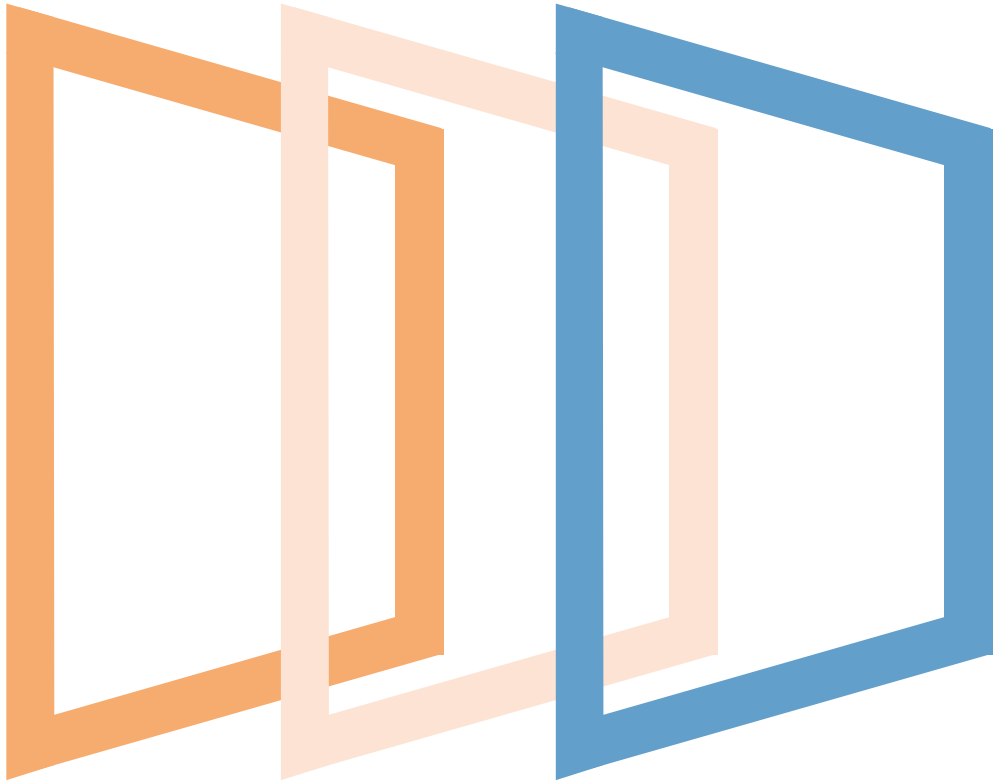
Copilot for Microsoft 365

April 2024



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An Indra company

Indra General

Introduction M365

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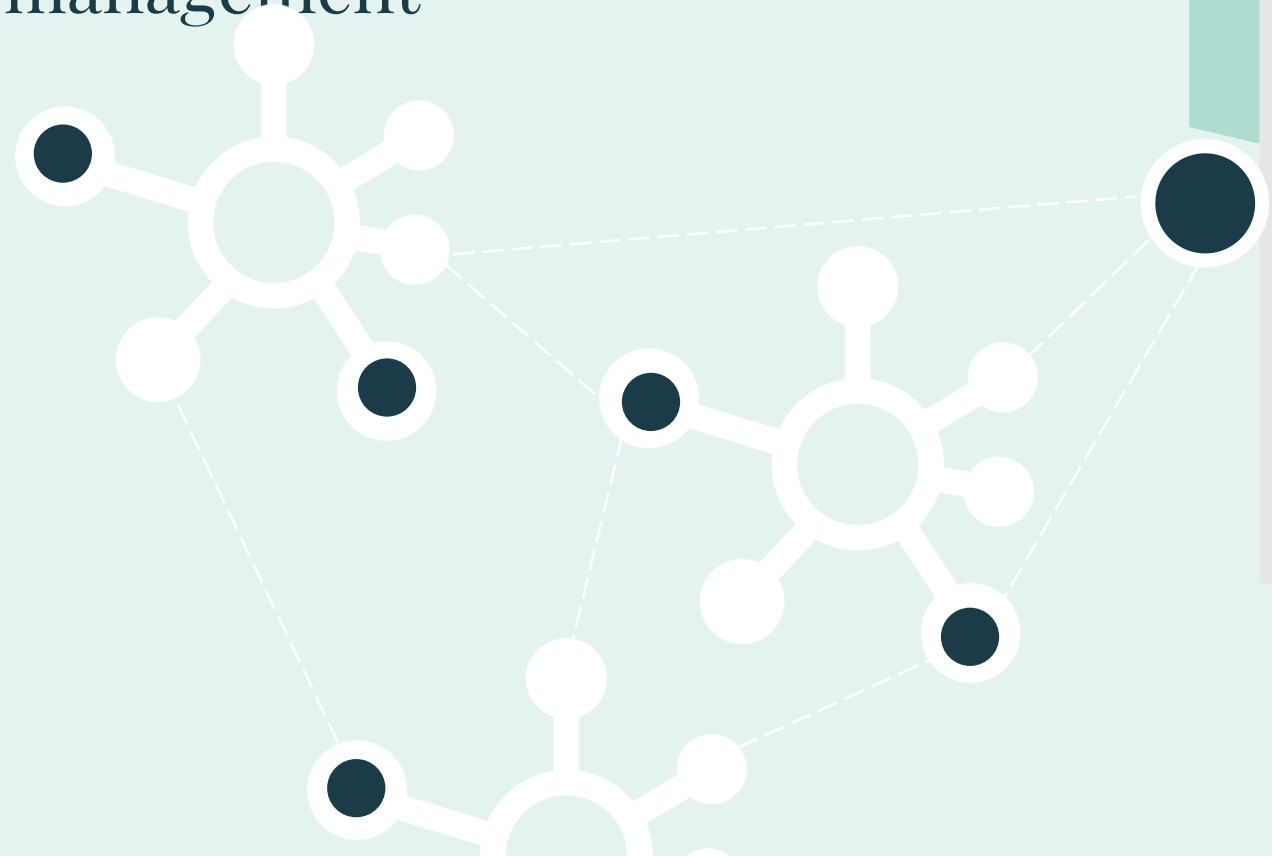
Why Microsoft?

“Yesterday working remotely was an exceptional rule, TODAY it is a priority for companies that are committed to a culture of collaboration and self-management”



Microsoft 365

The productivity cloud

Microsoft 365 is the platform that puts people **at the center** , bringing together Office 365 productivity solutions with device management tools and security solutions to ensure information protection.

Transform collaboration in the workplace

Protect the business

Streamline business processes

Benefits of the Microsoft Platform

More than 90 percent of Fortune 500 companies run on Microsoft Cloud.

Profitable

- Pay per use/subscription
- 0 infrastructure costs
- No cost associated with IT administration tasks

Scalable

- Incorporation or withdrawal of resources on demand based on business needs
- APIs and connectors minimize integration effort

Current

- Platform with defined roadmap and periodic releases
- Maintenance and updating are the responsibility of Microsoft

Reliable and secure

- Compliance with data protection regulations
- Integrated security
- 99.9% guaranteed SaaS and disaster recovery

Microsoft 365, a complete and intelligent solution that helps people be creative and work together securely

Productivity with Microsoft Power Platform

+

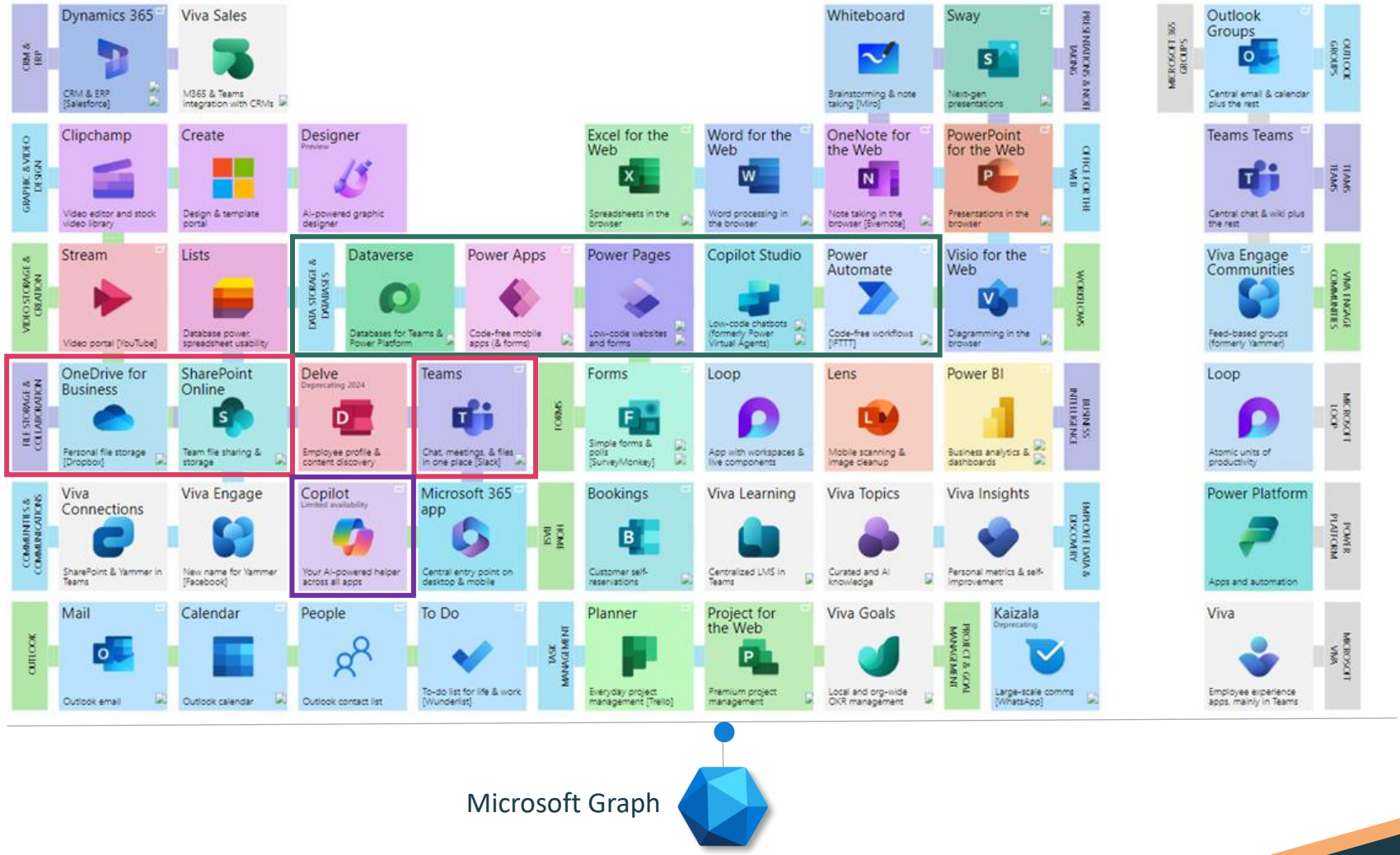
Collaboration with Microsoft Sharepoint & Teams

+

Generative AI with Microsoft Copilot

+

Extensibility with Microsoft Graph



Generative AI in the workplace with Microsoft Copilot

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What is generative AI and what can it do for you?

Generative AI is a form of artificial intelligence in which models are trained to generate new original content based on natural language input. Generative AI can describe a desired output in normal everyday language and the model can respond by creating the text, a new image or even generating code

1 Content generation

- Learn from large data sets to produce coherent and relevant content based on input.
- Improve and optimize existing content by rewriting texts to make them clearer, more concise, or give them a more formal tone for a specific audience.
- Generation of summaries of long documents, translation of text into other languages, interpretation and summaries of images, etc.
- Generation of new images from a description indicated in natural language

2 Semantic search

- It improves the accuracy and relevance of search results by using natural language processing and semantic analysis to understand the meaning and intent behind a query.
- It allows you to generate summaries of documents, identify the most relevant parts of the text and understand their relationship with the general topic of the document.

3 Summary and explanation

- It is of great help in generating summaries and explanations. It uses machine learning algorithms to analyze and understand large sets of text data, then generate accurate and consistent summaries of the information contained within them.
- It allows you to summarize long documents, news articles, reports and other types of content. It can also generate clear and concise explanations of complex concepts, thus making it easier for users to understand the information.

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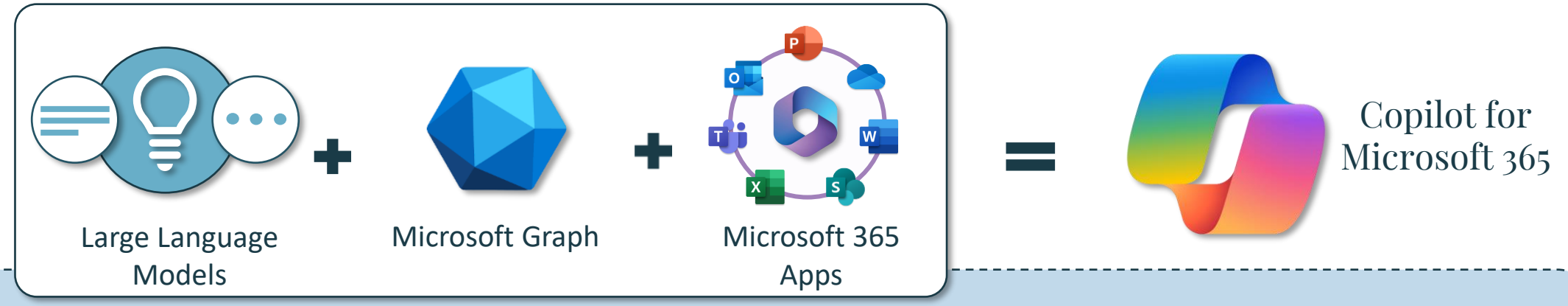
In the era of artificial intelligence, what is Copilot for Microsoft 365?

A **productivity tool** that combines **large language models (LLM), artificial intelligence (AI)** algorithms using deep learning techniques and large data sets to understand, summarize, predict and generate content. All of this vitamined with **Microsoft Graph** content **and Microsoft 365** apps you use every day. This integration provides real-time intelligent assistance, allowing users to improve their creativity, productivity, and capabilities.



- formatted and unformatted **text in new or existing documents**
- **Summary** of a document by asking clear questions through chat

- **Creating Power Point presentations** from business templates
- **Add slides, images** , or make formatting changes to the entire presentation

- **Get a summary of** the latest emails or most important meetings
- **Generate draft** emails from content the user already has access to

- **Real-time transcription and** meeting summary in Microsoft Teams
- **Summary** of chats, brainstorming boards, generation of new ideas, etc.

Microsoft Copilot is synonymous with trust

Security

Microsoft Copilot only presents data that each user can access through the underlying controls in each Microsoft 365 service. What the user does not access will never be visible from Microsoft Copilot

Compliance

In line with specific EU regulations that prevent data from leaving the regional boundary. In constant compliance with the General Data Protection Regulation

Privacy

Based on Azure Open AI, the content of the messages that Microsoft Copilot receives, the data that is retrieved, and the responses generated remain within the organization's Microsoft 365 service boundary.

Responsible AI

Aligned with the principles of Fairness, Trustworthiness, Privacy, Inclusion, Transparency and Responsibility that Microsoft puts into practice through governance, policy and research

Your data is **your data**

Your data **is not shared** with anyone or used to train AI models

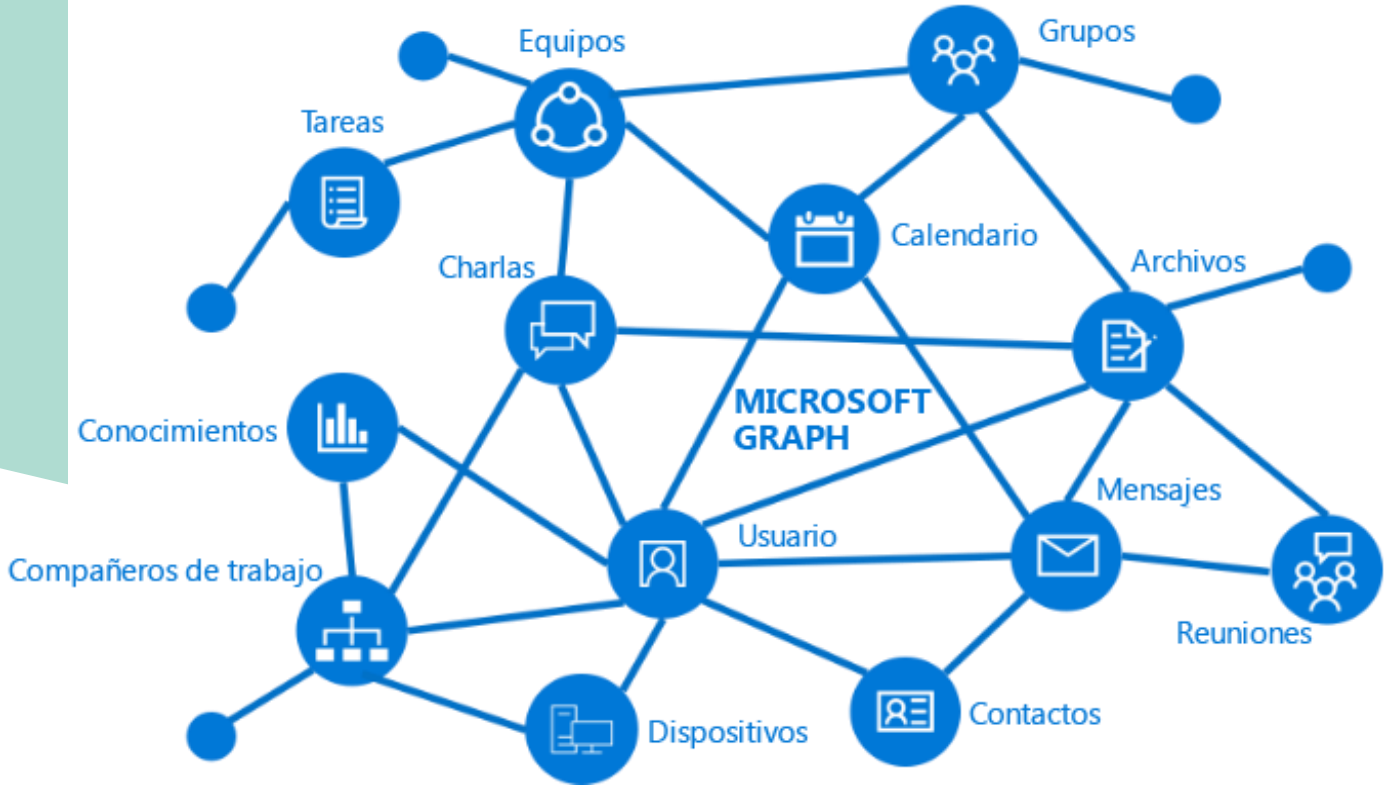
Your data is **protected** with the highest security and compliance standards

The Microsoft Graph API allows integrations with applications from the Microsoft 365 suite and can offer a personalized experience to users

The **API provided by Microsoft Graph** gives access to:

- Azure Active Directory
- Office 365 services
- Enterprise Mobility + Security Services
- Windows 10 services
- Compatible with different platforms and programming languages

Microsoft Graph Connectors (pre-built or custom) offer an intuitive way to bring content from external services into Microsoft Graph .



Copilot for Microsoft 365 takes the work environment to the next level

Creativity, productivity and competence are the three concepts that Microsoft Copilot is capable of promoting to now unknown limits to transform the work environment of all users who are part of the organization.

Increase and encourage creativity

Skip the beginning of an ideation process by allowing Copilot to offer corporate ideas and templates from which to start documents, emails and presentations using and exploring the data to which the user already has access

Raise productivity to another level

Go further and raise the level of productivity by delegating to Copilot the creation of summaries of the most important recent emails received and suggesting draft responses following the context of the conversation.

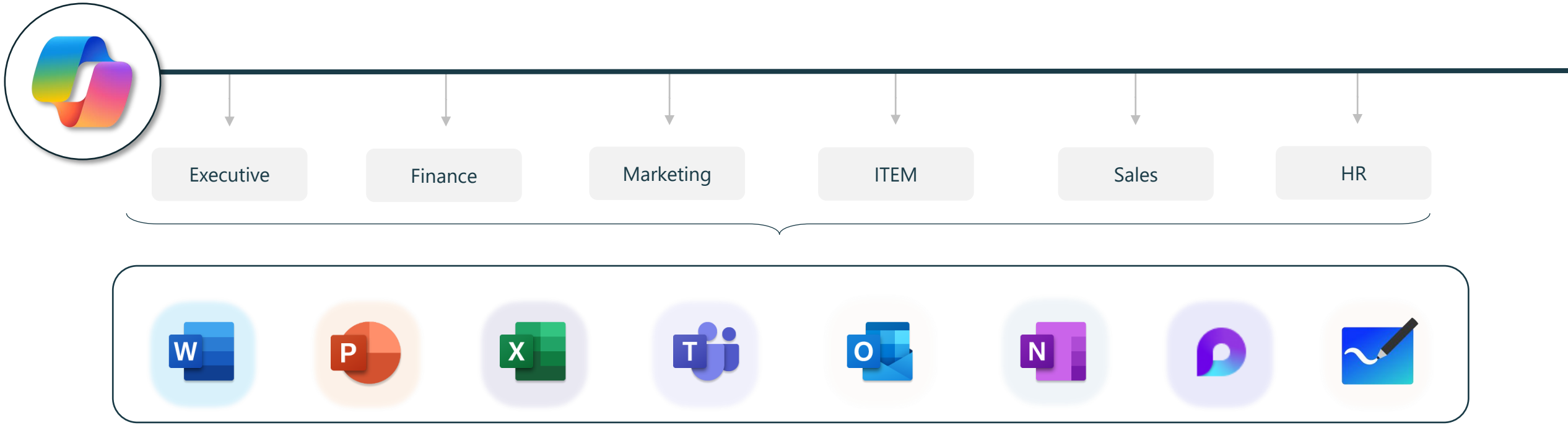
Real-time transcription of meetings, summarizing the most important points of the meeting, suggesting and providing ideas for next steps to follow.

Improve competencies and skills

Copilot is capable of transforming data into knowledge by offering users to use their documents, emails, calendar, notes and contacts from anywhere through the use of natural language such as:

- Check chats, emails and documents shared with a specific contact
- Write a document with the same style as a certain file
- Know what the next milestone is for a specific project

How to use Copilot in our daily lives?



Summarizes mail threads

Write an email

Compare files

Generation of documents

Resume meetings

Answer questions from a meeting

Manage your agenda

Aim grades in meetings

Rewrite and improve your writings

Tea help search correlations of data

Summarizes excel tables

Tea help search files

How does Copilot help me in my daily life?

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Copilot for Microsoft 365

Learn to use your resources more efficiently

	Word	PowerPoint	Excel	Teams
Executive	Generate conclusions about certain document and/or meeting	Summarize in 2 slides a presentation important	Look for points of improvement	Summarize meetings instantly
Finance	Generate a report about a determined theme	Modify texts of a presentation Changing he tone and structure	Ask for actions to improve results	Extract key points from the meeting
Marketing	Transform lists with information in boards	Generate a presentation based on a improvement proposal	Summarize tables dynamic	Extract the tasks that you they have assigned and you have not been able hear
ITEM	Rewrite a text already written to improve the quality of the document	Add new slides to one presentation already made to do it further solid	Extract key points from a graph	Ask that topics they have been treaties in the meeting and do questions
Sales	Write a proposal fast based on the notes targeted in an informal meeting with a potential customer	Generate a presentation about any topic to give a chat at the fair and/or event	Generate a summary of the status of the accounts to avoid analyzing the entire excel	Ask by files shared during the meeting
HR				

Copilot for Microsoft 365

Learn to use your resources more efficiently

- Executive
- Finance
- Marketing
- ITEM
- Sales
- HR

Word	PowerPoint	Excel	Teams
Generate planning and budgeting	Generate presentations with the conclusions obtained from a financial analysis	Highlight relevant data from a financial analysis	Summarize meetings instantly
Trigger comments linked to excel tables	Modify texts in a presentation by changing the tone and structure	Generation of pivot tables and graphs	Extract key points from the meeting
Restructure the information	Generate a presentation showing financial responsibilities	Optimize cell formats and styles	Extract the tasks that you they have assigned and you have not been able hear
Generate a proposal to improve the financial structure of your company	Prepare a presentation with the company's financial organization model	Find correlations between data	Ask that topics they have been treaties in the meeting and do questions
Reshape your writing to appear more or less formal, depending on the target user	Add new slides about the company's accounting process record to a financial presentation	Seeks instant correlations	Ask by files shared during the meeting

Copilot for Microsoft 365

Learn to use your resources more efficiently

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Word	PowerPoint	Excel	Teams
Write posts for the different RRSS	Modify the tone of your message to adapt it to your target audience	Benchmark	Summarize meetings instantly
Modify the tone of your messages according to the target audience	Generation of interactive content	Find weak points or outliers in a table with just one question	Extract key points from the meeting
Summarize news to stay up to date to save time	Prepare a presentation on ideas highlighted in a brainstorming session	Modify and add conditionals to cells	Extract the tasks that you they have assigned and you have not been able hear
Creation of citations and bibliographic references in different formats	Generate a roadmap showing the path to follow to move forward with a project	Draw conclusions from competitor assessments	Ask that topics they have been treaties in the meeting and do questions
Define, structure and mark the next actions to follow to carry out the ideas generated by the team in a brainstorming session.	Generate a presentation on the marketing campaigns necessary to carry out a strategy	Generates a summary of the collected data in pivot tables	Ask by files shared during the meeting

Copilot for Microsoft 365

Learn to use your resources more efficiently

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Word	PowerPoint	Excel	Teams
Generate guide documentation for device configuration and/or update	Generate presentations about device misuse	Creating Resource Usage Charts	Summarize meetings instantly
Generate documentation about the risks of misuse of devices	Create a plan to evaluate the resource needs of the company	Optimization of backup and recovery processes	Extract key points from the meeting
Generate document with the steps to follow to reset a password	Generate a presentation with the evaluation of potential threats to the company's digital infrastructure	Security risk analysis	Extract the tasks that you they have assigned and you have not been able hear
Generate reports on the resolution of incidents in the department	Generate presentations with guides to configure devices and/or connections	Creating Incident Trend Charts	Ask that topics they have been treaties in the meeting and do questions
Generate guides on how to free up space on a disk, or how to generate backups and restores of local files	Generate a presentation with optimizations so that corporate devices have better performance	Storage capacity	Ask by files shared during the meeting

Copilot for Microsoft 365

Learn to use your resources more efficiently

- Executive
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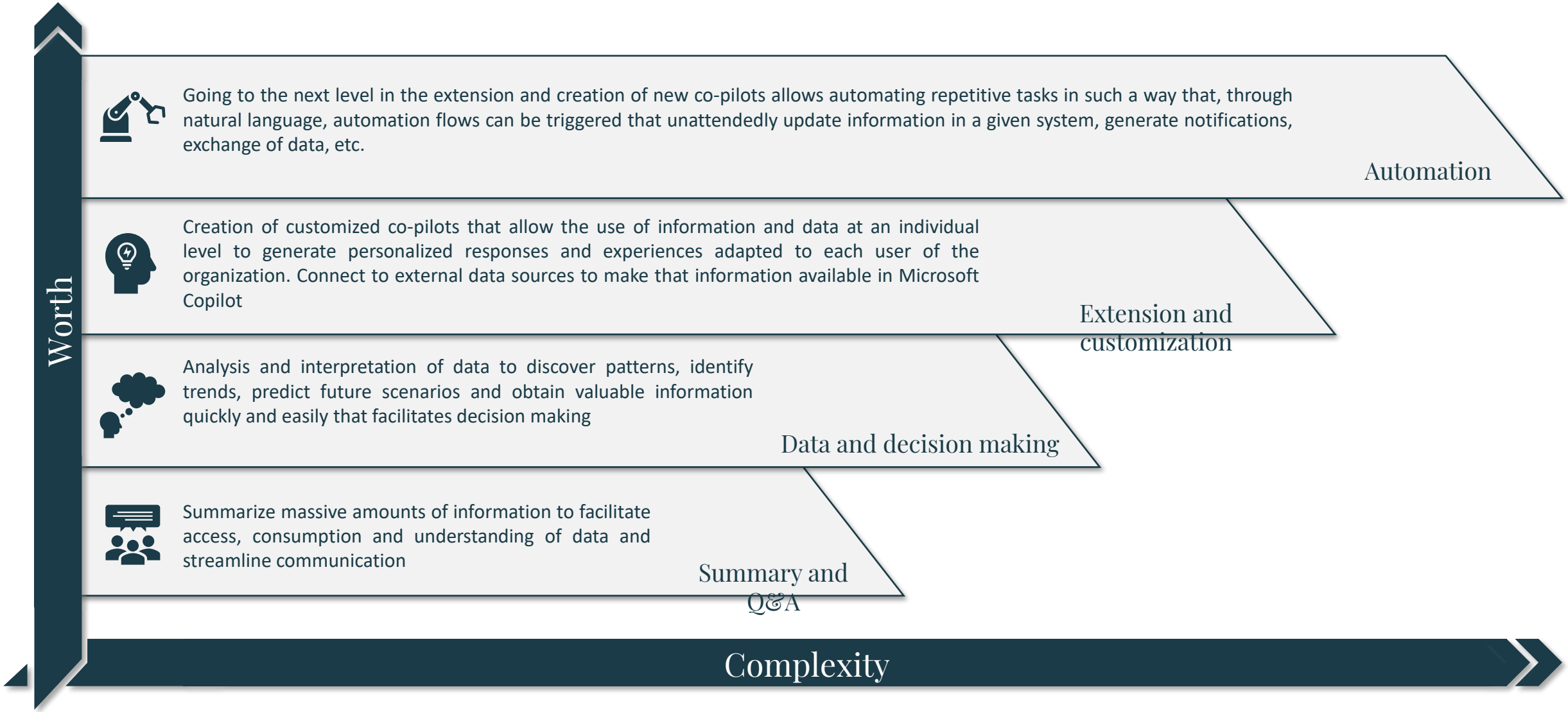
Word	PowerPoint	Excel	Teams
Summarize agreements and highlight the most relevant data in a negotiation	Generate slides in real time while you speak	Sales trend analysis	Summarize meetings instantly
Generate ideas on how to sell a product or service to the customer	Add slides with the goals established to achieve the objective	Product performance analysis	Extract key points from the meeting
Edit tables of contents and generate texts for each cell	Generate a presentation on strategy planning and its roadmap	Purchase history analysis	Extract the tasks that you they have assigned and you have not been able hear
Change the tone of a document depending on the trust you have with the client	Generate a presentation to evaluate work teams	Creating customer profiles by purchase history	Ask that topics they have been treaties in the meeting and do questions
Summarizes sales data obtained from an excel file to improve knowledge of a potential customer or market	Elaborate slides to give monitoring performance indicators of a Excel table	Sales budget tracking	Ask by files shared during the meeting

Copilot for Microsoft 365

Learn to use your resources more efficiently

	Word	PowerPoint	Excel	Teams
Executive	Generate CV comparisons between candidates	Trigger onboarding guides for newborns incorporated	Analysis of efficiency of recruitment programs	Summarize meetings instantly
Finance	Generate internal communication reports	Prepare a presentation with the evaluation and monitoring of employees	Matching offers with candidates	Extract key points from the meeting
Marketing	Summarize CV of applicants	Generate and present ideas to manage the work environment in the company	Hiring trend analysis	Extract the tasks that you they have assigned and you have not been able hear
ITEM	Speed up reading reports	Present employee performance evaluation	Tracking human resources budgets	Ask that topics they have been treaties in the meeting and do questions
Sales	Write guides on how to conduct an interview and what are the key aspects to look for in a candidate	Generate a presentation comparing candidates for a vacancy thanks to CV comparisons with Word	Succession analysis and career development	Ask by files shared during the meeting
HR				

How far can I go with Copilot for Microsoft 365?



How does Copilot work ?

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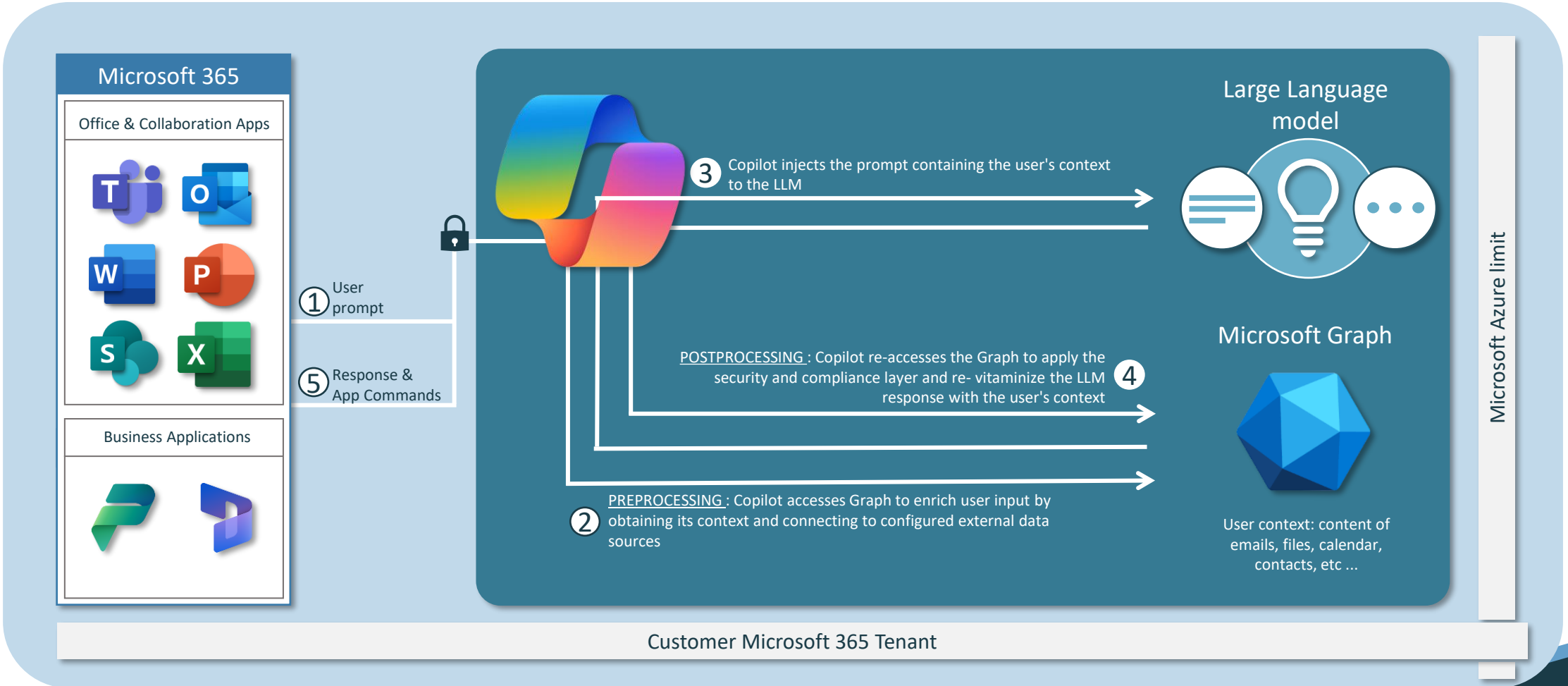
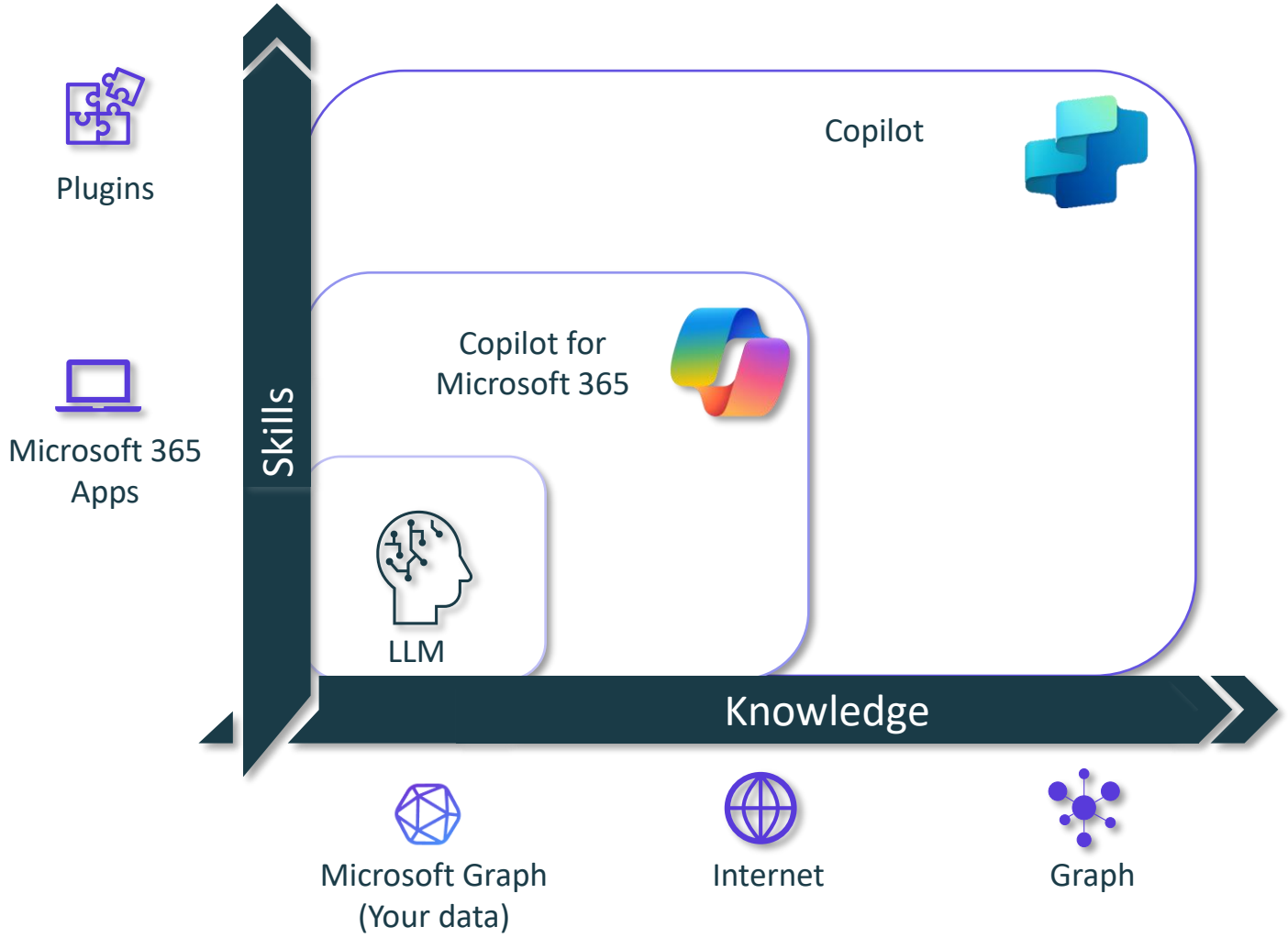
How does Copilot for Microsoft 365 work?

A **productivity tool** that combines **large language models (LLM), artificial intelligence (AI)** algorithms using deep learning techniques and large data sets to understand, summarize, predict and generate content. All of this vitamined with **Microsoft Graph** content **and Microsoft 365** apps you use every day.



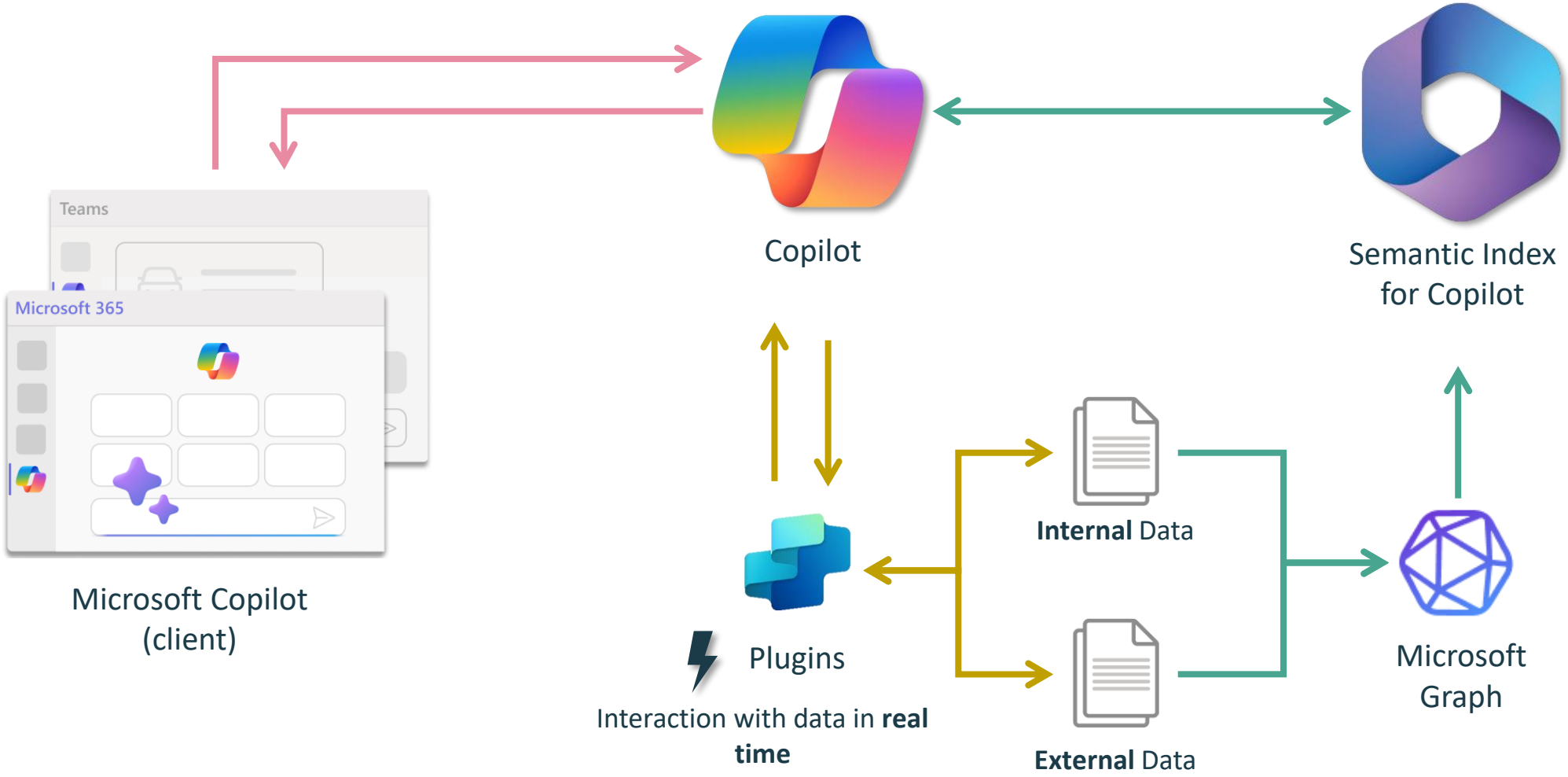
Can I extend Microsoft Copilot ?

Copilot Studio allows you to customize and extend the functionality of Microsoft Copilot by enabling users to create their own personalized copilots using individual-level information and data and connecting to external data sources.



Why extend Microsoft Copilot with Copilot Studio?

In scenarios where, in addition to making queries about the data, it is necessary to interact with the data in real time and/or perform data writing operations in third-party systems, the use of Copilot Studio becomes the protagonist to satisfy these requirements.



How do I monitor Copilot for Microsoft 365?: Viva Insight to review usage metrics and detect patterns and identify improvements in productivity, collaboration, and adoption

Balanced Scorecard*

- **Information for the users themselves, their managers and the organization** to be able to make better time measurements and work patterns
- **Metrics based on collaborative work data** such as number and time spent in meetings, people in each meeting, average time per meeting, number and time spent on emails or chats, time spent on applications, processes and tasks.
- **Identify patterns that can lead to unproductivity, stress or lack of time,** proposing guidelines to optimize and simplify work

Insight metrics require additional licensing*

Copilot adoption for M365

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The path to becoming an AI-driven company

Leadership

Develop leadership capabilities to leverage AI to gain results business

- Basic learning
- Business strategy
- Creation of the AI Council
- Provide clarity and prioritization to implementation

Human Change

Manage human transformation through robust user enablement programs

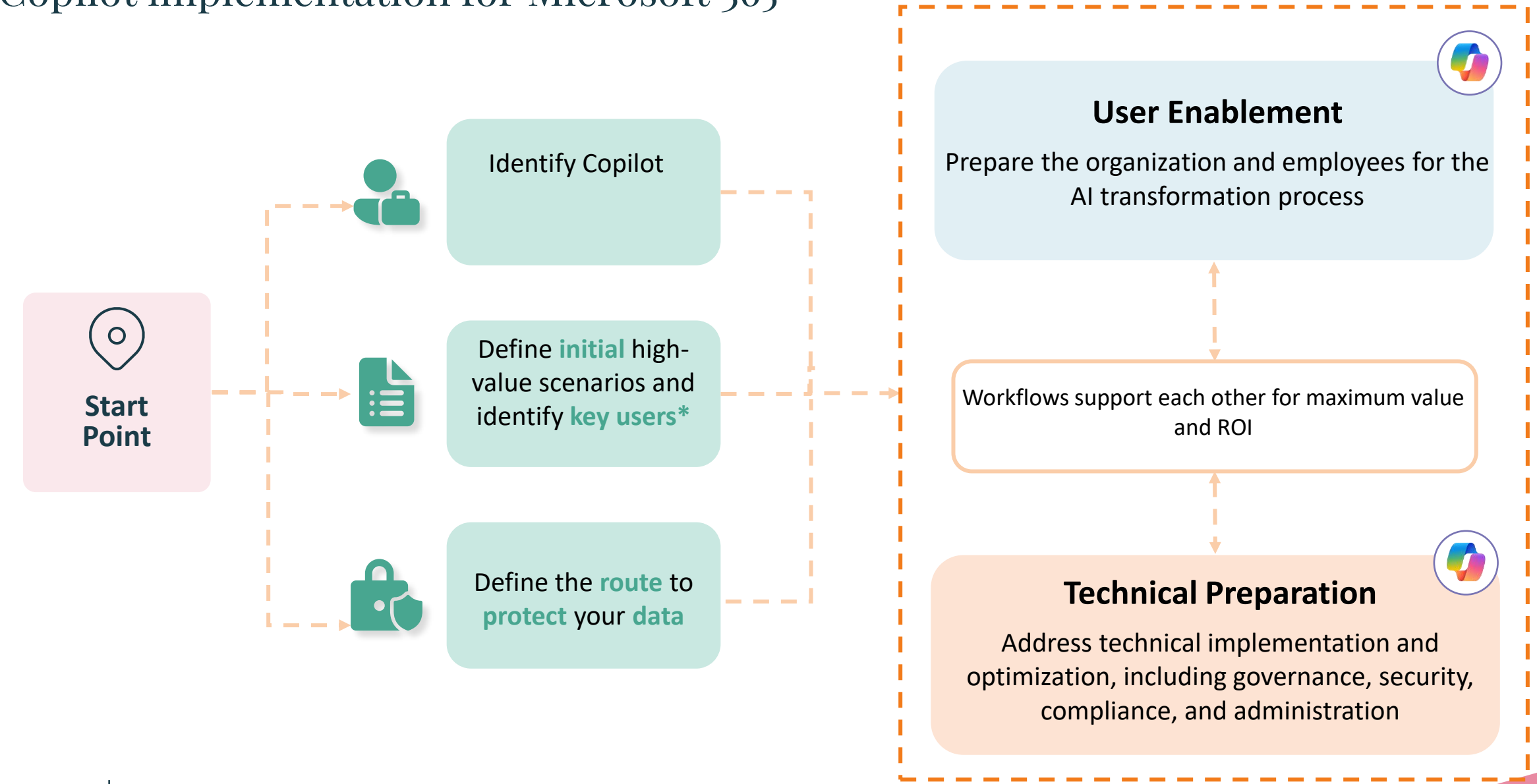
- Invest in employee experience
- Improve culture
- Authentically integrate feedback

Technical skills

Develop and iterate skills techniques to obtain results business

- Provide access to training and experts
- Manage and mitigate risk
- Improve the service management process

Copilot implementation for Microsoft 365



The path to success in implementing Copilot for Microsoft 365

	1 Preparation	2 Onboard & engage	3 Generate impact	4 Evolution
USER ENABLEMENT	Selection of the initial departments or businesses for deployment, as well as the set of critical users with whom to achieve rapid impact. ✓ Identify the best team to ensure success, being strategic and intentional with the selection	Lay the foundation for successful progression of AI skills. ✓ Establishment of training programs, key users and participation community Make continuous training the standard ✓	Copilot dashboard and user surveys ✓ Quantify impact, including growth, cost savings and benefits Disseminate success stories and share knowledge ✓	Extend to new scenarios and transform business processes. ✓ Identify new scenarios functional and interorganic of high value ✓ Recognize and reward he success
PREPARATION TECHNIQUE	Perform the initial Microsoft Copilot *assessment* for Microsoft 365 ✓ Identify security, governance, and data access needs Create a Copilot implementation plan shared with the user enablement team ✓	Preparing Microsoft 365 for AI deployment ✓ Control over how data security is configured ✓ Deploy additional Microsoft 365 applications if necessary, assign licenses, access, etc.	Knowledge of AI technology and management for better IT service delivery ✓ Copilot dashboard to analyze user retention and engagement ✓	Continuous observation of service status and optimization opportunities ✓ Design, create and publish plugins to offer unique experiences Build your own co-pilots ✓

Minsait is here to help you accelerate your journey to Copilot with expert-led services

User Enablement Path

USER ENABLEMENT

1 Preparation

- **Design an AI Council and define RAI principles**
- **Identify the owners of success, the champions and the pilot team**
- **Detail high value scenarios**
- **Define success criteria, KPIs and success measurement plan**

2 Onboard & engage

- **Design the user enablement strategy and training content:**
  - CoE
  - Communication plan design
  - Training plan design
- **Launch communications with employees**
- **Provide training to user champions and support staff**

3 Generate impact

- **Review success measures and user surveys**
  - Microsoft Copilot Dashboard - Viva Insights
  - Employee feedback with Microsoft Forms
- **Expanded training, adoption support and user support**
  - Opening communication channels in Teams
  - Continuous incident monitoring
  - Generation of FAQs material and new content
  - Continuous training reinforcement
  - Sharing success stories.

4 Evolution

Copilot Studio use case definition

- With the learnings obtained through the implementation pilot, a high-value use case will be defined in this phase to be developed under Copilot Studio

Pilot Range

Planned deliverables

01 Phase 1: Preparation

Design Council AI

Descriptive document of the IA council: objectives, roles, processes, tools,...

Stakeholder

- ❑ Responsible
- ❑ Champions
- ❑ Pilot team

Value scenarios

Document with a list of use cases by role, application and objective

Measurement plan

KPI definition document , scorecard and measurement plan

02 Phase 2: Onboard & Engage

CoE

Copilot CoE Descriptive Document to implement

Communication plan

- ❑ Document with the design of the plan and communication templates.
- ❑ Creation of communication channel

Training plan

- ❑ Document with the plan design
- ❑ Creation of training content
- ❑ Design of itineraries by role

03 Phase 3: Generate Impact

Measurement of success

- ❑ Copilot Initiative Measurement Report
- ❑ Adoption support content

04 Phase 4: Evolution

Copilot Studio use case definition

- ❑ Functional definition of the use case

Path Technical Preparation

USER ENABLEMENT

1 Preparation

Assessment for Copilot 365 optimization

- Starting point to define the roadmap in which the 365 administration, governance and monitoring team will participate

Preparation of the IT team for activation

- Technical documentation for the IT team and training workshops.

Defining an implementation plan for Copilot 365

2 Onboard & engage

Prepare your organization for Copilot for Microsoft 365

- Necessary tenant 365 configurations (365 Apps, Topics and Meetings cookies, privacy, deployment and update channel configuration)
- User account validation
- Deployment of applications to users
- Assigning Copilot licenses and roles

Interpretation of the optimization assessment and review of the starting point (Core / Best -In- Class)

3 Generate impact

Defining a service management plan

Copilot usage reports for Microsoft 365 and establishment of Service Health Checkpoints

- Implementation and configuration of the Copilot adoption dashboard for Micosoft 365 with Viva Insights
- Establishing a Service Health calendar Ceckpoints where the administration team evaluates the metrics obtained and defines points of improvement and actions.

4 Evolution

Copilot Studio in a Day

- With the learnings obtained through the implementation pilot, a high-value use case will be defined in this phase to be developed under Copilot Studio

Use case implementation for the creation of a personalized copilot that serves as training for the technical team.

Pilot Range

Deliverables planned

01 Phase 1: Preparation

Assessment

Document with the result of the assessment carried out detailing the main points analyzed

IT Training Material

Training material for the IT team on the functionalities and services that impact Copilot for Microsoft 365

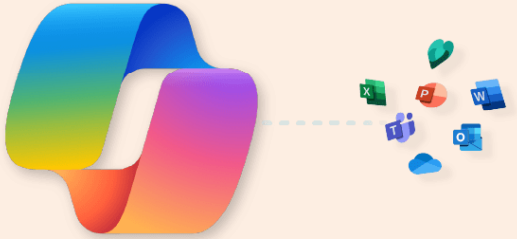
Deployment plan for Copilot Microsoft 365

Document that will detail the Copilot implementation plan for Microsoft 365 (Objectives, roadmap , identification of users and participating areas...)

02 Phase 2: Onboard & Engage

Copilot Microsoft 365 Adoption

Document with the adoption status for Copilot Microsoft 365 inventorying all the configurations made in this phase



03 Phase 3: Generate Impact

Service Management Plan

Document in which the service administration plan will be defined, indicating the actions to be carried out for its administration and evolution

04 Phase 4: Evolution

Copilot Studio Implementation

Copilot developed for the implementation of an identified use case