



# Copilot ready?



## What is Copilot for Microsoft 365?

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Microsoft protects your data and doesn't use it to re-train AI models, making this a safe alternative to many public AI tools.

## What is the use case?

Copilot promises to improve efficiency in the tasks we already do; think of it like an evolution of search engine which, according to Microsoft, enables 365 and office users to:

- Turn a Word document into a PowerPoint presentation in minutes
- Summarise documents and email chains, and write responses in seconds
- Schedule meetings, send reminders or analyse reports
- Summarise a customer's history, preferences, and previous interactions with the company.

## Workshop: Copilot Ready

We're recommending that clients book in a 'Copilot Ready Workshop' to help them better understand how it may be useful for their business.

**Contact:** [Duncan Ayres](#)

**Price:** [Free/3 Hours](#)

[Evaluate Copilot business case and ROI](#)

[M365 Technical Readiness check](#)

[M365 Data Readiness check](#)

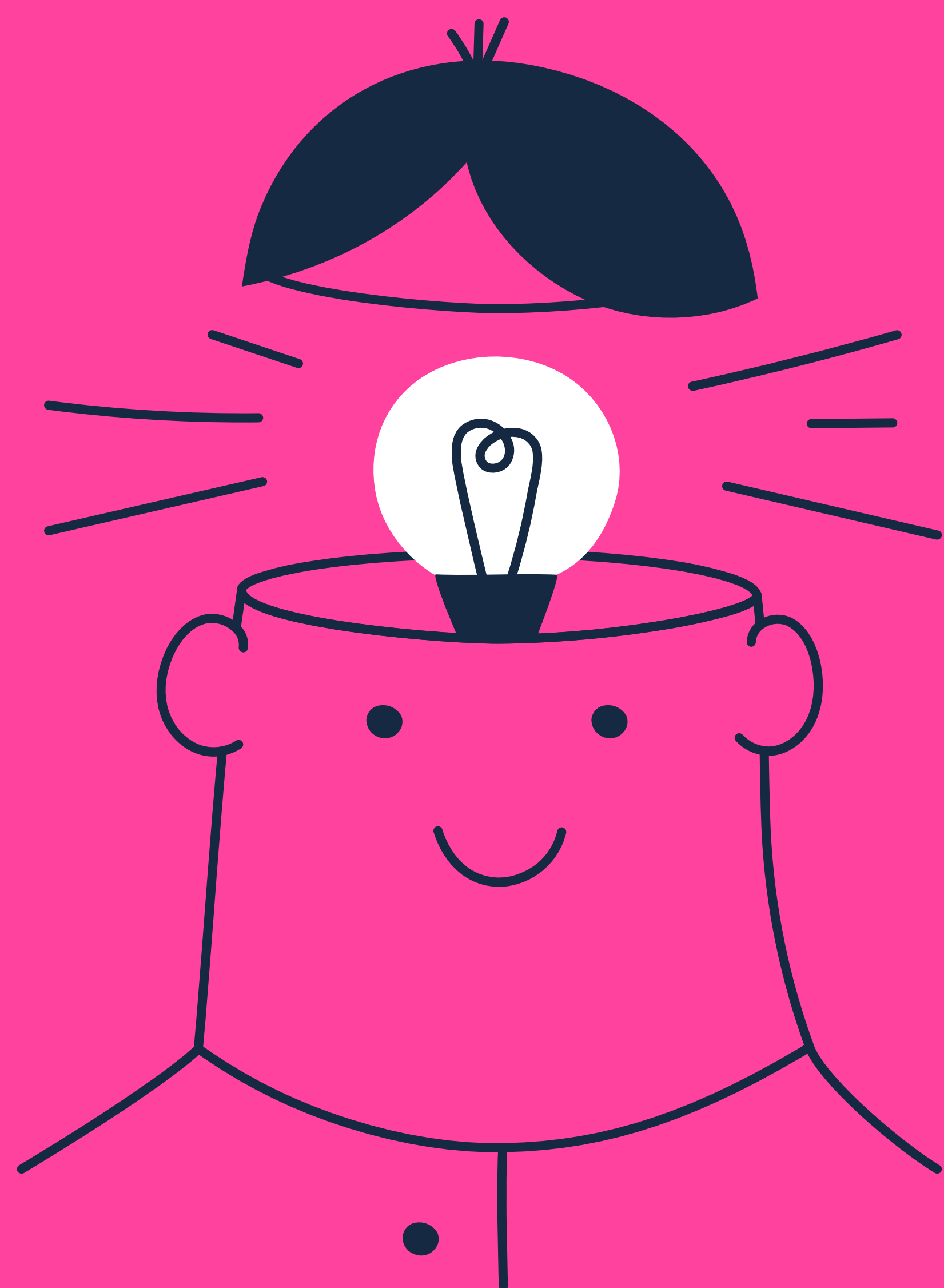
[Copilot Readiness Programme Defined](#)

# What are our clients already thinking?

## Need examples?

At Waterstons, Copilot could save us significant time in:

- Writing service orders
- Reading and responding to emails
- Keeping up-to-date with what's happening with the clients we support (*think ticket and project summaries available in seconds*).



## CIO / Board:

- They want to be seen as innovative... fearing missing out.
- They'll likely have heard of the major products available and perhaps see Copilot as a good starting point.
- Heard about AI, but don't know where to start.
- Might not appreciate the effort required to get M365 in shape for Copilot. Invest in the ecosystem to get the most out of it.
- ROI! How do we afford this, what are we not going to spend money on to facilitate this?

## IT Manager:

- Will be feeling pressure from end users and board on AI.
- Business likely already running public, non-secure tools – they'd like to control this to protect data, but don't want to be seen as shutting down innovation.
- Likely operating within a budget that hasn't accounted for the growth of AI, will need board buy-in for bigger projects (M/L).

## Information Protection/Compliance Officer:

- They will naturally have concerns about how to protect data used in AI.
- Explosive popularity of AI might mean they've not had the chance to review policies of tools in use.
- Likely concerned the business is using tools that have not been reviewed.

## Business Systems /Knowledge Manager

- Will have a good understanding of the M365 environment.
- Likely know what data is available and approach to organising in SharePoint.
- Will respond well to integration options with core business systems.
- Might have some concerns about upskilling users.



# Your Copilot journey...

*What to expect after your initial Copilot Ready Workshop*

## AI Board Briefing

Copilot is just one example use case of AI, this briefing aims to equip board members with enough knowledge to see through the noise, and evaluate how AI products and capabilities could impact their business

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## Managing Shadow IT

Are you concerned about users copying confidential data into unsanctioned AI or SaaS tools?

For organisations seeking a technical solution to these risks, we can help select and implement a CASB solution to protect or prevent data leaving M365, discover the unmanaged apps used by your users, and prevent the use of unsanctioned apps

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## Innovation Workshop

Need to build a business case and explore the real impact AI could have on your business?

The AI Innovation Workshop evaluates how problems in your business could be solved using AI technology, meaning you leave the workshop with scoped out AI projects.

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**Waterstons**

technology + growth partners

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## M365 Information Quality & Governance

Copilot is only as good as the data it can access.

We can help your business establish good data lifecycle practices through a combination of corporate policy and M365 technical controls.

For example; labelling and retention policies, support with data cleansing, and help optimising search for Copilot.

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## M365 Information Access & Security

Copilot will make use of all data a user has access to when forming a response. You must be sure your users have 'just enough access' to minimise the risk of personal or confidential data being shared incorrectly.

We can help you review and remediate access and permissions to your M365 data repositories, and make use of native info protection tools, to help ensure sensitive data cannot be overshared.

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## Copilot Bootcamp

Copilot licensing is a significant investment.

It's important that your team know how to get the most out of this investment with Copilot training.

Short-form practical training will be available in instructor led format or via our training portal.

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## Bespoke Copilot Connectors

Out of the box Copilot will utilise data from your Microsoft 365 environment.

Many organisations will have core business systems such as CRM / ERP outside of M365.

We can build custom Copilot connectors for these systems and applications to complete the data available to Copilot.

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