Prosperity 24/7
Great Minds, Always…

Please ask
Questions
with Slido

Great Minds Series:

Are you ready for Copilot for Microsoft 365?

Jersey | Thursday 22nd February | 2024

Microsoft
Solutions Partner
Data & AI
Azure

Microsoft
Solutions Partner
Digital & App Innovation
Azure

Microsoft
Solutions Partner
Infrastructure
Azure

Microsoft
Solutions Partner
Modern Work

Introductions

Chris Clark
CEO

Geraldine Evans
COO/CLO

Lee Pirouet
Director Tech Sols

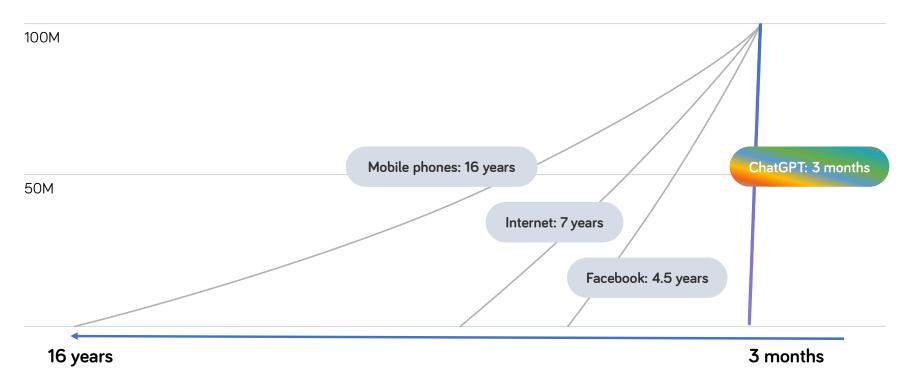Marcus Bailey
Head of Cloud

Fabio Hepworth
Head of Data

Great Minds, Always... On. Evolve. Innovate. Inspire.

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Agenda

- Introduction to M365 Copilot
- Security/Data Governance
- Why User Adoption is important
- Art of the possible demo
- Extending M365 Copilot
- Real world Scenario - Jersey Business
- TD Synnex - Aerial perspective

Please ask Questions with Slido

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Generative AI technology is here

Time to reach 100M users

100M

50M

Mobile phones: 16 years

Internet: 7 years

Facebook: 4.5 years

ChatGPT: 3 months

16 years   3 months

Source: Microsoft Research

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The pace of work is outpacing our ability to keep up

AI-powered tools represent an enormous opportunity

64%

of people have struggled with finding time and energy to get their work done.

3x

Amount by which time spent in Microsoft Teams meetings and calls has increased per week since February 2020.

70%

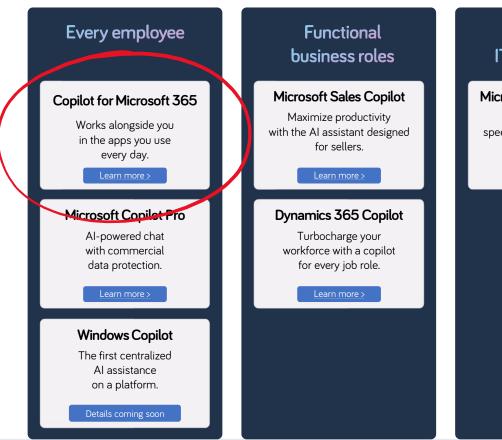Share of people who would delegate as much as possible to AI to lessen their workloads.
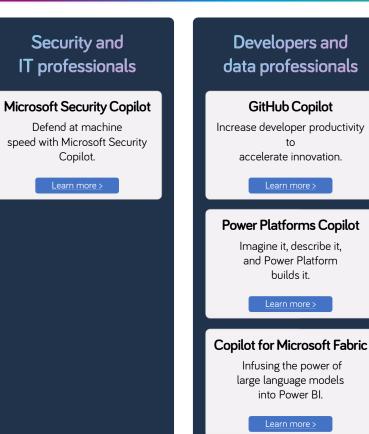
2x

Likelihood of a leader to say AI will provide value by boosting productivity vs. cutting headcount.

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A copilot for every Microsoft Cloud experience

Every employee

Copilot for Microsoft 365
Works alongside you in the apps you use every day.

Learn more >

Microsoft Copilot Pro
AI-powered chat with commercial data protection.

Learn more >

Windows Copilot
The first centralized AI assistance on a platform.

Details coming soon

Functional business roles

Microsoft Sales Copilot
Maximize productivity with the AI assistant designed for sellers.

Learn more >

Dynamics 365 Copilot
Turbocharge your workforce with a copilot for every job role.

Learn more >

Security and IT professionals

Microsoft Security Copilot
Defend at machine speed with Microsoft Security Copilot.

Learn more >

Developers and data professionals

GitHub Copilot
Increase developer productivity to accelerate innovation.

Learn more >

Power Platforms Copilot
Imagine it, describe it, and Power Platform builds it.

Learn more >

Copilot for Microsoft Fabric
Infusing the power of large language models into Power BI.

Learn more >

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6

Unlock productivity and unleash creativity

Copilot for Microsoft 365

Natural Language

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

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Copilot for Microsoft 365 basic architecture

Microsoft 365 Apps

Response + app commands

User prompt

Microsoft 365 Service Boundary

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

◄ Large Language Model

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

Modified

Azure OpenAI

Pre-processing

Grounding

Microsoft Graph

LLM response

RAI

RAI is performed on input prompt and output results

Post-processing

Semantic Index

Grounding

Your context and content

emails, files, meetings, chats, calendars, and contacts

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

Customer Microsoft 365 Tenant

Copilot – Security & Privacy

Copilot for Microsoft 365

Security + **Compliance** + **Privacy**

Microsoft's AI principles

Fairness

Reliability & Safety

Privacy & Security

Inclusiveness

Transparency

Accountability

Microsoft Cloud — AI you can trust

Your data is **your** data.

Your data is **protected** by the most comprehensive enterprise compliance and security controls.

Your data is **not** used to train the OpenAI foundation models without permission.

Adoption Challenges & Recommendations

Data Breaches

Data Governance

Access Controls & Content Oversharing

- Follow a 'Zero Trust' approach
- Define your sensitive data
- Understand where the sensitive data exists
- Define your sharing policies
- Review Access Controls
- Data Security Labels

Licensing Recommendation – Microsoft 365 Business Premium or Microsoft 365 E3 and above.

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How do we bring our people with us on this Copilot journey?

Copilot and AI is all about the new capabilities and ability to transform our everyday experience. However, we need to ensure we have a human centric approach.

#PeopleFirst strategy

Microsoft 365 Copilot

Embedded across Microsoft 365 apps
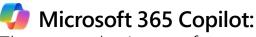
Learn more about our [responsible AI principles](#).
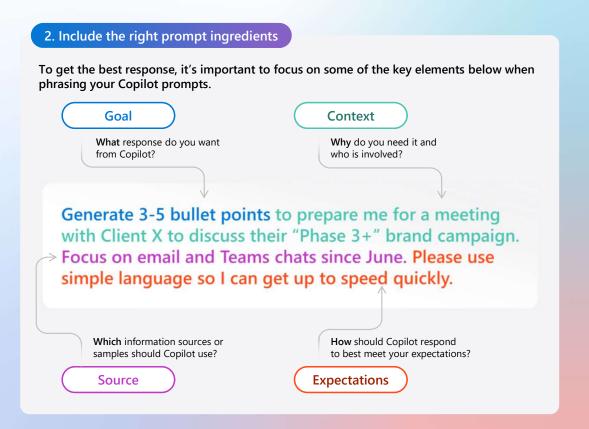
Microsoft 365 Copilot:
The art and science of prompting

Prompts are how you ask Microsoft 365 Copilot 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.

Source
Which information sources or samples should Copilot use?

Expectations
How should Copilot respond to best meet your expectations?

Microsoft 365 Copilot

Unleash creativity

Harness Copilot's power so you never start from scratch
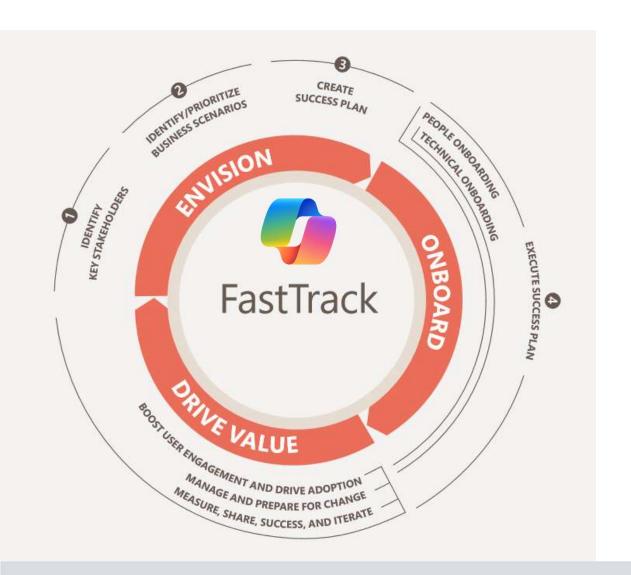
Unlock productivity

Let Copilot summarize actions for you, and optimize your time

Uplevel skills

Be better at what you're good at and master what you've yet to learn

What makes for a successful Copilot rollout?

The Art of the Possible - Demonstration

A Day with Copilot

1 Start your day

Check emails and the calendar. Make a list of actions for the day

Plan the day with Copilot. Get a summary of emails and actions

2 Find information online

Search for information online

Quickly find high-quality answers based on relevant content using M365 Chat

3 Review emails & reply

Read a long email thread and reply

Use Copilot to summarise a thread & draft an email. Review formality & writing style. Ask Copilot to coach

4 Summarise a document

Read a document and write a summary. Highlight key info

Copilot can review a document & summarise the key information

5 Draft a new document

Write a LinkedIn post

Ask Copilot to write a LinkedIn post by referring to existing documents. Use Designer to add images

6 Analyse data

Get data and create charts for a performance report

Ask Copilot to provide insights from data and create charts

7 Create a presentation

Create a presentation

Ask Copilot to refer to an existing document to create a presentation. No need to start from scratch

8 Late to a meeting!

Rush to a meeting – you're late!

Don't stress, the meeting is recorded. Ask Copilot for any info or pending items from the call

Agenda

- ✓ **Introduction to M365 Copilot**
- ✓ **Security/Data Governance**
- ✓ **Why User Adoption is important**
- ✓ **Art of the possible demo**
- **Extending M365 Copilot**
- **Real world Scenario - Jersey Business**
- **TD Synnex - Aerial perspective**

Please Ask Questions with Slido

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Extending Copilot for Microsoft 365
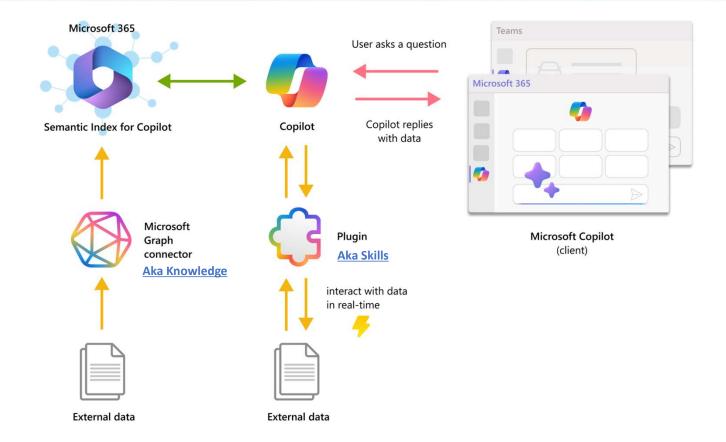
- **What about data outside of Microsoft 365?**

- **Wealth of information & knowledge**
  - Enquiries/Opportunities in Salesforce
  - Knowledge & precedents base in iManage
  - Products & services in NavOne
  - Contracts in DocuSign

- **Can we give this information to Copilot?**
  - Spoilers: yes!

Extending Copilot for Microsoft 365
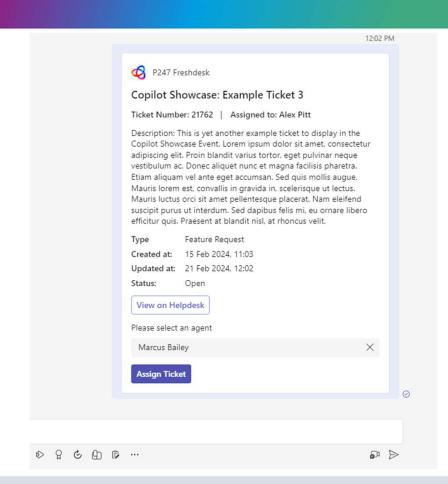
Extending Copilot for Microsoft 365

Not just available via copilot
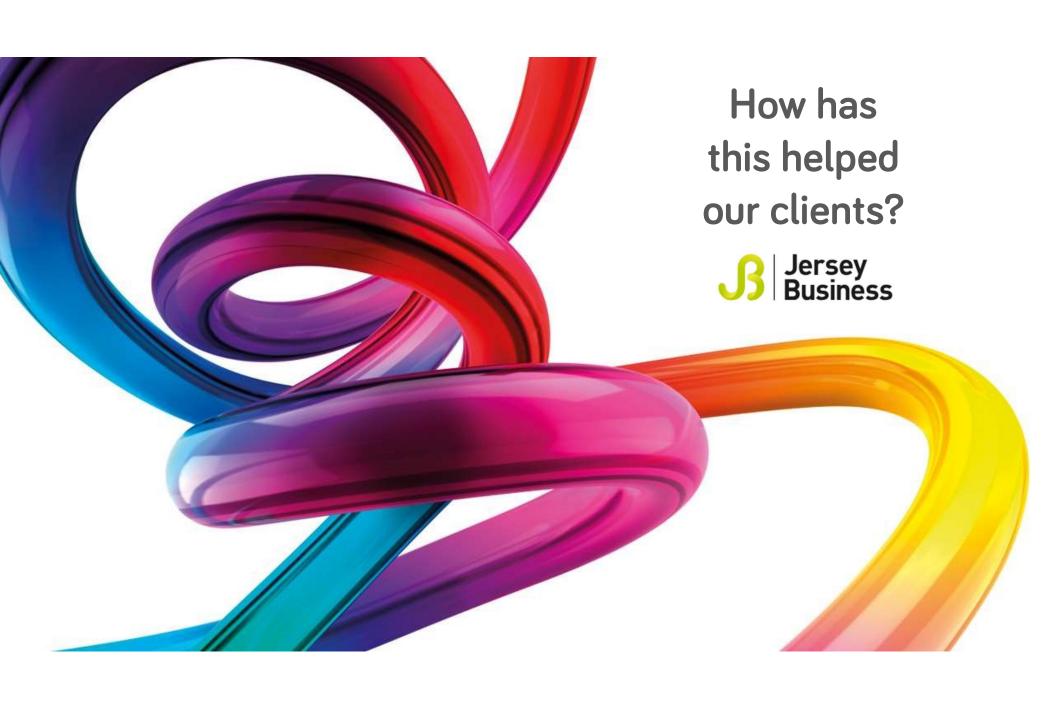
- Data in Graph Index shows in M365 search
- Plugins available in Outlook & Teams

What is next?

- Connectors already available to be explored from App Store
- Prosperity can help with onboarding, training, and development.

How has
this helped
our clients?

Jersey
Business

How has Copilot helped Jersey Business?

Gave a Summary of tasks

Drafted an email for review

Web Search & Summary

Suggested a Meeting Room

Transcribed Meeting Notes
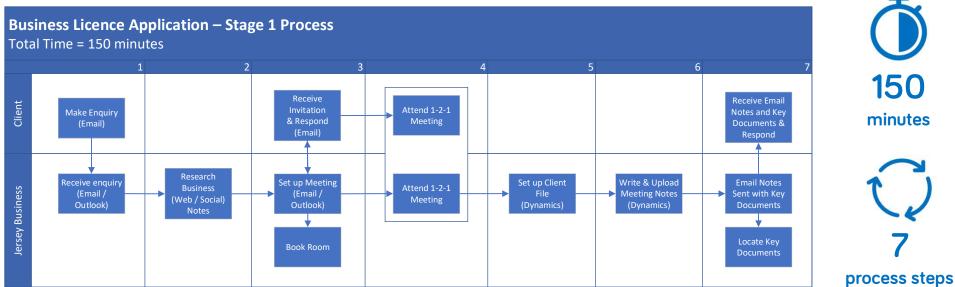
Located key Documents

Reviewed & Compared Documents

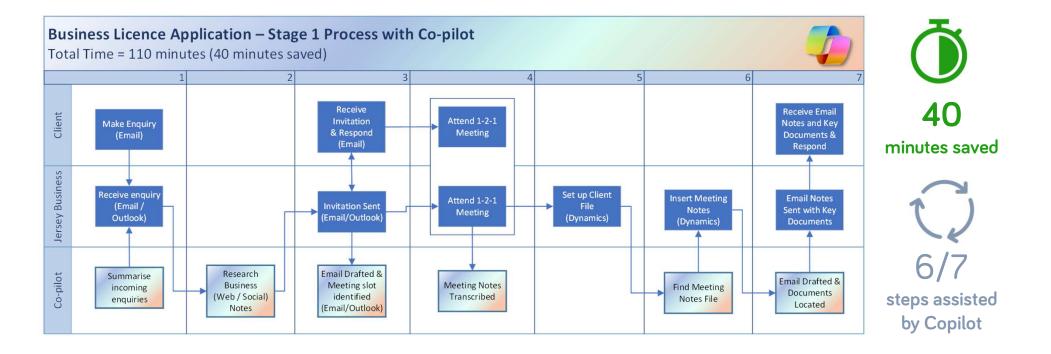Assisted with Charts & Formulas

Business Licence Application with Copilot

Impact of Copilot

Impact on Stage 1 Process	**40**mins saved for JB (27%)	**6/7** process steps assisted by Copilot	
Impact on Stage 2 Process	**83**mins saved for JB (24%)	**7/7** process steps assisted by Copilot	**1** client process step assisted by Copilot

How Copilot assisted

Gave a Summary of tasks

Drafted an email for review

Web Search & Summary

Suggested a Meeting Room

Transcribed Meeting Notes

Located key Documents

Reviewed & Compared Documents

Assisted with Charts & Formulas

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Business Licence Application – Stage 1 Process

In Stage 1, Jersey Business are contacted by a client and a 1-2-1 meeting is arranged.
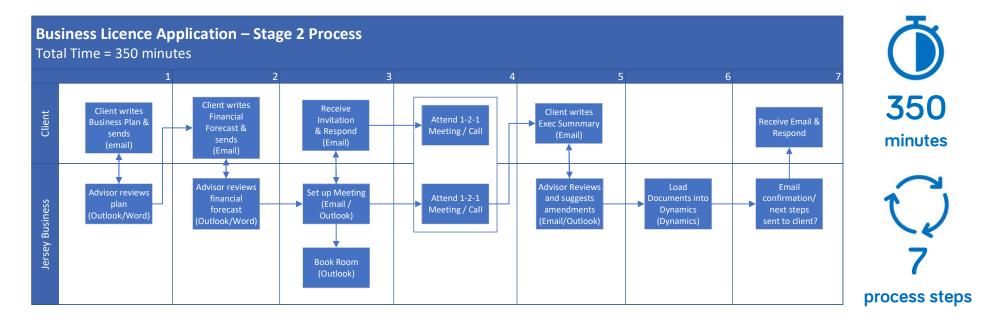Jersey Business take notes and create a client file. Notes and key documents are sent to the client.

Business Licence Application – Stage 1 Process
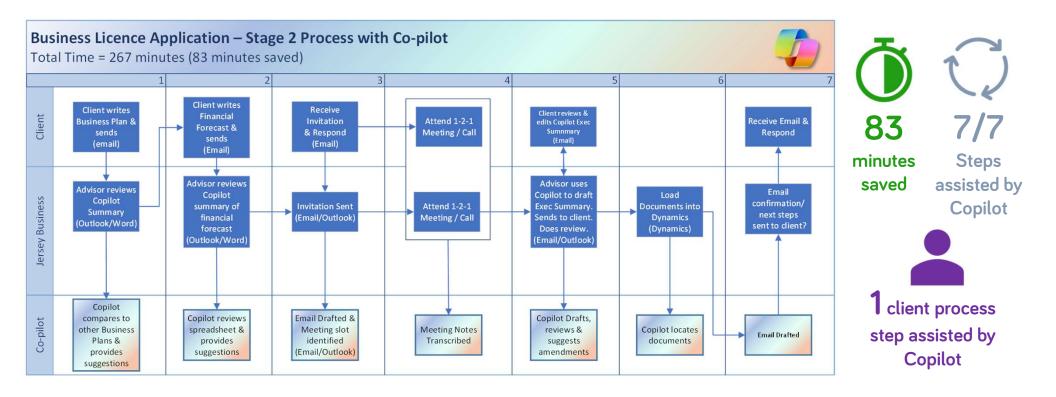Total Time = 150 minutes

	1	2	3	4	5	6	7
Client	Make Enquiry (Email)		Receive Invitation & Respond (Email)	Attend 1-2-1 Meeting			Receive Email Notes and Key Documents & Respond
Jersey Business	Receive enquiry (Email / Outlook)	Research Business (Web / Social) Notes	Set up Meeting (Email / Outlook) / Book Room	Attend 1-2-1 Meeting	Set up Client File (Dynamics)	Write & Upload Meeting Notes (Dynamics)	Email Notes Sent with Key Documents / Locate Key Documents

150 minutes

7 process steps

Prosperity 24/7

With Copilot: Business Licence Application – Stage 1 Process

Business Licence Application – Stage 1 Process with Co-pilot
Total Time = 110 minutes (40 minutes saved)

40 minutes saved

6/7 steps assisted by Copilot

Business Licence Application – Stage 2 Process

In Stage 2, Jersey Business coach and support the client to create a Business Plan, Financial Forecast and Executive Summary. A 1-2-1 meeting is held. Documents are uploaded to Dynamics.

Business Licence Application – Stage 2 Process
Total Time = 350 minutes

	1	2	3	4	5	6	7
Client	Client writes Business Plan & sends (email)	Client writes Financial Forecast & sends (Email)	Receive Invitation & Respond (Email)	Attend 1-2-1 Meeting / Call	Client writes Exec Summnary (Email)		Receive Email & Respond
Jersey Business	Advisor reviews plan (Outlook/Word)	Advisor reviews financial forecast (Outlook/Word)	Set up Meeting (Email / Outlook) / Book Room (Outlook)	Attend 1-2-1 Meeting / Call	Advisor Reviews and suggests amendments (Email/Outlook)	Load Documents into Dynamics (Dynamics)	Email confirmation/ next steps sent to client?

350 minutes

7 process steps

With Copilot: Business Licence Application – Stage 2 Process

Business Licence Application – Stage 2 Process with Co-pilot
Total Time = 267 minutes (83 minutes saved)

83 minutes saved

7/7 Steps assisted by Copilot

1 client process step assisted by Copilot

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On Island Existing Business Licence Application with Copilot

Impact of Copilot

Impact on Stage 1 Process	**40** mins saved for JB (27%)	**6/7** process steps assisted by Copilot	
Impact on Stage 2 Process	**83** mins saved for JB (24%)	**7/7** process steps assisted by Copilot	**1** client process step assisted by Copilot

How Copilot assisted

Gave a Summary of tasks

Drafted an email for review

Web Search & Summary

Suggested a Meeting Room

Transcribed Meeting Notes

Located key Documents

Reviewed & Compared Documents

Assisted with Charts & Formulas

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TD Synnex
Aerial Perspective
of Copilot

Microsoft

Get AI Ready

Sean Taylor
Microsoft Solutions Architect

Leanne Dewey
Microsoft Business Development Manager

Key take-aways from today
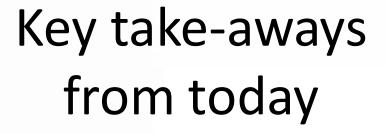
Readiness Adoption Measurement

Impact of M365 Copilot / Uptake across UK/Globe

The AI-powered organization

Copilot for Microsoft 365

Copilot for Microsoft 365

Three-phase approach to business progress

01 Phase	**02** Phase	**03** Phase
Readiness	**Adoption**	**Measurement**
• Concentrate licenses in a few key teams • Start with quick wins • Create an AI council.	• Create a Copilot user community • Identify Copilot champions and early adopters • Manage expectations • Communicate best practices early and often	• Quantify impact with the Microsoft Copilot Dashboard • Meet with your AI council biweekly • Publicly celebrate successes

Copilot for Microsoft 365 Readiness

Security & Data Protection

Things to consider

Risk Assessment — Identify and assess risky behaviours such as **oversharing** or exposing sensitive information.

User Education — Provide training on **how to use Copilot** safely and securely.

Access Controls — Ensure that only **authorised users** can access user data.

Data encryption — Encrypt data both in transit and at rest to protect from unauthorised access this can be done by using things such as **sensitivity labels.**

Data Retention — Establish data retention policies to ensure that user data is only retained for **as long** as necessary.

Regular Audits — Regularly audit data security & privacy practices to comply **with industry standard.**

Security & Data Protection

Essential security controls

**Copilot +
M365 Business Standard**

Multi-factor Authentication with security defaults

Device-based access & security controls for M365 resources

Basic content and keyword search for Copilot generated data

Comprehensive security controls

**Copilot +
M365 Business Premium**

Everything in M365 Business Standard, plus:

Conditional Access policies based on identity, device, location, & network

Terms of use policies to accept before getting access

Restrict saving business data and files to approved applications only

Protect sensitive M365 data from exfiltration and improper use (files & emails only)

eDiscovery, litigation hold and retention policies

Security & Data Protection

Security and Compliance controls for
Copilot for Microsoft 365

Baseline security

Multi-factor Authentication
with security defaults

Manual sensitivity labels
for Copilot generated content
(Office only)

Core security controls

Copilot +
Microsoft 365 E3

Conditional Access
policies based on identity, device,
location, & network

Manual sensitivity labels
for non-Microsoft documents
(e.g., pdf)

Endpoint management
capabilities

Best in class security controls

Copilot +
Microsoft 365 E5

User/session risk
and access control

Automatic sensitivity labels
for non-Microsoft documents
(e.g., pdf)

Discover and evaluate the
risk of 400+ AI apps & implement
controls to for their use at work

Copilot for Microsoft 365 Adoption

Workday efficiencies with Copilot

Summarize a long PDF	Draft emails and social content	Generate images	Learn new skills	Get answers for specific, complex questions
Turn a 20-page, jargon-filled PDF into 5 bullets using Copilot in Edge	Use it as your professional writer on call to draft emails, captions, and more	Leave behind stock images and text-only reports in favor of custom-generated images for emails, on social, and more	Ask questions tailored to your needs and interests to get consolidated key points from the internet for you	Get answers to questions that require multiple data points or a degree of analysis
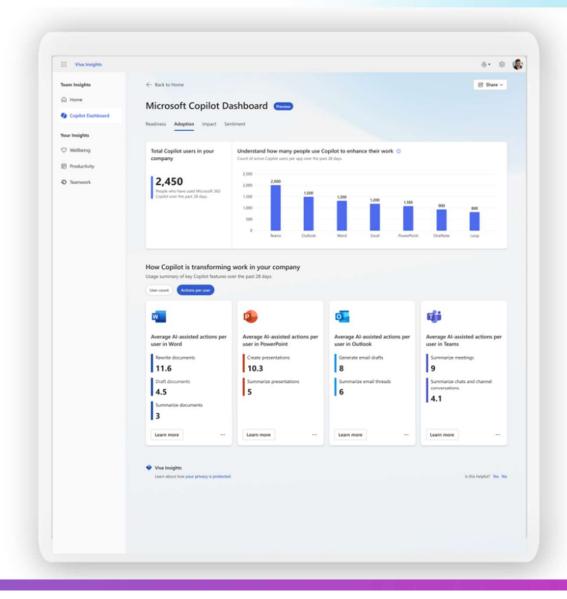
Copilot for Microsoft 365 Measurement

Microsoft Copilot Dashboard

Enable IT and business leaders to plan their AI readiness, drive adoption, and measure the impact of their Microsoft Copilot investment

Public preview

Setting the scene of "Digital Debt"

"It's easier than ever to communicate and harder than ever to keep up"

'64% of employees don't have enough time and energy to do their job'

Copilot Boosts Productivity

Research shows improvements for developers...

88%	74%	77%
are more productive	can focus on more satisfying work	spend less time searching for information or examples
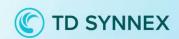
GitHub Copilot

M365 Copilot – The Global Market
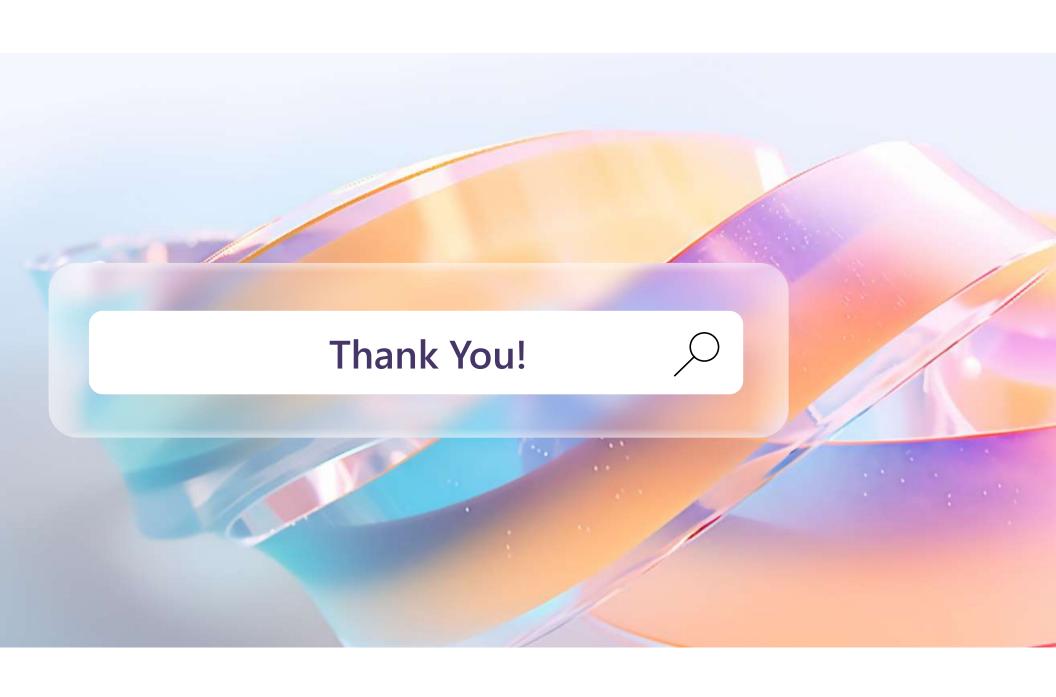
The early stages of adoption!

+ 2,000 Customers

Prosperity will help you on the Journey!

Thank You!

Productivity gains of Copilot for Microsoft 365

70% of Copilot users said they were more productive.

73% said they could complete tasks faster.

64% said Copilot helps them spend less time processing email.

87% said Copilot makes it easier to get started on a first draft.

86% said Copilot makes it easier to catch up on what they missed.

84% said Copilot makes it easier to take action after a meeting.

And Copilot improves quality and creativity:

75% said Copilot saves time by finding whatever they need in their files.

71% said they saved time on mundane tasks.

68% said it improved the quality of their work.

57% said it made them more creative.

68% said Copilot helped them jump-start the creative process.

72% said it helped them generate ideas while writing.

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Q & A
with Slido

Thank you

License costs and requirements

Copilot for Microsoft 365 commercial details

License cost (per user)	**£ 296.40***
Commitment	Annual commitment- annual payment
Payment	Full payment upfront

Requirements and details

All channels (EA, CSP, Direct)

Base license:
Microsoft 365 E5
Microsoft 365 E3
Office 365 E3
Office 365 E5
Microsoft 365 A5 for faculty
Microsoft 365 A3 for faculty
Office 365 A5 for faculty
Office 365 A3 for faculty
Microsoft 365 Business Standard
Microsoft 365 Business Premium

No min order size / Seat count

*Correct at time of publish & Subject to change
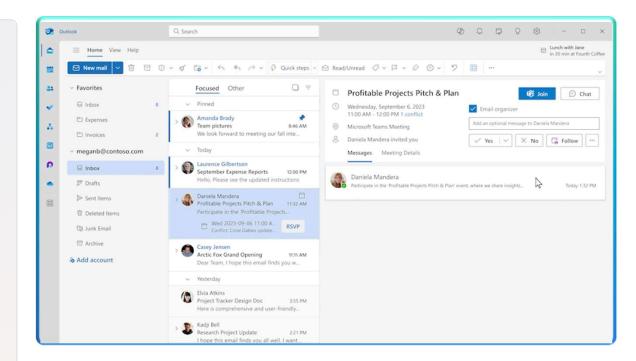
Copilot in Outlook

Helps you stay on top of your inbox and create impactful communication in a fraction of the time.
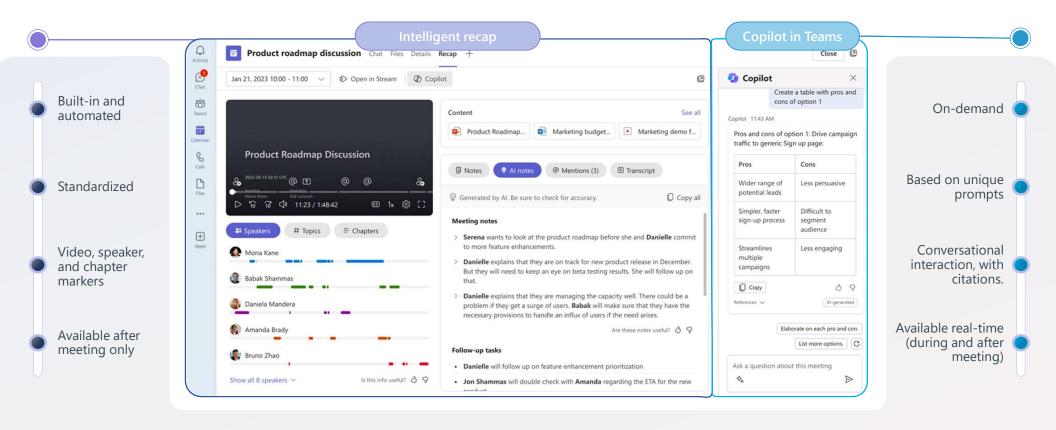
With Copilot now you can:

- Summarize an email thread and suggest action items, replies, and follow-up actions.

- Choose "Sounds like me" to match your unique writing style and voice.

- Follow along with a Teams meeting right from Outlook. Organizer will be notified to record it and Copilot will notify you when the recording is ready.

Intelligent recap in Copilot

Intelligent recap

- Built-in and automated
- Standardized
- Video, speaker, and chapter markers
- Available after meeting only

Copilot in Teams

- On-demand
- Based on unique prompts
- Conversational interaction, with citations.
- Available real-time (during and after meeting)

Use **built-in meeting summaries** and **ask any question** about the meeting

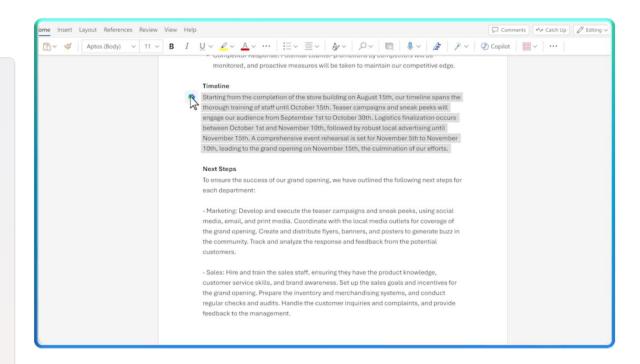*Intelligent recap is also available in Teams Premium

Copilot in Word

Transforms the writing process to make you more creative and efficient.

With Copilot **now you can:**

- Create a summary of any document to share as a recap or quickly get up to speed.

- "Rewrite" a paragraph or save time on formatting by asking Copilot to generate a table from your copy.

- Create custom graphics right in the document with Microsoft Designer, which will pull from stock images, or your own uploads in the chat.
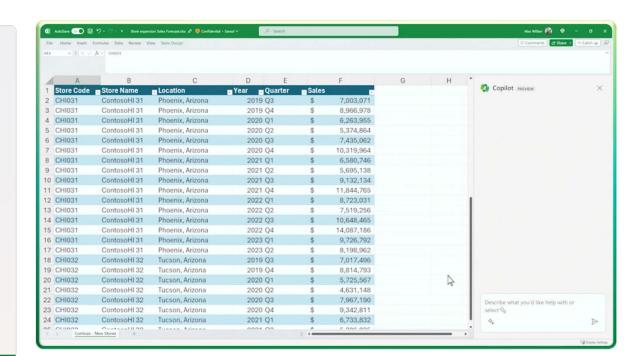

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Copilot in Excel

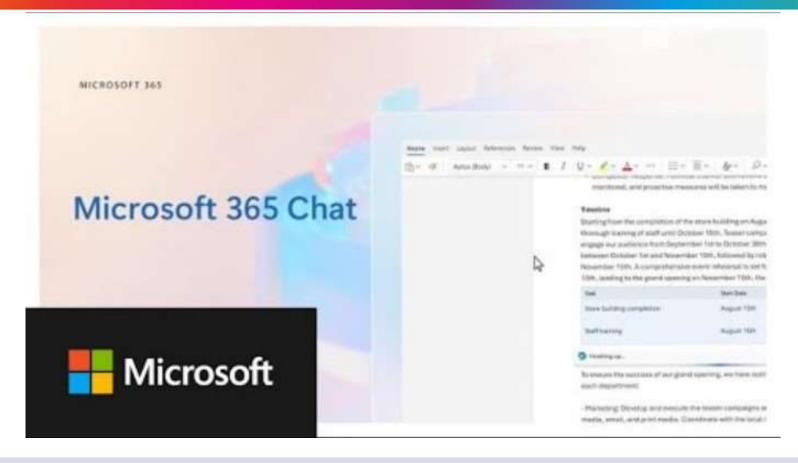**Enables anyone to analyze and visualize data like a data analyst.**

With Copilot now you can:

- Create powerful, professional visualizations, generate forecasts, and save time sorting through data with Python in Excel.

- Prompt: "make all cells red where the value is under 1000," filter and sort your data

- Ask questions about your data to instantly uncover key insights.

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What's the difference between ChatGPT and Copilot for Microsoft 365?

ChatGPT is a general-purpose LLM that works like a chatbot. It uses machine learning algorithms to answer user questions or 'prompts' in a way that mimics human conversations.

ChatGPT cannot search the internet, and its knowledge base does not extend beyond September 2021. This means it can "hallucinate" and provide wrong information. Users also cannot custom-tune ChatGPT.

Popular ChatGPT use cases include text compositions, lists, coding, and content summaries.

Copilot for Microsoft 365 is an AI-powered digital assistant that combines ChatGPT with data from the Microsoft Graph and Microsoft 365 apps. It uses data from user calendars, emails, chats, documents, meetings, and more to deliver contextual, relevant solutions directly in Microsoft 365 apps.

This approach only improves the context for a user's specific scenario; Microsoft does not leverage user data to train the Copilot model.

Since Copilot works directly in Microsoft 365 apps, it can do things like create new content in PowerPoint, suggest email replies in Outlook, and recap a Teams meeting.

Read more about the difference between ChatGPT and Copilot for Microsoft 365.

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Extending Copilot for Microsoft 365

Microsoft 365

Semantic Index for Copilot

User asks a question

Copilot

Copilot replies with data

Microsoft Graph connector
Aka Knowledge

Plugin
Aka Skills

interact with data in real-time

External data

External data

Teams

Microsoft 365

Microsoft Copilot (client)

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