



# Microsoft 365 Copilot

The AI Opportunity



# Today's Agenda

## Introduction to Microsoft 365 Copilot

- AI Fundamentals
- Copilot Family & Feature Comparison
- The Copilot Value proposition
- Use cases and scenarios

## How to get your customers AI Ready

- Data Security and Information Protection
- Identity & Access management
- Endpoint Management
- App Management

## Building a successful practice

- Partner Services opportunity
- Go-To-Market programs



# AI Fundamentals



# The world is changing



Industries are transforming rapidly.  
There is a need for Efficiency & Automation.



Drivers for economic growth are evolving.  
There is a need for Data Analysis and Insights.



Technology is at an inflection point.  
AI is at the forefront of Technological Innovation.

# AI will reinvent every industry

## Personal Healthcare

More effective patient treatment plans  
Accurate drug development and discovery  
Precise medical imaging and diagnoses

## Safe Finance

Protect loan/credit privacy with sharable data  
Detect suspicious and fraudulent transactions  
Turn data trends into risk assessments

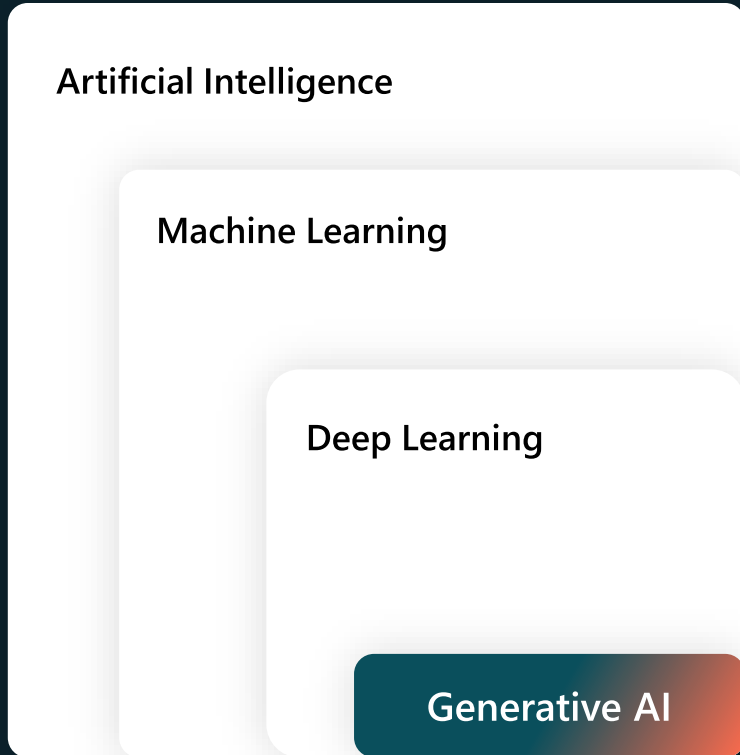
## Sustainable Retail

Tailor inventory and pricing based on demand  
Authentic virtual try-ons and less returns  
Generative product design and style transfers

## Efficient Manufacturing

Optimize inventory tracing in the supply chain  
Amplify humans with collaborative cobots  
Navigate the inner complexity of machines

# A brief history of AI



1950s

## Artificial Intelligence

The field of computer science that seeks to create intelligent machines that can replicate or exceed human intelligence.

1959

## Machine Learning

A subset of AI that enables machines to learn from existing data and improve upon that data to make decisions or predictions.

2017

## Deep Learning

A machine learning technique in which layers of neural networks are used to process data and make decisions.

2021

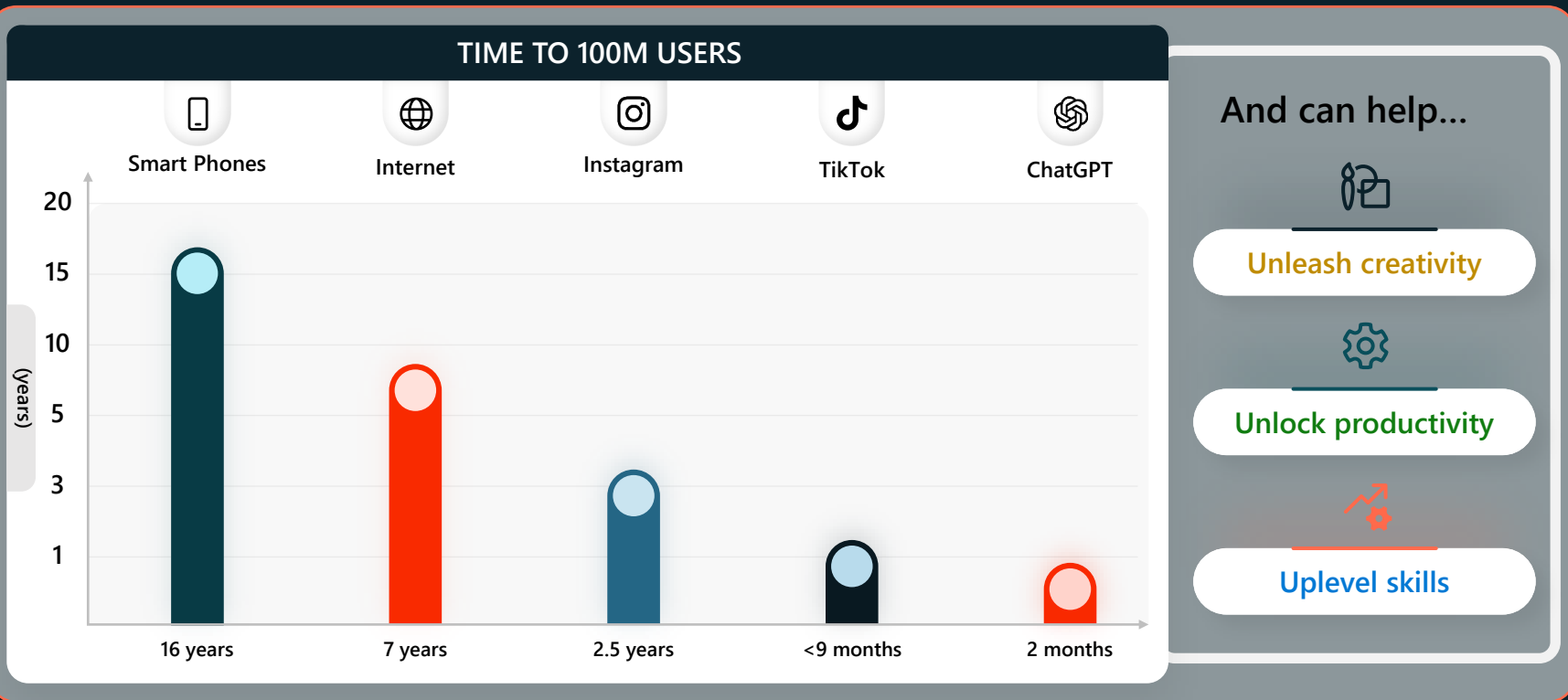
## Generative AI

Create new, original content like text, images and auditory content in response to prompts from users.

Create me a picture of a penguin ridding a harley davidson motorbie ridding down Queen Street Brisbane Australia



# Generative AI technology is being adopted at an unprecedented rate

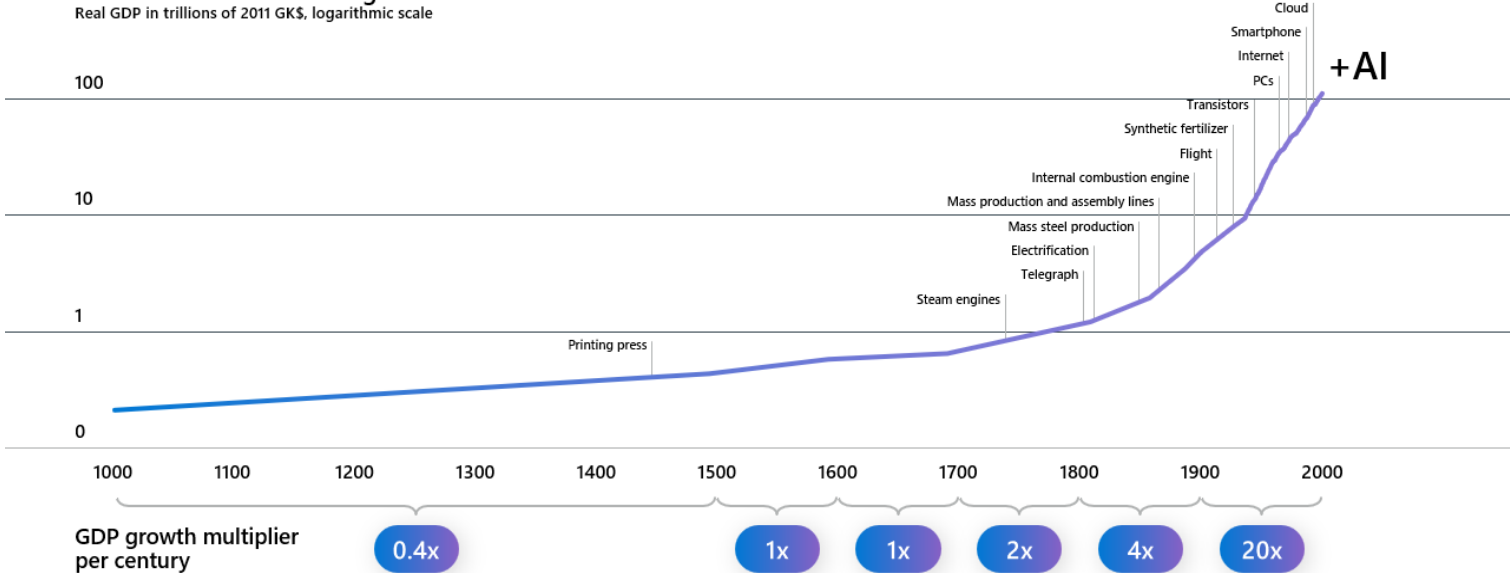




# And the impact is **real**

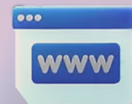
## Global GDP and technological revolutions

Real GDP in trillions of 2011 GK\$, logarithmic scale



Source: Maddison Project, [Ourworldindata](https://ourworldindata.org)

# Prompt Engineering



Ask me anything...


# The subtleties of prompting (prompt design)

Prompt

 Copy

Please give me the history of humans.

Prompt

 Copy

Please give me the history of humans in 3 sentences.

# Why is prompt engineering important?

PROMPT ENGINEERING IS A CRITICAL SKILL FOR ANYONE WORKING WITH LLM AI MODELS

A GOOD PROMPT PRODUCES THE DESIRED OUTPUTS

IMPROVEMENTS YOU CAN PERFORM TO MAKE THE RESULTS MORE PREDICTABLE:

- Make the prompt more specific
- Add structure to the output with formatting
- Provide examples with few-shot prompting
- Tell the AI what to do to avoid doing something wrong
- Provide context to the AI
- Using message roles in chat completion prompts
- Give your AI words of encouragement

# Copilot Family and Copilot for Microsoft 365 overview





HOW FAMILIAR ARE  
YOU WITH COPILOT?

Please select your response in the poll



# A copilot for every Microsoft Cloud experience



## Copilot for Dynamics 365

Copilot to assist roles within each line of business applications.



## Copilot for Power Platform

Use natural language to accelerate the development of apps, automations and pages.



## Copilot for Microsoft 365

Copilot assistant to accelerate productivity with Microsoft 365 apps and chat with your data



## Copilot for Security

Receive tailored insights that empower your team to defend.



## Copilot for Windows

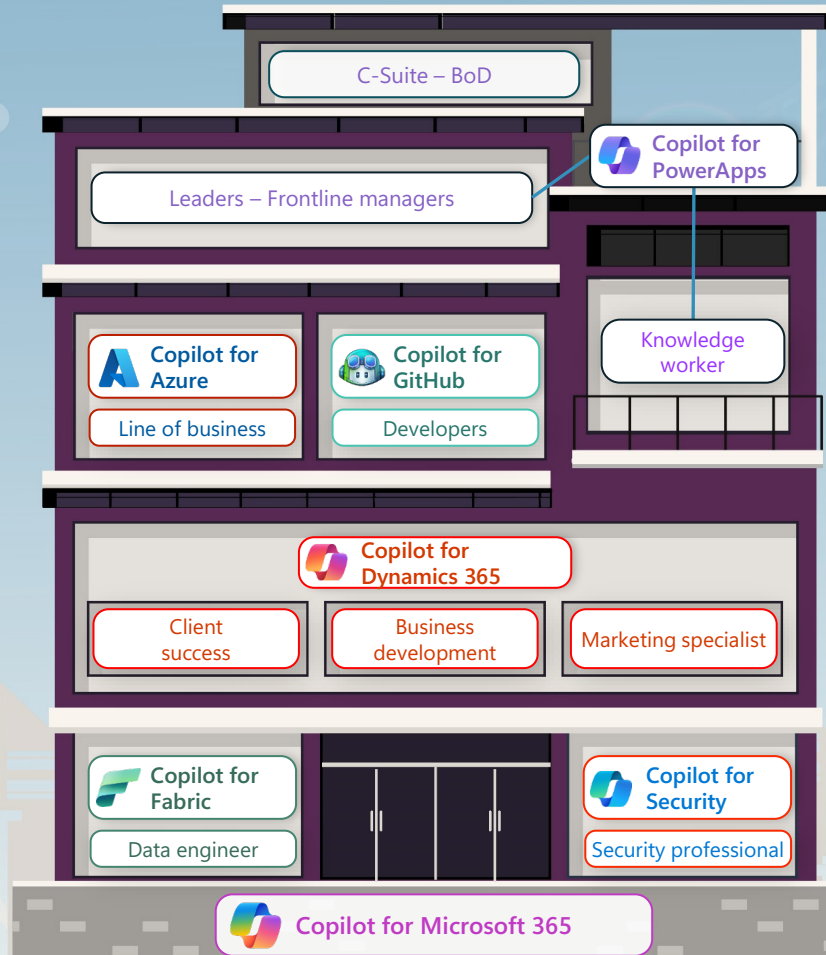
Get answers and inspirations from across the web, supports creativity and collaboration, and helps you focus on the task



## Copilot for GitHub

Increase developer productivity by helping you write code faster with less work.

# Meaningful business outcomes







# Copilot for Microsoft 365

Turn your words into the most **powerful productivity tool** on the planet

## Natural Language



Large Language  
Models

+



Microsoft Graph  
- Your Data -

+



Microsoft 365  
Apps

+



The  
Internet

# Extending availability to eligible customers

Users signed into Copilot with their eligible work or school accounts can access Copilot with commercial data protection at no additional cost

## Current eligible SKUs\*

- Microsoft 365 E3, E5
- Microsoft 365 A3, A5 (faculty only)
- Business Standard
- Business Premium



## Expanded SKU eligibility ^

Microsoft 365 F1 and F3, Office 365 E1, Microsoft 365 Business Basic

^March 14, 2024

\*Government and student users not included at this time

# COPILOT FEATURE COMPARISON

For Individuals

For Organizations

	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$33	Free	\$44.90
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 GPT Builder		Copilot Studio

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



# COPILOT FEATURE COMPARISON



Copilot

Copilot for  
Microsoft 365

Copilot for  
Sales

Copilot for  
Service

Free

\$44.90

\$76.65

\$76.65

Foundational Capabilities



Web grounding



Commercial Data Protection



Enterprise-Grade Data Protection



Graph Grounding



Microsoft 365 Apps



Copilot Studio



Role Specific capabilities



# AI-powered chat with commercial data protection

**Business data  
is protected**



User and business data is protected and will not leak outside the organization.

**Chat data is  
not saved**



Chat data is not saved, and no one at Microsoft can view customer data.

**Data is not used  
to train the  
model**



Chat data is not used to train the Large Language Models used by AI.

Leverage the **adoption kit** to drive healthy usage of Microsoft Copilot with commercial data protection

[aka.ms/Copilot/StarterKitDownload](https://aka.ms/Copilot/StarterKitDownload)

## Adoption kit in additional languages

In addition to [English \(U.S.\)](#), the Copilot adoption kit is now available in 9 languages. Download it in [Chinese \(simplified\)](#), [Chinese \(traditional\)](#), [English \(U.K.\)](#), [French](#), [German](#), [Italian](#), [Japanese](#), and [Spanish](#).

# Value Proposition



# Our Approach

## Copilot **business value**



All Up  
Value



Value by  
Workflow



Value by Role/  
Function

# Impact by Workflow



## Effective meetings

---

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



## Data analysis

---

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



## Content creation

---

- 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

---

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



# 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

# How fast you can recover the cost of Copilot

Executive  
\$200,000

Saving 1 hour at a pay rate of \$200,000/year saves \$100.

3.3 minutes/day breakeven

Manager  
\$100,000

Saving 1 hour at a pay rate of \$100,000/year saves \$50.

6.5 minutes/day breakeven

Individual Contributor  
\$60,000

Saving 1 hour at a pay rate of \$60,000/year saves \$30.

11 minutes/day breakeven

How long to break even

# Time savings are **just the beginning**

Copilot for Microsoft 365 can help you...



Increase employee  
satisfaction & wellbeing



Improve the quality  
of work



Reduce  
digital debt

# Copilot for Microsoft 365 Value Journey

Grow value from a base of solid usage and individual capacity gains by optimizing departmental processes and impacting the metrics that are important to your organization.



# Features and Use Cases





WHAT IS YOUR  
FAVOURITE APP TO USE  
WITH COPILOT?

Please select your response in the poll



# Copilot for Microsoft 365



**Your AI assistant at work**

# How does Copilot for Microsoft 365 work?



## Copilot for Microsoft 365



Microsoft 365  
Apps



Chat



Microsoft Graph  
- Your Data -



Semantic  
Index



# Copilot for Microsoft 365



## Supercharged Productivity

Unlock access to data and knowledge across your organization



## Amplified Creativity

Amplify human ingenuity and innovation with AI



## Trusted Security

Count on responsible, secure AI from a partner you can trust

# 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

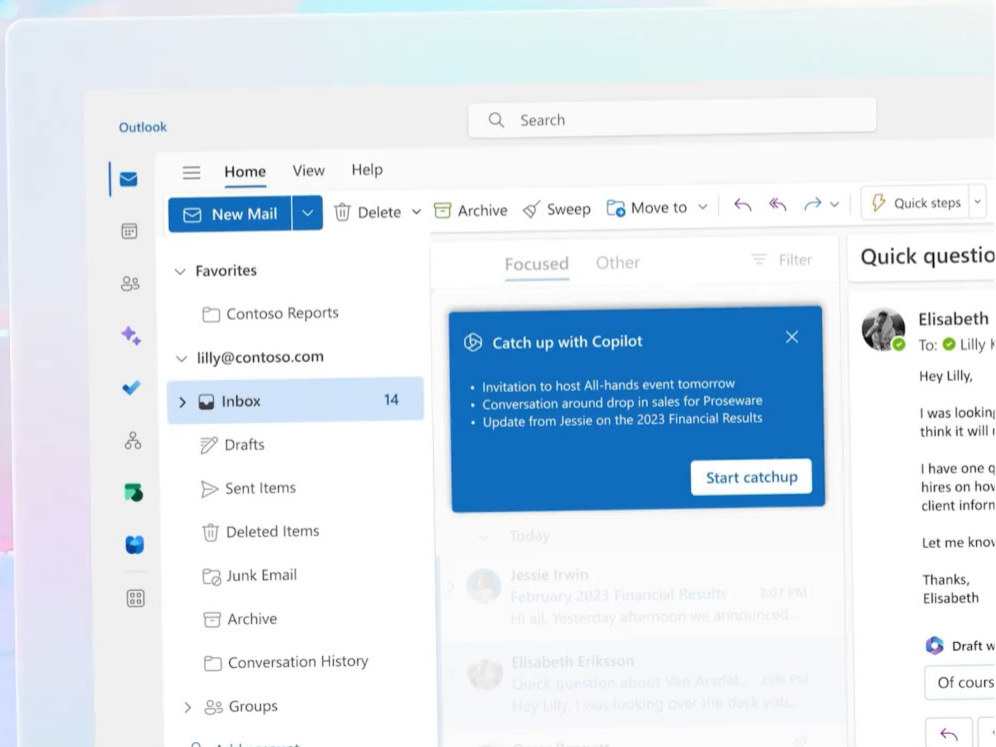
- Easily track discussions and suggested action items in real time
- Produce conversation summaries with citations to keep you up to speed and organized

### 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

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# Copilot in Outlook



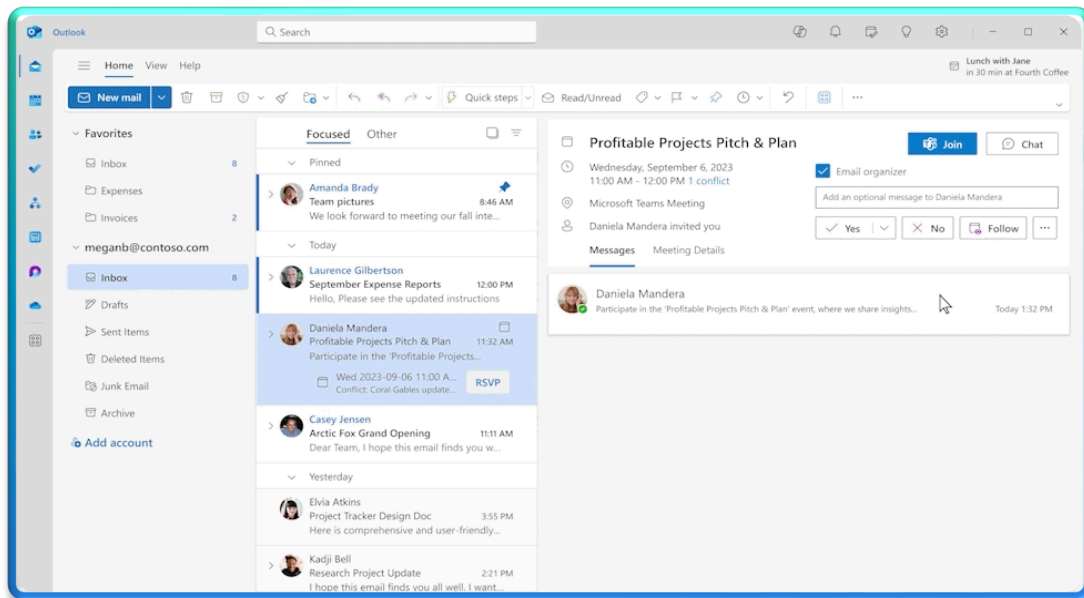
SUPERCHARGED PRODUCTIVITY

# 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 me
- 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.



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# Copilot in Teams Meetings

The screenshot displays a Microsoft Teams meeting interface. At the top, there is a search bar and navigation arrows. Below this, the meeting title "Core accounts business review" is shown 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 sidebar on the left contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area is divided into sections: "Shared content" with a file "Proseware Proposal.pptx", a video player showing a hand pointing at a screen with a "48m 42s" duration, and a "Speakers" section with a "Proseware negotiation strategy" topic. On the right, there are tabs for "Notes", "Mentions", and "Transcript". The "Notes" section is active, showing a "Summary" for "Core accounts.loop" titled "Quarterly results and forecasts for Core Account". The summary is based on meeting attendees' input and lists three key points: a \$230K revenue shortfall, a 15% inventory surplus, and a proposal for discounting scenarios. Below the summary, there is a "Notes" section with a bullet point mentioning the importance of Proseware negotiation and a new opportunity identified with Proseware.

Core accounts business review Chat Details Files Recap +

Mar 16, 10:00 AM Open in Stream

Shared content

Proseware Proposal.pptx

48m 42s

Speakers # Topics

Proseware negotiation strategy

Core accounts round table

Notes

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 n
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

Notes

- Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal.
- The team identified a new opportunity with Proseware th

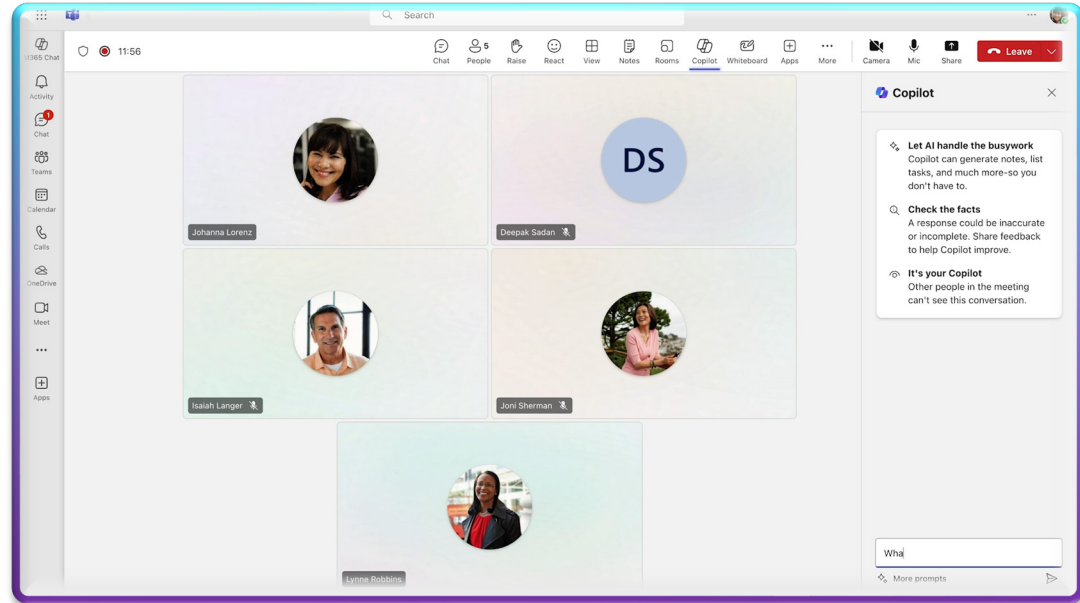
SUPERCHARGED PRODUCTIVITY

# Copilot in Teams

Copilot helps you run effective meetings, get up to speed, organize key discussion points, and summarize actions.

With Copilot now you can:

- Summarize what you've missed in a meeting.
- Create a table of pros and cons for [topic].
- What decisions were made, and what are some suggested next steps?



# Copilot and Teams Premium... what's the difference?

Better together: **Teams Premium** and **Copilot** in Teams

## Teams Premium is best for...

- **Automatically provided**, intelligent summaries and action items of meetings for Teams Premium users
- Tools to save time by **quickly navigating meeting recordings**
- **Consistency across users** who see the same experience, except for personalized points of interest in the recording (like when your name was mentioned)

## Copilot in Teams is best for...

- **On-demand insights** provided only when you ask for them and tailored to your unique prompts
- Going beyond summarization by asking Copilot to **execute actions** and **proactively make suggestions**
- **Contextual insights** into why and how decisions were made, and even the rationalization behind them

# Teams Premium and Microsoft 365 Copilot

## Accelerate your AI journey

- Brings together advanced capabilities **across Microsoft Teams** to make collaboration more secure, intelligent and engaging
- Enhance your **teamwork**
- **Built-in** generative AI to get you started

Teams Premium

- Your AI assistant at work that works alongside you **within the Microsoft 365 apps** and in a **standalone experience** to help you navigate any task
- Enhance **individual productivity**
- Generative AI **based on your unique prompts**

Microsoft 365 Copilot



Teams Premium includes **built-in summaries** with intelligent recap. M365 Copilot expands on it with the ability to **ask any question** about the meeting

The screenshot displays a Microsoft Teams meeting interface. The main window shows a meeting titled "Product roadmap discussion" with a video player and a list of speakers: Mona Kane, Babak Shammass, Daniela Manderá, Amanda Brady, and Bruno Zhao. An orange callout box labeled "Intelligent recap" points to the "Recap" tab in the top navigation bar. A blue callout box labeled "M365 Copilot" points to the Copilot sidebar on the right. The Copilot sidebar shows a prompt: "Create a table with pros and cons of option 1". Below the prompt, it displays a table with pros and cons for "option 1: Drive campaign traffic to generic Sign up page".

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 buttons for "Copy", "Elaborate on each pro and con.", and "List more options.". At the bottom of the Copilot sidebar, 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 and after meeting)

# AI capabilities across licenses

## AI capabilities deeply embedded in Teams

- AI-based noise suppression
- AI-based video optimization (brightness, backgrounds)
- Suggested Replies
- Live meeting captions and transcript
- Cameo video overlay on screen share and PowerPoint Live

## Meeting Experience

- Real-time translation of meeting captions and transcript
- Intelligent recap (after meeting) – standardized AI-notes and AI-tasks
- Intelligent recap (after meeting) – video, speaker, and chapter markers
- Ask any question about the meeting (available during and after meeting)
  - “How did the team react to this proposal?”
  - “Does this plan’s timeline have any conflicts?”
  - “Create a table with pros and cons of option 1”

## Other capabilities

- Microsoft Copilot UX
- Bing Chat (LLM + Web)
- Microsoft 365 Chat
- Microsoft 365 apps



Microsoft Teams



Microsoft Teams Premium



Microsoft 365 Copilot



**All licenses include Commercial Data Protection and Microsoft 365 Security, Privacy, and Compliance.**

# 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

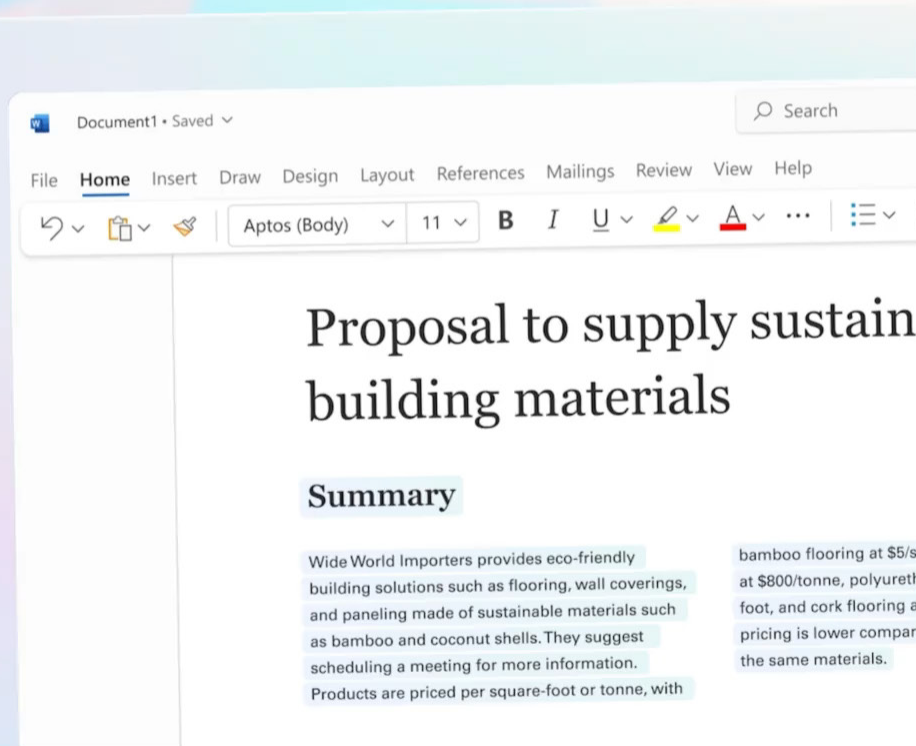
- Enjoy all the rich capabilities of Excel at your fingertips
- Create powerful, professional visualizations
- Explore your data without modifying it

#### 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

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# Copilot in Word



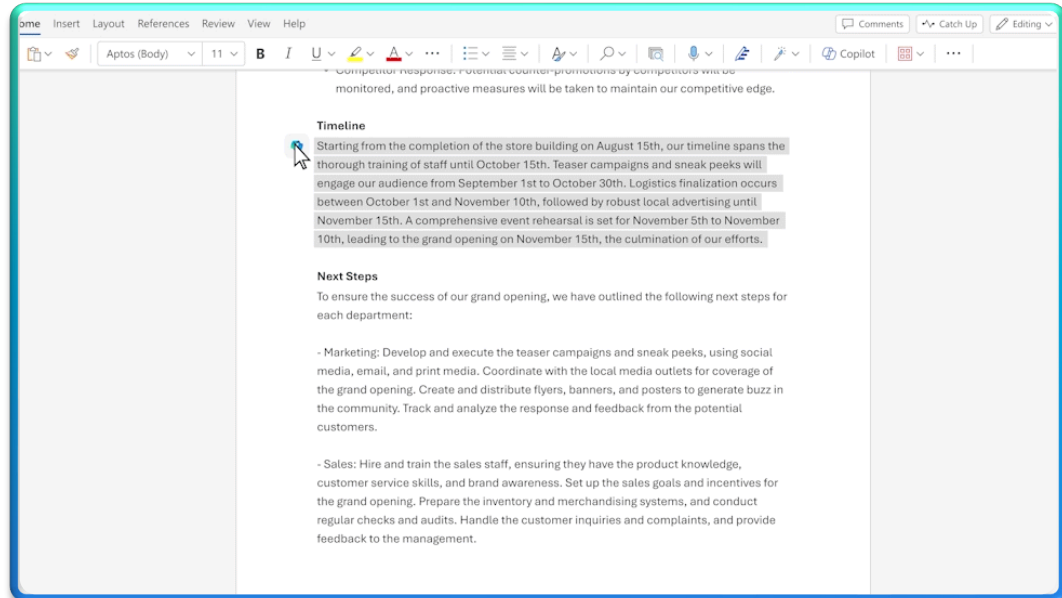
AMPLIFIED CREATIVITY

# Copilot in Word

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

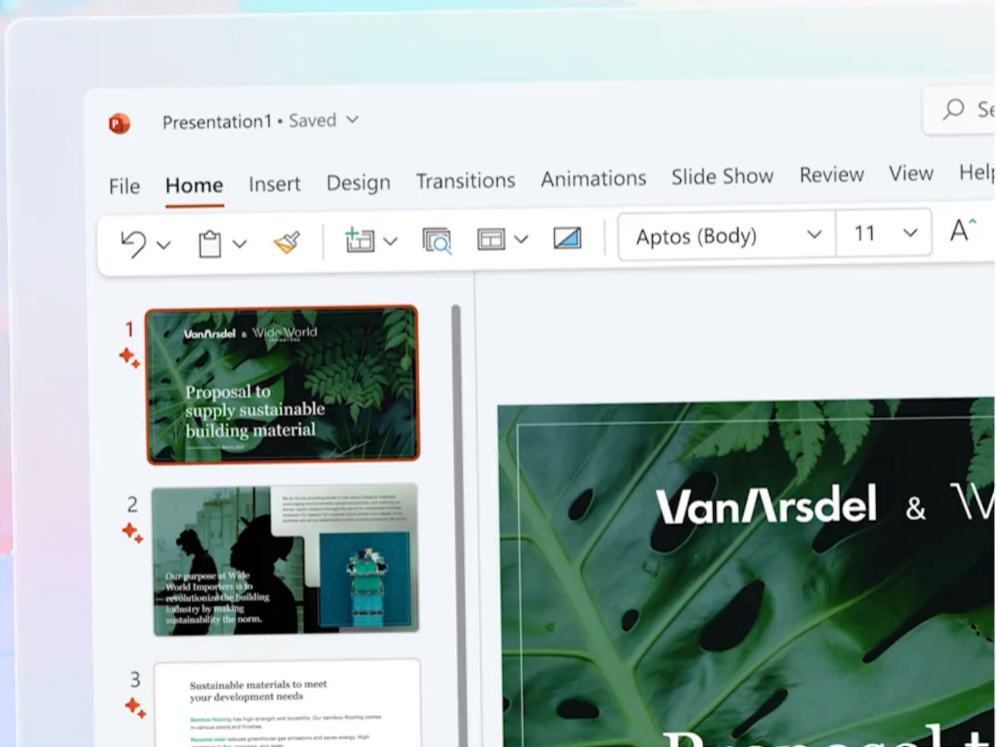
With Copilot now you can:

- 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 PowerPoint



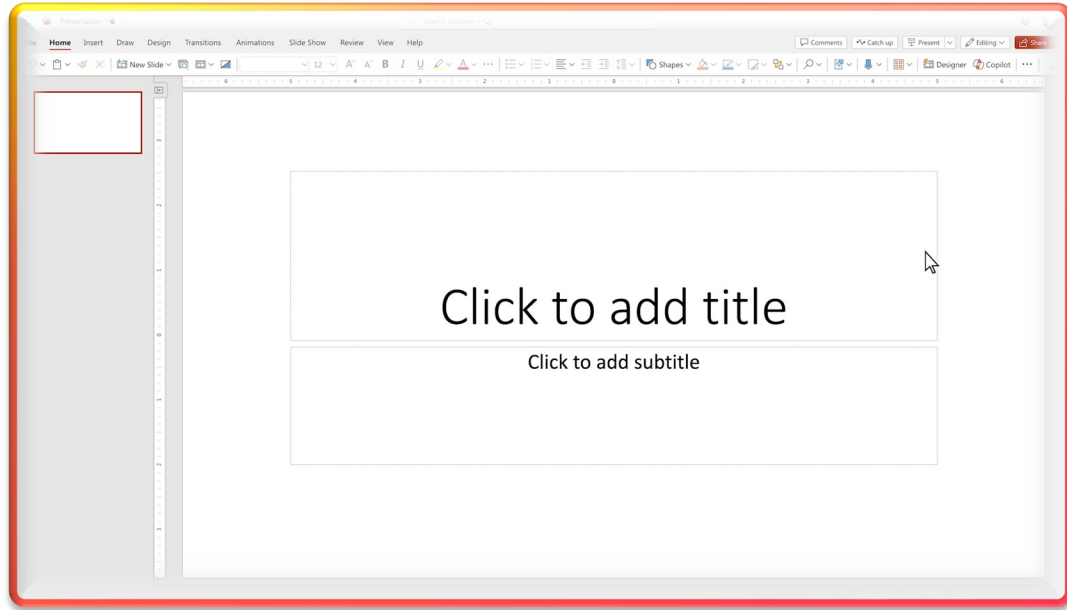
AMPLIFIED CREATIVITY

# Copilot in PowerPoint

**Copilot helps you turn your ideas into stunning presentations.**

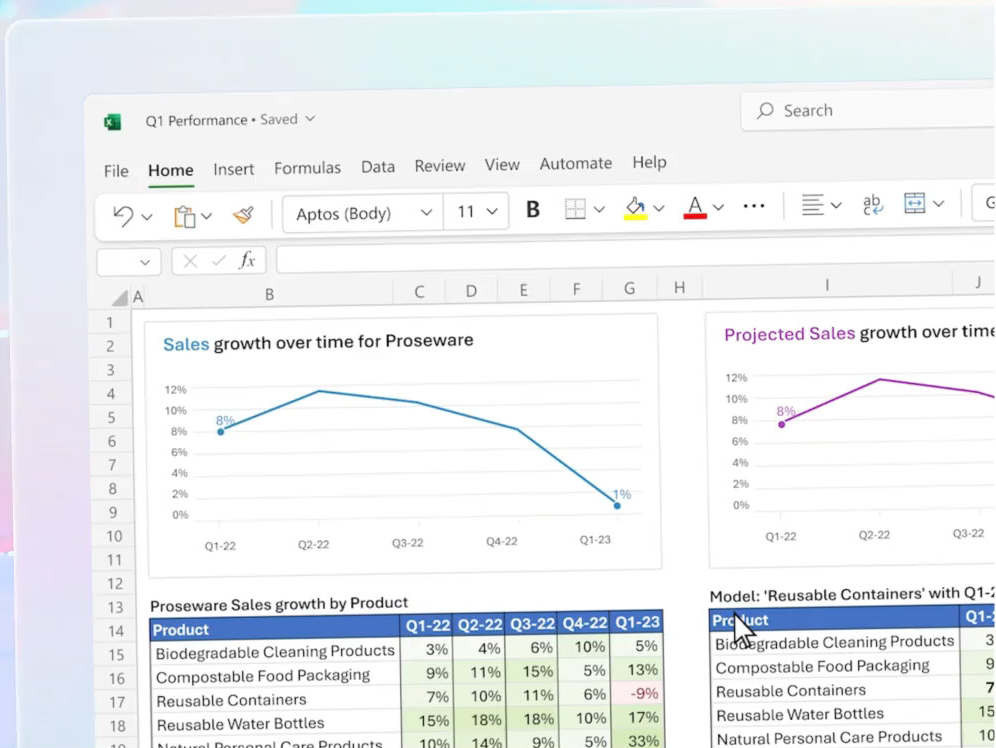
With **Copilot** now you can:

- Create a five-slide presentation based on a Word document, include relevant stock photos.
- Consolidate this presentation into a three-slide summary.
- Reformat these three bullets into three columns, each with a picture.



MICROSOFT 365

# Copilot in Excel





AMPLIFIED CREATIVITY

# 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.

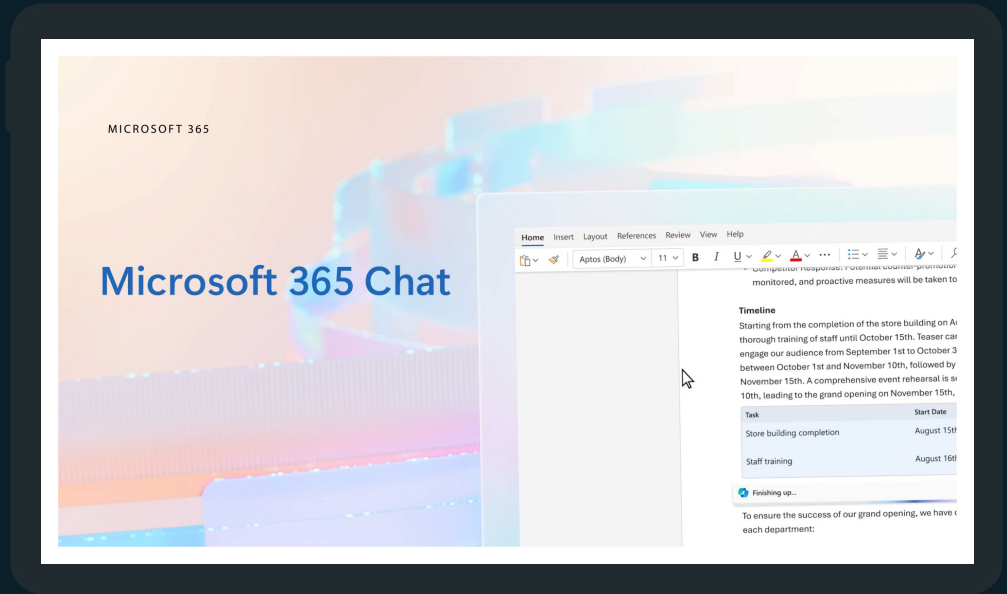
The screenshot displays an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	Store Code	Store Name	Location	Year	Quarter	Sales		
2	CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q3	\$ 7,003,071		
3	CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q4	\$ 8,966,978		
4	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q1	\$ 6,263,955		
5	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q2	\$ 5,374,864		
6	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q3	\$ 7,435,062		
7	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q4	\$ 10,319,964		
8	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q1	\$ 6,580,746		
9	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q2	\$ 5,695,138		
10	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q3	\$ 9,132,134		
11	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q4	\$ 11,844,765		
12	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q1	\$ 8,723,031		
13	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q2	\$ 7,519,256		
14	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q3	\$ 10,648,465		
15	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q4	\$ 14,087,186		
16	CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q1	\$ 9,726,792		
17	CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q2	\$ 8,198,962		
18	CHI032	ContosoHI 32	Tucson, Arizona	2019	Q3	\$ 7,017,496		
19	CHI032	ContosoHI 32	Tucson, Arizona	2019	Q4	\$ 8,814,793		
20	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q1	\$ 5,725,567		
21	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q2	\$ 4,631,148		
22	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q3	\$ 7,967,190		
23	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q4	\$ 9,342,811		
24	CHI032	ContosoHI 32	Tucson, Arizona	2021	Q1	\$ 6,733,832		

ELEVATE PRODUCTIVITY

# Uplevel Skills

- 1 **Turn your data into knowledge** with inputs across your documents, presentations, email, calendar, notes, and contact
- 2 **Spend less time** focused on the tools and more time focused on the most important work
- 3 **Use natural language to** tap into rich functionality across Microsoft 365 to make you better at what you're good at and master what you've yet to learn



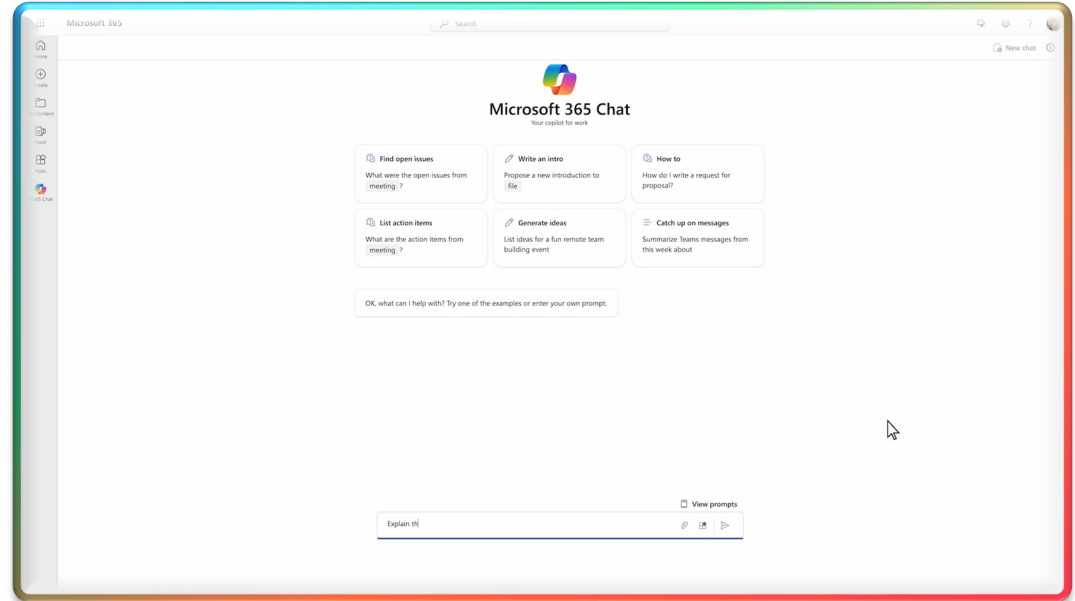
Microsoft 365 Chat

# Copilot in M365 Chat

Goes far beyond simple questions and answers to tame the complexity, eliminate the drudgery, and reclaim time at work.

With Copilot now you can

- Comb across all your work data to solve the most complex problems at work.
- Find whatever you need in your files (even if you forgot they existed), connect the dots across your content.
- Integrate with the apps you use to run your business.



# Copilot for Microsoft 365



## Trusted Security

Count on responsible, secure AI from a partner you can trust

Microsoft 365 Copilot is committed to advancing AI with an approach guided by ethical principles that put people first.

### Remain in control

- Individual users and admins are always in control as Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365
- Copilot respects individual and group permission policies

### Stay grounded and protected

- Copilot is architected to protect data. Your data never leaves its secure partition, and it is never used for training purposes

### Access better answers more efficiently and securely

- Copilot delivers real-time access to both your content and context in the Microsoft Graph
- Get accurate, relevant answers anchored in your business content and working context
- Microsoft 365 Business Standard and Business Premium customers can leverage Copilot now to access the power of an AI-powered chat for work with commercial data protection



# Copilot for Microsoft 365

Built on Microsoft's **comprehensive** approach



Security

+



Compliance

+



Privacy

+



Responsible AI

# Microsoft's AI principles



Fairness



Reliability  
& Safety



Privacy &  
Security



Inclusiveness



Transparency



Accountability

## Microsoft Cloud — AI you can trust

Your data is **your** data.

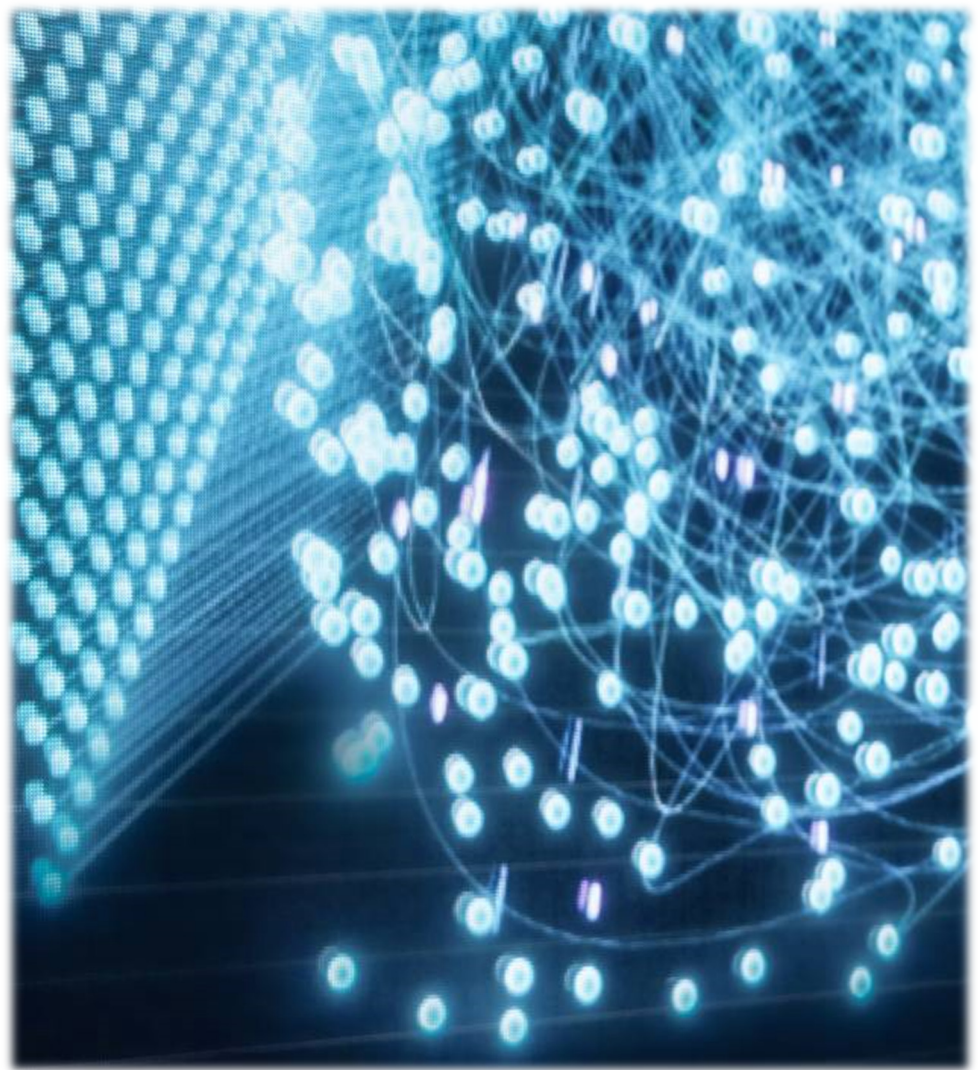
Your data is **not** used to train  
the OpenAI foundation  
models without permission.

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



WHAT'S THE ONE THING  
YOU LEARNED THAT  
YOU WANT TO TRY?

Please select your response in the poll



Break: 10 Min





# Architecture





**Large Language Model**

# Retrieval Augmented Generation

Search finds grounding data

We don't "train" on your tenant data



User prompt

+



Grounding data

+



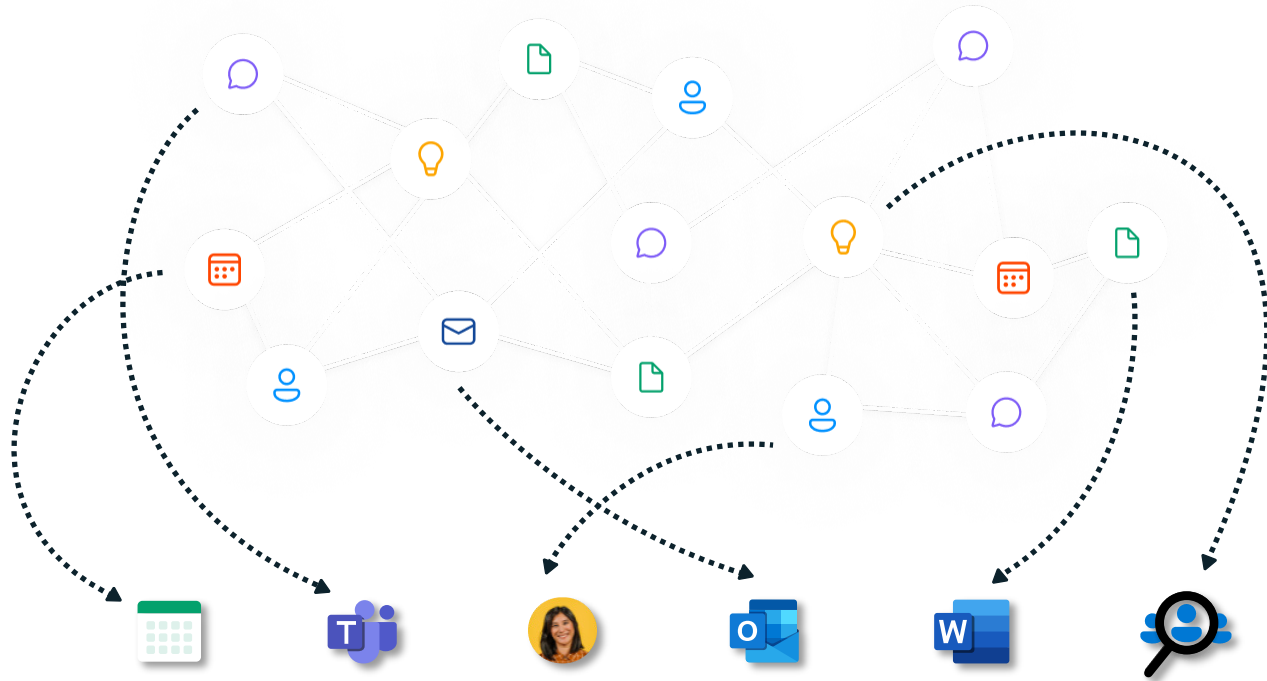
Chat history

+



System prompt

# Microsoft Graph



Knowledge & Insights via Microsoft Search

Embeddings for all Microsoft 365 entities



# - The Copilot System

# Microsoft protects your data and enables you to control it

## Customer tenant

Customers control their data. Customer data never leaves\* or stored outside the logical boundaries of the tenant.

Permissions model ensures that data won't unintentionally leak between users and groups.

## Microsoft 365 service boundary

Microsoft's commitments to Security, Privacy, GDPR, Data Location and Compliance.

Microsoft 365 Copilot orchestrator



Large Language Model

*\*unless a user searches the web, which can be turned off, or customer consent is given*



# Microsoft protects your data and enables you to control it

Microsoft 365 Copilot is integrated with Microsoft 365 and built on Microsoft's comprehensive approach to security, compliance, and privacy.

## Tenant

Microsoft 365 tenant is a logically isolated construct within Microsoft 365 that defines the default location for storing your organization's data. This location is specified when you create the tenant for your organization. Each Microsoft 365 tenant is distinct, unique, and separate from all other Microsoft 365 tenants. Data stored in a tenant is encrypted at rest and only available to the users within the tenant. Microsoft does not have standing access to Customer Data.

---

## Service boundary

Microsoft 365 service boundary encompasses all of the processes and resources for which Microsoft is responsible and against which Microsoft makes commitments, so that you know when, how and where your data is stored.

Microsoft 365 Copilot is subject to [Product Terms](#)

# Semantic Index for Copilot

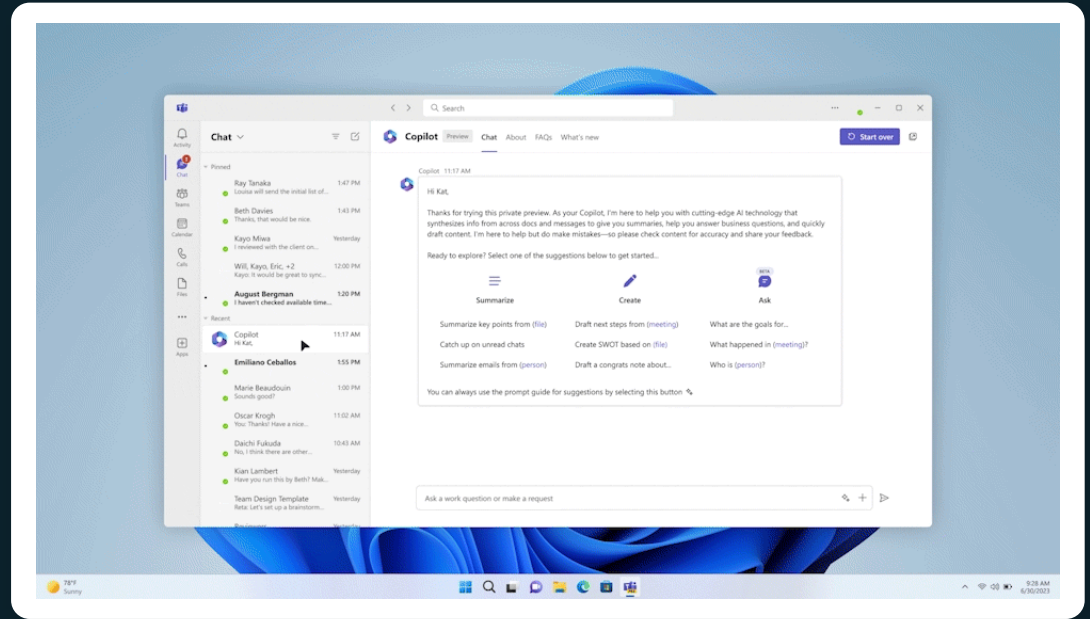




# Semantic Index for Copilot for Microsoft 365

To help every customer get AI-ready, we're rolling out Semantic Index for Copilot:

- The Semantic Index for Copilot creates a sophisticated map of your and your organizational data – identifying relationships and making important connections.
- It uses that conceptual understanding to determine your intent and help you find what you need
- The Semantic Index for Copilot enables Copilot for Microsoft 365 to deliver relevant, actionable responses to prompts – and do so in a secure, compliant, privacy-preserving way.



# Semantic Index for Copilot

Semantic Index for Copilot creates

# Semantic Index for Microsoft 365

keyword matched results & suggestions

Project Melbourne Shiroom

All Files Sites People Messages Images 2 more

Filters File type Last modified

Did you mean [project melbourne show room?](#)

- Melbourne - Upcoming Workshops**  
Project Melbourne  
Jodine Lingle modified on 1 March 2020  
Project Melbourne is an ambitious and innovative endeavour aimed at transforming the technology...Project Melbourne focuses on lev...
- Blog Strategy - Project Melbourne**  
Project Melbourne Blog  
Youngji Kim modified on 12 October 2022  
...address key challenges faced by hybrid work. The blog strategy envisions a holistic approach that integrates various aspects of...
- Melbourne phase 3 office build out**  
Melbourne Office  
Clodagh Fitzpatrick modified on 25 March 2017  
Sustainability is a key pillar of the Melbourne office. We should aim to reduce carbon emissions, enhance energy efficiency, and promote renewable energy sources throughout...
- Facts About Melbourne**  
Time and Places  
Jodine Lingle modified on February 16, 2018  
Founded in 1975, **Melbourne** is the worldwide leader in manufacturing, sales, services, devices and solutions that help...
- A New Life for Old Projects**  
DCX Managed Service

Without Semantic Index for Copilot

Project Melbourne Shiroom

All Files Sites People Messages Images 2 more

Filters File type Last modified

Including results for **'Project Melbourne Shiproom'**  
Search only for **'Project Melbourne Shiroom'**

**Project Melbourne is a forward-thinking and comprehensive urban development initiative that envisions a sustainable, technologically advanced, and inclusive future for the organisation.**

- PM Specification Document**  
<https://microsoft.sharepoint.com/teams/SalesAndAccounts/Profiles/Melbourne/>
- PM Shiproom June 2023**  
Project Melbourne  
Jodine Lingle modified on 1 December 2021  
Project Melbourne is an ambitious and innovative endeavour aimed at transforming the technology...Project Melbourne focuses on lev...  
Karin Blair shared this with you 5 days ago

**Frequently Asked Questions**

- What are the dependencies on Project Melbourne?
- When is project Melbourne expected to finish?
- What is the budget for project Melbourne?

Was this answer useful?

**PM Quarterly Newsletter**

With Semantic Index for Copilot

autocorrected spelling of organizational jargon

informative answers directly from documents

more relevant results, based on search intent

enhanced content sharing insights

AI generated questions and answers on topic

# Semantic Index for Microsoft 365

**Organizational Terms** creates a custom dictionary of generated terms that autocorrect misspelled jargon & acronyms unique to your organization.

**Document Excerpts** are extractive, informative answers to a query in the most relevant paragraph in the most relevant document.

**Semantic Search** understands the intent behind your prompts and commands, producing more relevant, transparent results

**More Context** provides collaboration, sharing and content insights to search results

**Frequently Asked Questions** provide AI generated questions and answers on a query to help you understand more about the query in a single search pane.

The screenshot shows a Microsoft 365 search interface for the query "Project Melbourne Shiroom". The interface includes a navigation bar with "All", "Files", "Sites", "People", "Messages", and "Images". Below the navigation bar, there are filters for "File type" and "Last modified". The search results are displayed in a list format. The first result is a document titled "PM Specification Document" with a URL. The second result is a presentation titled "PM Shiroom June 2023" by Jodine Lingle, modified on 1 December 2021. Below the presentation result, there is a notification that "Karin Blair shared this with you 5 days ago". The third result is a "Frequently Asked Questions" section with three questions: "What are the dependencies on Project Melbourne?", "How many products does Contoso produce?", and "Who is the CTO of Contoso Corporation?". The interface also includes a "Related searches" section on the right with links to "Project Melbourne", "Melbourne office", "Fabrikam Inc", and "Wide World Importers".

Microsoft 365

Project Melbourne Shiroom

All Files Sites People Messages Images 2 more

Filters File type Last modified

Including results for "Project Melbourne Shiroom"  
Search only for "Project Melbourne Shiroom"

Project Melbourne is a forward-thinking and comprehensive urban development initiative that envisions a sustainable, technologically advanced, and inclusive future for the organisation.

PM Specification Document  
<https://microsoft.sharepoint.com/teams/SalesAndAccounts/Profiles/Melbourne/>

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Frequently Asked Questions

What are the dependencies on Project Melbourne?

How many products does Contoso produce?

Who is the CTO of Contoso Corporation?

Was this answer useful?

Related searches

Project Melbourne  
Melbourne office  
Fabrikam Inc  
Wide World Importers

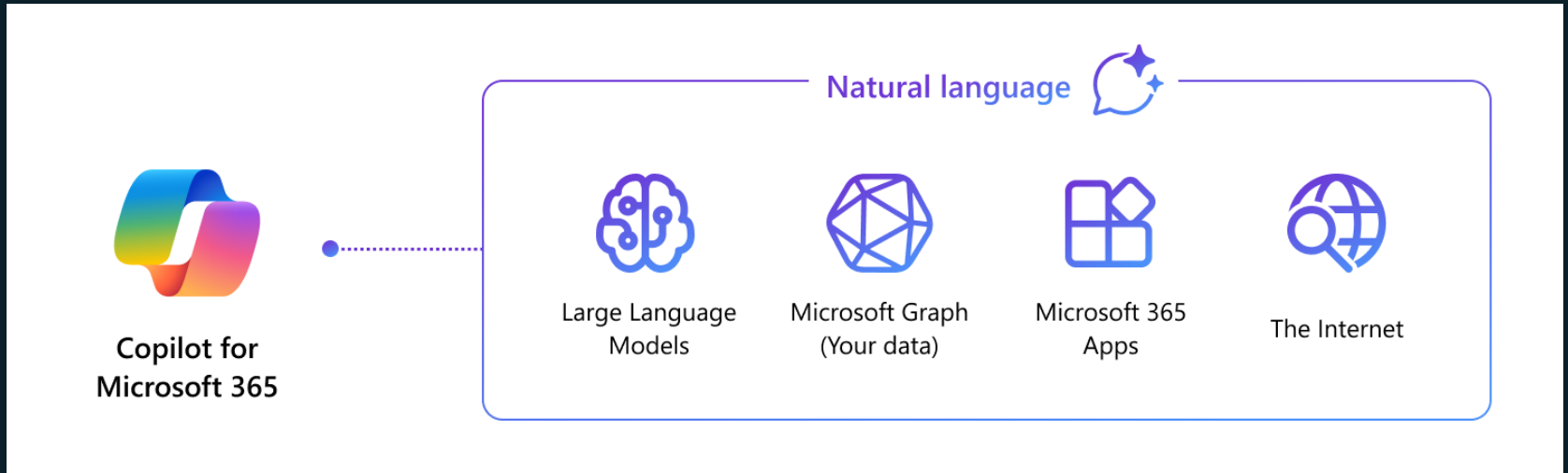
Were these work searches useful?

PM Quarterly Newsletter

# Copilot for Microsoft 365 - Extensibility

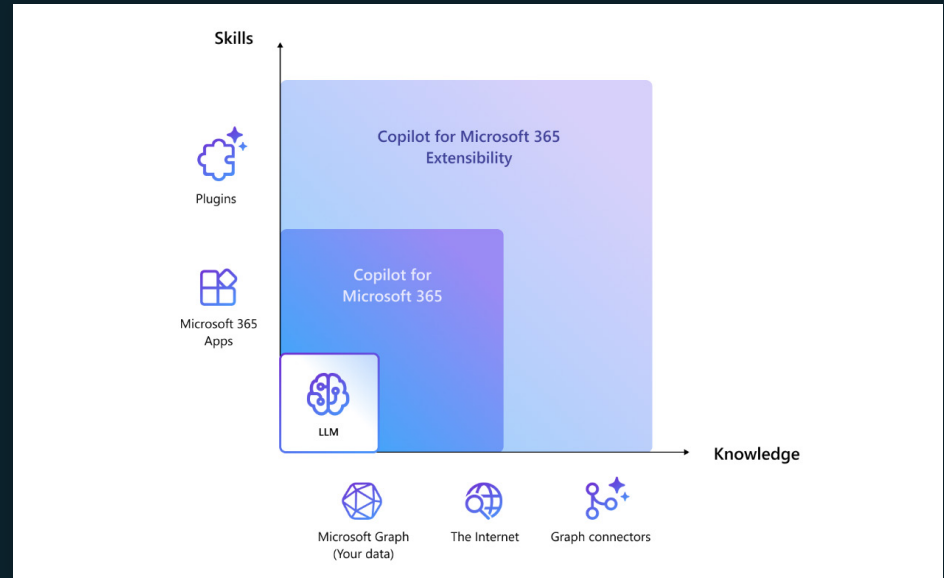


# Extend Microsoft Copilot for Microsoft 365

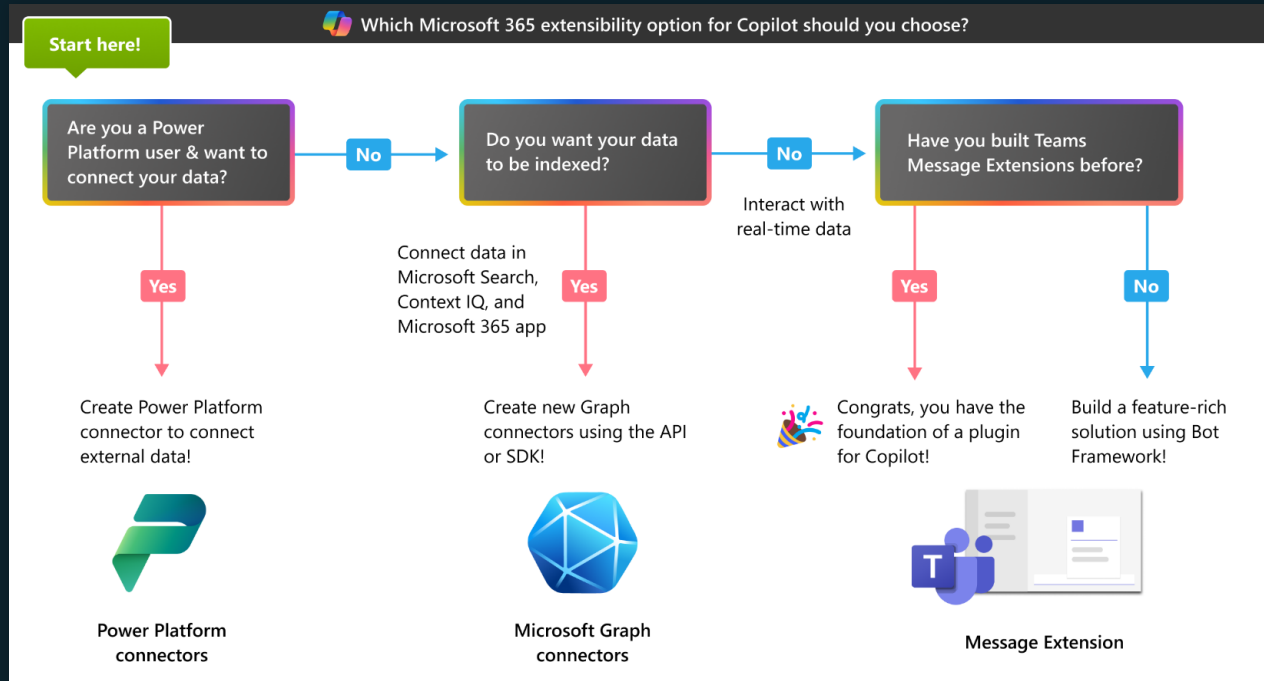


# Extend Microsoft Copilot for Microsoft 365

- Enrich the data estate of your enterprise with industry-leading AI.
- Keep your users in the flow of their work, start to finish.
- Inherit world-class security, compliance, and privacy policies



# Extensibility options flow for Microsoft Copilot for Microsoft 365





# Plugins

Access real-time information

Such as finding the latest news coverage on a product launch

Retrieve relational data

Such as reporting on service tickets assigned to a given team member

Perform actions across apps

Such as creating a new task in your organization's work tracking system

Build Plugins by building a:

Microsoft Teams message extension  
Power Platform connector

USE EXISTING INTEGRATIONS OR BUILD NEW ONES TO EXTEND YOUR ORGANIZATION'S AI-POWERED SKILLS.

# Plugin types

## Teams Message Extensions

Message extensions allow users to interact with a web service through buttons and forms in the Microsoft Teams, Outlook, and Microsoft 365 app clients.



## Power Platform Connectors

A proxy or a wrapper around an API that allows users to leverage a set of prebuilt actions and triggers to build their apps and workflows.



## Open AI Plugins

Open AI plugins connect ChatGPT to APIs, enabling it to perform actions like browsing and interacting with websites and games.



Existing Investments

New

# Microsoft Graph connectors

Make the most of your external data

by giving Copilot the ability to access and summarize your diverse datasets from different sources, enabling more comprehensive insights

Use Copilot as a research aid letting Copilot find, summarize, and perform Q&A natively by leveraging the dataset of your choice

Surface the intelligence of Copilot

in Microsoft Search, ContextIQ, and more to enhance the ways your users are already searching for answers

## 3 main steps to set up a Graph connector

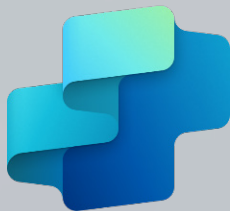
1. Create a connection

2. Register your schema

3. Ingest your content to the Microsoft Graph

Introducing

# Copilot Studio



Connect to data

Create and orchestrate  
sophisticated logic

IT manageability  
& control

# Microsoft Copilot Studio

## Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI

## Customize Microsoft Copilot

Extend and customize 1st party Microsoft Copilots with your own enterprise scenarios. *Copilot Studio will be included with the Microsoft 365 Copilot SKU.*

## Connected platform

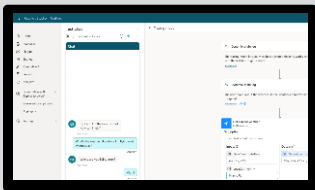
Integrates and exposes various Microsoft's conversational AI technology stacks - integrated with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models and more

## Manage copilot experiences

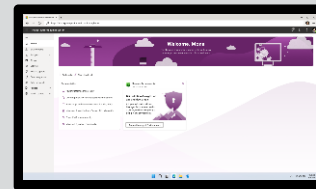
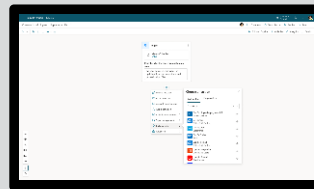
Governance and control features to monitor usage with full visibility of customizations, standalone copilots as well as who is building and customizing them.

The screenshot shows the Microsoft Copilot Studio interface for a solution named 'Northwind Trader'. The interface is divided into a left-hand navigation pane and a main content area. The navigation pane includes sections for 'Building blocks' (GPTs, Topics, Plugin actions, Prompts), 'Copilots' (Create a copilot), 'Extend Microsoft Copilot' (Publish, Analytics), and 'Settings' (AI integration tools, Channels, Test your copilot). The main content area features a header for 'Northwind Trader' with a 'View solution' link. Below this is a prominent blue banner titled 'Boost your conversations (preview)' which includes a text input field for 'Enter your website', a 'Use generative answers' button, and an 'Advanced options' link. A sub-note states: 'Make sure AI-generated content is accurate and appropriate before using. See terms'. To the right of the banner is a diagram showing a flow from a website to a chat interface. Below the banner are three cards: 'Extend a Microsoft Copilot (preview)' with an 'Extend with plugins' button, 'Add plugins for dynamic chaining (preview)' with a 'Go to plugins' button, and 'Meet people where they are' with a 'Go to publish' button.

# What's in Copilot Studio?



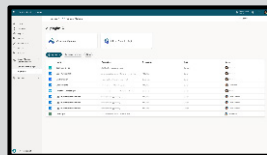
## Workspaces



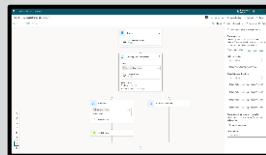
## Copilot building studio

Use the new studio to create, test and deploy conversational copilots.

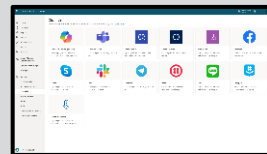
Including advanced capabilities of Azure copilot Framework natively in Copilot Studio.



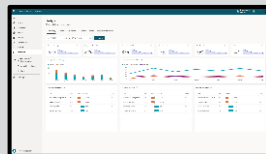
### Plugins



### Generative AI



### Channel Publishing



### Analytics and Insights

## Automation Studio

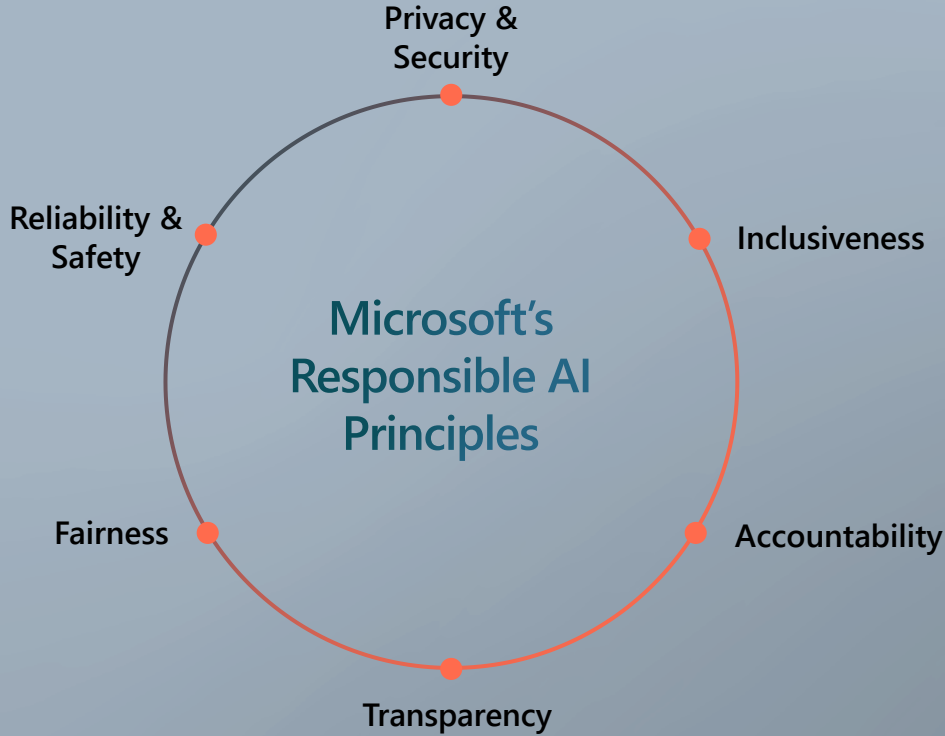
Drive action in built in automation. Use over 1000+ prebuilt and custom data connectors and digital process automation into your conversation flow.

## Admin Studio

Deploy copilots securely using central administration, built-in security roles, and simple management across environments to maintain compliance and governance.

# Security, Privacy and Data Protection





## Building blocks to enact principles



Tools and processes



Training and practices



Rules



Governance



# How does Microsoft 365 Copilot protect your data?

## Inheriting Microsoft 365 policies and controls

### Data access & permissions

Copilot only displays data to users who have at least view permissions. Leverage permission models within Microsoft 365 services to ensure appropriate access for users/groups.

### User-tenant focus

Copilot exclusively searches and utilizes the current user's Microsoft 365 cloud content within their tenant, excluding other tenants the user may be a B2B guest on or non-current user's tenants with cross-tenant access or sync.

### Customer data protection

Customer data for each tenant is logically isolated, encrypted in transit, processed in-memory by the services, and never stored outside the logical boundaries of the tenant.

### Data processing and residency

Data is processed in compliance with GDPR and other relevant Privacy Laws. Copilot is EUDR compliant.

## Protecting data processed through LLMs

### Security/Compliance

When using Copilot, all prompts, retrieved data, and generated responses are kept within the service boundary, adhering to existing data security and compliance commitments.

### Data usage

Customer data (including prompts, responses, and data accessed through the Microsoft Graph) isn't used to train the foundation LLMs that Copilot uses. Your data remains confidential and secure within your organization's environment.

### Committed to responsible AI

Microsoft is committed to making sure AI systems are developed responsibly. This work is guided by a core set of principles: fairness, reliability and safety, privacy and security, inclusiveness, transparency, and accountability

# Rapid adoption of AI: there are associated risks



## Rise of shadow AI

58%

of organizations have concerns around the lack of visibility into the unsanctioned use of generative AI.<sup>1</sup>



## Lack of controls to protect data shared in AI

43%

of organizations said lack of controls to detect and mitigate risk in AI is a top concern.<sup>2</sup>



## Increased regulatory pressure

By  
2027

at least one global company will see its AI deployment banned by a regulator for noncompliance with data protection or AI governance legislation.<sup>3</sup>

1. PRNews wire, portal 26 report, Nov 2023

2. Survey of 658 data security professions, Mar 2023, commissioned by Microsoft

3. Gartner Security Leader's Guide to Data Security, Sep 2023

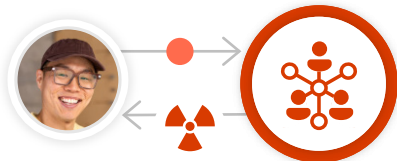
# Security concerns associated with AI usage



Insufficient visibility into the usage of AI applications can result in security and compliance challenges.

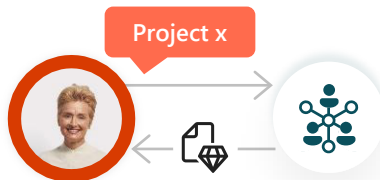
1

User uses unmanaged AI apps, potentially exposing organizations to risks



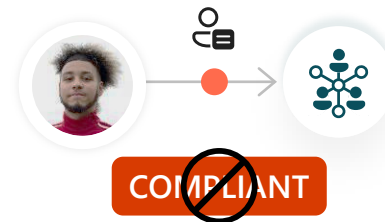
2

Compromised user identity or overprivileged insider access sensitive data via AI applications

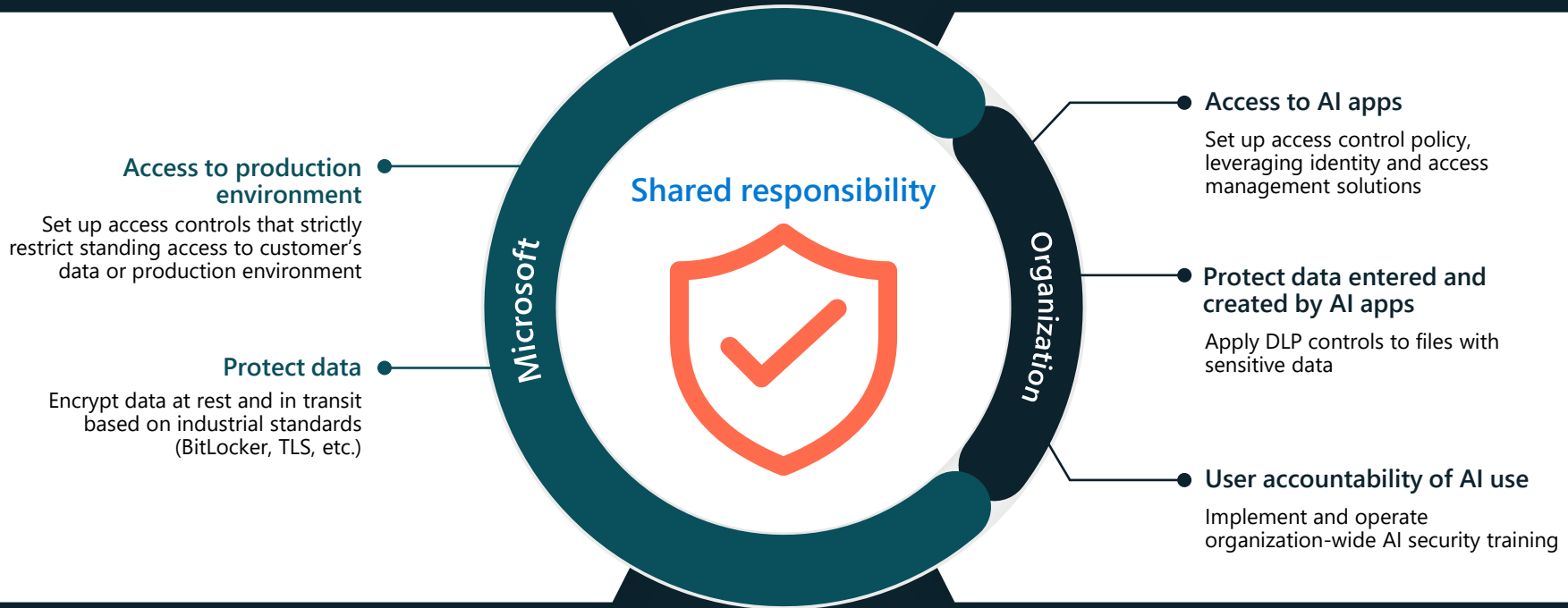


3

User negligently shares sensitive data, such as PII, in AI applications, violating compliance requirements



# Shared responsibilities of security for AI usage for Copilot for Microsoft 365



# Govern **access** and secure **data** in Microsoft Copilot for Microsoft 365



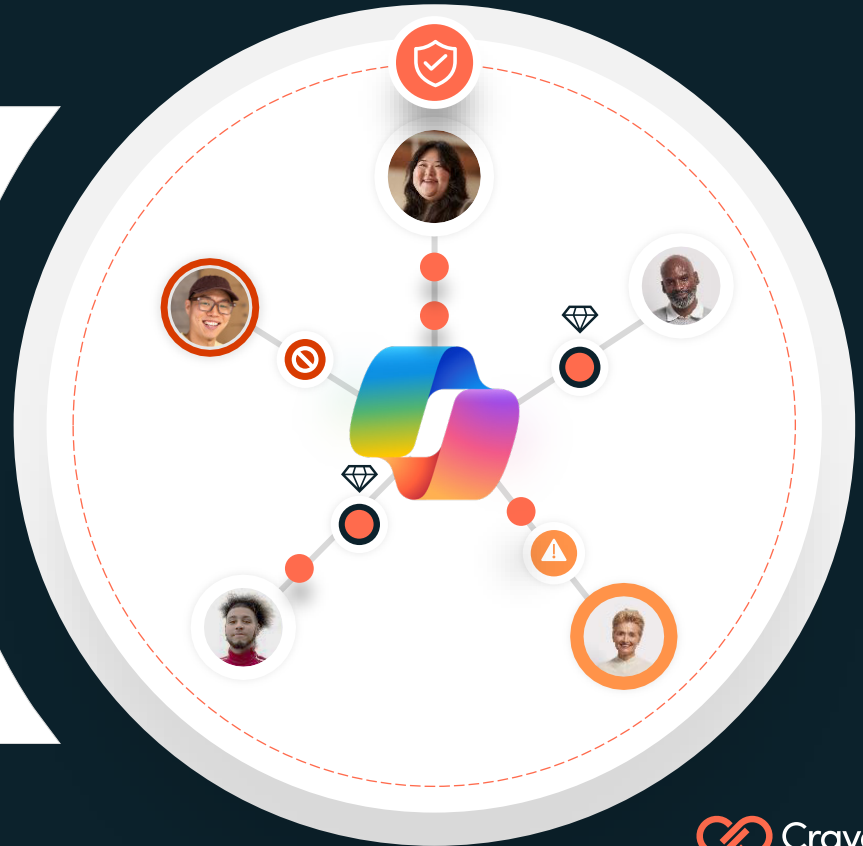
Discover overprivileged and risky users and mitigate access risks automatically with **conditional access controls**



Identify and protect sensitive data



**Retain, log, and manage compliance** of Copilot interactions to align with organizational policies and regulations



# Microsoft Purview with Microsoft 365 Business Premium

## Data Security

Secure data across its lifecycle,  
wherever it lives

Data Loss Prevention  
Information Protection

## Data governance

Govern data seamlessly to  
empower your organization

Data Map  
Data Catalog  
Data Estate Insights

## Risk & compliance posture

Manage critical risks and  
regulatory requirements

Compliance Manager  
eDiscovery and Audit

Office 365 apps

Unstructured & structured data

Across IaaS and SaaS

### Shared Platform Capabilities

Data Map, Data Classification, Data Labels, Audit, Data Connectors

# Let's see how it all works together

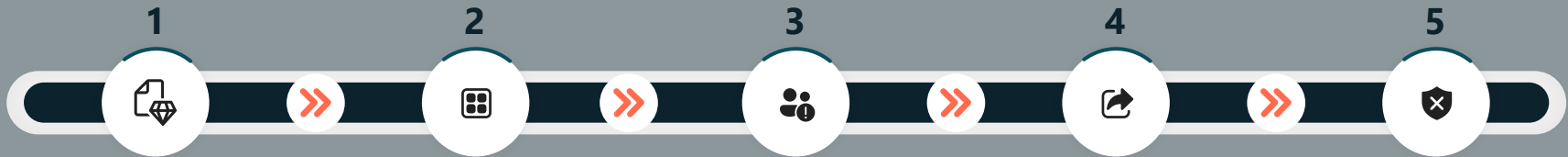
Alex worked on a highly confidential project, Project Obsidian

Alex leveraged both Microsoft Copilot and unmanaged consumer AI apps for the project

Her identity was compromised due to the malicious code in the high-risk consumer AI apps

Without knowing the impact of her activities, she continued sharing sensitive data in consumer AI apps.

Project Obsidian's information was leaked before the debut



# Let's see how it all works together

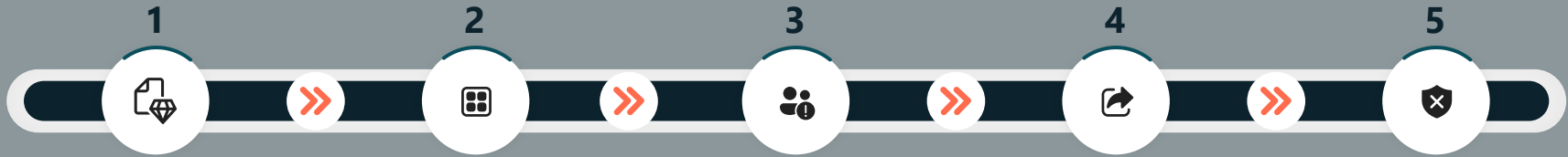
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Project Obsidian's information was leaked before the debut



The project owner labeled all documents with the "highly confidential" label to restrict rights to data with **Microsoft Purview**

Discover use of high-risk apps with **Microsoft Defender for Cloud Apps** and **Microsoft Defender for Business**

Detect the compromised identity and take actions (e.g., reset password, restrict access) to protect Microsoft Copilot or other critical resources with **Microsoft Entra Conditional Access**

Gain complete visibility and logs of activities to conduct investigations with **Microsoft Purview**



# Why Microsoft is uniquely positioned to empower secure AI usage



## Integrated

The only security solutions that natively integrate with Microsoft Copilot



## Comprehensive

End-to-end security across threat protection, identity & access management, and data security



## Intelligent

Industry-leading AI vendor with AI-powered security capabilities



# Getting your Customers AI Ready

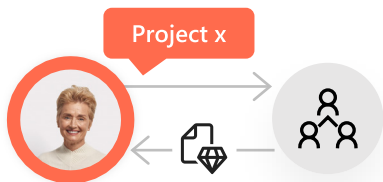


# Security and compliance challenges

1

## Data oversharing:

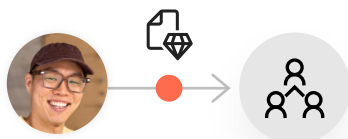
Users may access sensitive data via AI apps they're not authorized to view or edit



2

## Data leak:

Users may inadvertently leak sensitive data to AI apps



3

## Non-compliance usage:

Users use AI apps to generate unethical or other high-risk content



# Secure and govern Copilot with Microsoft Security



Security

+



Compliance

+



Privacy

+



Responsible AI



## Secure access

Manage organization-wide search with **Restricted SharePoint Search controls**

Restrict or block risky access with **conditional access**

Control the use of Copilot on devices with **device and application management**



## Protect sensitive data

Protect access to sensitive data in Copilot interactions with **sensitivity labeling**

Keep confidential information within your business with **DLP policies**

Understand user activities and detect risky access to Copilot with **audit logging**



## Govern Copilot usage

Retain and log Copilot interactions with **retention and deletion policies**

Find information on Copilot interactions with **search and export capabilities**

Manage cases and apply legal hold to **investigate security and compliance incidents**

# Copilot for Microsoft 365

inherits your security, compliance, and privacy policies

1

Manage  
overprivileged  
and risky users



Microsoft Entra ID

2

Mitigate  
Device  
Risk



Microsoft Intune

3

Prevent  
over-exposure  
of data



Microsoft Purview  
Information Protection

4

Discover and  
control the use  
of AI apps



Microsoft Defender for  
Cloud Apps

GETTING YOUR CUSTOMERS AI READY

# Identity & Access management



# Govern access to Copilot

## Microsoft Entra ID

### Users and Devices

1 Manage overprivileged and risky users with Identity and access management

Microsoft Entra ID

2 Mitigate Device Risk

### Copilot for Microsoft 365



Login to Microsoft 365 with a single & managed corporate identity.



Evaluate login attempts based on the user or group membership, IP location, device state, application, risk detection.



Decide access level with Conditional Access policies.



Allow access



Require MFA



Limit access



Password reset



Monitor access



Monitor critical events and issue access tokens that can be revoked immediately.

GETTING YOUR CUSTOMERS AI READY

# Endpoint Management

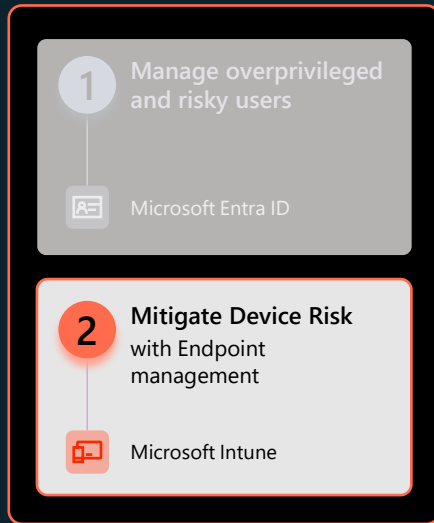




# Manage device real-estate

## Microsoft Intune

### Users and Devices



### Copilot for Microsoft 365



Ensure the Microsoft 365 apps are securely installed on the user's device and kept up to date.



Limit the use of work apps, including Copilot, on personal devices



Implement App protection policies to limit the actions users can take on devices:

- Save generated files to unsecured apps
- Restrict copying and pasting to non-work apps



Wipe all work content if the device is lost or disassociated with the company or the user.

GETTING YOUR CUSTOMERS AI READY

# Data Security and Information Protection



# Why is security and data governance important when Deploying Copilot for Microsoft 365?

## Internal confidential data

Restrict and protect internal confidential data, such as HR and personnel information



## Partner and supplier data

Restrict and protect partner and supplier confidential information and PII

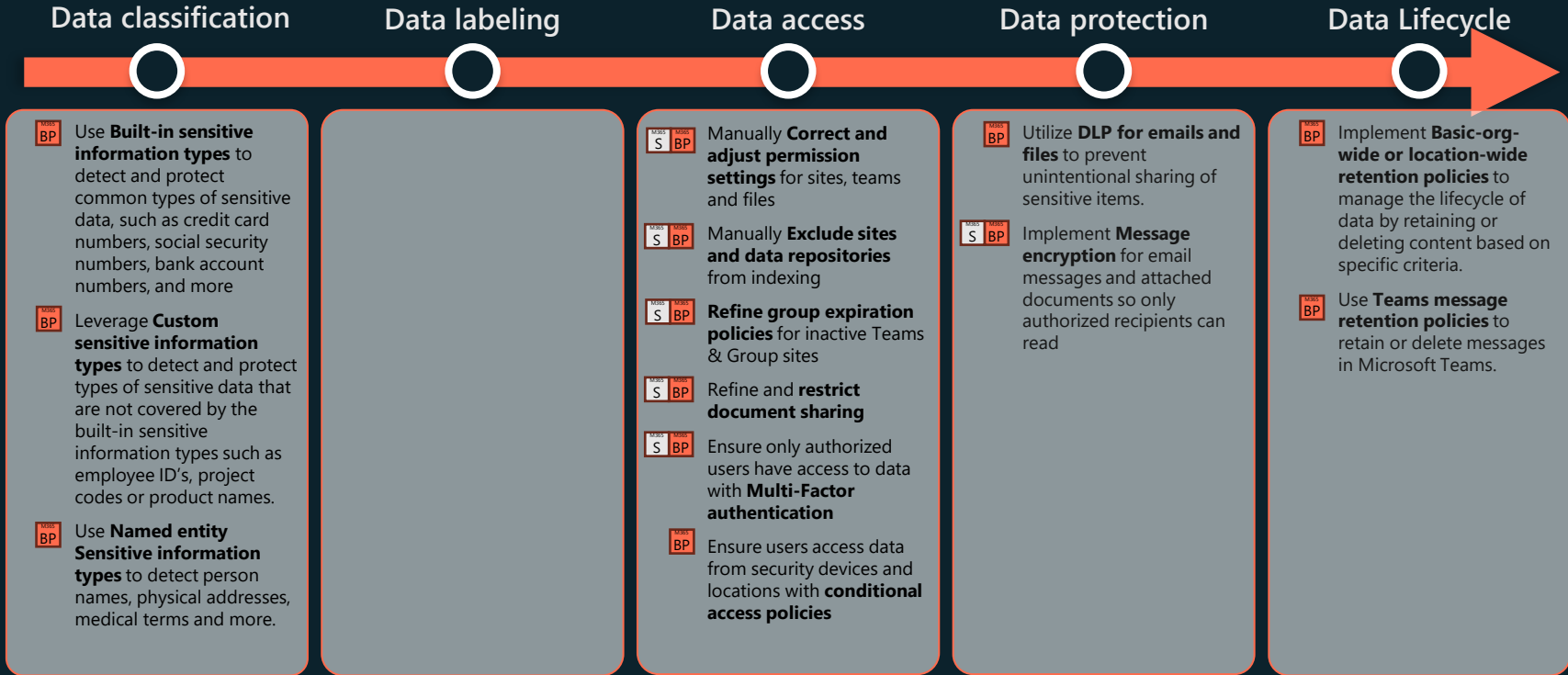


## Customer data

Restrict and protect customer PII and confidential information



# Data protection features in M365 Business



MAKE A RATIONAL CHOICE BASED ON EVIDENCE AND ACTUAL DATA.

# Decide on the path forward



## Acceptable risk

- Start using Copilot today, no need to take any extra steps to protect organizational data.

## Medium risk

- Start using Copilot today
- Temporarily exclude users, data sources and applications with high risk
- Implement additional data security measures.

## Not acceptable risk

- Implement data security measures and improve security posture before enabling Copilot.

# Protect business information and restrict actions

## Microsoft Purview Information Protection

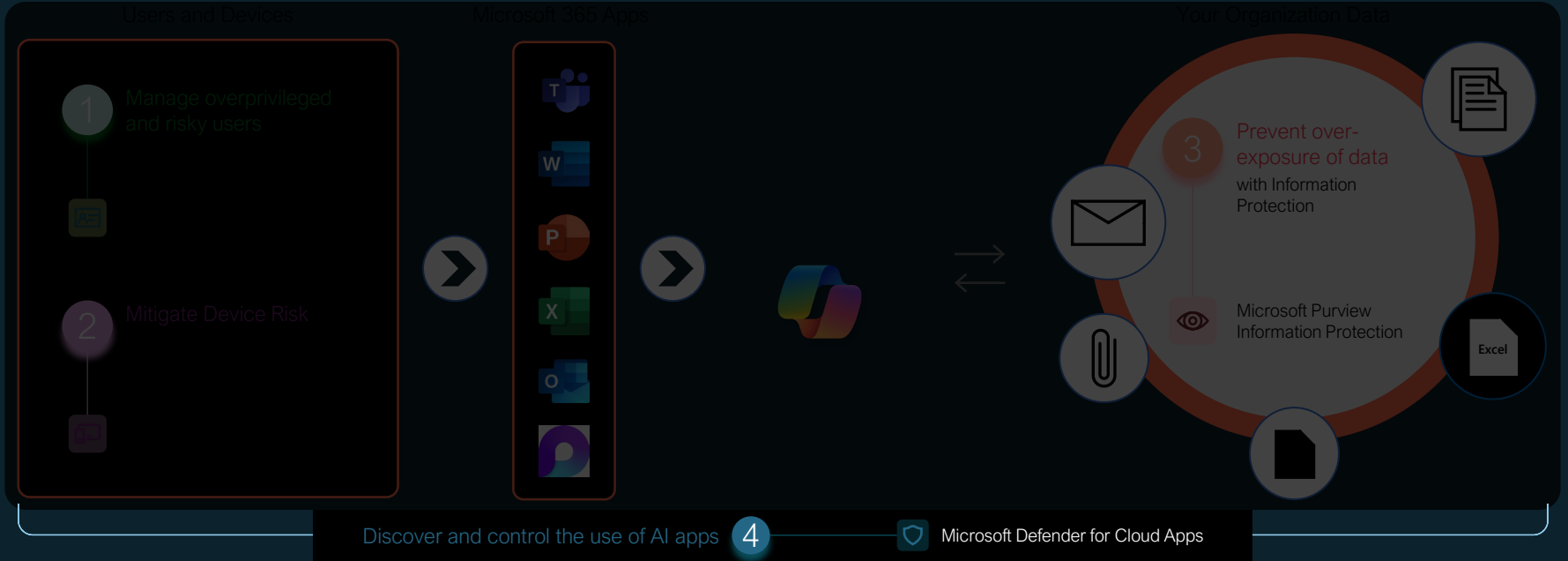
- ✓ Data consumption and processing with Copilot is limited to the user's permissions.
- ✓ Copilot inherits sensitive documents' sensitivity labels and applies them to its output and references.
- ✓ If Copilot generates sensitive data and saves it in Microsoft 365, Data Loss Prevention policies will apply.
- ✓ Interactions with Copilot are logged for auditing purposes and business, or code of conduct violations can be detected.

  
Copilot for  
Microsoft 365



# Discover and control the use of AI apps

## Microsoft Defender for Cloud Apps

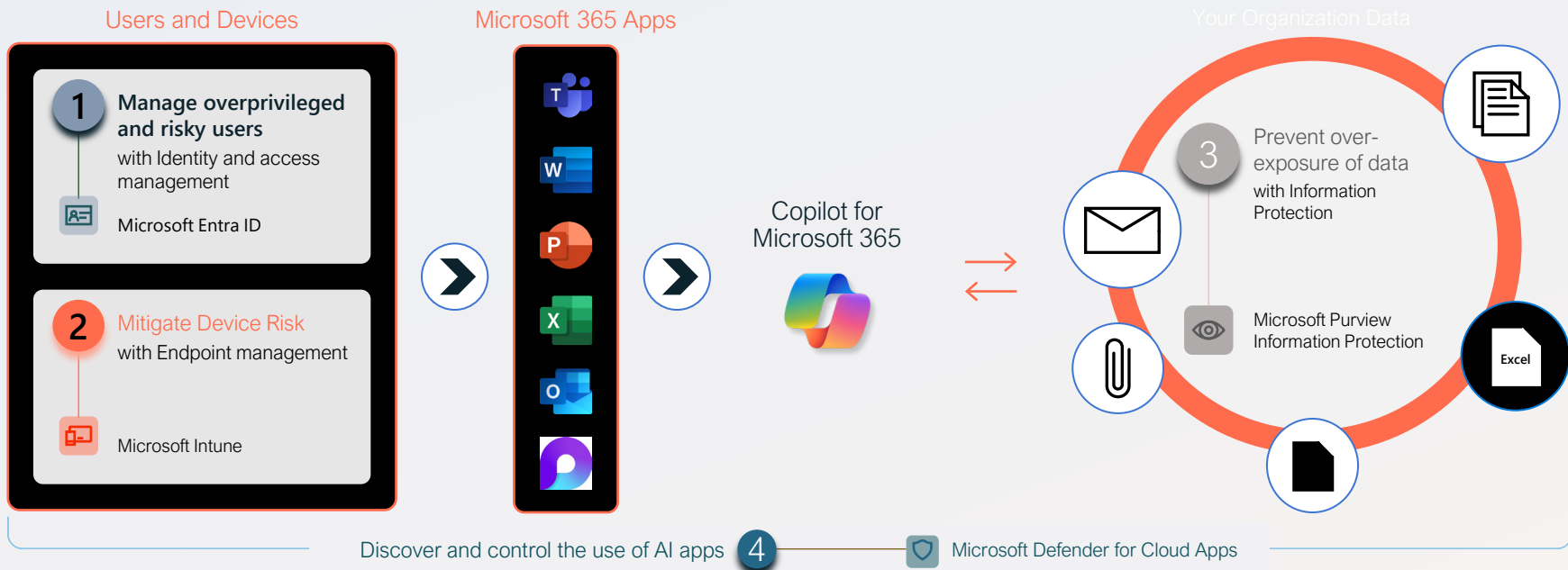


Discover & assess the risk across 400+ AI apps in an organization



Block or approve the use of discovered AI apps in the organization

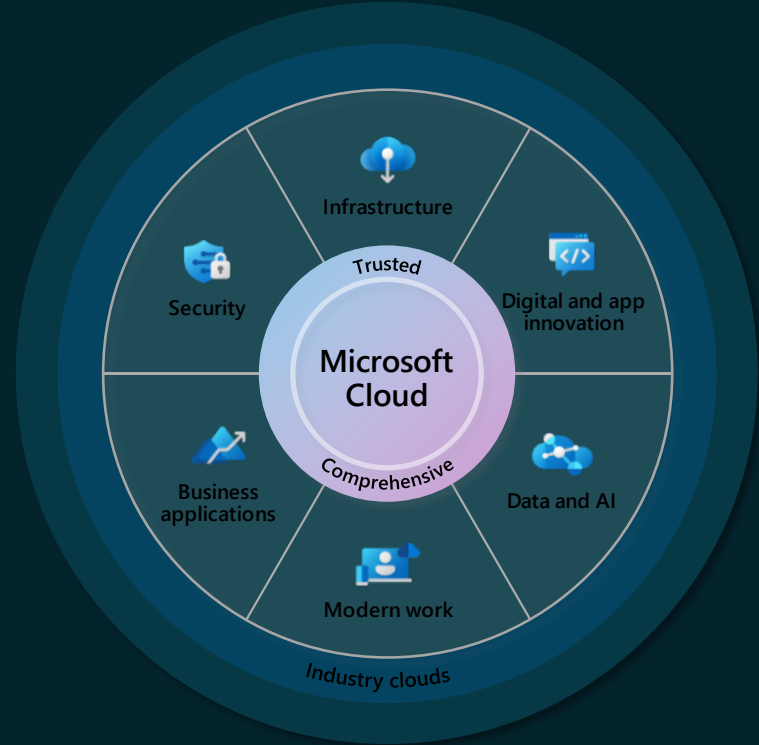
# Security and compliance controls for Copilot for Microsoft 365





LEARN MORE IN OUR WEBINAR

Enhance your security to get ready for Copilot for Microsoft 365 Webinar [On-Demand](#)





WHICH SECURITY & COMPLIANCE  
CONTROLS DO YOU SEE AS AN  
OPPORTUNITY FOR FURTHER  
LEARNING?

Please select your response in the poll





# Building a successful practice



BUILDING A SUCCESSFUL PRACTICE

# Partner Service Opportunity





# 3 steps to build a successful CSP Copilot for Microsoft 365 practice

01

Get customers AI ready

02

Sell & deploy

03

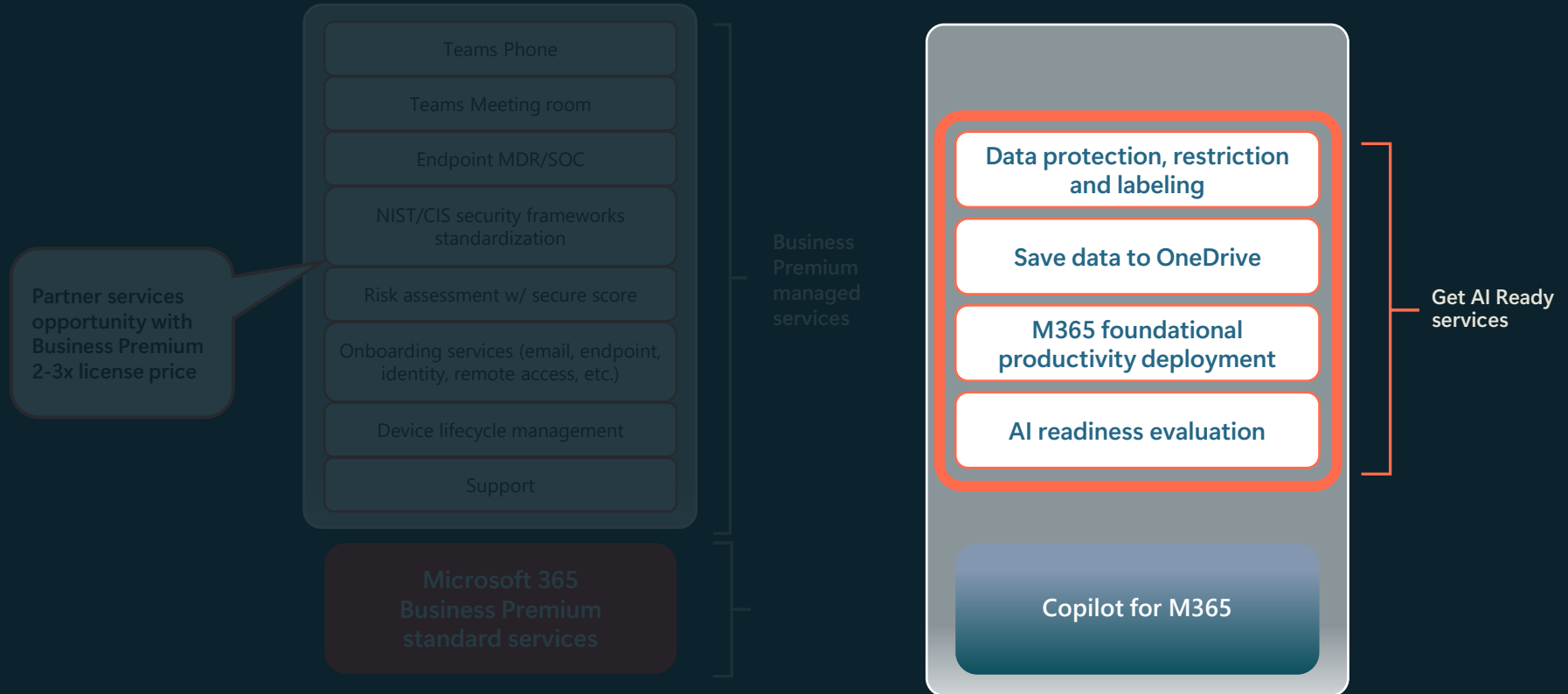
Adoption & ongoing services



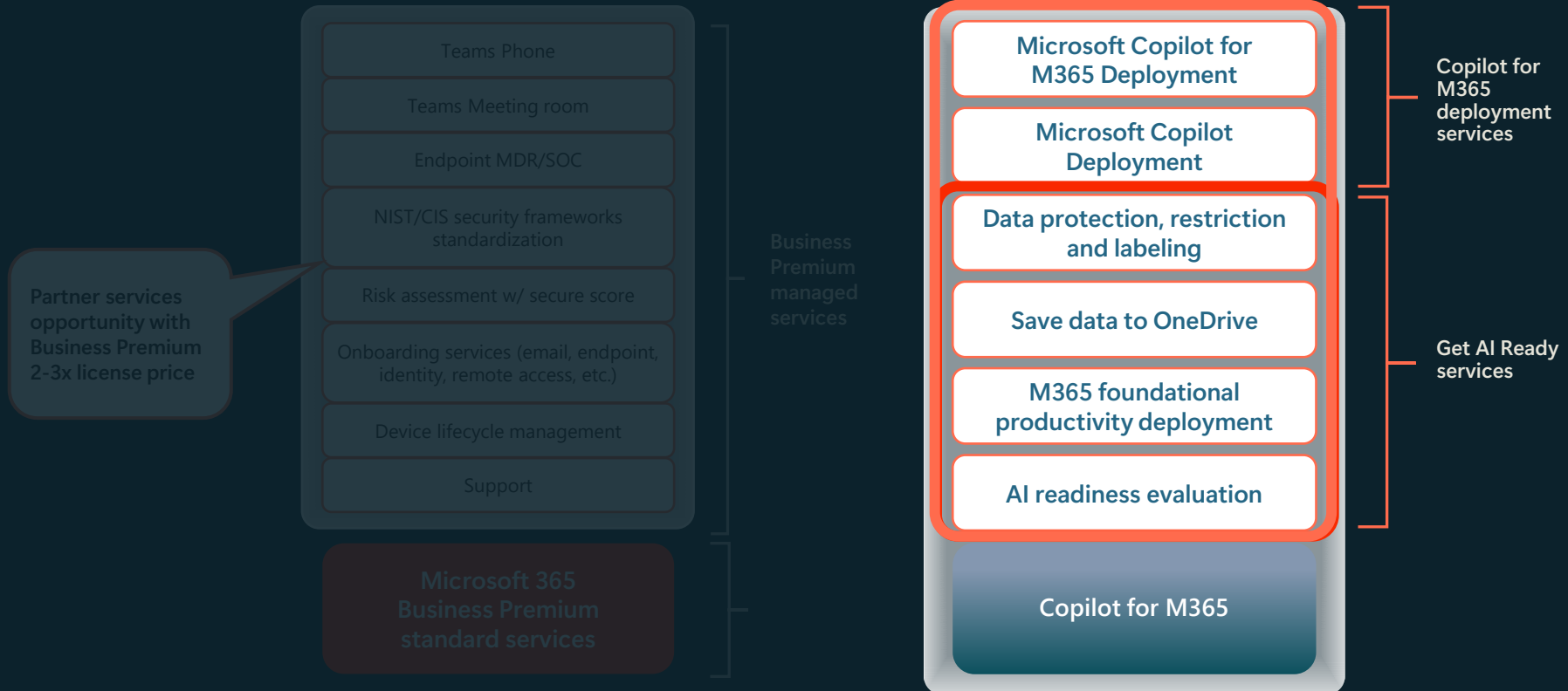
**Microsoft 365 Lighthouse**

Multi-customer management and AI driven customer targeting

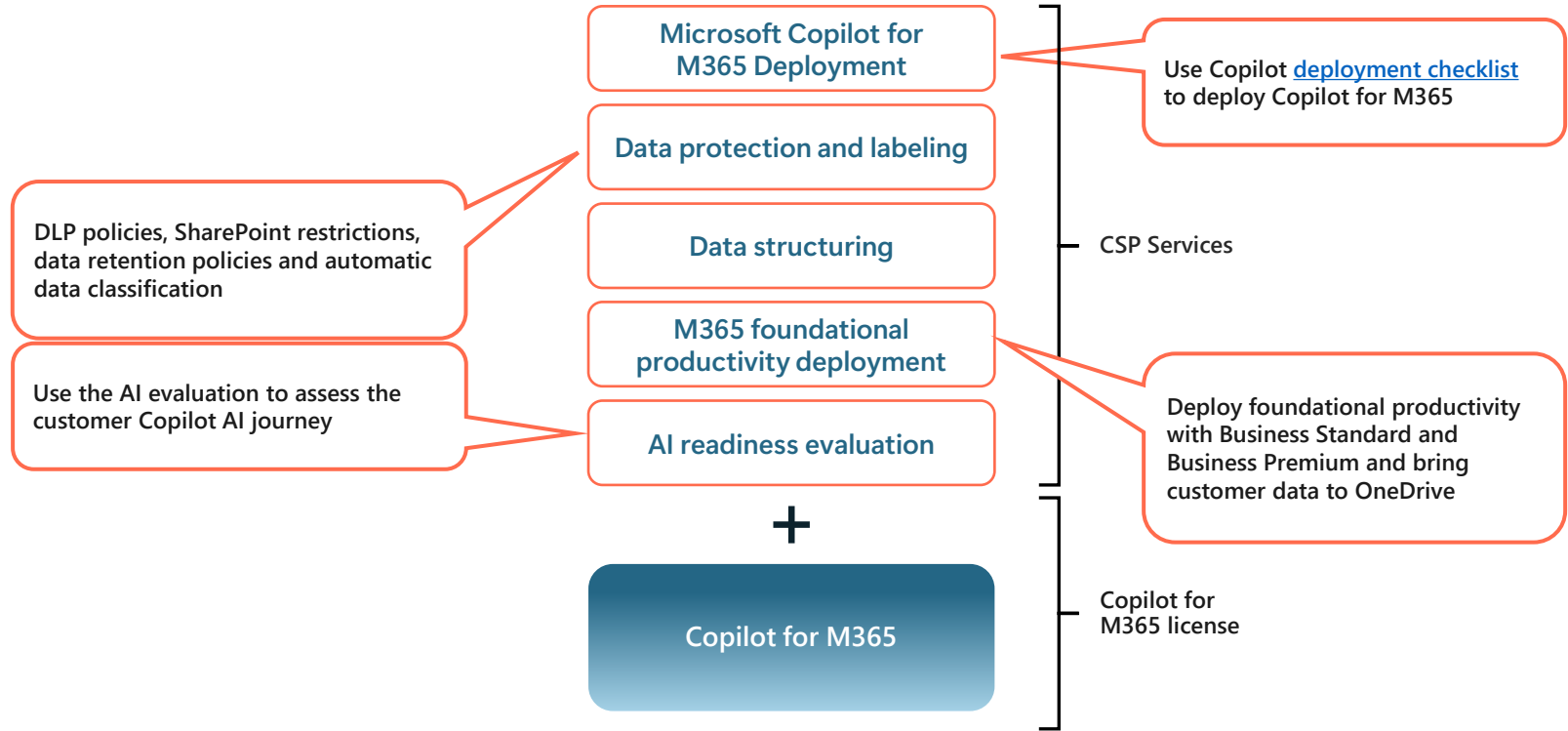
# Copilot brings additional CSP revenue and profitability opportunities



# Copilot brings additional CSP revenue and profitability opportunities



# Copilot for Microsoft 365 managed services example



M365 Lighthouse multi customer management



COPILOT FOR M365 MANAGED SERVICES

# Pre-Sale Services



# Get customers AI ready

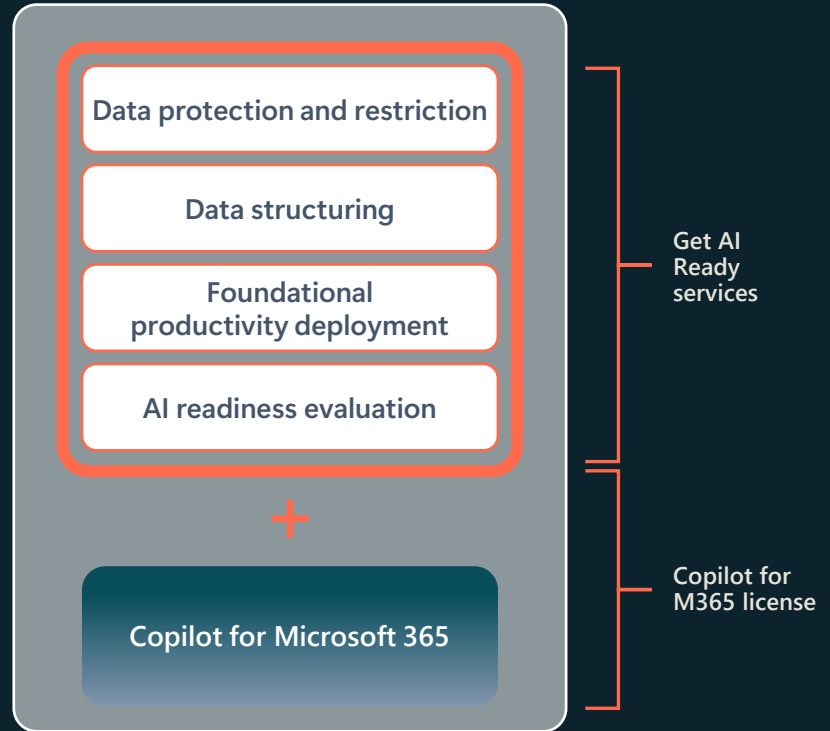
01

## Get customers AI ready

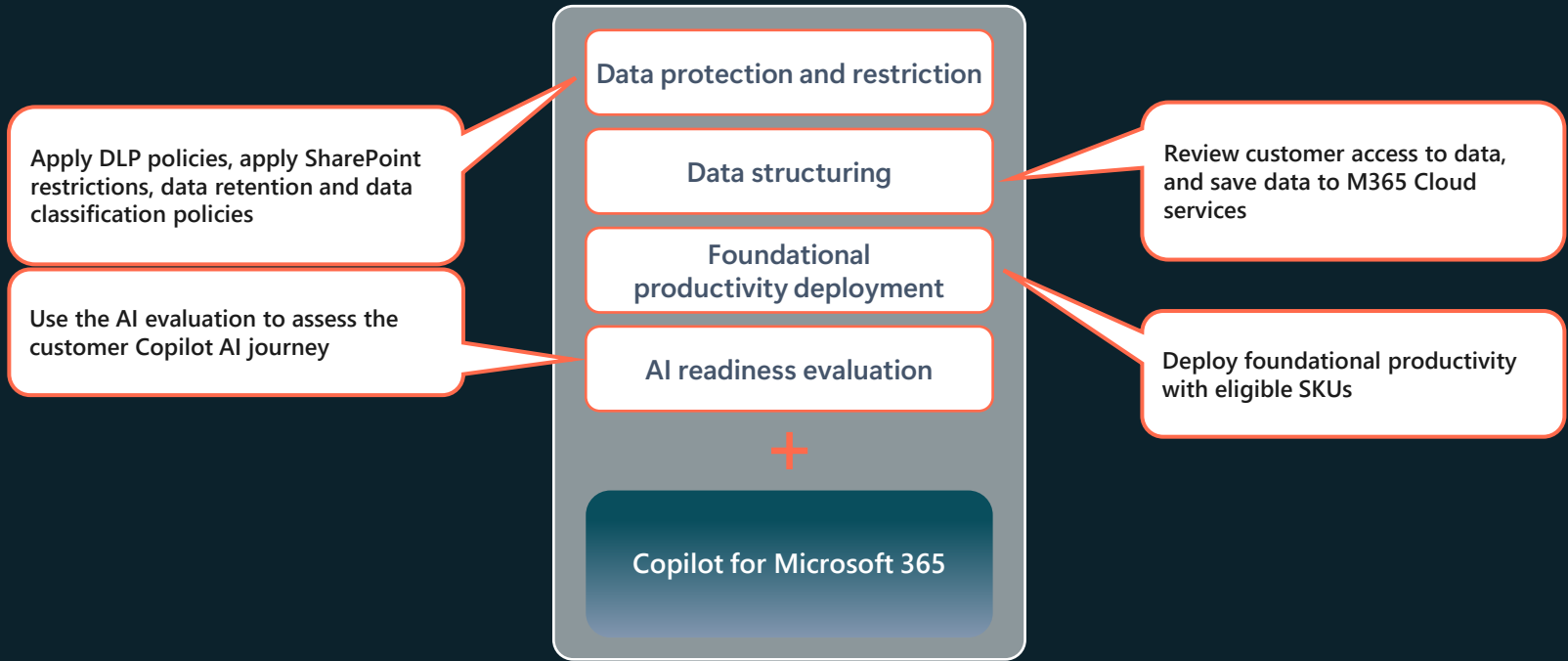
Prepare customers to adopt Copilot leading with hero SKUs Business Premium and ME3/5


Offer AI evaluation to define customer Copilot journey

Offer AI readiness services to ready customers



# Copilot for Microsoft 365 managed services





## Prepare customers for Copilot for Microsoft 365 with a Copilot Optimization Assessment

Execute a Copilot Optimization Assessment to help you customers in their AI journey to Copilot for Microsoft 365, including the 3 key steps:

**Assess the customer's readiness for Copilot for Microsoft 365**

- ✓ Foundational productivity readiness
- ✓ Data readiness
- ✓ Security readiness

# Copilot for Microsoft 365 Optimization Assessment

- [Complete the Microsoft Copilot for Microsoft 365 Optimization Assessment](#)
- Understand current licensing
- Understand of identity management
- Understand current collaboration tools
- Understand current data locations
- Uncover opportunities to implement data security measures and improve data security posture to optimize user experience with Copilot for Microsoft 365

The [assessment](#) is designed to understand your current licensing profile, your collaboration tools, sensitive data handling, and security controls implemented today in your organization, helping you identify a clear path to deploying Copilot for Microsoft 365. The assessment consists of 26 questions and takes about 30 minutes to complete.

**Note:** Review details on how to [further interpret the results of the Optimization Assessment](#).



## Microsoft Copilot for Microsoft 365 Optimization Assessment Results

**Thank you for taking the time to complete the Copilot for Microsoft 365 Optimization Assessment.** You've taken an important step to understand how far along your organization is in adopting AI. This report highlights the foundational elements you already have to help your organization prepare for its digital transformation journey and take full advantage of Copilot for Microsoft 365.

The answers you provided in the Copilot Optimization Assessment give us your Optimization Scores, which reflects your organization's potential ability to take advantage of Copilot for Microsoft 365 to help increase employee productivity and security posture.

Blockers Identified **0**

This score reflects any primary blockers to overcome to get ready for Copilot for Microsoft 365 and the new era of AI.

Microsoft 365 Copilot-ready users **25%**  
in your organization

1000 of 4000



## Customer Baseline

Organizational Profile Readiness **69%**  
11/16



Your organizational readiness score relates to your ability to drive adoption of Copilot for Microsoft 365 through effective organizational sponsorship and awareness of the capabilities of generative AI solutions.

Productivity Tool Readiness **71%**  
17/24



Productivity and collaboration are the backbone of Copilot for Microsoft 365. A major benefit of AI is the opportunity to automate certain tasks and improve productivity to help employees focus on the work that matters most to your organization.

Data Security Readiness **67%**  
24/36



This score reveals your organization's readiness and risk with regard to your data security. A zero-trust foundation can help you secure identities, defend against threats, and protect sensitive information, while also leveraging the power of AI in a responsible and trustworthy manner.



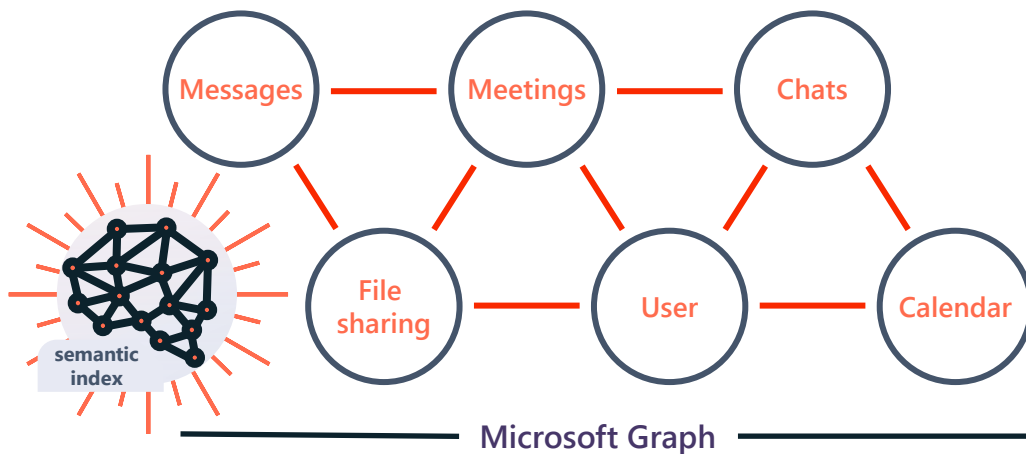
# Microsoft 365 Business Premium

A BETTER COPILOT EXPERIENCE



# Prepare customer environments for a better Copilot for Microsoft 365 experience

Implement good content management practices to prepare organizational data for Copilot.



Review data governance policies, protect sensitive organizational data, and **prevent content oversharing**. Microsoft 365 allows you to:

- Apply a retention or deletion policy for Copilot interactions
- Data loss prevention policies to protect sensitive data, generated by Copilot and saved in M365 locations, from exfiltration
- Exclude sensitive files that users have no view permission from being processed by Copilot for said users

Business Premium value

# The partner opportunity with Microsoft 365 Business Premium



## Secure your customers and manage risk

Elevate your customer's security as they work in a remote/hybrid environment by upselling Microsoft 365 Business Premium.

Accelerate shift to cloud and reach new higher margin customers.



## Grow your profits through standardized managed services

Use Microsoft 365 Business Premium as a foundation for a flywheel of recurring, high-margin standardized managed services offers for remote access, teamwork, and security.

Build additional services for monitoring, alerts, and compliance to become your customer's outsourced IT team.



## Receive additional partner incentives from Microsoft

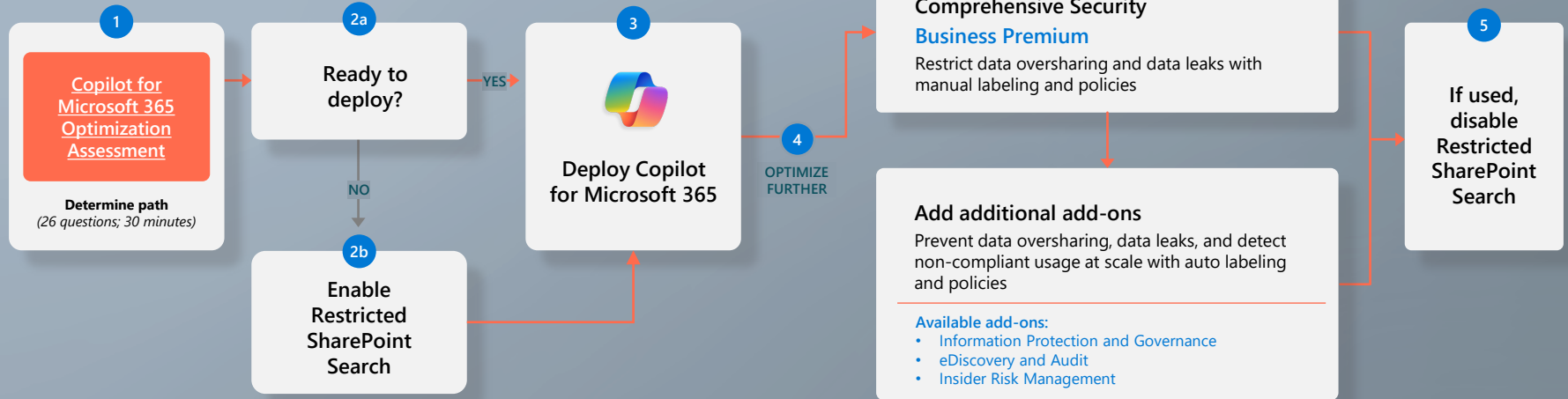
Microsoft provides a margin and incentives to CSP Direct Bill and Indirect Providers related to Strategic Products and New Customer Acquisition.



# Take the time to apply appropriate data security solutions with confidence

Copilot for Microsoft 365 includes *Restricted SharePoint Search (RSS)*. It is intended as a solution that can be enabled or disabled while implementing data security solutions. This limits Copilot experiences and organization-wide search to a select set of SharePoint sites. To get the best Copilot experience, we recommend using Business Premium to leverage additional data security features.

Get started with Business Basic or Business Standard



Learn more about Restricted SharePoint Search [here](#).

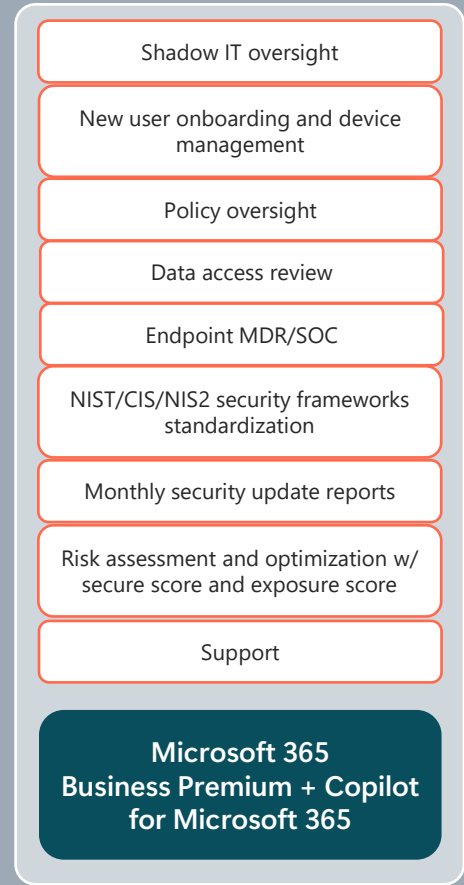


# Business Premium and ME3/5 creates the opportunity to expand services

Learn more about how to build a Business Premium managed services practice with the Business Premium managed services guide and webinar series

Find the training series and content on:  
<https://aka.ms/M365BPPartnerPlaybook>

Ongoing managed services



# Security and compliance controls for Copilot for Microsoft 365



## Foundational security controls

Microsoft 365 Business Basic or Business Standard  
+ Copilot for M365

- > **Multi-factor authentication (MFA)** to securely access M365 applications to use Copilot
- > **Search for and export results** for Copilot prompts and interactions
- > **Audit logs** for Copilot interactions
- > **Retention or deletion policies** for Copilot interactions on any generated content



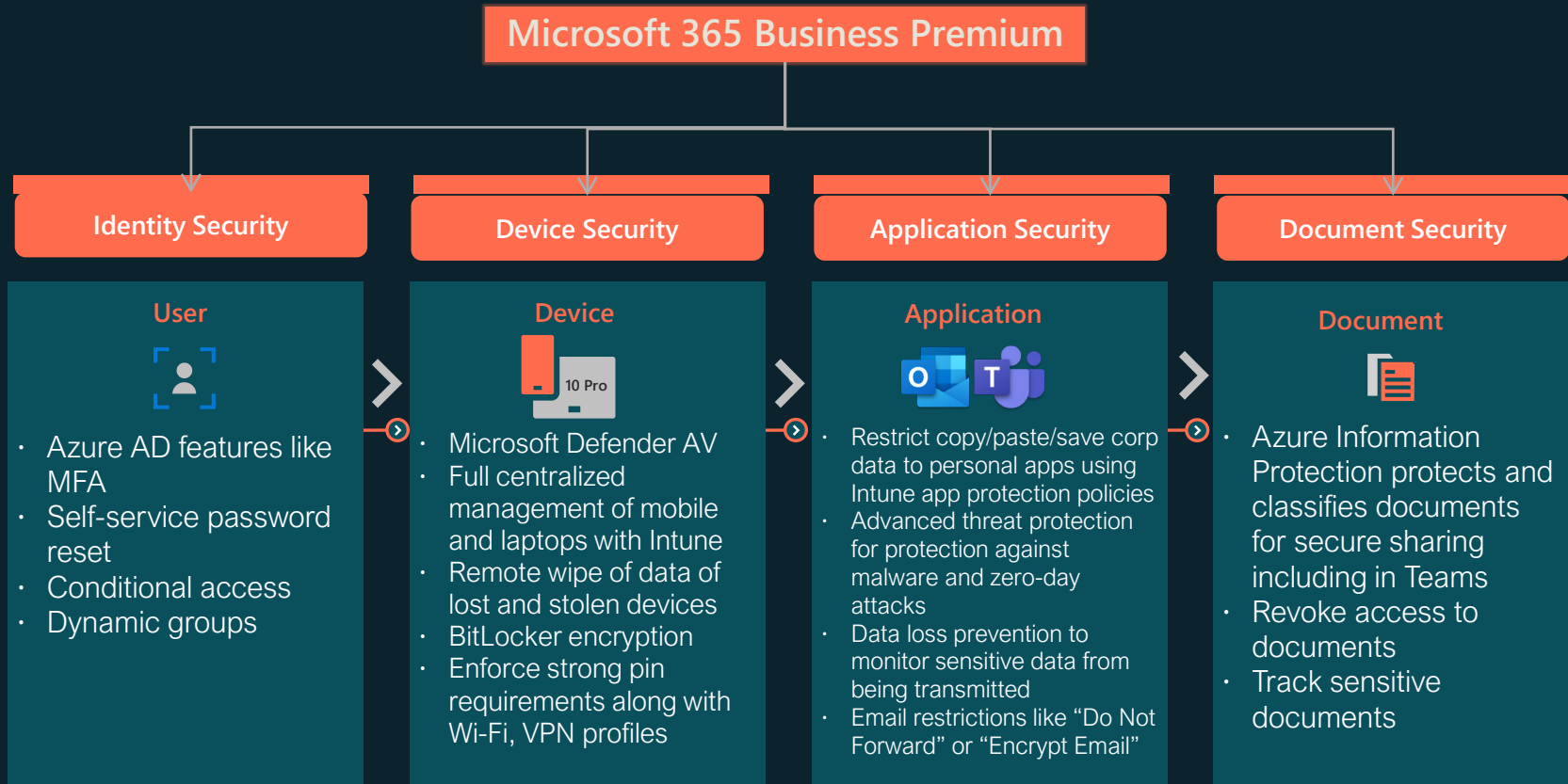
## Comprehensive security controls

Microsoft 365 Business Premium  
+ Copilot for Microsoft 365

- > **MFA with Conditional Access** based on identity, device, location, and network
- > **Search, export, eDiscovery case management, and legal hold** for Copilot prompts and interactions
- > **Audit logs** for Copilot interactions
- > **Retention or deletion policies** for Copilot interactions on any generated content
- > **Manual sensitivity and retention labels** for content that can be processed by Copilot in files and emails
- > **Data loss prevention policies** to help protect sensitive data generated by Copilot in files and emails



# Recap | Layered security with Microsoft 365 Business Premium





# Sell and deploy Copilot for Microsoft 365

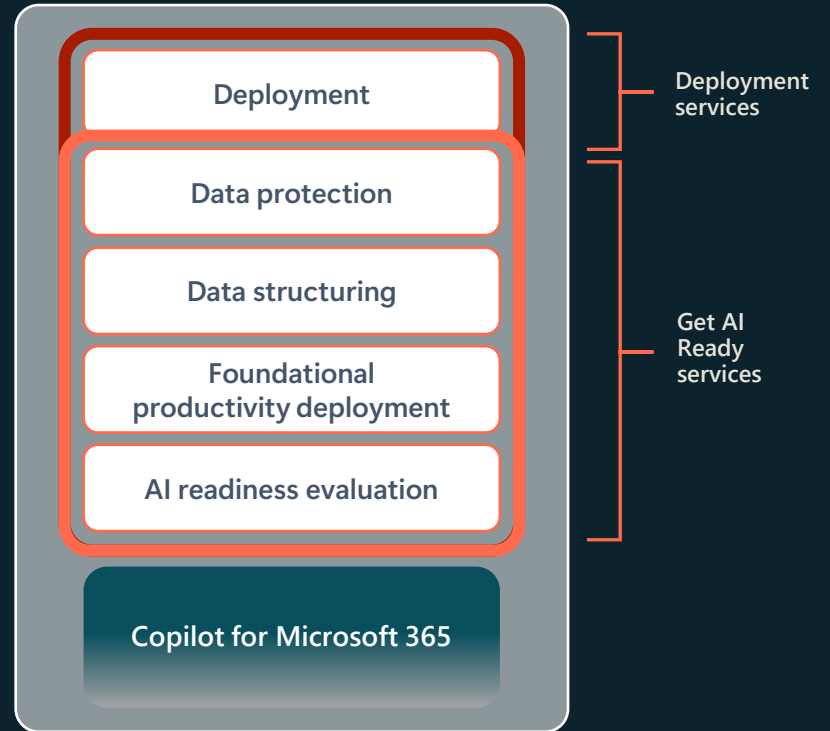
## 02

### Sell and deploy

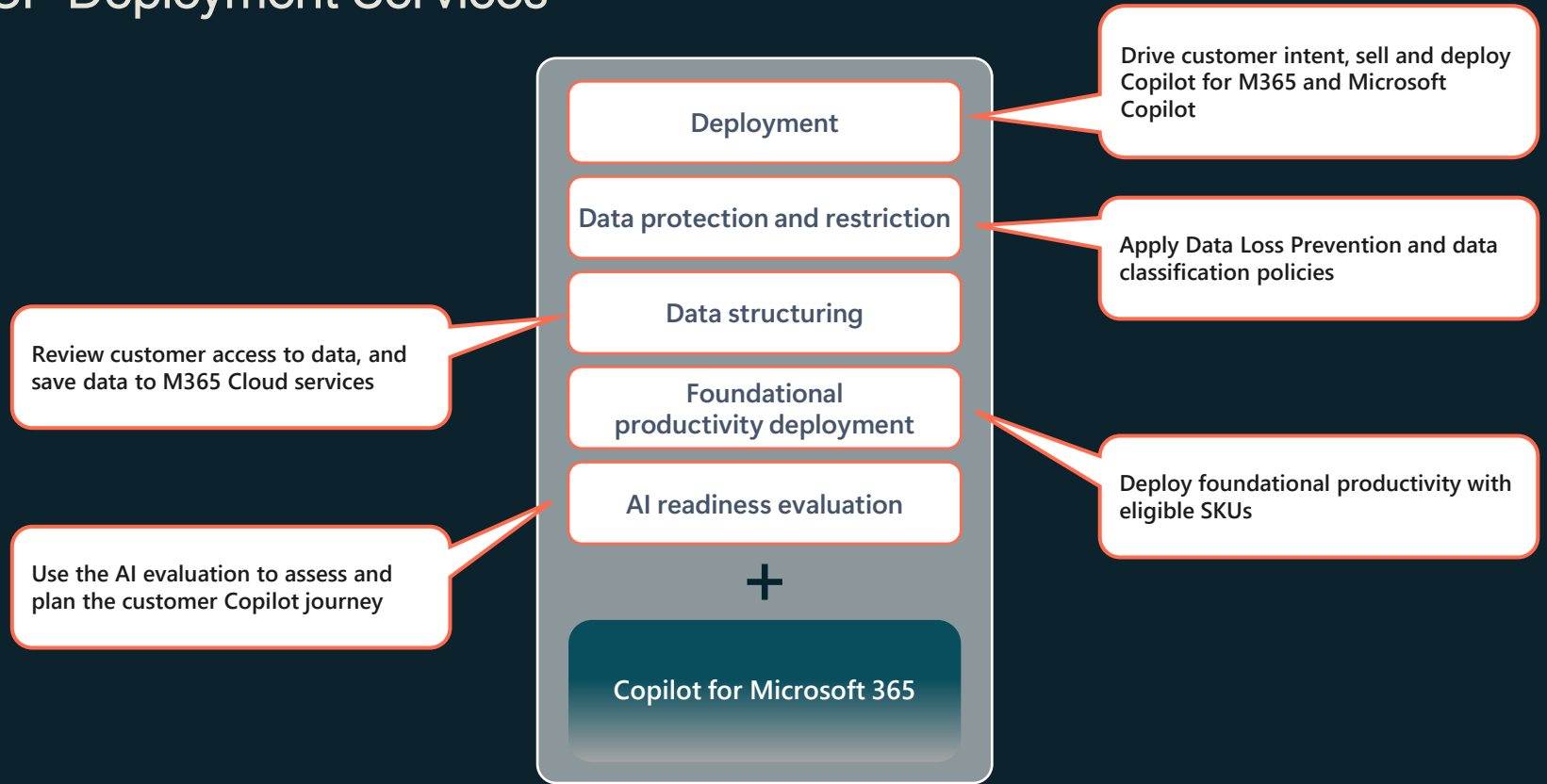
Sell Copilot for Microsoft 365, targeting high propensity customers using Sales Advisor

Drive Copilot customer intent with the SMB Briefing Program and customer ready presentations

Deploy Copilot for Microsoft 365 and Microsoft Copilot



## 2. CSP Deployment Services



# Security and compliance value for Copilot for Microsoft 365 in Business Standard and Business Premium

	Scenario	Business Standard	Business Premium
Identity & Access Management	Login to Copilot for Microsoft 365 with a single identity	•	•
	Enforce MFA when accessing Microsoft 365 to use Copilot	Basic MFA	•
	Enable end-user password reset, change, and unlock when accessing Microsoft 365	Cloud only	•
	Implement Conditional Access policies based on identity, device, and location when accessing Microsoft 365 to use Copilot		•
	Enable near real-time access policies enforcement, evaluate critical events, and immediately revoke access to Microsoft 365		•
	Require employees or guests to accept terms of use policy before getting access		•
Endpoint Management	Push/deploy Microsoft 365 apps to devices and grant access to Copilot in those apps		•
	Manage Microsoft 365 app updates		•
	Restrict the use of Microsoft 365 apps and Teams – as well as Copilot in those apps – on personal devices		•
	Prevent saving files – including those generated by Copilot – to unprotected apps		•
	Wipe all work content – including content generated by Copilot – if a device is lost, stolen or compromised	•	•
	Revoke work access on noncompliant devices	Except Windows	•
Data security & compliance	Search for Copilot generated data by content, keyword search, apply legal hold, and export the search results; investigate incidents related to Copilot and respond to litigations	Content, keyword search, and export only	Standard
	Audit logs for Copilot interactions	Standard	Standard
	Apply a retention or deletion policy for Copilot interactions	•	•
	Data Loss Prevention policies to protect sensitive data, generated by Copilot and saved in Microsoft 365 locations, from exfiltration		Files & email
	Prohibit Copilot from summarizing or including data that users have no extract permissions in its response messages for the said users		•
	Exclude sensitive files that users have no view permission from being processed by Copilot for the said users	•	•



COPILOT FOR M365 MANAGED SERVICES

# Post Sales Services



# Adoption, extensions and managed services

03

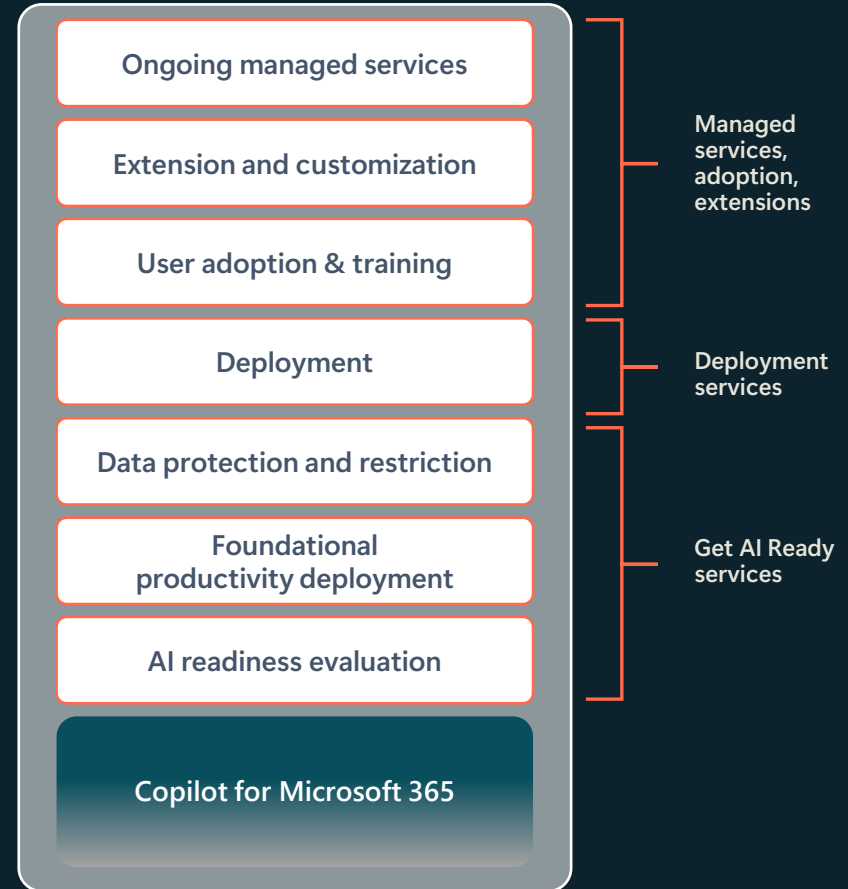
## Adoption, extension and managed services

Drive user adoption focusing on key role-based scenarios and getting started with prompts ([Copilot Labs](#))

Extend Copilot value with plugins and connections

Customize value with Copilot Studio and connect with other Copilots and Power Platform

Offer ongoing managed services leading with Business Premium and M365 Lighthouse value



# Driving Copilot user adoption

## Key Copilot for Microsoft 365 usage steps



## Extend & optimize

### Explore



#### Identify new high value scenarios

- Gather data from service health reviews
- Prioritize via AI Council and leadership engagement
- Skill/acquire talent for extensibility opportunities

### Expand



#### Understand Copilot Studio capabilities

- Build, automate and administer copilots
- Select extensibility scenarios

### Extend



#### Scale Copilot users and skills

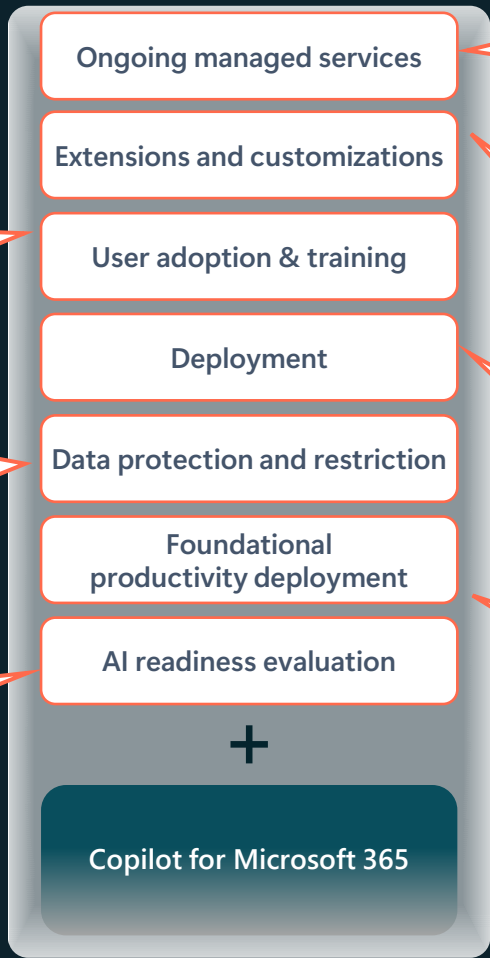
- Extend throughout organization
- Identify high value user cohorts for advanced skill building
- Optimize usage patterns

# Copilot for Microsoft 365 managed services

Drive adoption by training users on getting started with Copilot prompts ([Copilot Labs](#)) and using key role-based scenarios

Review customer access to data and save data to M365 Cloud services. Connect data to Microsoft Graph, apply DLP policies, apply SharePoint restrictions, data retention and data classification policies

Use the AI evaluation to assess the customer Copilot AI journey



Scale with M365 Lighthouse and Business Premium features. Offer ongoing optimization, data protection, security, SOC and compliance services

Extend value with Copilot plugins and connections. Conduct Line of Business evaluation and customize and connect with other Copilots with Copilot Studio

Deploy Copilot for M365 and Microsoft Copilot. Offer post deployment services to optimize with Copilot Dashboard insights (via Viva Insights)

Deploy foundational productivity with Business Standard or Business Premium

# Package Microsoft 365 Copilot services

Drive innovation and business transformation for customers around the world with Microsoft 365 Copilot offers. Tap into the millions of Microsoft customers and bring generative AI to the productivity suite they know and trust, setting them up for success with pre-sales and post-sales support alongside best-of-breed protection and education. Take innovation to a new level and amplify the capabilities of Copilot with the power of plugins and Microsoft Graph.

## AI + Microsoft 365 Copilot Advisory

- Lead business transformation conversations with Copilot
- Provide guidance for the responsible use of AI
- Identify personas and scenarios that would deliver the most value if reimaged with AI

## Microsoft 365 Copilot Readiness

- Assess licensing and technical readiness
- Assess customer data protection and governance
- Showcase the benefits of Copilot
- Identify high-value scenarios

## Microsoft 365 Copilot Deployment

- Close readiness gaps
- Build a business case
- Plan customer success with Microsoft account teams
- Evaluate Microsoft 365 tenant usage and configure security and compliance
- Launch pilot

## Adoption & Change Management

- Drive change management programs
- Establish employee communication channels
- Measure business impact
- Conduct employee training
- Continuously support and optimize

## Microsoft 365 Copilot Extensibility

- Conduct line-of-business app assessments
- Extend value with Copilot plugins and connections
- Connect data to Microsoft Graph and Dataverse
- Deliver integration, customization, and configuration services

## Customer Engagement & Go-to-market resources



The opportunity to  
lead the AI transformation  
is ours

190M  
addressable seats



# Microsoft 365 Copilot | Customer Journey

Engage high propensity customers for Copilot



TARGET

Leverage [Partner Marketing Center](#) (PMC) and [Digital Marketing Content OnDemand](#) (DMC) for Copilot campaigns

INSPIRE

- Need intent building→
- Copilot Demos & Assessment
- Needs ROI/Value Justification→
- [Business Value Tools](#)

ASSESS

- Deliver technical readiness assessment for Copilot
- Land Deployment & management services + product proposal

DEPLOY

- Set up a strong Zero Trust foundation
- Streamline endpoint management
- Enable Copilot COE (centre of excellence)
- Deploy Copilot
- Customization
- Solution deployment

MANAGE

- Train & Support end users
- Help business transformation by unlocking the full potential of copilot and help realize value

- **M365 Copilot Rev**
- **Deployment & configuration services**
- **ACM (adoption & change management) services**
- **Managed services**

# M365 Copilot Persona and Scenario Mapping



## Use case by role

Tell the Copilot value story by showing how Copilot can be used to simplify key business processes. Includes detailed prompts, links to support and adoption material and so much more!

**Complete an acquisition with Microsoft 365 Copilot**

From forecasting to financial reporting to drafting stakeholder communications, Copilot works alongside finance teams, so their time is spent on the high-value tasks that make the biggest impact.

**79% of people** are comfortable using AI for analytical work

**Microsoft Workday Work Index, May 2023**

- Microsoft 365 Chat**: Summarize the due diligence information from the operations and legal teams.
- Copilot in Excel**: Discover the organization's past financial information and verify revenue projections.
- Copilot in Teams**: Meet with the legal team and business development to decide how to structure the deal and get a list of the required legal notifications.
- Copilot in Word**: Add a section to the offer sheet discussing some conditions for the deal based on the meeting transcript.
- Copilot in Excel**: Refine the deal analysis based on the customer negotiations and changes in the economic environment.
- Copilot in PowerPoint**: Create a presentation summarizing the deal for the leadership team.

[Copilot Product Documentation](#) | [Microsoft 365 Copilot Adoption Site](#) | [How to use Copilot](#)



## Day in the Life by role

Get BDMs excited about Copilot by showing how Copilot can simplify their day. Includes detailed prompts.

**A day in the life of a Marketing Manager**

- 8:00 AM**: Daiichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.
- 8:30 AM**: Daiichi meets with his team to brainstorm creative enhancements based on customer feedback. Copilot organizes the ideas for easier discussion.
- 9:00 AM**: Daiichi will analyze the marketing data from the latest round of surveys. He uses Copilot to prepare charts so he can see the trends in the data.
- 9:00 AM**: Daiichi uses Copilot to prepare a brief to give to the agencies bidding on a new advertising campaign.
- 9:30 AM**: Daiichi meets with his team to brainstorm creative enhancements based on customer feedback. Copilot organizes the ideas for easier discussion.
- 10:00 AM**: Daiichi will analyze the marketing data from the latest round of surveys. He uses Copilot to prepare charts so he can see the trends in the data.
- 4:00 PM**: Daiichi needs to catch up on email before he heads out for the day. Copilot sorts the work by summarizing email threads and preparing draft responses.
- 5:00 PM**: Daiichi updates the roadmap deck to reflect the commitments from the engineering team meeting.
- 5:00 PM**: Daiichi meets with the engineering team to plan the development of new features. During the meeting he uses Copilot to understand the prioritization of the features.

**Daiichi is a marketing manager at Contoso**



## Product guidance

Answer product capability questions with detailed guidance on what each Copilot app can do with demos and prompt guidance.

**How to use: Copilot in PowerPoint**

Note the specific prompts shown may vary

**Sample use cases**

- Tap to show a presentation
- Turn a Word doc into a presentation
- Improve an existing presentation
- Prepare to give a presentation by summarizing key points and creating slide notes

**Use the Copilot chat pane to**

- Create
  - Create a presentation from a description
  - Create a presentation from a Word document
- Refine
  - Refine a slide about a topic
  - Add an image based on a description
  - Change the text format
  - Organize the presentation by adding an agenda and speaker notes
- Summarize
  - Summarize a presentation
  - Create a summary
  - Show key slides, associates a list of slides with important information
  - Display slide numbers
  - Show action items and next steps
  - Ask questions about the presentation
- Control
  - Control slide navigation
  - Control a live slide

**Select a predefined prompt in the Copilot sidebar. You can then add more context.**

**Ask general knowledge questions or ask for creative ideas. You'll need to review any context for factual inaccuracies.**

**Click on the Prompt Guide icon to show the prompts to edit a slide or learn about the presentation.**

# Reach new & existing SMBs excited about Copilot for Microsoft 365



On-premises customers ready for cloud migration



Customers looking to consolidate apps and software to one solution

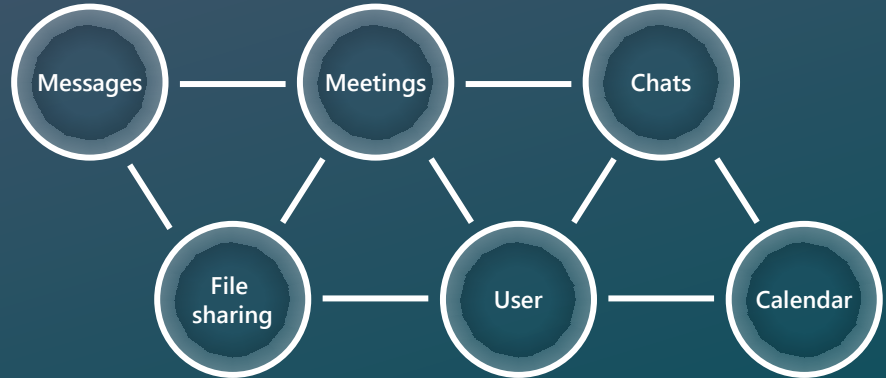


Customers on competitor solutions

## Partner can:

- ✓ Bring new customers into the Microsoft Cloud
- ✓ Migrate on-premises servers
- ✓ Remediate legacy file shares. Use SharePoint/OneDrive for file storage and sharing

## Microsoft Graph



# Get customers AI ready

Convert

AI excitement



Foundational  
productivity

## Lay the foundation for AI-powered Productivity

### Get customers on E3, Business Premium, or Business Standard

- Invite customers to attend [SMB or Modern Work Briefings](#)

### Start preparing for Copilot for Microsoft 365

- Join [CSP Masters Program](#) for upskilling
- Leverage Get AI Ready and Copilot assets on <https://aka.ms/CSPCopilot>
- Be the expert for AI: [M365 Copilot Hub for Partners](#)

### Take the first step with Copilot

- Use [customer pitch deck](#)
- Get started at [copilot.microsoft.com](https://copilot.microsoft.com)
- [Technical documentation](#) for managing Copilot
- Share user adoption kit: [aka.ms/Copilot/StarterKit](https://aka.ms/Copilot/StarterKit)



# Accelerate your growth for Copilot M365

MICROSOFT 365 LIGHTHOUSE OVERVIEW



ACCELERATE YOUR GROWTH

# Microsoft 365 Lighthouse overview



Manage  
customers at scale



Manage risks  
proactively



Improve  
security



Standardize  
configuration

Set up all your customers with granular delegated admin privileges (GDAP) through Microsoft 365 Lighthouse

ACCELERATE YOUR GROWTH

# Tap into three opportunities with Microsoft 365 Lighthouse

01



Unlock Copilot Opportunities

Identify which customers are eligible

02



Get customers AI-Ready

>40% customers are not AI-Ready

03



Use renewals as compelling moment

>60% of renewals happening in H2

# Renewal management made easy with M365 Lighthouse

Boost customer retention & grow revenue with new renewal insights and recommendations

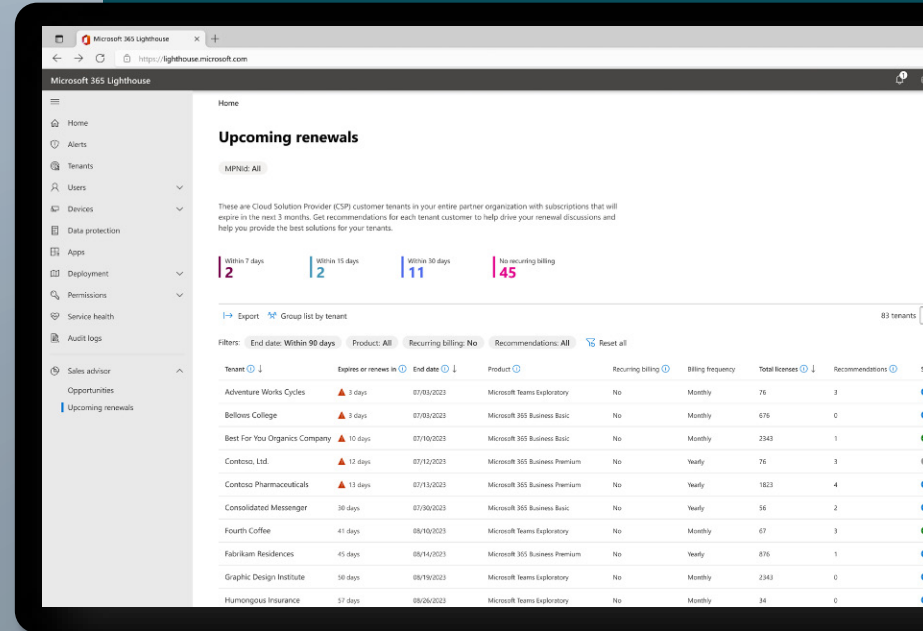
With Sales Advisor you can:

**Quickly & easily track** subscriptions approaching expiration within the next 7 - 90 days

**Prioritize customer outreach** by sorting or filtering on expiration, seat size, product or auto-renew status

**Optimize the renewal conversation** with contextual retention, upsell and expansion recommendations

**45%+** of Q3 subscription renewals surfaced to more than 11K onboarded partners at GA

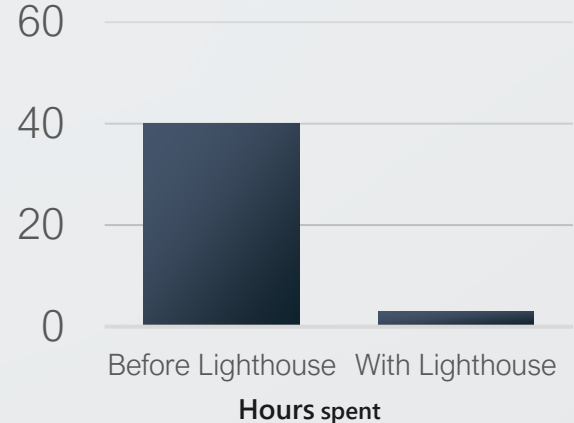




# Partners have seen benefit both in **productivity** as well as **increased revenue** when using Microsoft 365 Lighthouse

## Increased productivity

Partners are able to engage customers faster with relevant recommendations, allowing them to scale.



## Increased revenue

Partners have seen a 15% increase in revenue across existing customer base.



Revenue





# Marketing & Sales Tools



# NEW Get Copilot Ready SMB Briefing

**Flexible** to run in smaller **1: many** engagements or large webcast events

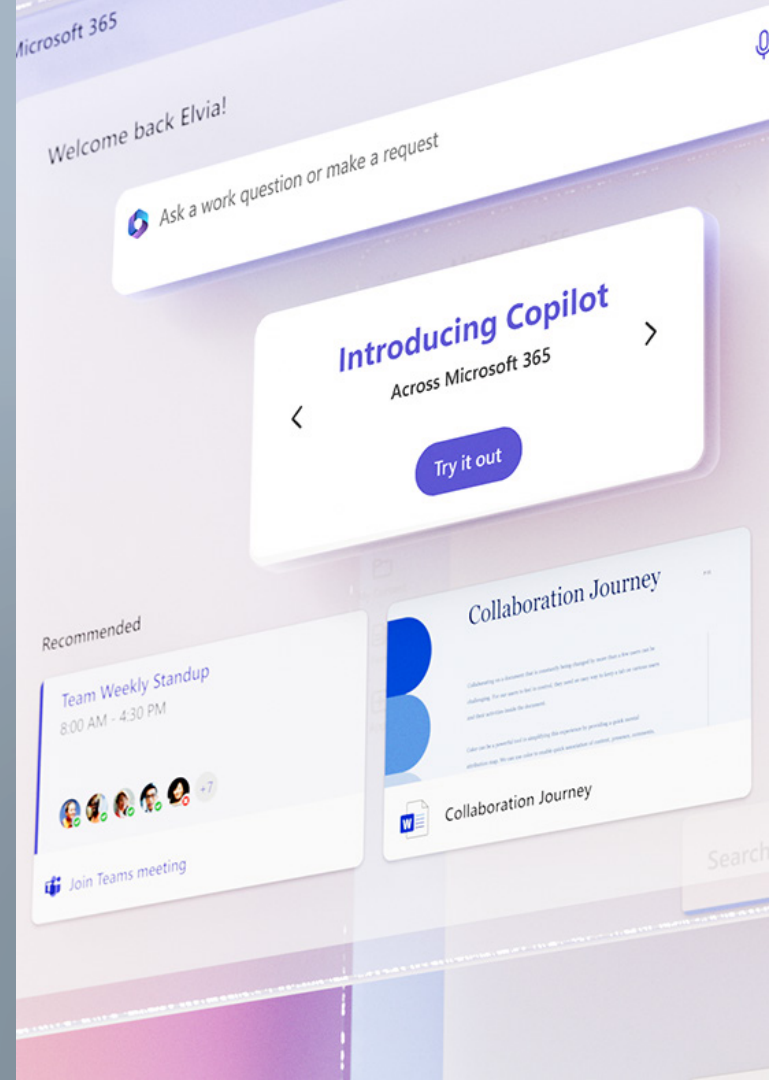
Get customers ready for Copilot for Microsoft 365:

- Get started with Microsoft Copilot now
- Migrate to Microsoft 365 cloud prerequisite SKUs
- Implement data governance to ensure the right access

**Demonstrate Copilot** capability to make work easier with real-world easy-to-use simulations

Earn **incentives** for executing events with your customers

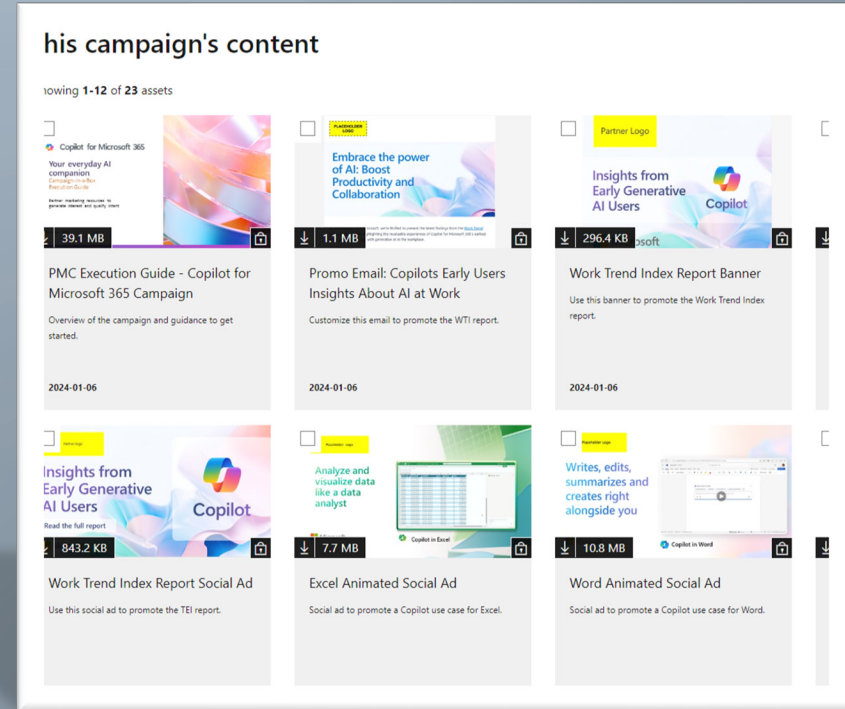
→ [Get Copilot Ready Briefing](#)



# Copilot for Microsoft 365 campaign in a box

## Copilot for Microsoft 365 campaign in a box

- Launch a campaign to drive awareness, generate leads, and initiate sales engagement opportunities to help customers engage with and adopt Copilot.
- Use this customizable campaign to drive awareness and top of the funnel leads for Copilot for Microsoft 365 with your customers.
- Other resources:
  - [DMC - Adopting Copilot for Microsoft 365](#)
  - [Get AI Ready to-partner email](#)
  - [Get AI Ready campaign messaging and positioning framework](#)
  - [Partner Go-To-Market Toolbox](#)
  - [DMC - Secure Productivity for SMBs](#)
  - [Modern Work for Partners - Microsoft Partner Accelerators](#)



# CAMPAIGN ASSET LIBRARY

## PROMOTION

Promo email (1)

Social ads (5)

Display ads (2)

## ACQUISITION

TEI Report

Infographic (1)

One-Pagers (2)

## CONSIDERATION

Nurture emails (5)

## DECISION

Partner To Customer Pitch deck (1)

Partner Decks (3)

Workshop content Link

### Customizing your assets

The campaign assets in this collection are templates that require **partner customization**. Each asset will give specific instructions for you to make it your own, by modifying:

- Brand font, logo, and colors
- Solution value proposition and details
- Call to Action (with link) and company contact information

- Check out the full range of [campaign assets](#)
- Get support in our [partner portal](#)
- Review [Microsoft Partner-Led Marketing Guidelines](#)

# Campaign Guidance

BUILD YOUR MARKETING CAMPAIGN WITH THESE EASY-TO-FOLLOW CHECKLISTS

## 1. PROMOTION

### Social

- Select the **social platform** (LinkedIn, Twitter) where your audience engagement is strongest.
- Build a paid media plan**, identifying budget and campaign dates for a lead acquisition campaign promoting one of the hero assets and targeting priority audiences.
- Customize **social ad templates** for your brand. Be sure to direct the ads to where your hero assets are being hosted.
- Incorporate **organic promotion**, posting via your brand handle.
- Consider **A/B testing** different messaging variations **and optimizing** over the course of the campaign.

### Email

- Leverage **priority audience** guidance to build an email list with known prospects or existing customers.
- Use the **promotional email** to promote the hero asset. Customize the OFT email files according to instructions.
- Review results** and optimize, refreshing subject lines and campaign messaging for resends to contacts who did not open previously. Consider **A/B testing** variations, such as recipient first name in the subject lines.

### Display Ads

- Customize the **display ads** for your own brand.
- Identify the ad network** you want to advertise through (e.g., Bing, Google etc.), and whether you will run a broader PPC campaign or a more targeted campaign (displaying your ads to previous visitors to your website, or people in a particular location, for example).
- Set up your campaign parameters** including budget and launch your campaign. Monitor and optimize your approach/ audience.

## 2. ACQUISITION

### Acquisition

- Customize your campaign **hero asset**, incorporating your CTA.
- Host your asset** on your web domain, creating a **Gated Landing Page**, (requiring prospects to enter contact details to access the asset) to aid in lead collection.
- Determine **lead capture form requirements** that align with your CRM structure and minimize required fields to avoid drop-off.
- Update promotional assets with the correct link** to your hosted landing page.

## 3. CONSIDERATION

### Nurture

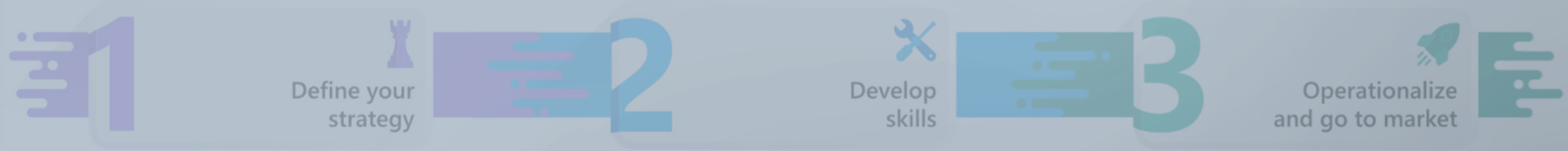
- Upload assets promoted via nurture** to your marketing automation system. Add links to corresponding emails.
- Personalize the nurture email files** with your solution details, contact info, privacy information, and CTA links.
- Customize the assets promoted in the nurture** emails following instructions in each document.
- Instrument the emails in your marketing automation system and create lead scoring to **qualify leads for sales follow-up**.

## 4. DECISION

### Sales follow-up

- Provide the sales team an **overview** of the campaign, including a copy of your campaign assets.
- Customize the **pitch deck** for your own brand.
- Schedule qualified customers for the **Enable Frontline Workshop**
- Enter sales qualified leads into **Partner Center**. (See [FAQs for help](#), [here](#))

# Sales Tools



[Modern Work for Partners - Copilot for Microsoft 365](#)

[Microsoft Adoption - Copilot for Microsoft 365](#)

## Microsoft 365 Lighthouse

- Opportunity discovery
- AI-driven Insights
- Actionable Content
- [aka.ms/M365Lighthouse](https://aka.ms/M365Lighthouse)
- [Introducing Sales Advisor –Microsoft 365 Lighthouse](#)

## Partner Ready Decks

- [Copilot for Microsoft 365 partner opportunity deck for CSP partners](#)
- [Copilot for Microsoft 365 customer pitch deck](#)
- [SMB customer pitch deck](#)
- [SMB early value deck](#)

## Other Resources

- [Microsoft Copilot for Microsoft 365 Training - Microsoft Events Catalog](#)
- [Copilot for Microsoft 365 optimization assessment for SMB](#)
- [Get AI Ready campaign assets for CSP partners](#)
- [Copilot Partner Led Immersion Experiences](#)
- [SMB click-through simulation demos](#)



# Next Steps





# Next steps to start building your practice

## Build product knowledge

01

[Review](#) the service description, key technical documentation and licensing resources.

## Sales & technical training

02

Attend the [CSP Masters sales bootcamp](#) to learn how to build a successful CSP practice and land your first sale.

Attend the [technical bootcamp](#) to learn how to deploy and manage your first customer.

## GTM & targeting strategy

03

Develop your GTM strategy leveraging the [Secure Productivity solution play](#).

Target high propensity customers with [Sales Advisor](#) AI driven insights.

## Drive customer intent

04

Execute [SMB Briefings](#) focusing on the 2 key scenarios:

1. Upsell existing customers to Business Premium
2. Attach Copilot for Microsoft 365

Create your customizable campaign with [Campaign in a Box](#) content

# Get SMB ready for AI with Microsoft 365 Business Premium

## Get ready

### Partner readiness

First, get your customers excited using the communication assets provided here [Get AI Ready Partner BOM](#)

Use the [Copilot Readiness Assessment with SMB](#) customers

Join [CSP Masters Program](#) for upskilling

Be the expert for AI: [M365 Copilot Hub for Partners](#)

## Pre-sales

### Target customers

Build your target list for dark-to-cloud with **Cloud Ascent**

Address upsell opportunities with [Sales Advisor](#)

### Generate interest and create intent

Invite your customers to attend [SMB Briefings](#) and showcase the value of [M365 Business Premium](#)

Deep dive your customer's security posture with a **Solution Assessment**

## Post-sales

### Expand offer and build relationship

Offer your security [managed services](#) on top of M365 Business Premium

Create a CLM and Security practice leveraging [M365 Lighthouse and Sales Advisor](#)

Be an advisor for **change management** and **drive end-user adoption** with the [Copilot Adoption Kit](#)

Leverage the [Copilot for Microsoft 365 partner resources](#) to start the attach conversation with customers.

## Book a Meeting with Crayon



Scan the QR code

Talk to M365 Copilot SureStep experts to start selling and deploying Copilot and AI projects for your customers

## ANZ M365 Copilot Incentive



Scan the QR code

Earn big with Crayon, #1 Distributor for Copilot sales in SMB for ANZ! Earn up to **\$2,000** cashback by buying Copilot licenses from us

## ANZ 10:10 Copilot Incentive



Scan the QR code

ANZ partners - Get **10% cashback** when you place an order of 10+ Copilot licenses!

## SEA M365 Copilot Incentive



Scan the QR code

SEA partners – Buy your Microsoft 365 Copilot with us and get **10% cashback** when you place an order of 10+ Copilot license!