



# Copilot for Microsoft 365

Your AI assistant at work

# Your Speakers

Tim Latham

Head of Data Intelligence

**simoda**



Michael Markey

Partner Development Manager

**INGRAM** MICRO<sup>®</sup>





# Copilot for Microsoft 365


- Brief Introduction
- What is Microsoft 365 Copilot?
- How AI can address challenges faced by organisations
- Prepare your business for Microsoft 365 Copilot
- The inner workings of Microsoft 365 Copilot and its fusion with M365 apps
- Introduction to Bing Chat Enterprise & generative AI features

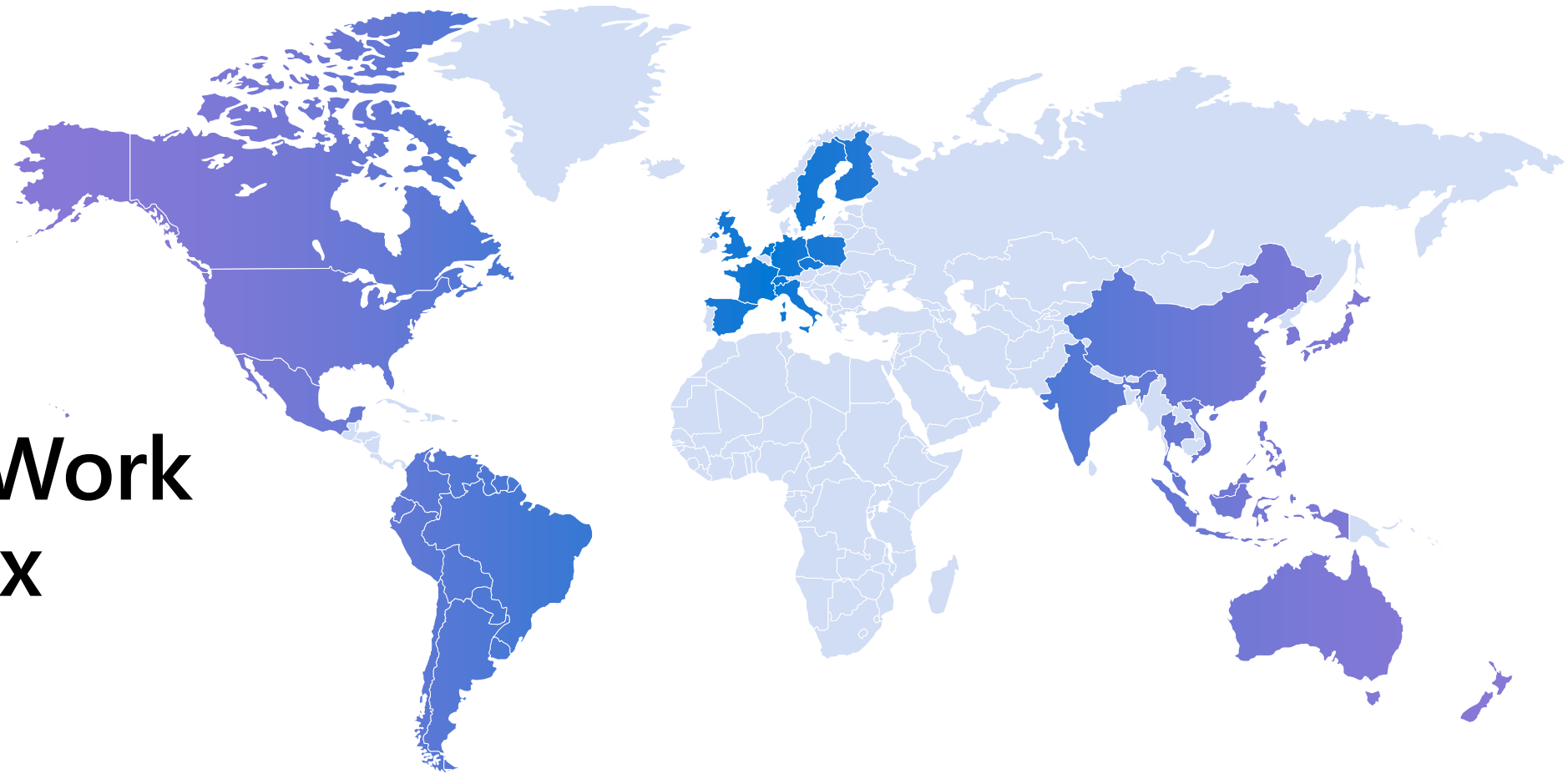
# Microsoft Work Trend Index

<http://aka.ms/wti>

 **31,000** people

 **31** countries

 Microsoft 365, LinkedIn,  
Glint People Science + academic research



# Copilot for Microsoft 365 is transforming work

64%

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

62%

spend too much time searching for information during the workday

60%

of leaders say a lack of innovation or breakthrough ideas is a concern



70%

said Copilot made them more productive

68%

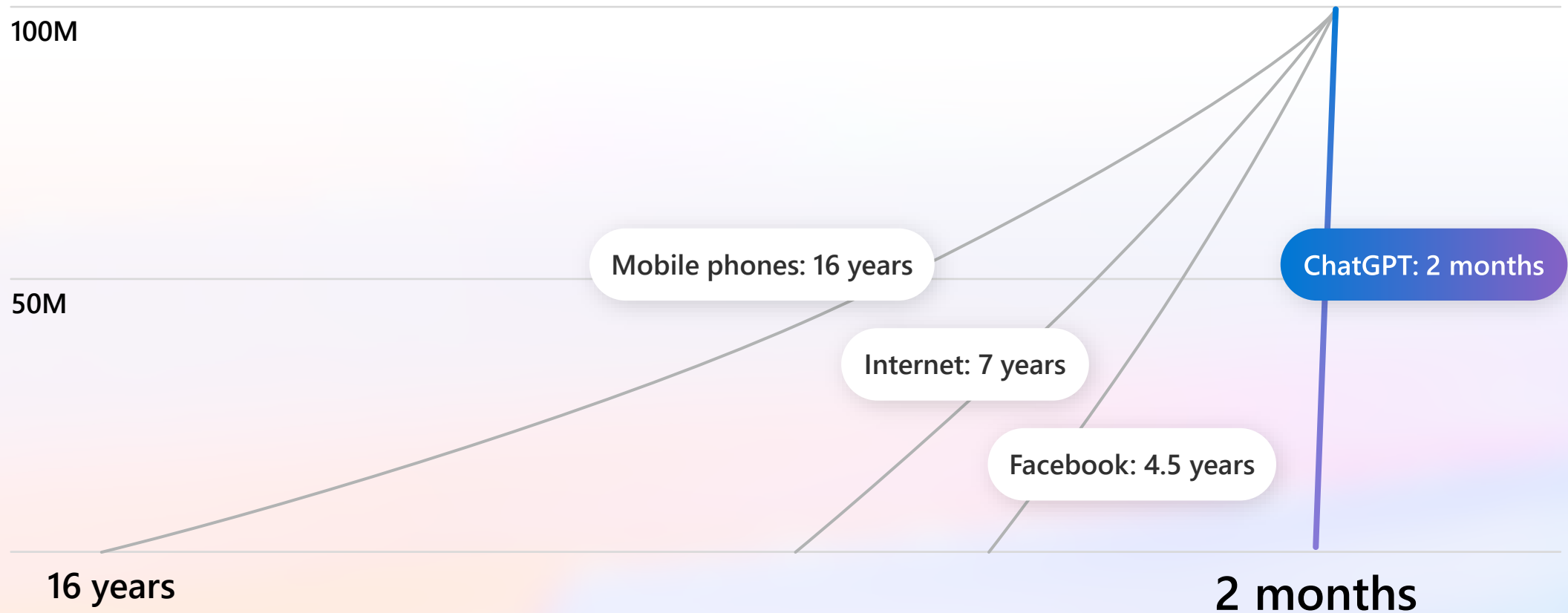
said Copilot improved the quality of their work

77%

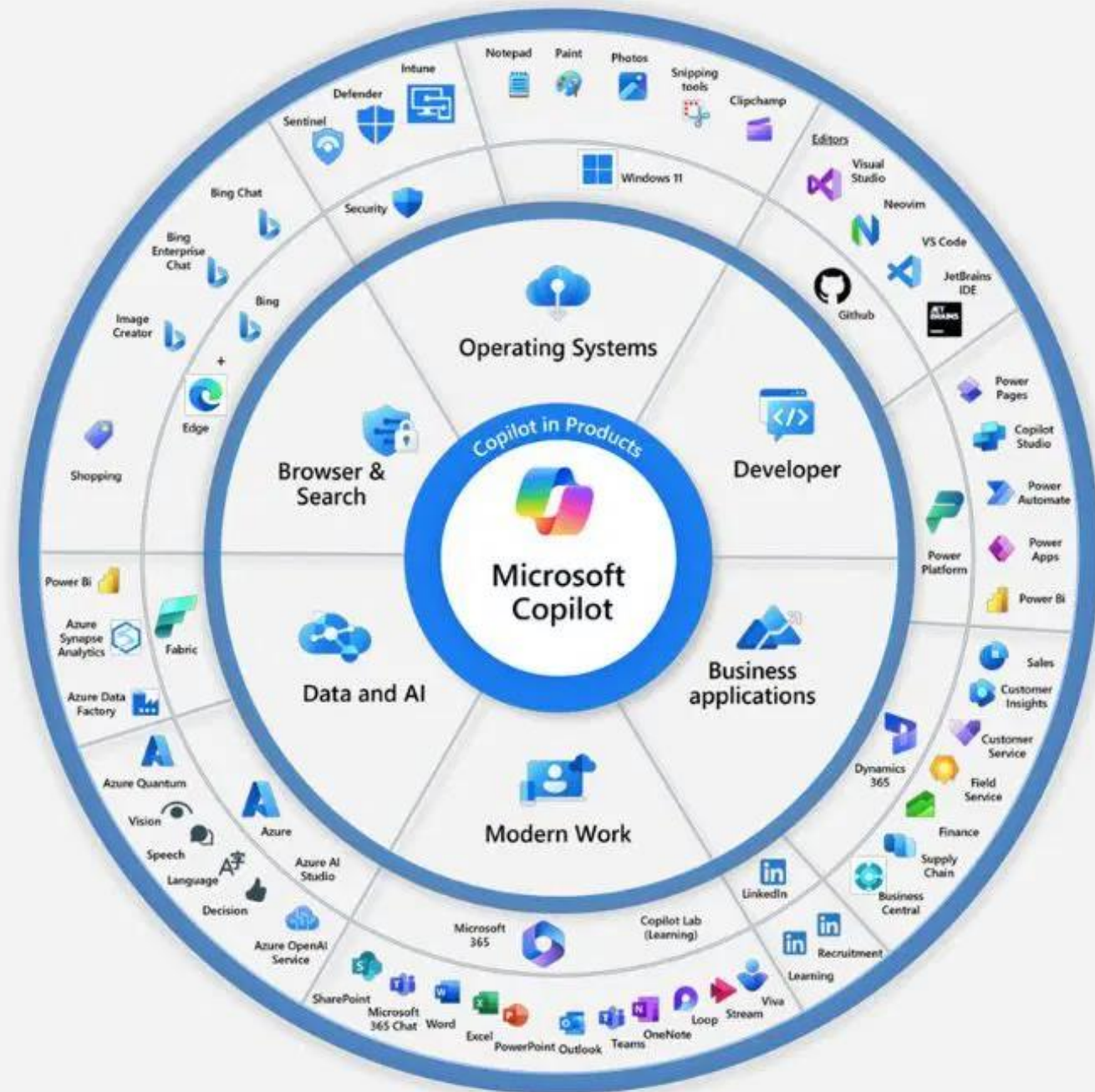
said they didn't want to give Copilot up

# Generative AI technology is here

Time to reach 100M users



The age of Copilots  
has arrived.







Alexis Blackwell

**Arce** Vol.10

Brooklyn, NY



# Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language  
Models

+



Microsoft Graph  
- Your Data -

+



Microsoft 365  
Apps

+



The  
Internet



# Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



# Copilot for Microsoft 365

1



---

Security  
foundation

2



---

AI at  
work

3



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Culture  
shift

# Copilot for Microsoft 365

1



Security  
foundation

2



AI at  
work

3



Culture  
shift



# Copilot for Microsoft 365

Built on Microsoft's comprehensive approach



Security



Compliance



Privacy



Responsible AI

# Microsoft protects your data and enables you to control it

## Protecting your data through the LLMs



Security and  
Compliance



Data Usage  
and Privacy



Committed to  
responsible AI



## Inheriting Microsoft 365 policies and controls



Data access &  
permissions



User-tenant  
focus



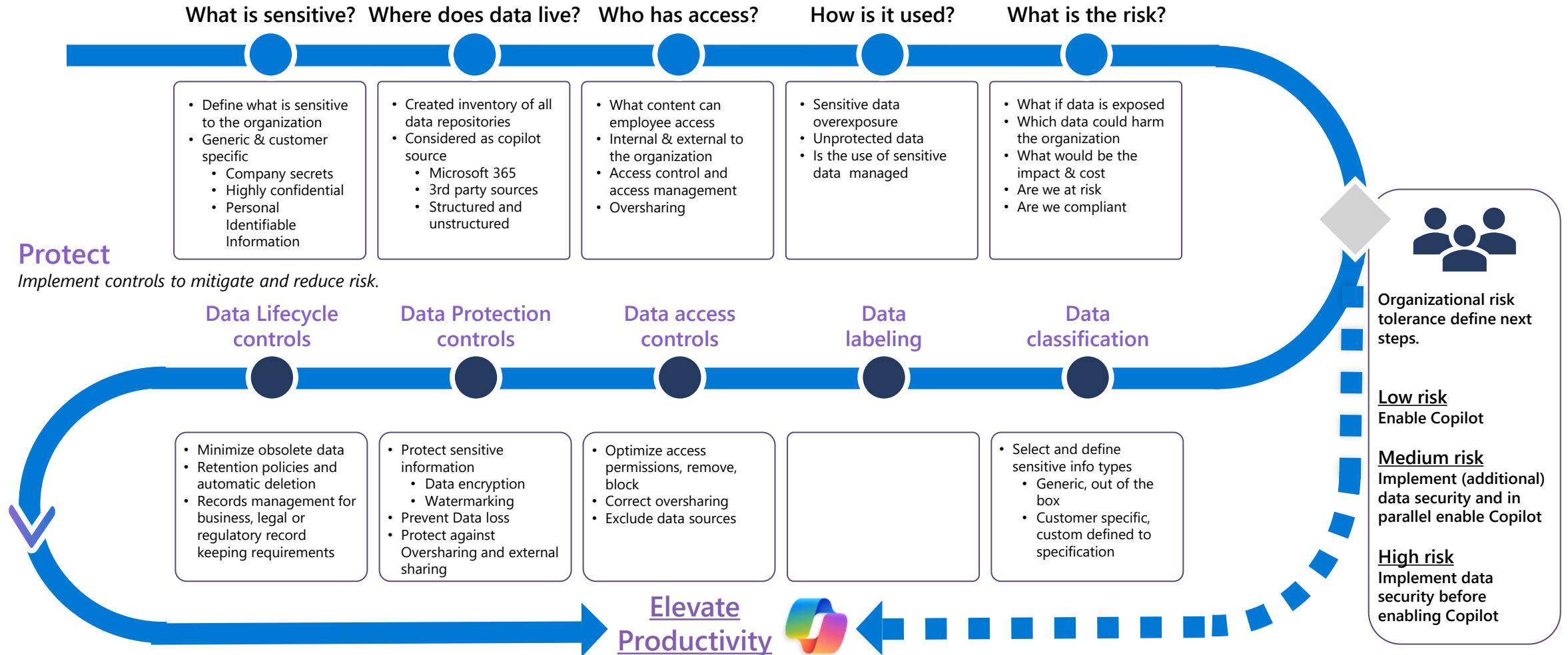
Customer data  
protection



Data processing  
and residency

# Discover – Know your data and understand the risks

Uncover the potential data and security risks Microsoft 365 Copilot could introduce into your organization.







## Microsoft 365 Security and Compliance controls for Copilot

### Essential security controls



Copilot +  
Microsoft 365 Business  
Standard

**Multi Factor Authentication**  
With security defaults

**SharePoint Controls**  
Controlling access to data  
repository

### Best in class security controls



Copilot +  
Microsoft 365 Business  
Premium

**Conditional Access** policies based  
on identity, device, location and  
network

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



## Microsoft 365 Security and Compliance controls for Copilot

### Baseline security



Copilot +  
Office 365 E3

**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

1



Security  
foundation

2



AI at  
work

3



Culture  
shift



Microsoft Copilot empowers  
**every end user**

**HR**

*Store, access, and prioritize notes in a fraction of the time*



**Marketing**

*Jumpstart the creative process and generate ideas while writing*



**Data and IT Pros**

*Effectively manage shared projects and track progress*



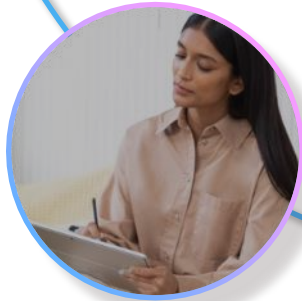
**Sales**

*Stay focused on closing deals with an AI assistant for email*



**Finance**

*Simplify financial reporting and validating data quality*



**Customer Service**

*Stay coordinated as a team to resolve more customer issues*



# Impact by Function



## HR

- Communicate policies and draft job descriptions
- Create stunning training materials
- Easily respond to job applicants' or employees' emails



## Marketing

- Identify relevant market trends and segments
- Create the first draft for a project
- Summarize campaign results with powerful visuals



## Sales

- Have better sales conversations and close more deals
- Create sales presentations and proposals
- Analyze sales data from previous quarters



## IT

- Create a project plan for a product roll-out
- Stay up to date on various project calls and chats
- Identify patterns in data and solve issues faster



## Finance

- Simplify financial reporting and planning
- Identify performance improvements
- Report metrics using professional charts

# Impact by Workflow



## Effective meetings

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- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting



## Data analysis

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- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations



## Content creation

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- Jumpstart creativity, and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts, and tables



## Email processing

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- Draft email replies instantly
- Personalize the tone and length even on the go
- Quickly summarize a long email thread

# Copilot for Microsoft 365



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## Supercharged Productivity

Unlock access to data and  
knowledge across your  
organization



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## Amplified Creativity

Amplify human ingenuity  
and innovation with AI

# Copilot for Microsoft 365



## Supercharged Productivity

Take productivity to the next level by unlocking access to data and knowledge across your organization

Microsoft 365 Copilot turns your words into the most powerful productivity tool on the planet. Because Copilot is integrated into the apps you use every day, you will spend less time focused on the tools, and more time focused on what really matters – serving your customers and growing your business

### Lighten the load in Outlook

- Clear your inbox in minutes, not hours, by summarizing long messages and generate suggest action items and replies
- Create impactful communications by leveraging coaching tips to help you hit just the right note

### Stay caught up with Teams

- Easily track discussions and suggested action items in real time
- Produce conversation summaries with citations to keep you up to speed and organized

### Laser focus on what matters most

- Get up to speed and complete tasks in no time with integrated cross-application intelligence working across all your data
- Quickly pull together information from multiple sources



MICROSOFT 365

# Copilot in Outlook

The screenshot displays the Outlook interface for a meeting recap. At the top, the Outlook logo and a search bar are visible. The meeting title is "Marketing Sync - meganb@contoso.com" with an event titled "Meeting recap". The main content area shows the meeting title "Profitable Projects Pitch & Plan" and the date "Wednesday 9/8/2023, from 11:00 AM to 12:00 PM". Below this is a video call grid with six participants. To the right of the grid, there is a "Content" section with a "Product Roadmap..." document, a "Notes" section with "AI notes" (highlighted in blue), and a "Meeting notes" section with AI-generated text. At the bottom, there are buttons for "Speakers", "Topics", and "Chapters", and a user profile for "Serena Davis".

Outlook

Search

Marketing Sync - meganb@contoso.com

Event [Meeting recap](#)

Profitable Projects Pitch & Plan | Wednesday 9/8/2023, from 11:00 AM to 12:00 PM

Content

Product Roadmap...

Notes AI notes

AI-generated content may be incorrect.

Meeting notes

- > Daniela highlighted the s before-and-after images i their effectiveness. Seren suggestion into the team'
- > Babak suggested conduc prosperous home improv

Speakers Topics Chapters

Serena Davis

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# Copilot in Teams Meetings

The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes the Teams logo, navigation arrows, and a search bar. The meeting title is "Core accounts business review", with tabs for Chat, Details, Files, and Recap. The meeting time is "Mar 16, 10:00 AM" and there is an "Open in Stream" button. A "Shared content" section shows a file named "Proseware Proposal.pptx". Below this is a video player showing a hand pointing at a screen with a play button and a duration of "48m 42s". A "Speakers" section is visible with a "Topics" button. The main content area shows notes generated by Copilot for the meeting, starting with "Core accounts.loop" and "Quarterly results and forecasts for Core Account".

Core accounts.loop

### Quarterly results and forecasts for Core Account

**Summary**

Based on what attendees said in the meeting

- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled materials)
- Account leads to propose discounting scenarios to lower inventory
- Proseware was discussed as a leading opportunity

**Notes**

- ❖ Beth emphasized importance of Proseware negotiation strategy with offers - this is a must win deal.
- The team identified a new opportunity with Proseware that could be pursued through the ACAR process.

# Intelligent recap in Copilot

The image displays a Microsoft Teams meeting interface with an 'Intelligent recap' overlay. The meeting title is 'Product roadmap discussion' and the date is 'Jan 21, 2023 10:00 - 11:00'. The recap includes a video player for the meeting, a list of speakers (Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, Bruno Zhao), and AI-generated notes. The notes are categorized into 'Meeting notes' and 'Follow-up tasks'. The 'Meeting notes' section includes:

- > **Serena** wants to look at the product roadmap before she and **Danielle** commit to more feature enhancements.
- > **Danielle** explains that they are on track for new product release in December. But they will need to keep an eye on beta testing results. She will follow up on that.
- > **Danielle** explains that they are managing the capacity well. There could be a problem if they get a surge of users. **Babak** will make sure that they have the necessary provisions to handle an influx of users if the need arises.

The 'Follow-up tasks' section includes:

- **Danielle** will follow up on feature enhancement prioritization
- **Jon Shammass** will double check with **Amanda** regarding the ETA for the new product

On the right, the 'Copilot in Teams' interface is shown, displaying a prompt: 'Create a table with pros and cons of option 1'. The Copilot response includes a table with the following content:

| Pros                            | Cons                          |
|---------------------------------|-------------------------------|
| Wider range of potential leads  | Less persuasive               |
| Simpler, faster sign-up process | Difficult to segment audience |
| Streamlines multiple campaigns  | Less engaging                 |

Below the table, there are options to 'Copy', 'Elaborate on each pro and con.', and 'List more options.'. At the bottom, there is a text input field: 'Ask a question about this meeting'.

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

On-demand

Based on unique prompts

Conversational interaction, with citations

Available real-time (during & after meeting)

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

\*Intelligent recap is also available in Teams Premium

# Copilot for Microsoft 365



## Amplified Creativity

### Amplify human ingenuity and innovation with AI

Microsoft 365 Copilot is designed to help you get your creative juices flowing, so you never have to start from scratch again. Copilot will help you turn your ideas into the masterpieces you, while making it easier to collaborate with your team.

#### Be more creative in Word and PowerPoint

- Partner with Copilot in Word to write, edit, and summarize content
- Transform written content into compelling presentations with a single command
- Create custom graphics right in your document with Microsoft Designer

#### Think faster by analyzing trends and creating data visuals in Excel

- Enjoy all the rich capabilities of Excel at your fingertips
- Create powerful, professional visualizations
- Explore your data without modifying it

#### Make meetings more creative with Whiteboard

- Ask Copilot to turn ideas into designs and summarize whiteboard content
- Gather ideas on specific topics and run more creative and efficient meetings
- Create original images in Whiteboard with Microsoft Designer

# Copilot for Microsoft 365

1



Security  
foundation

2



AI at  
work

3



Culture  
shift

This is a whole new way of working that  
involves both software and culture.

# Common questions we hear from customers



● **Who** do I give the first Copilot licenses to?



● **How** do I get employees up and running quickly?

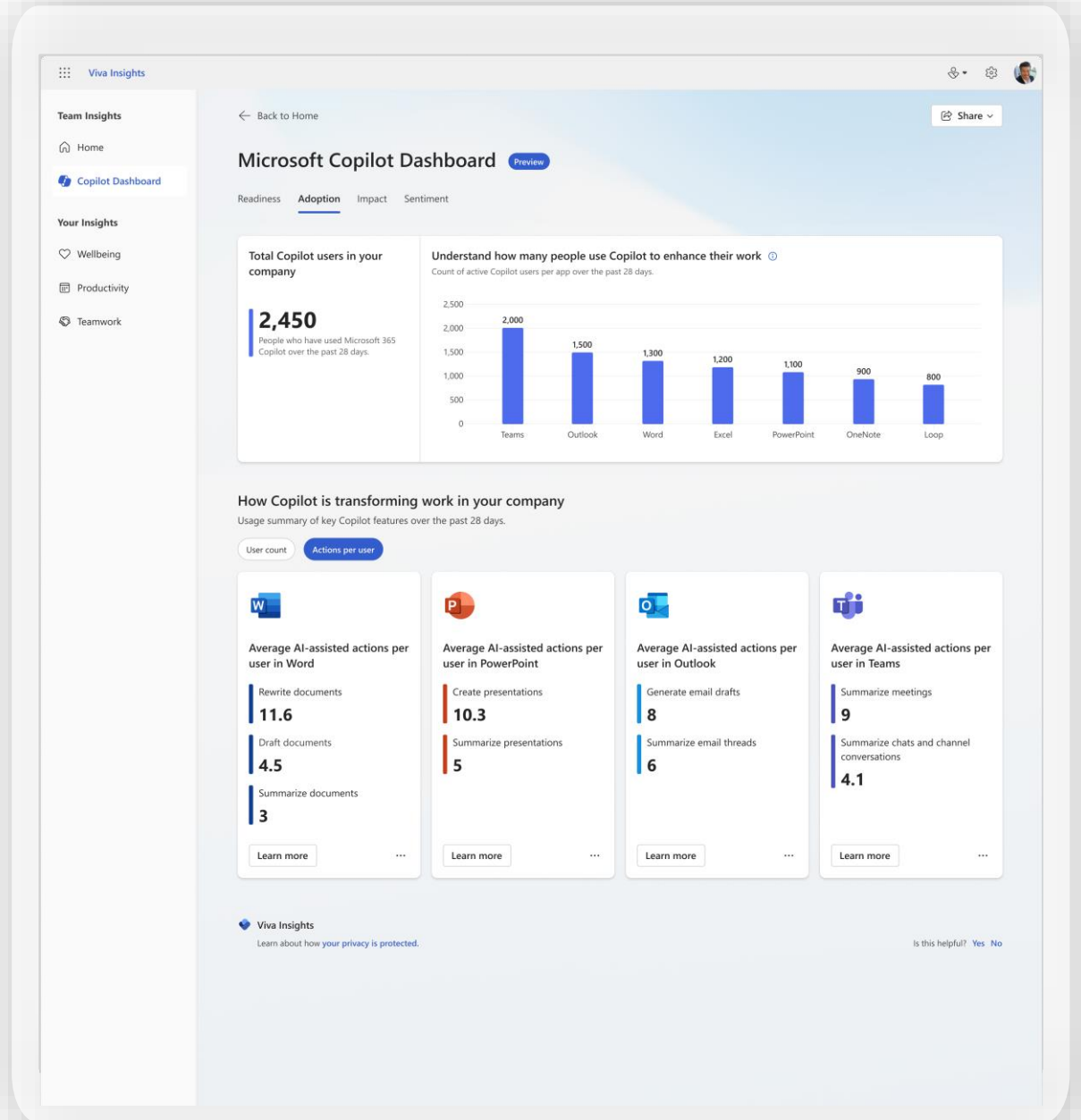


● **What** are the ways to measure impact?

# 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





# How do you get started?



Get copilot-ready with prerequisite licenses:

- Microsoft 365 – Business Basic/Business Standard/Business Premium
- Microsoft 365 – E1/E3 & E3/E5
- Office 365 – E1/E3/E5



Get started with Copilot (Formerly Bing Chat Enterprise)



Understand file permissions & loss prevention policies



AI Strategy: Learn how AI is creating a whole new way of working



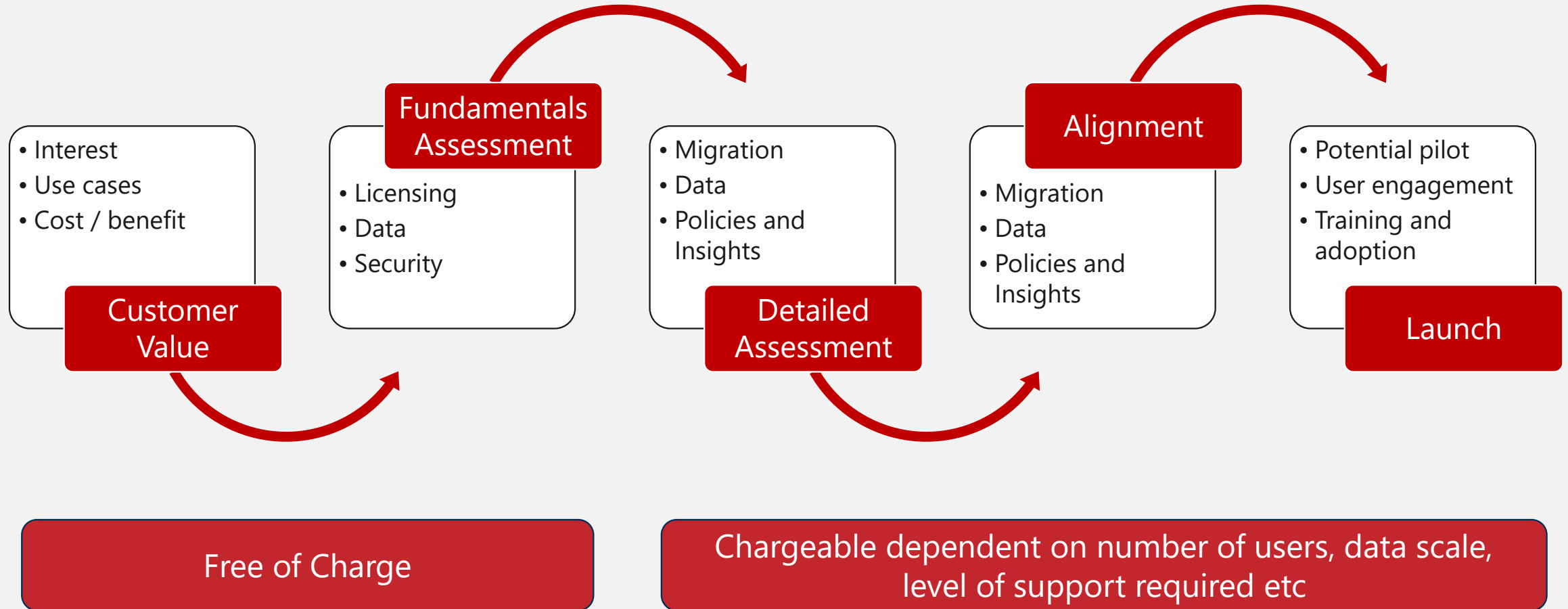
Adoption Strategy: Leverage Resources for Adoption for your Copilot roadmap

# Copilot feature comparison

|  | Copilot | Copilot for Microsoft 365 |
|--|---------|---------------------------|
|  | Free    | £296.40                   |
| Foundational Capabilities                                | ●       | ●                         |
| Web Grounding  | ●       | ●                         |
| Commercial Data Protection                               | ●       | ●                         |
| Priority Model Access                                    |         | ●                         |
| Copilot in Outlook, Word, Excel, PowerPoint, and OneNote |         | ●                         |
| Copilot in Teams   |         | ●                         |
| Microsoft Graph Grounding                                |         | ●                         |
| Enterprise-Grade Data Protection                         |         | ●                         |
| Customization  |         | Copilot Studio            |

*Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.*

# Copilot\_for\_365\_Readiness





# Q&A



Thank You