



Synergy Advisors – Copilot for Microsoft 365 Engagement

CY24 Q1 v1.0

Empowering Your Organization's Success with Copilot for Microsoft 365

- This document serves as your comprehensive guide to getting the most out of Copilot for Microsoft 365 with Synergy Advisors as your trusted partner. We'll provide a clear technical overview and scope of the engagement, equipping you with the necessary resources and considerations for a smooth and successful integration.
- Our focus is on tailoring Copilot to your specific organizational needs and maximizing its potential. We'll offer prescriptive guidance on essential base activities, ensuring you have the roadmap to effectively address your unique business scenarios.

Session	Description	Outcome	Target Audience
Introduction	Synergy Advisors Overview + Set workshop agenda and schedule	Align on goals and expectations	Project Lead, Project Manager
Understanding Artificial Intelligence	Discuss key trends from Microsoft Work Trend	Deepen understanding of current work trends surrounding AI	Executive Sponsor, LOB Leaders, Project Manager, IT Decision Maker
Responsibility of using AI	Explain Microsoft's approach to responsible AI	Enhance understanding of Microsoft's commitment to responsible AI	Executive Sponsor, LOB Leaders, Project Manager, IT Decision Maker
Copilot for Microsoft 365	Introduce Copilot's capabilities	Gain foundational knowledge of Copilot	Executive Sponsor, LOB Leaders, Project Manager, IT Decision Maker
Fostering Creative Expression	Showcase Copilot's creative potential in Word, PowerPoint, Excel	Understand how Copilot empowers users to create more effectively	Content Creators, Marketing Professionals
Boosting Productivity with Copilot	Demonstrate Copilot's productivity features in Outlook, Teams meetings, Teams chat	Discover how Copilot streamlines workflows and saves time	Knowledge Workers, Project Managers, Team Leads
Levering Microsoft Copilot with Synergy Advisors	Explore how Synergy help your leverage Copilot by enhancing its capabilities through various use cases	Recognize the value of Synergy's tool integrated with Copilot for continuous improvement.	All Users

NOTE: This agenda is a starting point and can be easily tailored to the specific interests, knowledge level, and needs of your audience.

Engagement Phases - Copilot for Microsoft 365

Crawl

- Briefly introduce Copilot for Microsoft 365.
- Discuss key trends from the Microsoft Work Trend Index.
- Explain the importance of responsible AI.
- Provide a high-level overview of Copilot's features and functionalities.

Walk

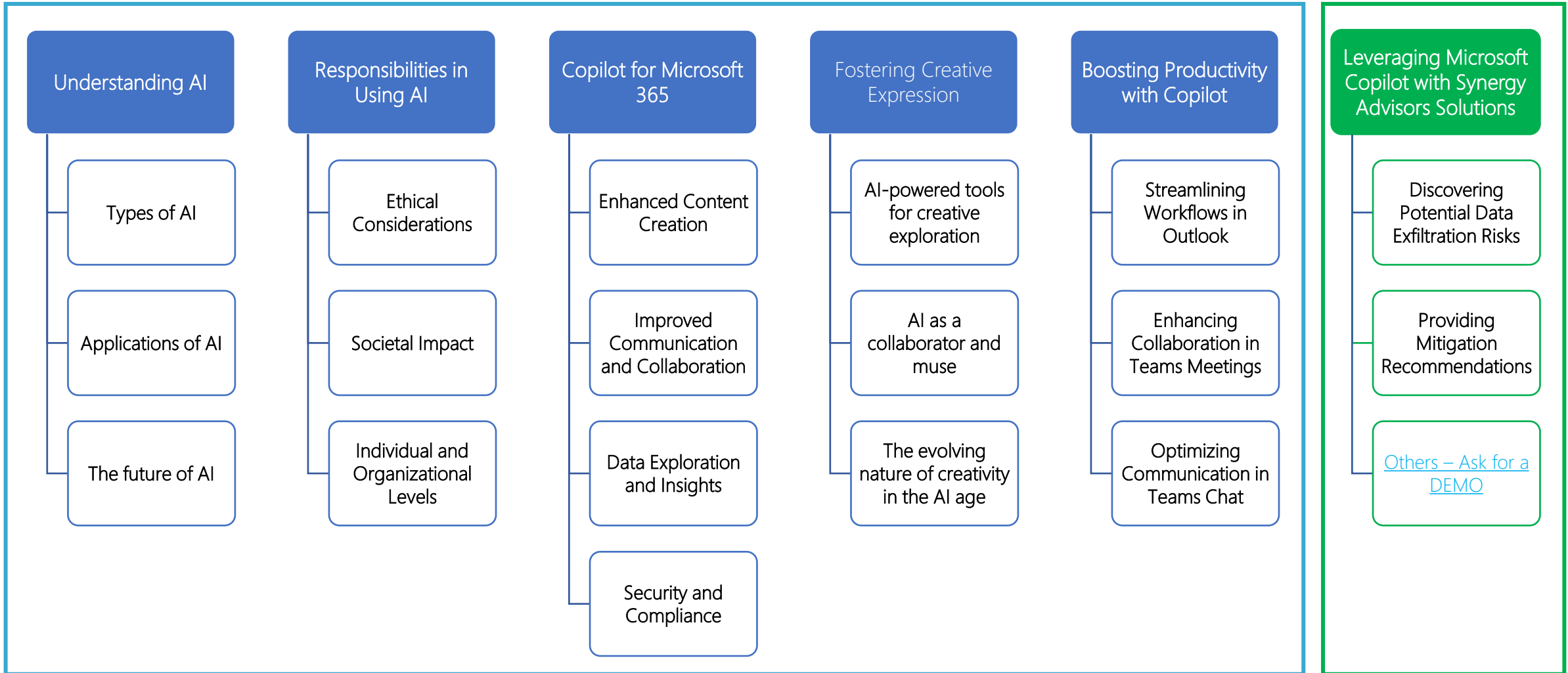
- Demonstrate practical use cases for content creation with Copilot.
- Showcase how Copilot streamlines workflows and saves time in various applications.
- Highlight different ways Copilot can support continuous learning and development.

Run

- Explain the synergy between Copilot and Teams features.
- Introduce the concept of extensibility and its benefits with Copilot.
- Present real-world scenarios demonstrating Copilot's value for various roles.

Scoped Scenarios

Out Scope Available



Synergy Advisors

Overview





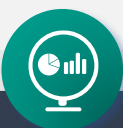
SYNERGY ADVISORS

Security, Data Governance, Modern Work, and Analytics
 +12 Years
 +6.5M End Users



E-Visor

- Enterprise-wide analytics
- Reporting, drill-down, and analysis
- Data correlation across Microsoft 365 workloads and beyond
- Adoption and security insights
- Microsoft 365 configuration best practices
- Licensing usage and activity



E-Visor Teams app

- Scoped analytics
- Alerts and notifications
- Self-service actions
- Different user experiences and actions
 - End user, Manager, Support/IT
- Scenarios
 - Modern Work (O365 Meetings, collaboration)
 - Security (Defender)
 - Compliance (Purview)
 - Identity (Entra)
 - Devices (Intune)



E-Cryptor

- Sensitive data lifecycle management
 - Baseline
 - exception
- Self-service document access request
- Workflow-based advanced collaboration
 - Internal
 - Business to Business (B2B)
- LOB application integration



E-Inspector

- Data at rest structured and unstructured inventory and content inspection
- Business and compliance driven actions based on
 - Data state (Stale/duplicates)
 - Data Sensitivity (Content)
 - Data Location
 - Access type
 - Access profiles



E-Vigilant

- Advanced security and modern work alerts and notifications
- Workflow based + Chatbot experiences (E-Bot)
- Business and technical incident management
 - Ticketing systems integration



E-Migrator

- Assess, discover, and analyze past and future meetings
- Zoom to Teams [Z2T] migration
 - Past meetings Recordings
 - Upcoming Meetings



Zero Trust Solutions



Secure E-mail

- Strong user authentication and protection
- Compliant Device Access
- Control Application usage
- Prevent Data Leakage
- Email Platform Configuration
- Protect against threats
- Tune alerting and reporting



Secure Collaboration

- Strong user authentication and protection
- Control access by user, device, and risk
- Harden and protect the collaboration platform
- Defend against advanced threats
- Advanced data protection and encryption
- Secure external Collaboration



Device Protection

- Strong user authentication and protection
- Establish security and compliance baseline protection
- Sanctioned and unsanctioned application control
- Data protection on the endpoint
- Advanced threat protection



Information Protection

- Strong user authentication and protection
- Automatically discover sensitive data
- Classify, protect, and encrypt your most sensitive files
- Data retention and deletion
- Secure external Collaboration



Threat Protection

- Strong user authentication and protection
- Defend the endpoint from advanced threats
- Protect your cloud, apps, and infrastructure
- Advanced monitoring, service analysis, alerts and notifications



Platform Protection

- Establish security baseline
- Streamline cloud infrastructure entitlement management
- Integrate advanced cloud security controls
- Protect against cloud threats
- Advanced monitoring, service analysis, alerts and notifications



Secure Access

- Strong user authentication and protection
- Advanced cloud security solutions and integration
- Protect against cloud threats
- Advanced monitoring, service analysis, alerts and notifications



Copilot for Microsoft 365

*Additional Scenarios Available
Data Governance
(Out of Scope)

ROTATION-BALANCE-SPEED
CONNECTED



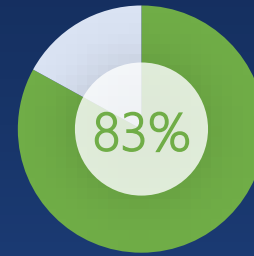
40% of organizations have an insufficient budget for protecting data at rest.



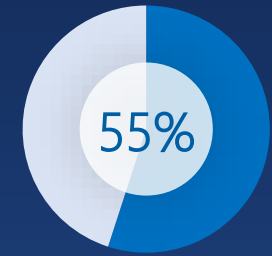
54% of organizations are not entirely confident in their employees' ability to secure data at rest.



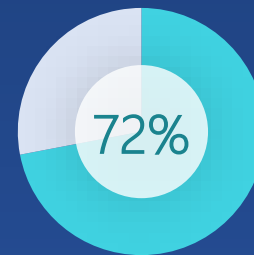
22% of organizations do not have a security solution to protect data at rest



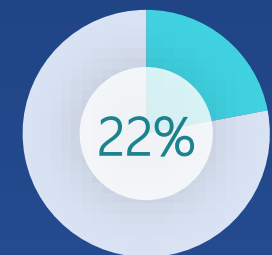
... expressed concerns over data sovereignty.



... recently experienced a data breach, with human error identified as the primary cause.



...of the surveyed organizations acknowledge having experienced a data breach.



...of respondents say they have a limited encryption plan or strategy that is applied to certain applications and data types.

Microsoft 365 Copilot - Data Governance Assessment Summary



SPO



OD4B



Teams

Copilot M365
Assessment
Summary

M365 Assessment

Data at rest configuration and shared collaboration activity review for M365 workloads

In scope

- Frequency
 - One-time
- Actions
 - Discover potential data exfiltration risk
 - Provide mitigation recommendations
- Scope
 - Microsoft 365
 - SharePoint Online (SPO) Share settings and activity
 - SPO User access
 - File sensitive identification (SIT)
- Data Type
 - Unstructured data

Out of Scope

- Frequency
 - Additional scans
- Actions (one/many)
 - Persistent scan and remediation
- Scope
 - Other Cloud services
 - On-premises
- Data Type
 - Structured data



E-Suite Offerings [E-O] Overview (Out of Scope)

ROTATION-BALANCE-SPEED
CONNECTED

E-Suite Offerings [E*O]

Integrated Approach

Consultants and technologies as part of the engagement

Quick win focus

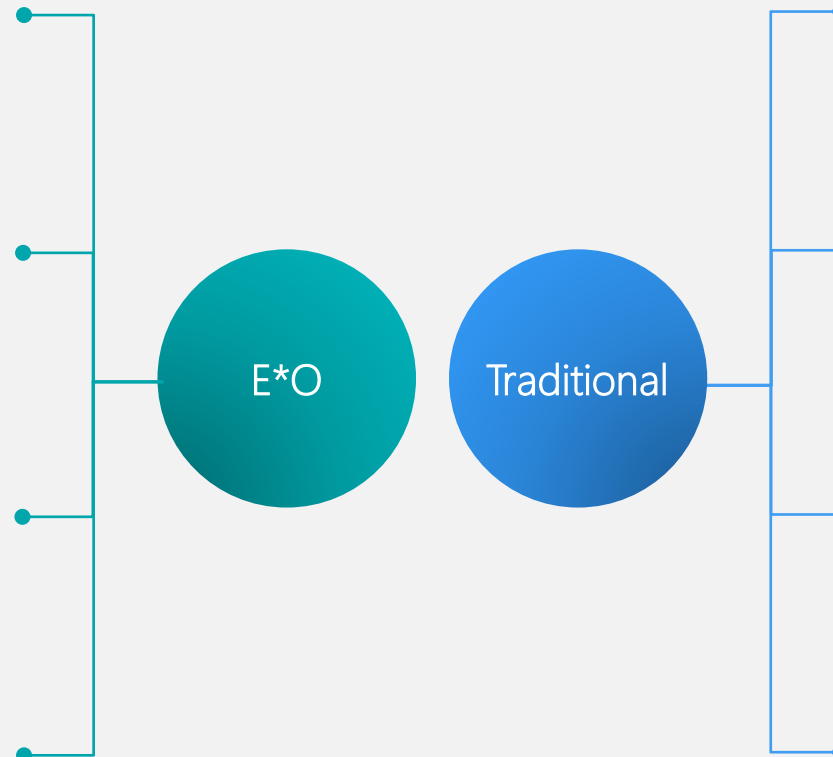
Focused in a few days/weeks' effort with BIG impact

Technology

- Specialized in optimizing inspection, changes and protection as lightning speed
- Optimized analytics provides for easy impact analysis

People

Experts focused on optimization not manual configuration/documentation



Traditional Engagement

Isolated Approach

Consultants and technologies not necessarily happening in an orchestrated fashion

Big impact but the time consuming

- Requires big effort to gather data, provide recommendations and implement changes
- People and expert time translated in expert time costs

Technology

- Typically, part of long upfront investment
- PoC /Pilots may not include experts

People

Experts gathering and implementing changes with OOB solution tools that are time consuming
Manual evidence, findings documentation process

E-Suite Offerings Overview

Quick-win focused short services/technology “blend” engagement providing:

Technology

Quick assessment or remediation solutions that accelerates findings and remediation according to your organization needs.

Use of the tool as part of the engagement



Expertise

Expert assistance along the way preparing our technologies for best impact and post execution analysis

Pre/post hour activities included as part of the engagement scope



Facts

Quick results with executive level ready reports

Outcome/deliverable available to customer for further review





Discovery [EDO]

- **Objective**
 - Assessment focus activity
- **In Scope**
 - *One-time* review of current workload(s)
 - Pre configuration review
 - Findings review
- **Out of Scope**
 - Platform/workloads/data Modifications



Remediation [ERO]

- **Objective**
 - Remediation focus activity
- **In Scope**
 - *One-time* change of current workload(s) after EDO done
 - Configuration and change assistance
 - Findings review
- **Out of Scope**
 - Additional Platform/workloads/data Modifications or assessments



Protection [EPO]

- **Objective**
 - Protection focus activity
- **In Scope**
 - Recurrent protection of workload and data *after* EDO/ERO
 - Configuration and change assistance
 - Limited time [Pilot]
- **Out of Scope**
 - Additional Platform/workloads/data Modifications or assessments
 - Permanent product subscription



Monitoring [EMO]

- **Objective**
 - Monitoring focus activity
- **In Scope**
 - Recurrent protection of workload and data after EDO/ERO/EPO
 - Configuration and change assistance
 - Limited time [Pilot]
- **Out of Scope**
 - Additional Platform/workloads/data Modifications or assessments
 - Permanent product subscription





E-Suite Offerings - Discovery
Data at rest scenarios
(Out of Scope)

CAM:A1

Security-scanning

ZONE: M DETAILS-AREA-CODE-A-

0000 0000 0000 0000
0000 0000 0000 0000
0000 0000 0000 0000
0000 0000 0000 0000

31.171

07500

36.00

00

500.00

00.00

CAM:A2

ROTATION-BALANCE-SPEED

CONNECTED



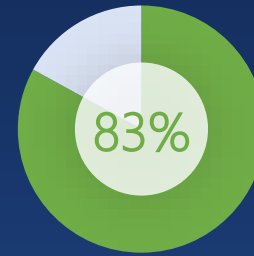
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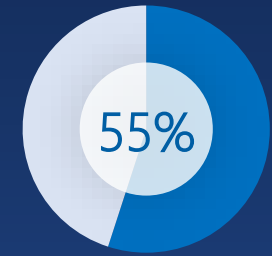
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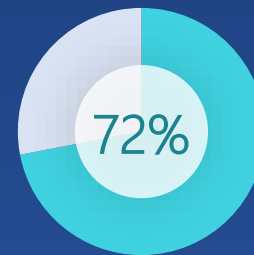
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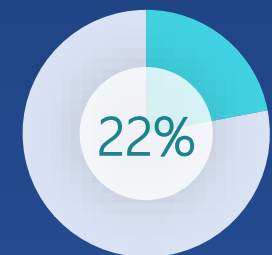
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SPO OD4B Teams

aws

S3

A

Storage File

On-premises

File Server SP 2019 NAS

Azure

- Azure Blob Storage
- Azure Cosmos DB
- Azure Data Explorer
- Azure Data Lake Storage Gen 1
- Azure Data Lake Storage Gen 2
- Azure Database for MySQL
- Azure Database for PostgreSQL
- Azure Data Bricks Unity Catalog
- Azure Dedicated SQL Pool
- Azure Files
- Azure SQL Database
- Azure SQL Managed Instance
- Azure Synapse Analytics

Database

- Amazon RDS
- Oracle
- Snowflake
- SQL Server
- SQL Server on Azure-Arc
- teradata.

File/Service Apps

- Amazon S3
- hadoop HDFS
- Dataverse

M365 / M365 Copilot Assessment

M365 Assessment

User access and shared collaboration of unstructured data within M365 workloads

Hybrid-cloud data Assessment

Multi-Cloud + On-prem

Unstructured data at rest on-premises, in M365, Azure, and AWS S3

Data Anywhere

Structured and unstructured data at rest on-premises, and M365, Azure and AWS

* Subject to change by Microsoft/AWS API/ Synergy Advisors
 ** Microsoft Purview IP (E5 IP&G or later needed for unstructured data protection)
 ** Microsoft Purview Data Catalog (needed for structured data scan and discovery)



SPO



OD4B



Teams

M365 / M365
Copilot
Assessment

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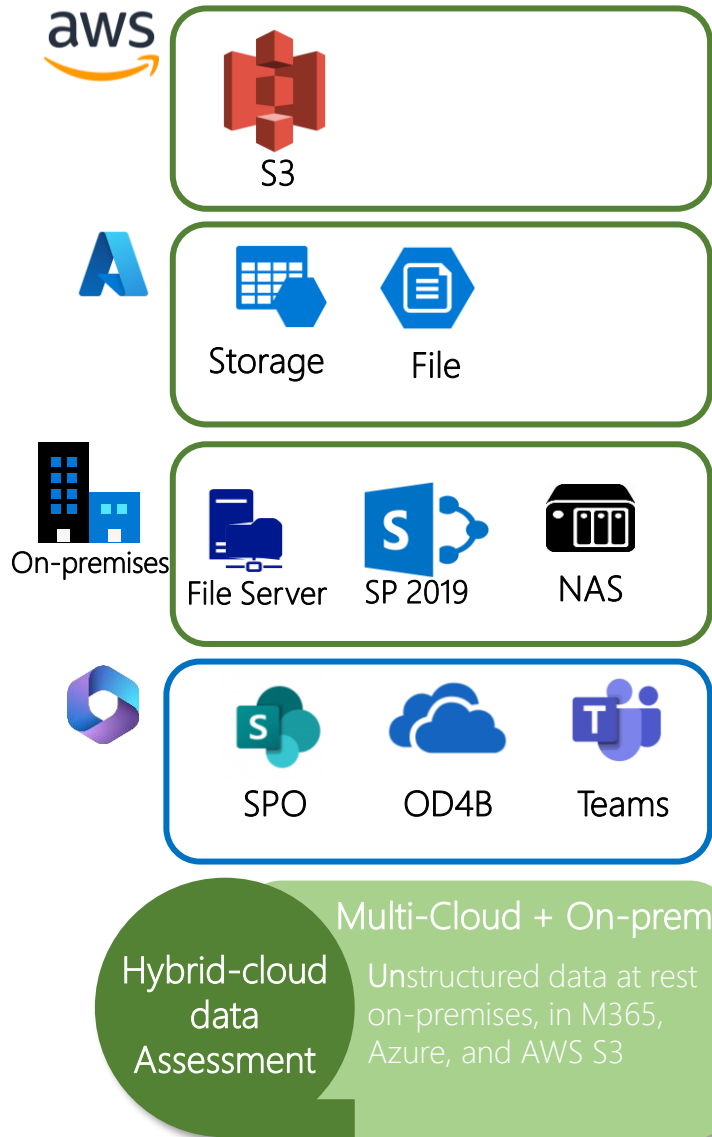
User access and shared collaboration of unstructured data within M365 workloads

In scope

- Frequency
 - One/Up to 4 Scans
- Actions (one/many)
 - Discover, Remediate, Protect, Monitoring
- Scope
 - Microsoft 365
 - One/Limited workloads
 - Limited TB
- Data Type
 - Unstructured data

Out of Scope

- Frequency
 - Additional scans
- Actions (one/many)
 - Persistent scan
- Scope
 - Other Cloud services
 - On-premises
- Data Type
 - Structured data



In scope

- Frequency**
One/Up to 4 Scans
- Actions (one/many)**
Discover, Remediate, Protect, Monitoring
- Scope**
Microsoft 365, On-premises, AWS S3
One/Limited workloads
Limited TB
- Data Type**
Unstructured data

Out of Scope

- **Frequency**
 - Additional scans
- **Actions (one/many)**
 - Persistent scan
- **Scope**
 - Per Cloud/workload defined scope
- **Data Type**
 - Structured data

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In scope	Out of Scope
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Data Anywhere
Structured and unstructured data at rest on-premises, and M365, Azure and AWS

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Learn more about us



Consulting services



E-Suite solutions



Managed services



E-Suite Offerings



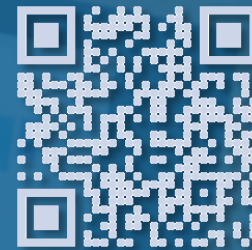
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E-Visor Teams App



E-Inspector



E-Cryptor



E-Migrator



E-Vigilant

Thanks!



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