Business, and other Microsoft 365 apps
- ✓ AI-powered chat with Microsoft Copilot
- ✓ Create plugins to your data and automation using Copilot Studio
- ✓ Enterprise-grade security, privacy, and compliance

A separate license for [a qualifying Microsoft 365 plan](#) is required.



Security and Compliance Controls for Microsoft 365 Copilot

Microsoft Business Standard
\$12.50/User/Month

Microsoft Business Premium
\$22/User/Month

Microsoft 365 E3
\$36/User/Month

Microsoft 365 E5
\$57/User/Month

Data Protection

Sharing Policies for SharePoint/OneDrive/Teams – Define internal and external sharing policies for documents for OneDrive, SharePoint Sites, and Teams Repositories

Site Level Privacy Settings –Restrict access to SharePoint sites and Teams/Teams channels for public or private access

Audit Logs- Conduct audit log searches for interactions with Copilot across your organization

Information Protection Labels –Create sensitivity labels to apply to documents within your organization to restrict what information users can interact with and find in Copilot.

Default sensitivity labels for SharePoint document libraries – Bulk apply sensitivity labels across all documents in SharePoint document libraries

Auto-Labeling – Automatically apply sensitivity labels to documents across your organization based on detection of sensitive info types such as financials, PII, credit cards, or custom sensitive information definitions

Data Loss Prevention – Prevent users from inappropriately sharing sensitive data with people who shouldn't have it both internally and externally for email and files

Data Loss Prevention for Teams Chat –Extend DLP policies to Teams Chat messages. Prevent users from sharing sensitive files and information that can be surfaced in Copilot

Retention Policies – Create policies to retain and delete user interactions with Copilot

Data Classification – Create trainable classifiers to detect and search for sensitive data throughout the organization

Communication Compliance – Examine and check Copilot interactions that have been flagged as potentially containing inappropriate or confidential data leaks across the org

eDiscovery –Create cases, searches, and legal holds around Copilot interactions

eDiscovery (Premium) -Search for and delete user prompts and Microsoft Copilot for Microsoft 365 responses in supported applications and services

Access Controls

Group Management – Add/remove users to groups to streamline access controls

Dynamic Groups –Add/remove users to groups automatically based on attributes such as job title, department, account enabled, etc.

Access Reviews – Conduct automated periodic reviews of user access for groups, apps, and role assignments

Privileged Identity Management (PIM)– Provide Just-in-time access for privileged roles to reduce security footprint for Copilot interactions

Entitlement Management- Manage identity and access lifecycle at scale by automating access request workflows, access assignments, reviews, and expiration

Lifecycle Workflows – Automate user access to resources across onboarding, offboarding, and lateral movement in the org

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Questions?