SPYGLASSMTG

A Women Owned/Women Led Company

Microsoft 365 Copilot Flight Plan: Take Off Deployment

Microsoft
Solutions Partner

Infrastructure Azure
Data & AI Azure
Digital & App Innovation Azure
Modern Work
Security

Competencies and Specializations

Microsoft Advanced Specializations

Adoption and Change Management
AI and Machine Learning on Microsoft Azure
Analytics on Azure
Azure Virtual Desktop
Data Warehouse Migration to Azure
Identity and Access Management
Infra and Database Migration to Azure
Teamwork Deployment
Threat Protection

Microsoft PowerBI Partner

PARTNER SUCCESS SERIES
OEA Advanced Partner
OEA
Microsoft

MICROSOFT IN A DAY PROGRAM
Microsoft
Delivery Partner
App in a Day

Microsoft
FAST TRACK
READY PARTNER

Copilot for Microsoft 365 Jumpstart Partner

Microsoft Solutions Partner

Infrastructure Azure
Data & AI Azure
Digital & App Innovation Azure
Modern Work
Security

Microsoft
Cloud Solution Provider

SPYGLASSMTG

The Problem

Microsoft 365 Copilot is a whole new way to work thanks to the integration of AI into our normal business tasks that allow us to be more productive and bring forth new insights from the documents we interact with. These new capabilities also bring challenges to adoption, security, and compliance within our environments.

Organizations may find it difficult to maintain consistent controls and policies for interacting with Microsoft 365 Copilot and never realize the potential benefits without introducing significant risk. The issues are around how to:

- Maximizing the business value of Microsoft 365 Copilot
- Handling increased data compliance and security risks
- Setting boundaries and policies for usage
- Steering innovation and integrations with copilot
- Monitoring data access and exfiltration

SPYGLASSMTG

The Solution

Spyglass's **Microsoft 365 Copilot Take Off (Deployment)** is focused on achieving three things: protecting data and identities, training, and support.

- **Data Governance**
  - Data Loss Prevention and Retention
  - Labelling and Classification
  - Insider Risk Management
  - Data Permission Review and remediation
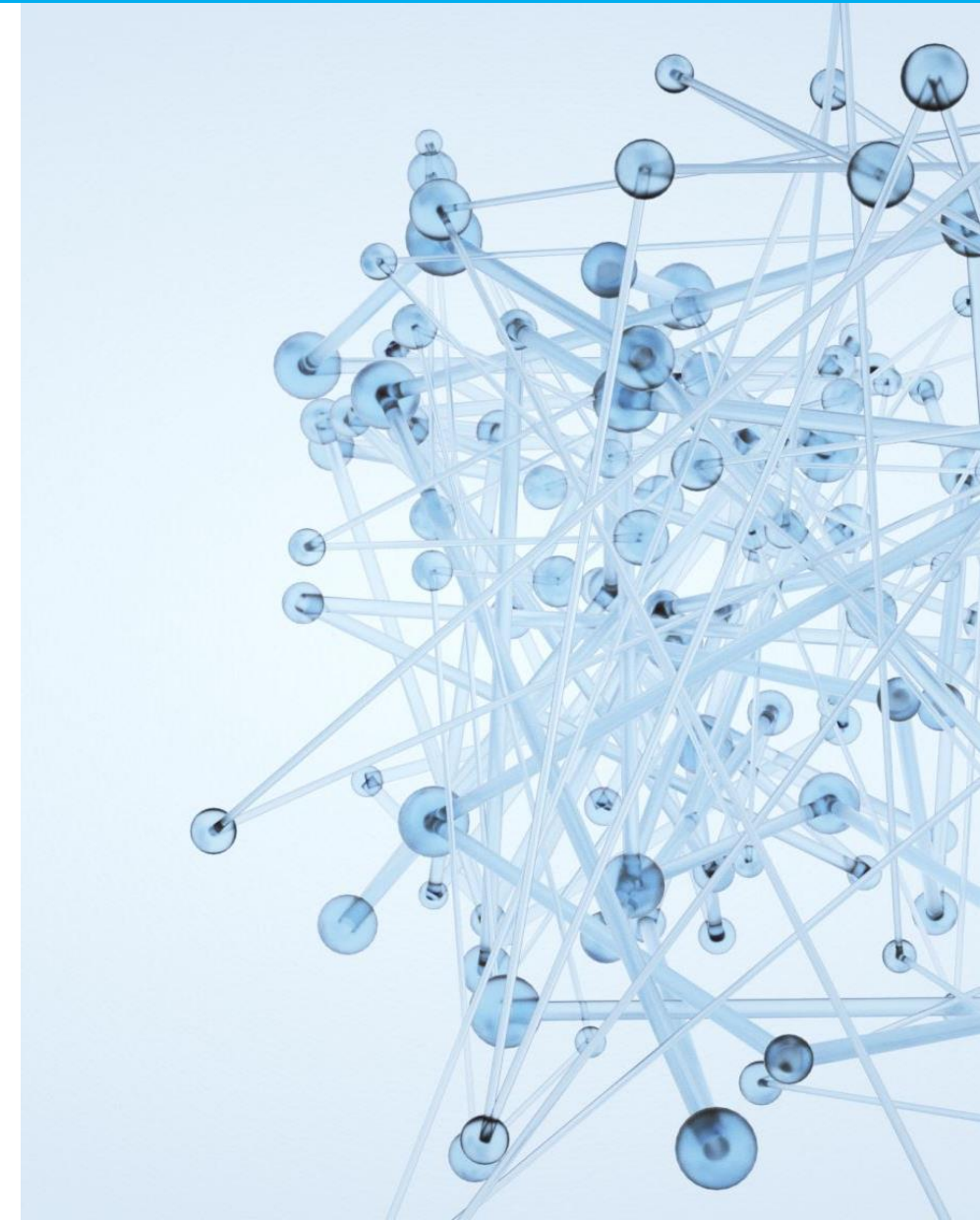- **Identity Governance**
  - RBAC
  - Conditional Access Policies
  - External Access and Sharing
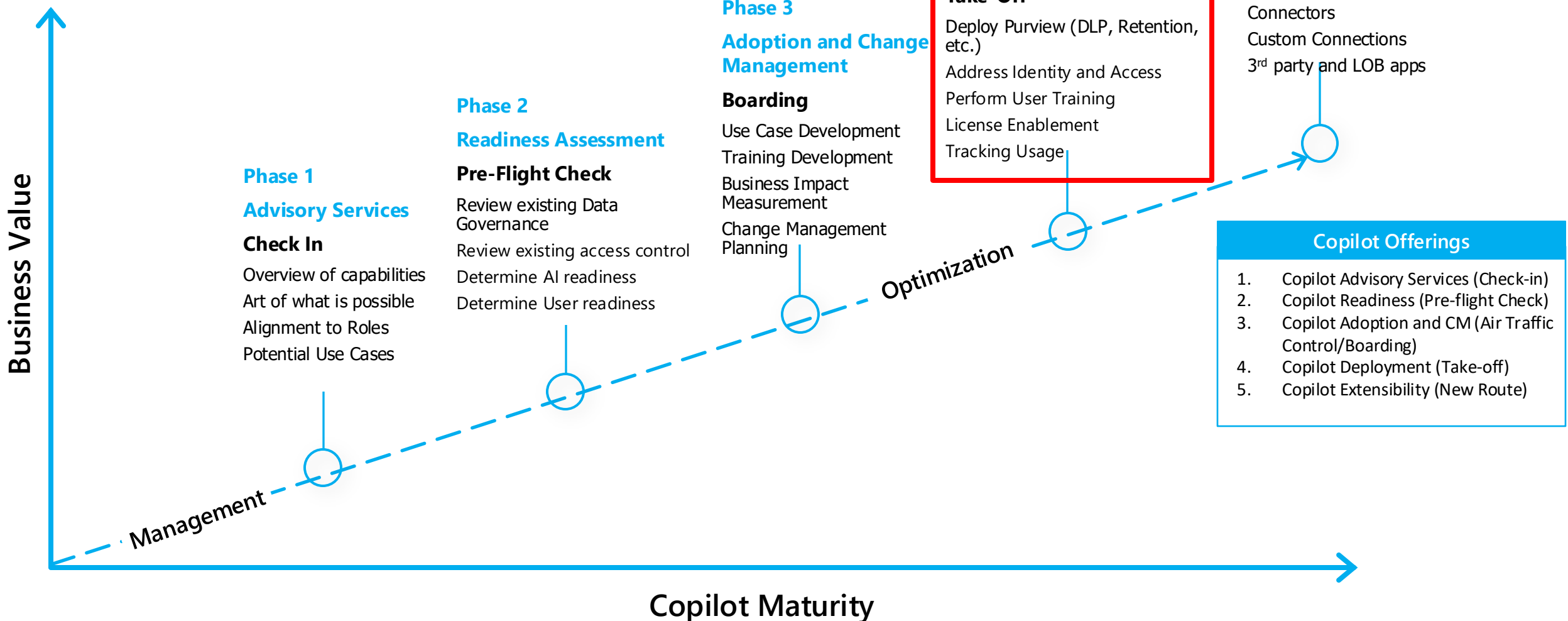- **Training and Support**
  - Train Users, Admins and Support staff.
  - Usage Reporting
  - **Chatbot creation for Microsoft 365 Copilot Support**

Final Deliverables

- Configuration and Support Docs
- Training

SPYGLASS MTG

Microsoft 365 Copilot Flight Plan to Secured Deployments

Business Value (y-axis)

Copilot Maturity (x-axis)

Management → Optimization

Phase 1

Advisory Services

Check In

Overview of capabilities
Art of what is possible
Alignment to Roles
Potential Use Cases

Phase 2

Readiness Assessment

Pre-Flight Check

Review existing Data Governance
Review existing access control
Determine AI readiness
Determine User readiness

Phase 3

Adoption and Change Management

Boarding

Use Case Development
Training Development
Business Impact Measurement
Change Management Planning

Phase 4

Deployment

Take-Off

Deploy Purview (DLP, Retention, etc.)
Address Identity and Access
Perform User Training
License Enablement
Tracking Usage

Phase 5

Extensibility

New Routes

Plugins
Connectors
Custom Connections
3rd party and LOB apps

Copilot Offerings

1. Copilot Advisory Services (Check-in)
2. Copilot Readiness (Pre-flight Check)
3. Copilot Adoption and CM (Air Traffic Control/Boarding)
4. Copilot Deployment (Take-off)
5. Copilot Extensibility (New Route)

SPYGLASSMTG

Phase 4: Copilot Take-off (Deployment)

- Define the Data Governance controls required to protect the data in scope of Copilot
- Initial or expanded deployment of Purview components
  - DLP (up to 5 out of box policies with 1 revision for fine tuning)
  - Retention (up to 3 policies)
  - Sensitivity Labels (up to 4)
  - Retention Labels (up to 3)
  - Setup Insider Risk Management (up to 2 policies (no HR or Badging))
- Addressing Identity and Access controls across the Entra ID landscape
  - Role Based Access Control (RBAC)
  - Sharing
  - Conditional Access Policies (Up to 5 policies)
  - External Access
- Perform User and Admin Training (up to 3 recorded sessions)
- Create Chatbot to help with support questions
- Document creation
- License Enablement
- Tracking Usage to evaluate success

SPYGLASSMTG

Thank You

info@spyglassmtg.com

SPYGLASS