Netwoven

Your Copilot for work

A whole new way to work

Copilot for Microsoft 365

Unveiling the Dynamics and Capabilities

Your AI assistants at work

List of Copilots

Sample use cases of the Copilot for improving productivity

Microsoft Copilot (formerly Microsoft Bing Chat)

"Summarize the content", "Draft a blog", "Draft an email", "Create an image"

Copilot for Microsoft 365

"Summarize the content", "Draft a blog", "Draft an email", "Create a presentation" – based on context of your data

Copilots based on roles – Sales, Service, Security and GitHub (development), and more

"Prepare for meetings", "Generate sales forecast", "Assess security posture", "Monitor your environment for suspicious activity", "Condense lengthy case details, notes and emails for agents", "Generate chat and email replies", "Code completion", "Generate code documentation"

Build custom Copilots using Microsoft Copilot Studio and Azure Open AI Studio

Build Power Virtual agents and Chatbots for "Sales help and support issues", "Store opening hours and store information", "Employee benefits information"

Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language

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

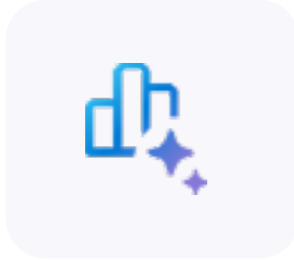| Security	+	Compliance	+	Privacy	+	Responsible AI

Built on Microsoft's comprehensive approach

Copilot for Microsoft 365

Grounded in

Your business data

Connecting cutting-edge AI to your business data in a secure, compliant, privacy-preserving way.
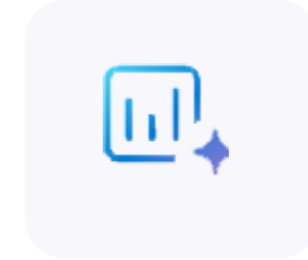
Comprehensive

security, compliance & privacy

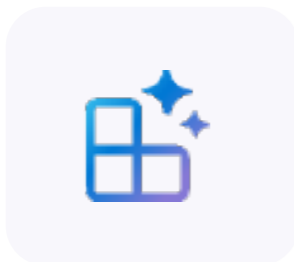Copilot inherits your security, compliance, and privacy policies set up in M365.

Protected with

secure data partitions

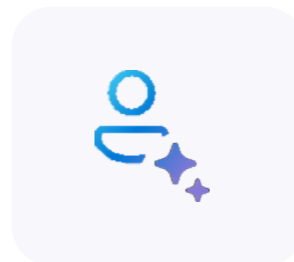Your data never leaves its secure partition, and it is never used for training purposes.

Integrated into the

apps you use evereyday

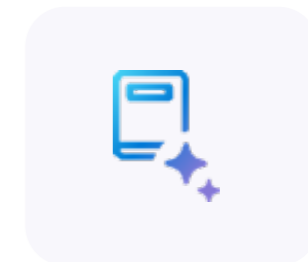Word, Excel, PowerPoint, Outlook, Teams, and more.

Individual user & admin

always in control

User decide what to use, modify, or discard.

Designed to

learn new skills

As Copilot learns about processes, it can perform more sophisticated tasks and queries.

Microsoft's Responsible AI principles

Microsoft Cloud — AI you can trust

Your data is your data. Your data is not used to train the OpenAI foundation models without permission. Your data is protected by the most comprehensive enterprise compliance and security controls.
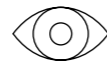
Fairness

Reliability & Safety

Privacy & Security

Inclusiveness

Transparency

Accountability

70%

Copilot users said they were more productive

source: Microsoft

With Copilot for Microsoft 365 You Can Be...

More Productive in Outlook

"Please summarize this email thread for me. Please highlight decisions made, open issues, and action items assigned to me."

More Expressive in PowerPoint

"Please create a customer presentation using these documents. Make sure to include a section on Next Steps."

More Analytical in Excel

"What are the key insights from this table of quarterly sales forecasts broken out by segment and product?"

More Creative in Word

"Please draft a blog post using these documents."

More Collaborative in Teams

"Please summarize this group chat and recap any decisions that were made."

68%

The professional said it improved the quality of their work.

source: Microsoft

Organization challenges adopting Copilot for M365

Copilot challenges

- Copilot is trained on a massive dataset of text and code, which means that it has access to a lot of sensitive information. Organizations need to be aware of the potential privacy and security risks associated with using Copilot, and they need to implement appropriate security measures to protect their data.

- Good content management practices need to be in place. For many organizations, content oversharing, and data governance can be a challenge

- Organizations need to be aware of the copyright or other laws affecting usage of AI generated content and its usage within the organization.

- Copilot for M365 is a subscription-based service ($30/user/month) and organizations need to manage the access and cost of the AI solution diligently.

- Copilot requires a certain level of technical infrastructure to run. The requirements are: M365 E3/E5 or M365 for Business/Business Premium, Entra ID, OneDrive, new Outlook client and access to M365 and Teams App store.

- Employees will need additional training on how to use Copilot for M365 effectively.

- Extending Microsoft Copilot using Plug-ins and connectors into LOB or external data requires new development skills.

- Organizations may need to provide support to employees to resolve errors and provide guidance for Copilot for M365 usage.
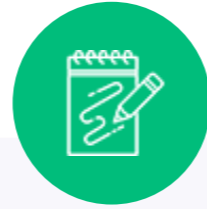
Copilot for Microsoft 365 Implementation Sequence

Copilot best practices

01

Define some success criteria

02

Sketch out the organization rollout plan

03

Secure your data

04

Set up a pilot group

05

Train users on prompt generation

06
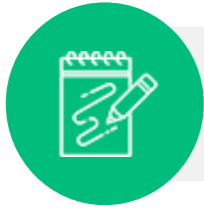
Review results and publicize winners

01: Define Success Critieria

- ✓ Engage the organization to tie Copilot for M365 to business outcomes

  - ✓ What is possible to achieve?

  - ✓ What are some desirable outcomes?

  - ✓ How could Copilot for M365 drive organizational efficiencies or focus?

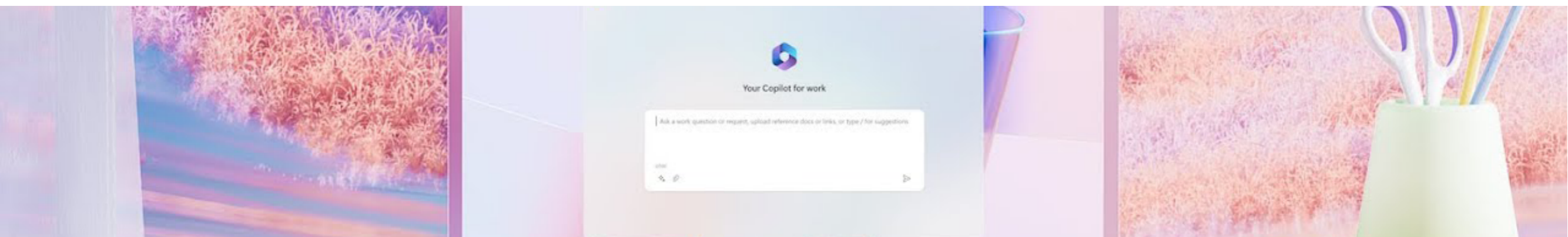 - ✓ What is the potential benefit/value to the organization?

64%

Users said Copilot helps them spend less time processing email

source: Microsoft

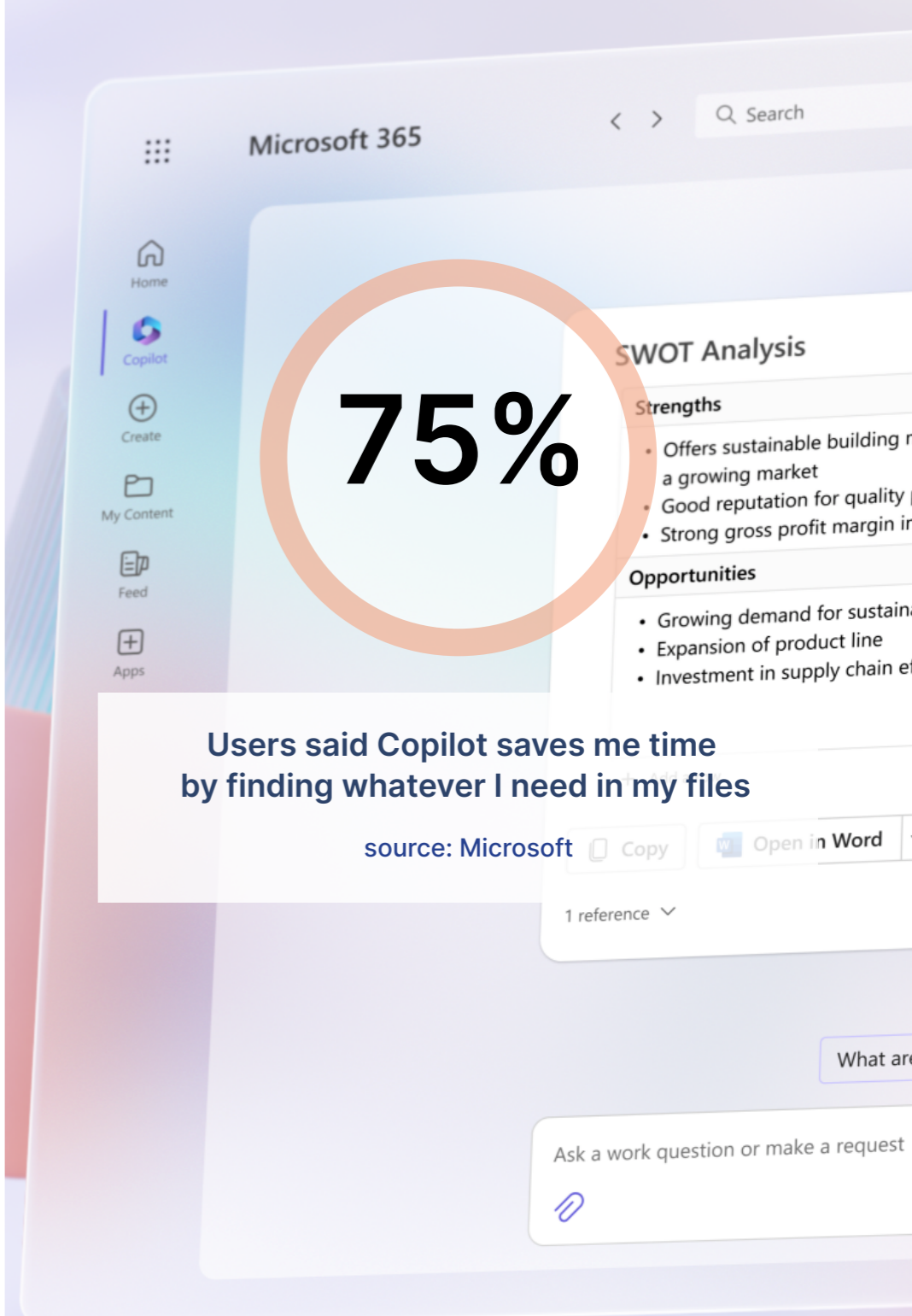# 02: Define the Contours of an Organizational Rollout

✅ Recap the drivers for Copilot for M365 use from Step 1

✅ Calculate the licensing costs to support Copilot for M365 across the organization

✅ Characterize the cost-benefit

✅ Identify what groups/individuals should be part of the prototyping phase

   ✅ Define exit criteria for this phase

✅ Determine sequence of rollout to rest of the organization

03: Secure your data

- ✅ Define Confidential and Sensitive data

- ✅ Identify locations of Confidential and Sensitive data

- ✅ Apply security labels and privacy policies

- ✅ Confirm that Confidential and Sensitive data is not processed by Copilot for M365

75%

Users said Copilot saves me time by finding whatever I need in my files

source: Microsoft

04: Run a Pilot

01
Select individuals from different roles and functions

02
Set goals and exit criteria for the pilot

03
Provide training on how to create effective prompts

05
Communicate to the broader organization

04
Create a workspace to share experiences

05: Train Users

Show users how to comply with corporate security and privacy policies while using Copilot for M365

Demonstrate effective Copilot prompts

Review Protected and Unprotected Copilot

Brainstorm on productive uses of Copilot for M365

77%

Users said once they used Copilot, they didn't want to give it up

source: Microsoft

06: Evaluate and Celebrate

1

Review Copilot for M365 trial

Successes, Failures Usage, Issues uncovered

2

Use pilot learnings to adjust organizational rollout

3

Communicate "wow" Copilot uses

Best practices for a successful Copilot rollout

Assess current state

Identify use cases that would be great for Generative AI

Develop a Copilot roadmap for your Org

Partner with Copilot experts and prompt engineers

Choose a phased rollout strategy

Provide training and effective communication to improve adoption

Amplify AI success stories within your company

Continuously Evaluate and Refine

Copilot for Microsoft 365 implementation highlights

Readiness Assessment
Review of current setup and pre-requisite Review Compliance standards Perform content security assessment Conduct Assessment workshops

Configuration
Ensure OneDrive account for all Pilot users Perform Office apps specific settings Assign Copilot for Microsoft 365 Licenses Enable users for Copilot

Monitoring
Track usage and adoption reports Track performance and accuracy of output Gather user feedback

Prepare environment and Use case
Protect Sensitive data using MS Purview tools Ensure data is properly indexed Gather Requirements and build Use cases

Deployment
Prepare Training materials Send user communications about features Conduct Training and support

Integrations and Development
Extend Copilot using low-code development Extend Copilot using plugins, Teams message extensions or connectors Build custom Copilots using Azure AI Studio (custom code) or Microsoft Copilot Studio (low code)

Next Steps

Data Security and Governance Primer Workshop

Free Workshop

Advanced Data Security and Governance Workshop

Contact us

Readiness Assessment

Call us

Attendees will get free ebook via email. For other questions or requests, mail to: info@netwoven.com

About Netwoven

Netwoven is a trusted Microsoft Solutions Partner who unravels complex business problems leveraging Microsoft technologies. We create and implement digital transformation strategies around secure collaboration, modern software applications, deeper insights from data, modern infrastructure, and security.

Netwoven is a global company headquartered in the San Francisco Bay area, founded in 2001 by senior-level executives from Microsoft, Oracle, and Intel.

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