



M365 Copilot Strategy Briefing

Welcome!



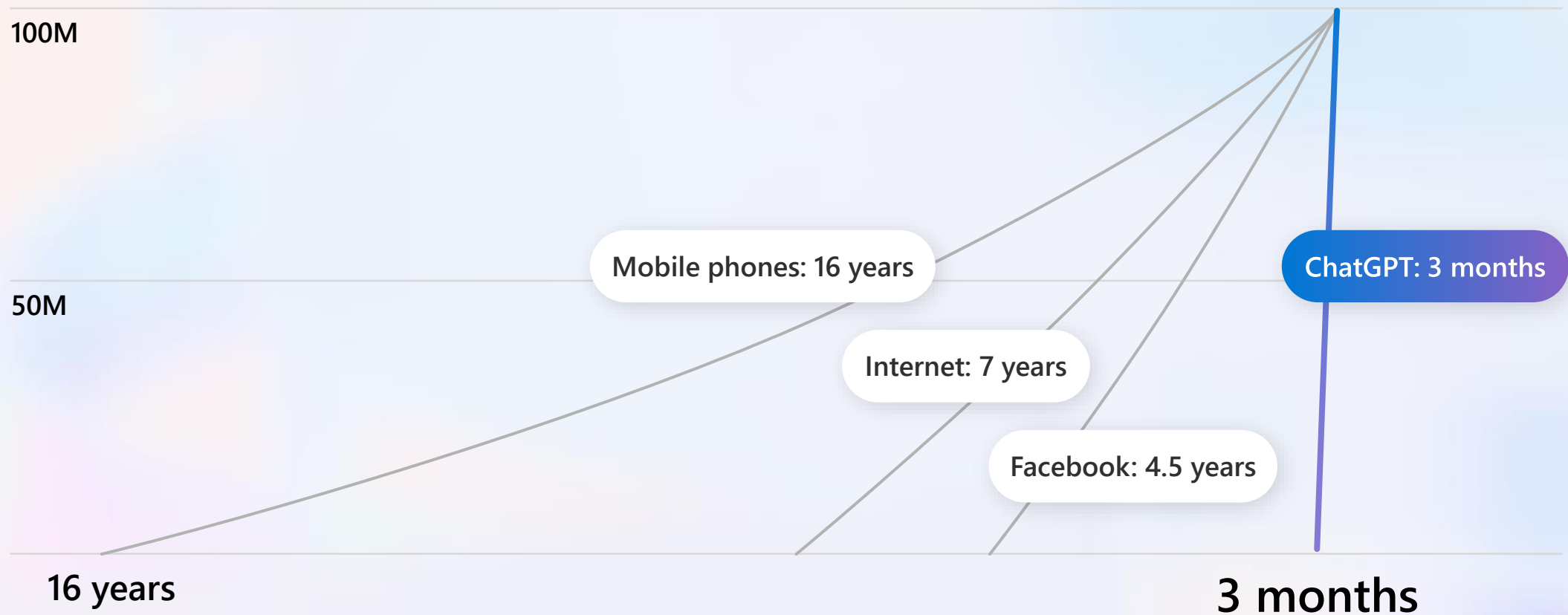
Welcome & Introductions



Powering your AI Transformation with the Microsoft Cloud

Generative AI technology is here

Time to reach 100M users



What can AI do for *you*?

87%

of organizations believe AI will give them a competitive edge

What can AI do for *you*?

Productivity &
job satisfaction



“GitHub Copilot gets them 98% of the way there, and they only need to make small changes to finish it up.”

Cost savings &
efficiency

KOMATSU

“It’s allowed us to optimize the way we work. The team is now able to focus on high-value tasks.”

Cybersecurity



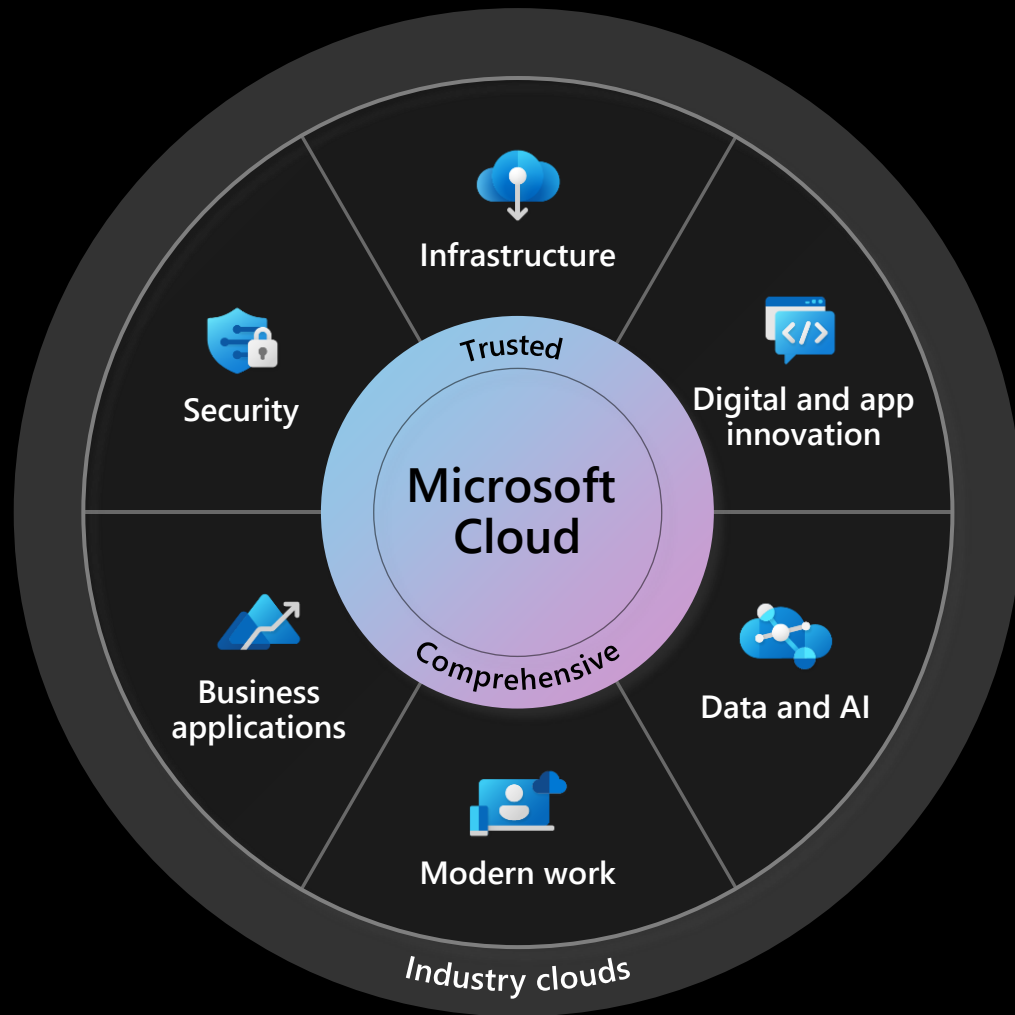
“Our first ambition at Swift is to build a foundation model for anomaly detection that underpins the detection and prevention of fraud.”

Microsoft Cloud Runs on trust

Your data is your data

Your data from any fine-tuning is not used to train the foundation AI models

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



Microsoft Cloud

Radically accelerate your organization's productivity with built-in AI

Differentiate from the competition with intelligent apps using AI

Power your AI transformation with the Microsoft Cloud

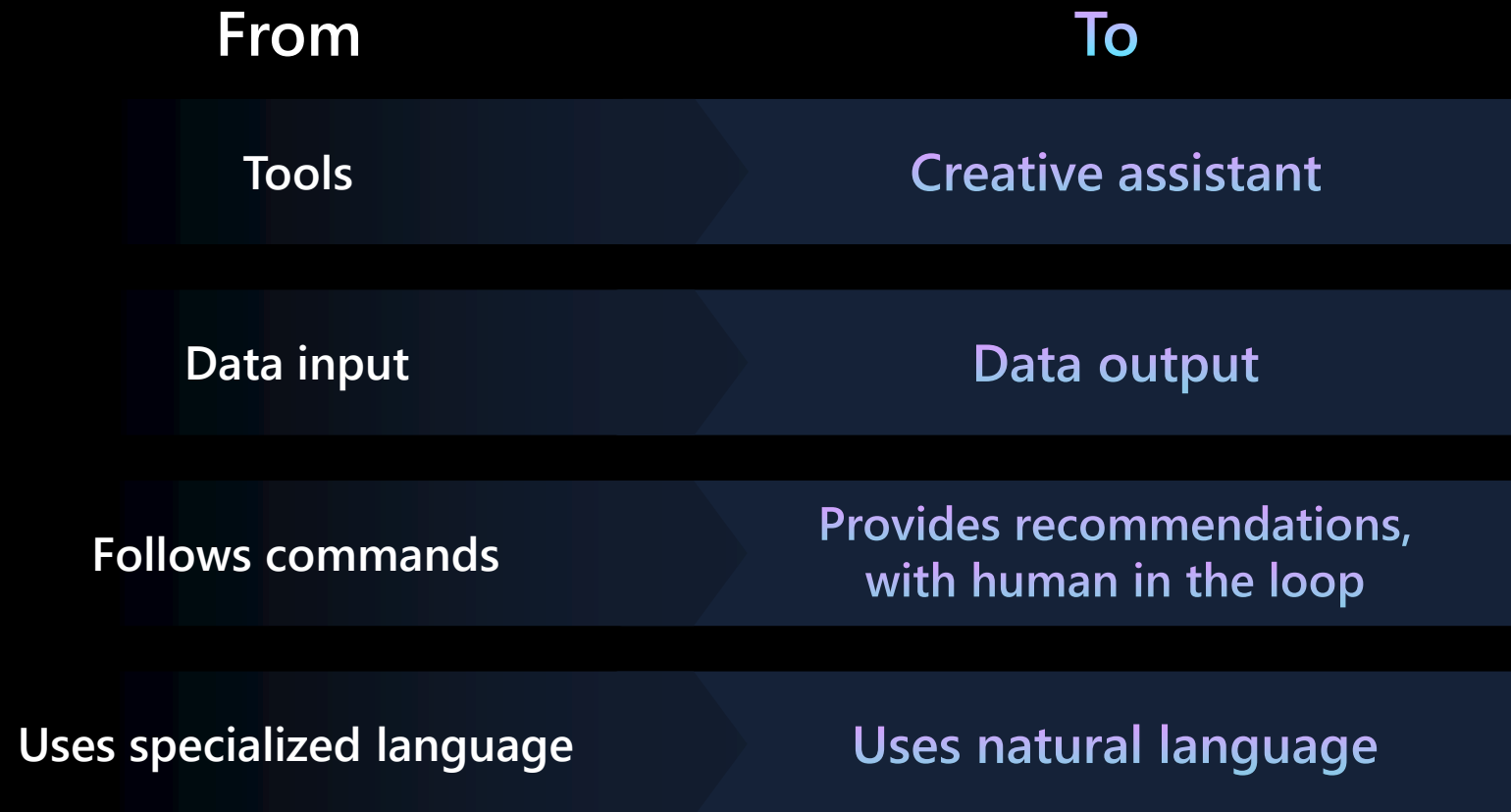
Amplify human
ingenuity with a copilot
for everyone

Deliver transformational
experiences by building
your own intelligent apps

Safeguard your business
and data with the most
trusted AI platform

Era of AI Copilot

The role of technology





Breakout Session: Key challenges we're facing today

Employees without time & energy are...

2x

more likely to say they struggle with **too many meetings**

The Broken Meeting

2.5x

more likely to say they struggle with **spending too much time searching for the right information or data**

The Information Labyrinth

2.5x

more likely to say they **don't have enough focus time**

The Blank Page

Where your employees need help

The Broken Meeting

- **“Receiving the information I need”** is the number one reason employees join a meeting
- Only **1 in 3** employees think **they would be missed** if they couldn't join most of their team meetings
- 58% of employees say it's **difficult to brainstorm** in a virtual meeting

The Information Labyrinth

- 62% of employees say they struggle with spending **too much time searching for information** in their workday
- A heavy email user will spend the equivalent of an entire work day – **8.8 hours** – per week in email

The Blank Page

- 68% of employees say they don't have enough **uninterrupted focus time** during their work day
- 67% of employees say they don't have **enough time to reset** between work tasks
- **Feeling uninspired** is ranked one of the **top productivity disruptors** by employees

Suggested breakout questions

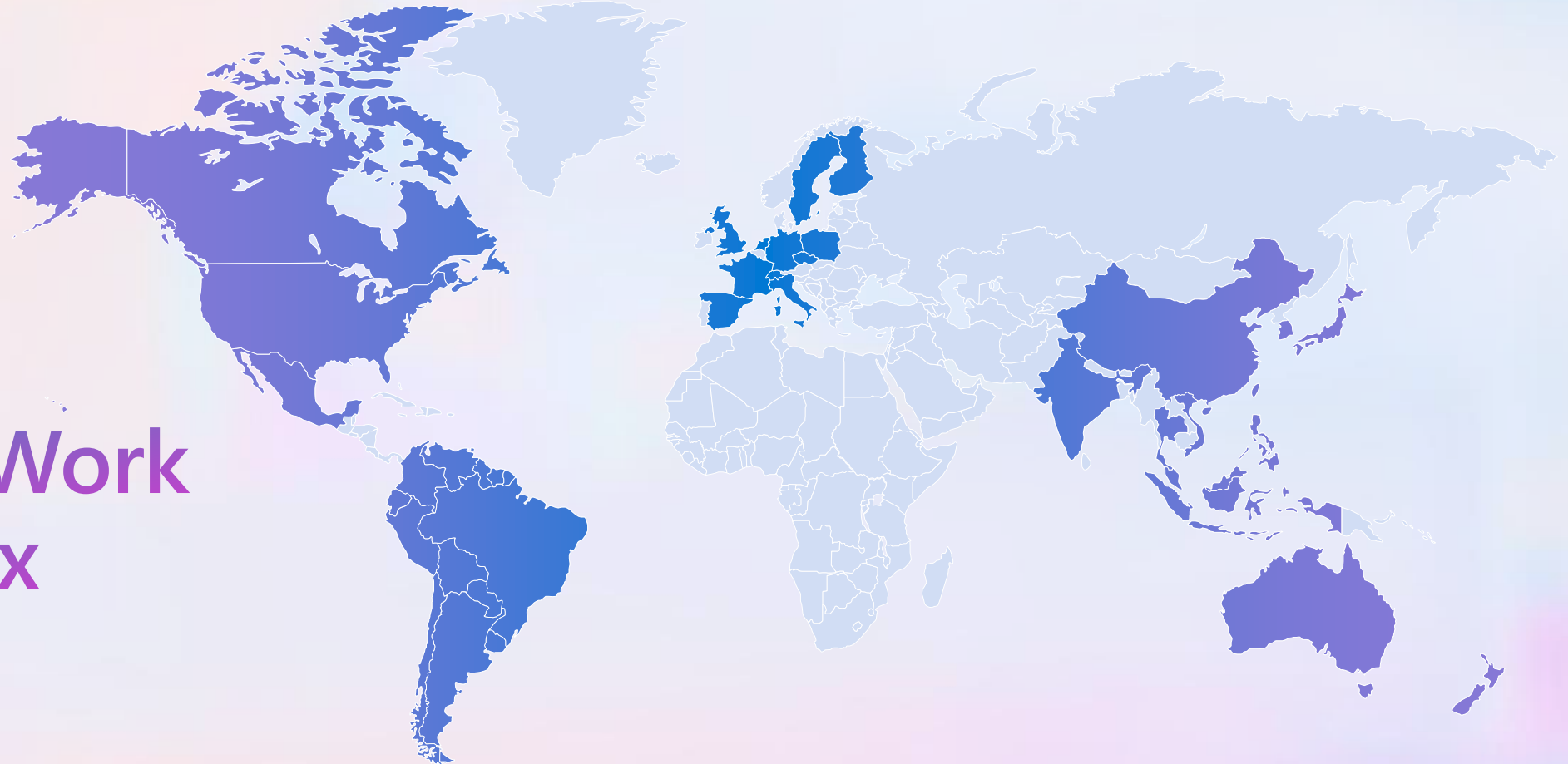
1. What are your organization's goals for using AI?
2. What features of AI are you most interested in, and how do you see them benefiting your organization?
3. What are your organization's pain points that AI can address?
4. What are your organization's current capabilities in terms of AI? This
5. Does your organization have a clear understanding of what AI is and how it can be used and by which personas or roles?

Group readout

5 minutes per group to share out



Introducing Microsoft 365 Copilot




Microsoft Work Trend Index

<http://aka.ms/wti>

 **31,000** people

 **31** countries

 Microsoft 365, LinkedIn,
Glint People Science + academic research

The pace of work is outpacing our ability to keep up

AI-powered tools represent an enormous opportunity

64%

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

3x

Amount by which time spent in Microsoft Teams meetings and calls has increased per week since February 2020.

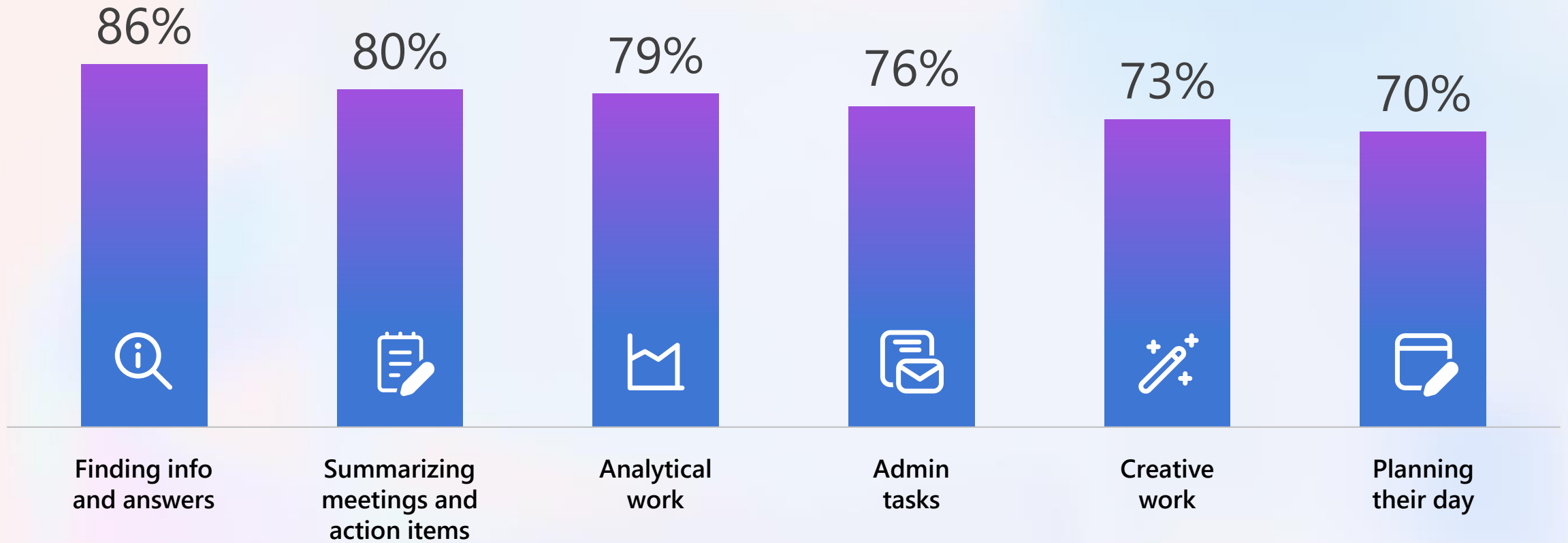
70%

Share of people who would delegate as much as possible to AI to lessen their workloads.

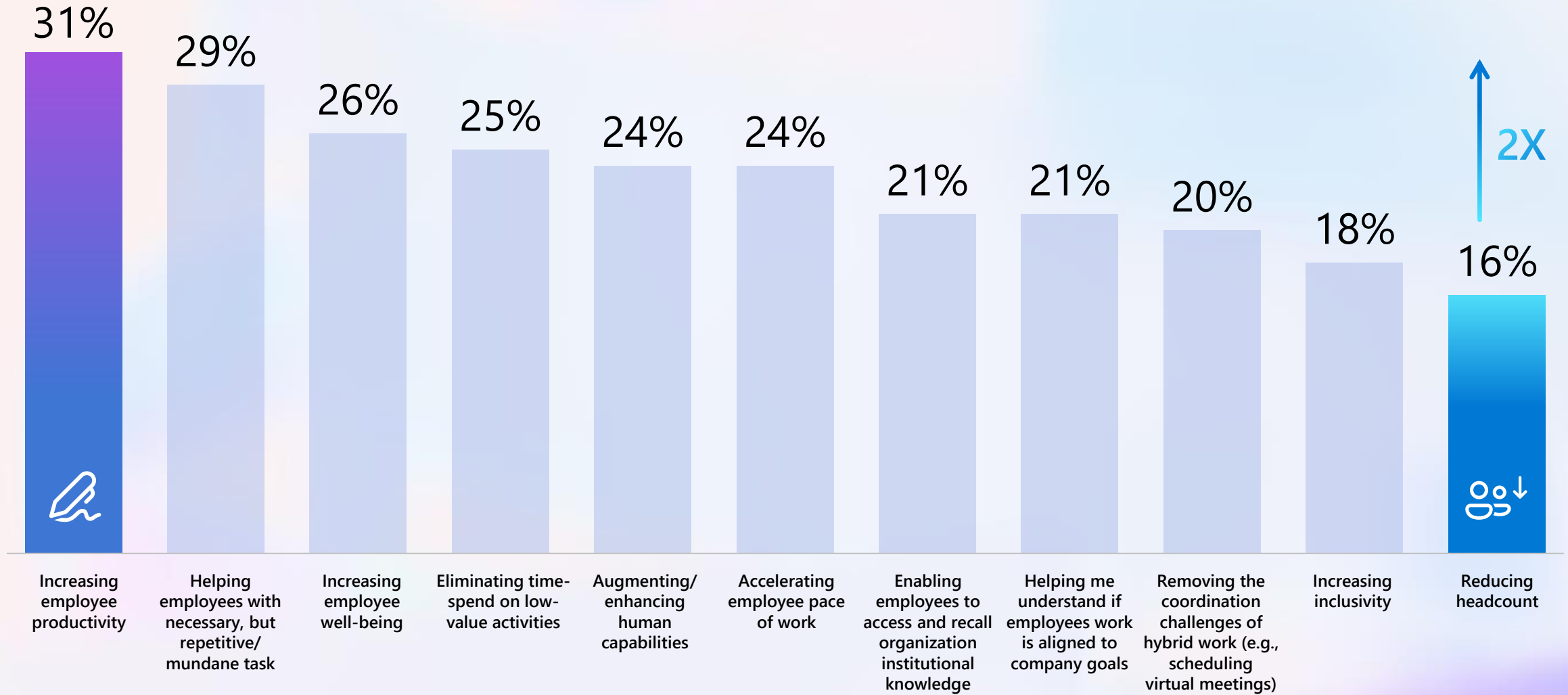
2x

Likelihood of a leader to say AI will provide value by boosting productivity vs. cutting headcount.

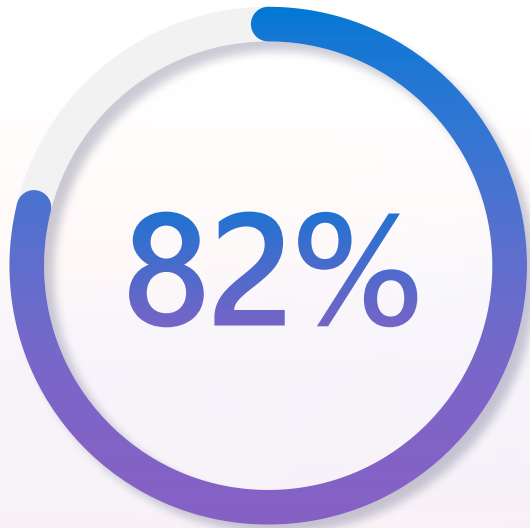
What employees want from AI



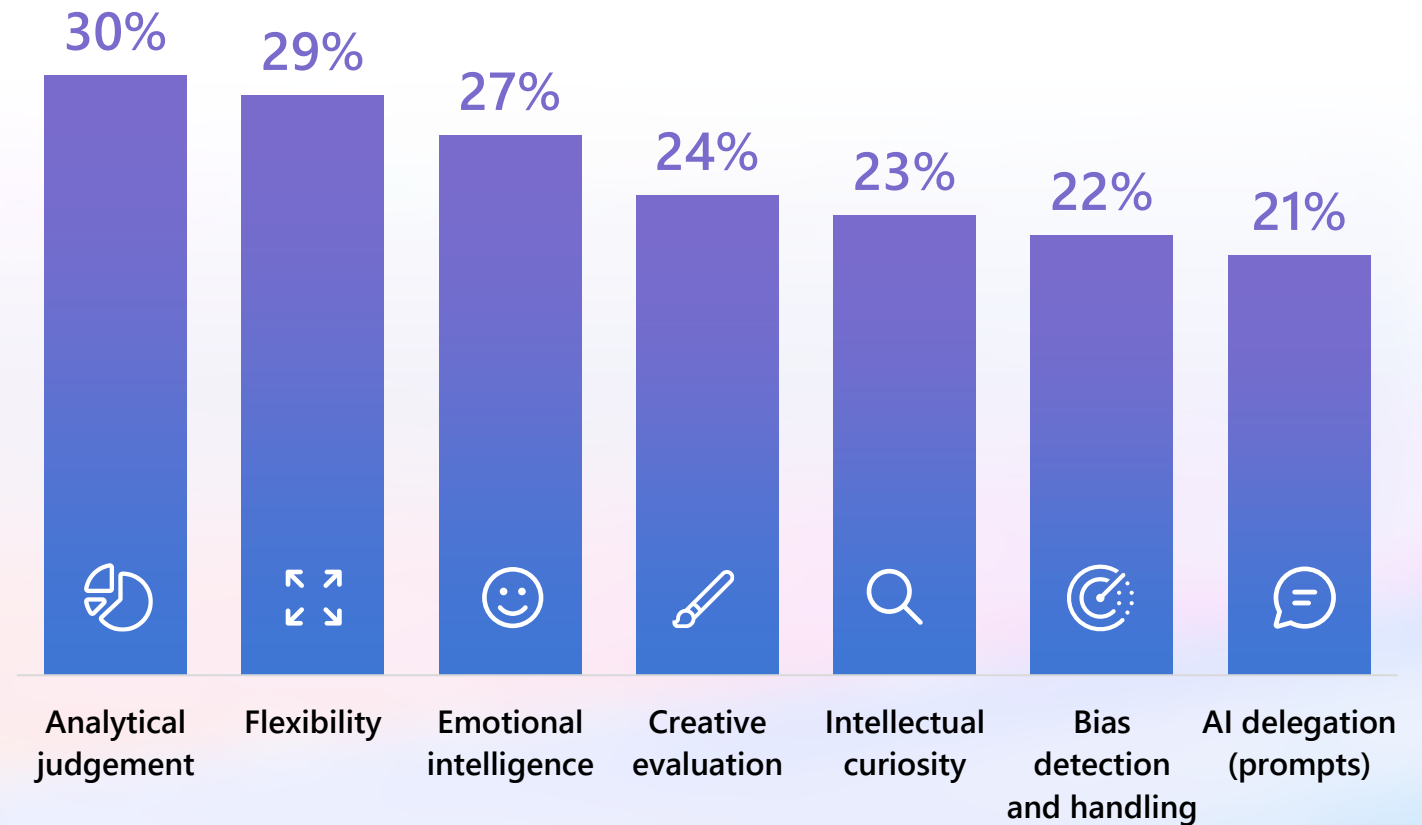
What leaders want from AI



Employees need AI aptitude



of leaders say employees will need new skills to prepare for AI



Bing Chat Enterprise

AI-powered chat for work

**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.

MICROSOFT 365

Bing Chat Enterprise

Microsoft Bing SEARCH CHAT


 **Bing Chat Enterprise** 


AI-powered chat for work


Bing is powered by AI, so surprises and mistakes are possible. Please share feedback so we can improve! [Terms](#) | [Privacy](#)

Choose a conversation style

More Creative More Balanced More Precise

 Anal Create a

 Writ Help me write a s sales pit

 Busi What's a New Yo

Getting the job done is taking a toll on innovation

64%

of people struggle with having the time and energy to do their job

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

Introducing



Microsoft 365 Copilot



Microsoft 365 Copilot



Microsoft 365 Copilot brings AI into the apps you use every day



Microsoft 365 Copilot



Unleash creativity

Harness Copilot's power so you never start from scratch



Unlock productivity

Let Copilot summarize actions for you, and optimize your time



Uplevel skills

Be better at what you're good at and master what you've yet to learn

A day in the life of your recruiting manager

Recruiter Omar is responsible for sourcing new employees.



Craft the job description

Starting from a blank document, Omar (he/him) prompts **Copilot**:

Generate a job description for a senior animation designer role, based on design team core responsibility list.



Job description goes to the web and is posted!



Summarize interview notes

Lots of talented designers apply! Omar invites an experienced candidate, Maya (she/her), to a virtual phone screen via Teams. Maya accepts.

During the meeting, Omar turns on transcription. No need to take notes. When the meeting is over, Omar turns to **Copilot**:

Summarize notes from this interview.
How many years of experience did Maya mention she had?



Interview notes are ready pass to the hiring manager.



Draft the offer

After a follow-up call, the hiring manager agrees. Maya is the right designer for the role. Using **Copilot**, Omar spins up an offer letter:

Draft an offer letter to Maya with a start date of March 16th. Include details on our benefits package.

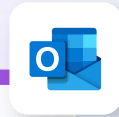


Copilot in Outlook with help him send the letter—fast.

Humm...the email tone isn't quite as welcoming as it should be. With a click, Omar has a friendly email, he reviews it, and sends!

A day in the life of your sales lead

Sales rep Cassandra is responsible for reaching out to customer leads.



Surface new leads

Cassandra (she/her) checks her inbox first-thing—she received over 50 emails just yesterday and wants to get right to anything from a prospect. She asks **Copilot**:

Show me emails from new senders.



Copilot automatically filters results and displays an email from a new lead, Babek (he/him) from Fabrikam. **Copilot** allows Cassandra to respond to his email in seconds:

Invite **Babek** to a meeting to learn about our **core offerings**. Use persuasive language.



Babek accepts the meeting.



Prepare for each pitch

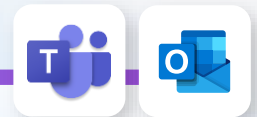
This could be a big account, and Cassandra knows she must come to the meeting prepared. She asks **Copilot** in Teams,

Recap **customer pitch tips** from the **spotlight meeting** last week.



Then, she turns to **Copilot** in PowerPoint to create her pitch:

Update **generic product pitch template** for **Fabrikam**. Add **pricing_for_enterprise_accounts.xls**. Update front image to include the **Fabrikam logo**.



Capture meeting notes

She's ready to meet with Babek!

Cassandra hosts the meeting in Teams. No need to take notes, she knows she can trust a Copilot-generated meeting summary when the call is done.

After they say goodbye, Cassandra jumps back to her inbox to thank Babek for his time.

Draft a thank you note from our **meeting notes**. Include next steps.



Note for speaker: pick 2 personas based on audience

A day in the life of your IT administrators

IT Administrator Will is tasked with summarizing system changes for the help desk.



Summarize changes

Yesterday, a critical system underwent an update that will impact customers. IT teams have been documenting the changes in separate files.

Will (they/them) is tasked with synthesizing everyone's notes into simple talking points for the help desk. Will turns to Loop and tags their team members to share what they have documented.

Next they schedule a meeting with all IT teams to get on the same page. To prep for the meeting, Will turns to **Copilot**:

Review system documentation and **surface all references** to customers. **Summarize** these references into bullet points.



Stay on topic during a meeting

During the meeting, IT managers discuss what the help desk needs to know, and a few points stand out. Will asks **Copilot** to summarize the impacts Marie (she/her) explained.

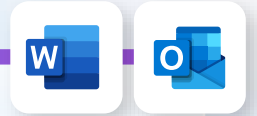
After the meeting, Copilot in Teams lists the important items for Will.

Recap all help desk tips that were considered. Turn our ideas into a table.



From there, Will is back to Word, creating a reference document for the help desk.

Turn this meeting checklist into a 1-page document. Provide more context for customer actions.



Share the impact

Time to share the 1-pager with the help desk! From a blank email, Will prompts **Copilot**:

Draft a detailed email from the linked 1-pager. Add three talking points from meeting notes. **Make the tone more friendly**, include formatting and emojis.



Sent! 😊

Prompt Ingredients

Get the most out of Microsoft 365 Copilot by writing rich prompts with the best ingredients:

Goal

What output do you want from Copilot?

"I want a list of 3-5 bullet points to prepare me..."

"Please help me draft some content for the new web page we are creating..."

+

Context

Why do you need it and **who** is involved?

"...for an upcoming meeting with Customer X, focused on their current state and what they're looking to achieve..."

"...I'm a marketing manager focused on the small business customer segment..."

+

Source

Which information sources or samples should Copilot use?

"...and focus on email and Teams chats over the last couple weeks."

"...and base it on themes for the new product as described in [link to strategy document]"

+

Preferences

How should Copilot respond to best meet your preferences?

"...please use terms a twelve-year old would understand..."

"...use a fun tone with catchy phrases..."

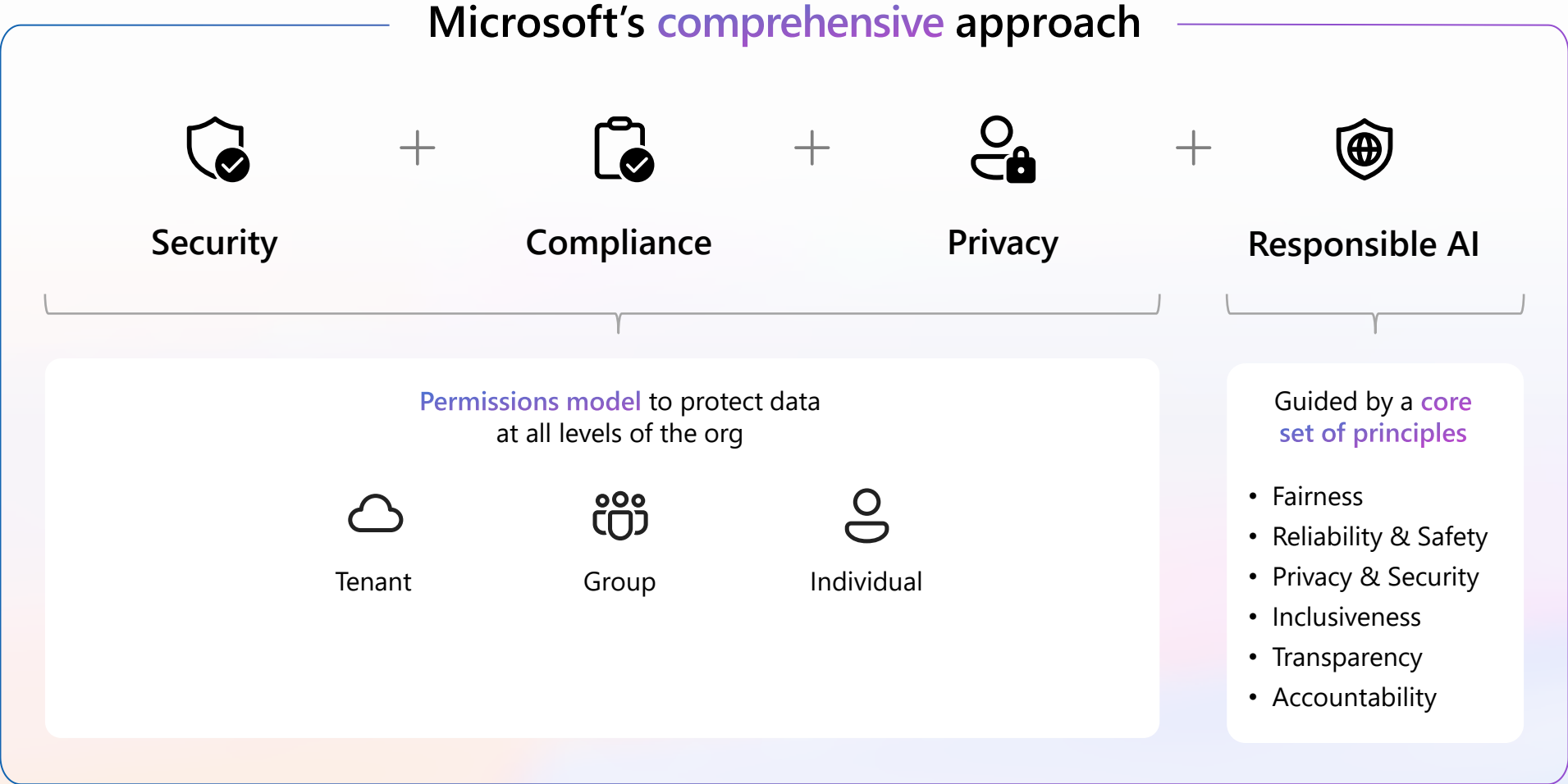


How Microsoft 365 Copilot Works



- The Copilot System

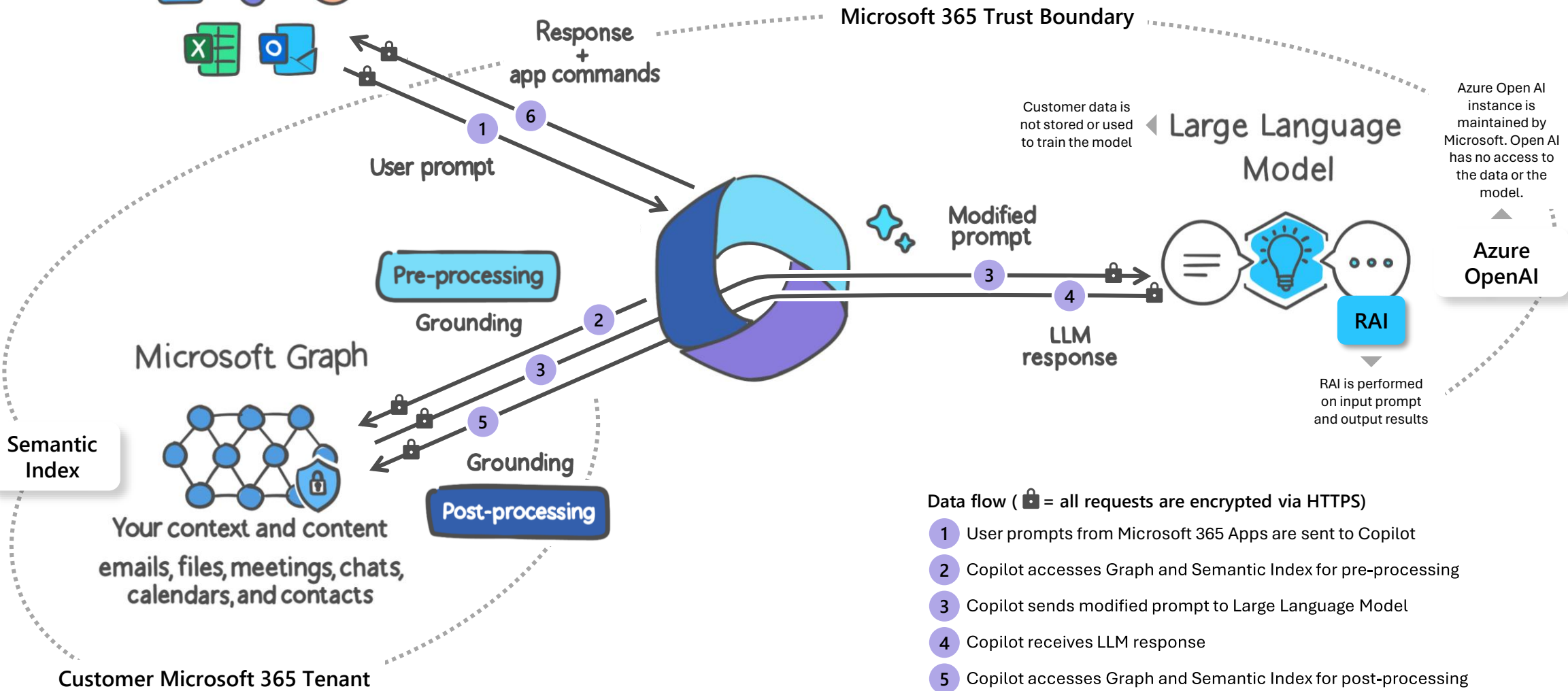
Microsoft 365 Copilot foundational principles



Microsoft 365 Copilot basic architecture

Microsoft 365 Apps

Microsoft 365 Copilot



Azure Open AI instance is maintained by Microsoft. Open AI has no access to the data or the model.

Azure OpenAI

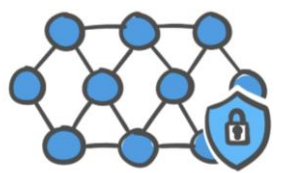
RAI is performed on input prompt and output results

Data flow (🔒 = all requests are encrypted via HTTPS)

- 1 User prompts from Microsoft 365 Apps are sent to Copilot
- 2 Copilot accesses Graph and Semantic Index for pre-processing
- 3 Copilot sends modified prompt to Large Language Model
- 4 Copilot receives LLM response
- 5 Copilot accesses Graph and Semantic Index for post-processing
- 6 Copilot sends the response, and app command back to Microsoft 365 Apps

Semantic Index

Microsoft Graph



Your context and content emails, files, meetings, chats, calendars, and contacts

Customer Microsoft 365 Tenant

Pre-processing

Grounding

Post-processing

Grounding

Response + app commands

User prompt

Modified prompt

LLM response

Large Language Model

RAI

Microsoft 365 Trust Boundary

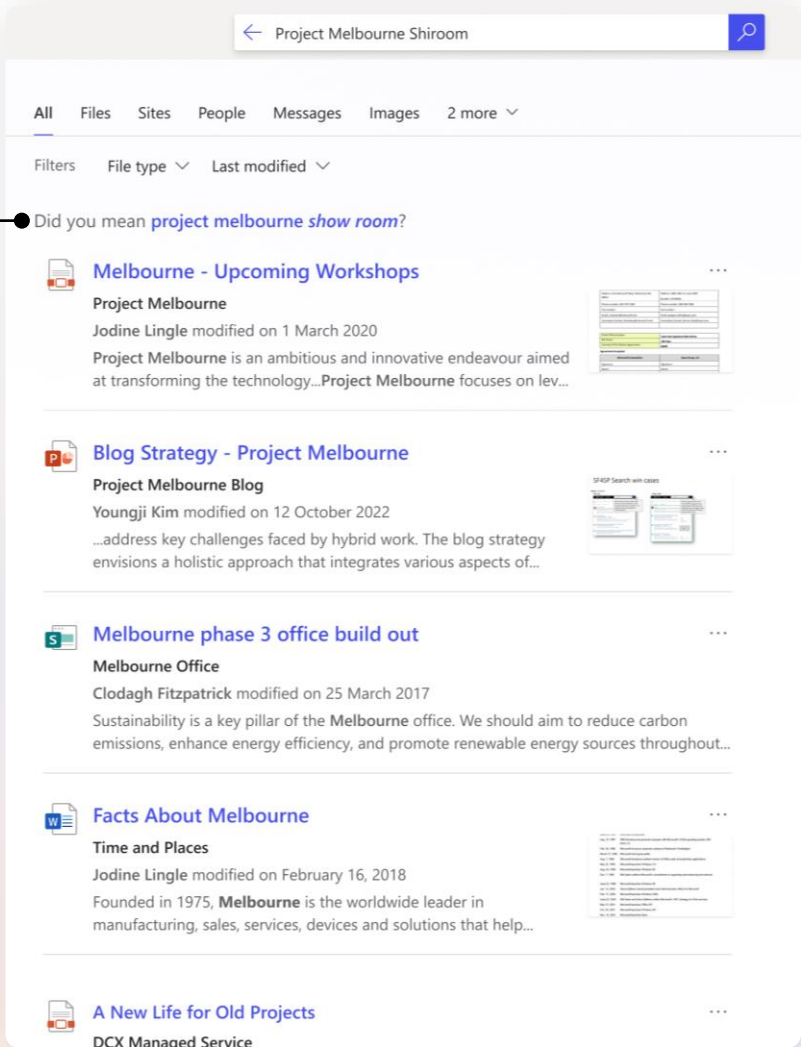
Customer data is not stored or used to train the model

Semantic Index for Copilot

Semantic Index for Copilot creates

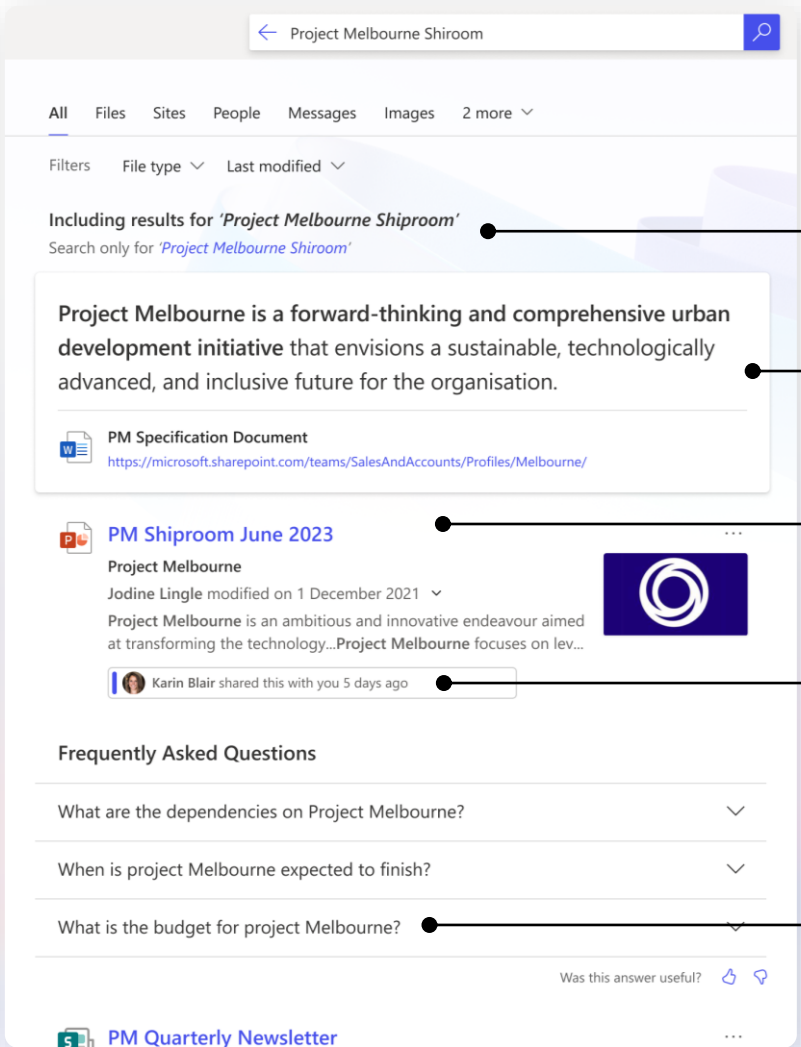
Semantic Index for Microsoft 365

keyword matched results & suggestions



Without Semantic Index for Copilot

autocorrected spelling of organizational jargon



With Semantic Index for Copilot

informative answers directly from documents

more relevant results, based on search intent

enhanced content sharing insights

AI generated questions and answers on topic



Microsoft Graph

Ground Copilot
in **your data**

Enforce **security**
& **permissions**
at runtime

Customer's **data**
- **not used** for
training

Power **Semantic**
Index for Copilot

Microsoft 365 Copilot



Grounded in
your business data

Microsoft 365 Copilot has real-time access to both your *content and context* in the Microsoft Graph.



Comprehensive
security, compliance, & privacy

Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365.



Architected to protect
data

Your data never leaves its secure partition, and it is never used for training purposes.



Integrated into the
apps you use every day

Word, Excel, PowerPoint, Outlook, Teams, and more.



Individual user & admin
always in control

User decide what to use, modify, or discard.



Designed to
learn new skills

As Copilot learns about processes, it can perform more sophisticated tasks and queries.

Resources for leaders

WorkLab

[editorial, podcasts, thought leadership]

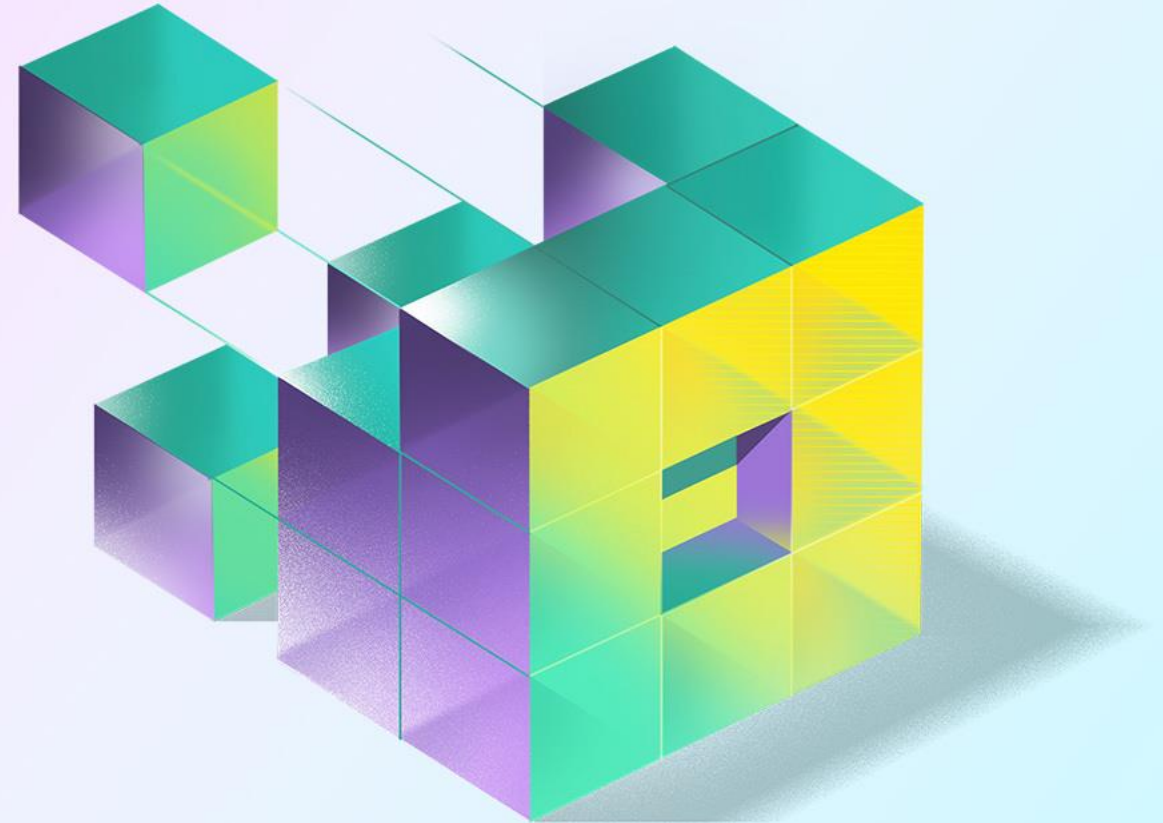
Work Trend Index

[annual survey, research, reports]

How to Hybrid Guides

[playbook for leaders]

microsoft.com/worklab





Thank You!



Lunch

Optional MTC Tour



Microsoft 365 Copilot

**Microsoft adheres
to industry leading
privacy and security
commitments**

**Microsoft 365 Copilot Early Access
Program falls under Preview Terms**

**At GA, Microsoft 365 Copilot will
fall under [Product Terms](#)**

Microsoft 365 Copilot

Designed for the needs of the enterprise



Grounded in
your business data

Microsoft 365 Copilot has real-time access to both *your content and context* in the Microsoft Graph.



Comprehensive
security, compliance, & privacy

Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365.



Architected to protect
data

Your data doesn't leave the compliance boundary and isn't used to train the foundation model.



Integrated into the
apps you use every day

Word, Excel, PowerPoint, Outlook, Teams, and more.



Individual user & admin
always in control

Users decide what to use, modify, or discard.



Designed to
integrate new skills

As Copilot learns about processes, it can perform more sophisticated tasks and queries.



See Microsoft 365 Copilot in action

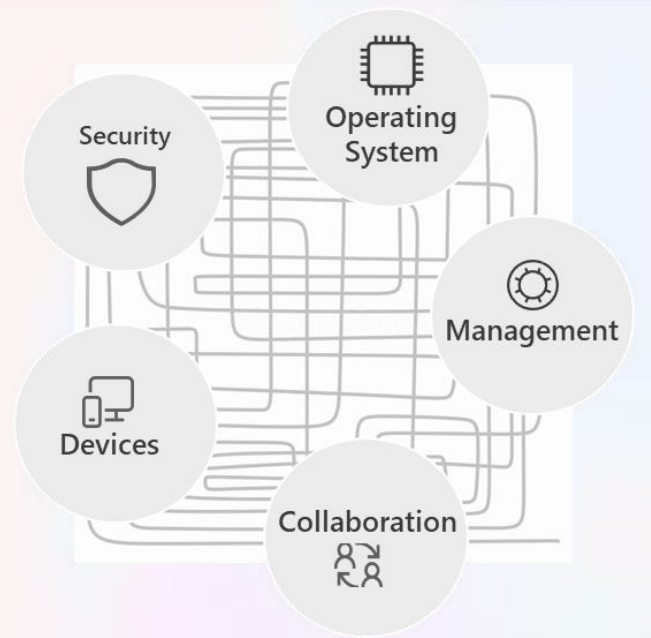


Getting ready for your AI transformation journey today

Are you ready to join the era of AI?

Pivoting to a proactive AI strategy (Access, Devices, and Data)

A complex, disconnected tech stack limits the power and promise of AI



• Do you have comprehensive 'Zero-Trust' security?

AI introduces new vectors for security risk with repercussions like data breaches, financial losses and reputational risks. Zero-trust using anomaly detection can **tighten access controls** and **minimize security breaches**.

• Are your endpoints and apps easily managed?

A modern tech stack is critical to success with AI, so IT teams can easily enhance **data loss protection** controls, apply **robust data governance** and enforce data retention policies and access rights.

• Is your data unified and readily accessible?

Companies that have not yet found ways to **unlock data silos**, harmonize their data, and make it **readily accessible** will be unable to fine-tune generative AI to unlock more of its transformative uses.

The journey to a new way of working

Set up a strong Zero Trust foundation

Secure and manage identities

Defend against threats on multi platforms

Protect sensitive information across data estate

Streamline endpoint management

Improve IT efficiency

Manage and protect any endpoint

Deliver the best experience with Windows 11

Drive Productivity and Collaboration

Empower employees with best-in-class productivity apps

Get everyone connected and working together

Bring your data to life with Semantic Index

Elevate Productivity with



Microsoft 365 Copilot



Elevate Productivity

Discover a whole new way to work



Microsoft 365 Copilot

Built

on Microsoft's **comprehensive** approach



+



+



+



Security

Compliance

Privacy

Responsible AI

Embedded

across Microsoft 365 apps



Semantic Index for Copilot



Unleash Creativity



Unlock Productivity



Uplevel Skills

How to get ready for Microsoft 365 Copilot

- ✓ Enterprise customers: Microsoft 365 E3 or E5
SMB: Microsoft 365 Business Premium or Business Standard
- ✓ Azure Active Directory account¹
- ✓ Some features (file restore, management, etc.) require a OneDrive account
- ✓ WebSockets (wss://) allowed to endpoints in ID #46 in the section for [Microsoft 365 Common and Office Online](#)
- ✓ Word, Excel, and PowerPoint: first available in web versions and later in Desktop (Current Channel)
- ✓ Outlook: Users need to be using the new Outlook for [Windows](#) or [MacOS](#)
- ✓ Teams: Users must be using Teams desktop or the web app. Both current and new versions of Teams supported²
- ✓ Loop: Tenants must have Loop enabled. [Learn more how to enable Loop.](#) [Manage Loop Workspaces.](#)
- ✓ Cross-app experience depends on indexed data; tenants with the richest data get the best results

Please note this is an early version of the technical requirements for Microsoft 365 Copilot EAP and subject to change

¹Currently there is no obstacle to a hybrid solution such as using AAD as well a third-party single sign-on solution (e.g., Okta)

²Once Business Chat is configured in the Teams desktop client, users can access it in the mobile client.

Optimized for Microsoft 365 Copilot

- ✓ Information Protection Labelling:¹ [Learn about sensitivity labels - Microsoft Purview \(compliance\)](#)
- ✓ Content Migration/Data Migration for Semantic Indexing: [Semantic Index for Copilot: Explained by Microsoft](#)
- ✓ SharePoint Site Restrictions Configured: [Restrict SharePoint site access - SharePoint in Microsoft 365](#)
- ✓ Access Reviews:² [Review your access to groups & apps in access reviews - Microsoft Entra](#) and [Review link sharing](#)
- ✓ Data Loss Prevention: [Learn about data loss prevention - Microsoft Purview \(compliance\)](#)
- ✓ Retention Policies: [Learn about retention policies & labels to retain or delete - Microsoft Purview \(compliance\)](#)
- ✓ Feedback: [Enable all feedback settings for Microsoft 365 Apps](#)

It is not a requirement to enable all the features below for Microsoft 365 Copilot EAP. These are recommended to provide optimal data governance

¹Enhanced Automation Capabilities are Included in M365 E5/ Compliance SKU

²Using this feature requires Microsoft Entra ID Governance subscriptions for your organization's users; some capabilities within this feature may operate with a Microsoft Azure AD Premium P2 subscription

How to prepare for Microsoft 365 Copilot

- ① Understand file permissions:
 - Overview of [sharing and permissions available in SharePoint in Microsoft 365](#)
 - [Sensitivity labels](#) from Microsoft Purview
- ② Implement data loss prevention policies:
 - Learn about [data loss prevention](#)
 - Watch: [automatically classifying and protecting documents and data](#) and [data loss prevention in Microsoft Purview](#)
- ③ Use reporting to stay updated:
 - [Usage reports](#) in the Microsoft 365 admin center
 - [Data access governance reports](#) in SharePoint admin center

Review this [blog post](#) on getting tenant ready for Microsoft 365 Copilot or watch this Microsoft Mechanics [video](#).

How to prepare for Microsoft 365 Copilot

To learn more about getting your tenant ready for Microsoft 365 Copilot, watch the Microsoft Mechanics video at

aka.ms/M365CopilotAdmin

Permissions policies

Preparing your organization for data governance in Microsoft 365 Copilot.

Data permissions will be consistent, and users will only be able to search the information they already have access to.

Review our blog about content management as you prepare your organization to use Copilot: [New era in content management and security in SharePoint, OneDrive, and Teams](#)

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

Characteristics of companies that win



Leader-led
transformation



Maximized use
of data



Willingness
to change

How you can get started today

Try Microsoft's
copilots in action

Get copilot-ready
with Microsoft 365

Ensure an AI-ready
data foundation

Build your own
AI-powered copilot

The opportunity is yours to
lead the AI transformation

Thank you

Microsoft 365 Copilot Customer Resources



Resources and assets to understand Microsoft 365 Copilot

Microsoft 365 Copilot Announcements



- [Introducing Microsoft 365 Copilot | Microsoft 365 Blog](#)
- [Introducing Microsoft 365 Copilot | Your Copilot for Work Video](#)
- [Unleash your productivity with AI and Microsoft 365 Copilot](#)

Microsoft 365 Copilot Videos



- [How Copilot Works](#)
- [How to get ready for Microsoft 365 Copilot](#)
- [Semantic Index for Copilot: Explained by Microsoft](#)
- [Microsoft 365 Copilot YouTube Channel](#)

IT Admin – Getting Started Support



- [How to prepare for Microsoft 365 Copilot](#)
- [Get Started with Microsoft 365 Copilot \(admin setup\)](#)
- [Microsoft 365 Copilot Early Access Program \(admin FAQ\)](#)
- [Data, Privacy, and Security in Microsoft 365 Copilot Whitepaper](#)
- [New era in content management and security in SharePoint, OneDrive, and Teams](#)
- Public [MS](#) and [SharePoint](#) permission policies

End User – Support Guides



- **NEW!** [Microsoft 365 Adoption Site](#)
- Initial [Word](#) and [PPT](#) support guides
- [Microsoft 365 Copilot YouTube Channel](#)

Learn more

[Microsoft 365 Copilot](#)

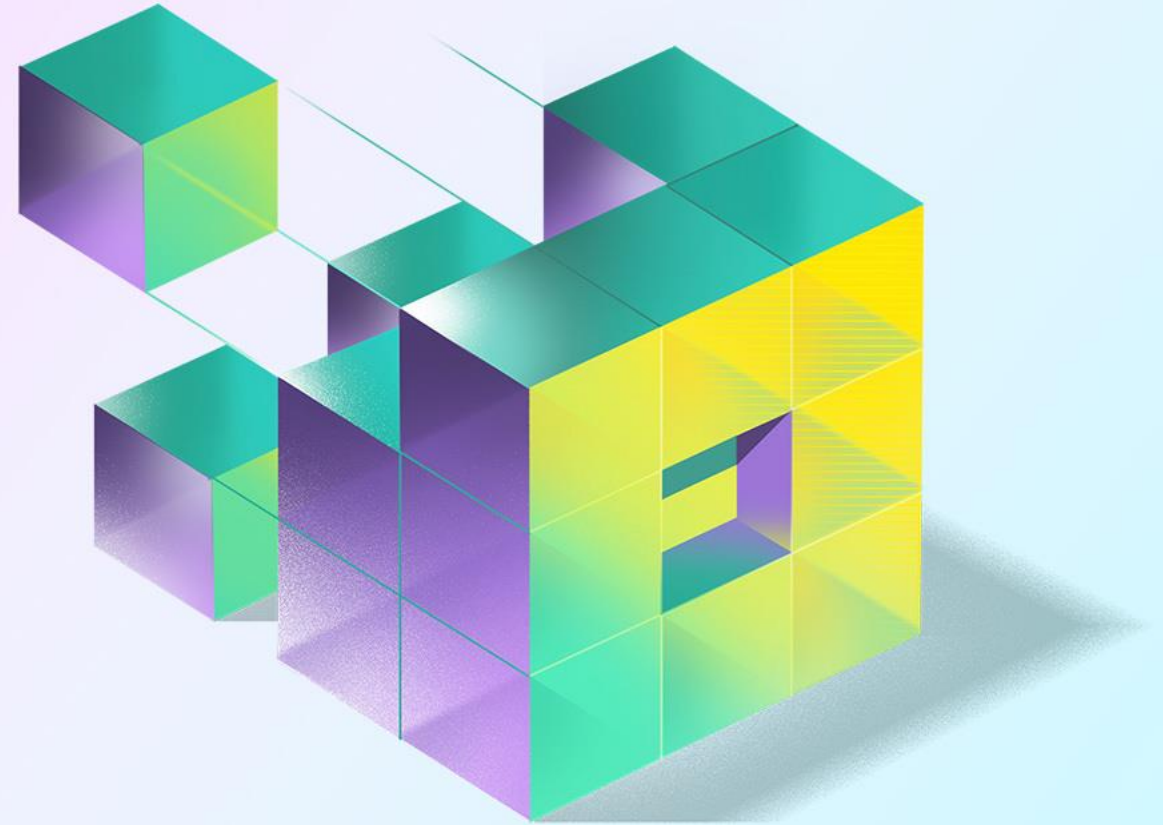
Your copilot for work

[Microsoft WorkLab](#)

Research and data on the trends
reshaping the world of work

Are you ready for Copilot?

- [Take the assessment](#)
- [Contact your Microsoft Customer Success Manager or Account Executive](#)





Appendix



It's been exciting to pilot with Microsoft during this defining and groundbreaking moment of AI, and I can see how advances like this could alter the future of work. As our team has tested the technology, we've received great feedback about Copilot in Teams. The ability to ask questions during a meeting is fantastic and the action items list and meeting summaries are very useful features. While Copilot is still early in its development cycle, we're excited to see what's next!"

— **Sherry Neubert**
VP & Chief Information Officer
The Goodyear Tire & Rubber Company



The potential of Microsoft 365 Copilot is undeniable, and it's energizing to explore the possibilities as we couple the ingenuity of our people with the functionality of the tool. Early access has given us visibility into how it can further streamline processes, speed insights, spark ideas, enhance productivity and evolve the way we work. We're proud to team with Microsoft as we continue to achieve new levels of innovation and advance the future of energy."

— **Guy Moore**
Workforce Enablement Program Manager
Chevron



While an app still has to be built from the ground up, our people are now part of the process and are empowered to develop the solutions they're using every day. We're able to do that faster and more cost-effectively than before.

Mithun Parameswaran
Power Platform COE Lead Westpac





There aren't too many vendors on the planet that can create a solution capable of providing consolidated insights into large, complex environments like ours. That's why we chose Microsoft."

— **Thomas Mueller-Lynch**
Service Owner Lead for Digital Identity
Siemens

SIEMENS



One of the best things about using Windows Autopilot is that we reduce device deployment time by 80 percent, from 500 minutes to 100 minutes."

— **Gustavo Londoño Lopera**
IT Infrastructure Engineer
Grupo Bancolombia

 **Grupo
Bancolombia**



With Microsoft 365, we're offering employees a great suite of tools and enabling more freedom and flexibility in terms of how and where they work."

— **Zephanie Hardy**
Senior Vice President of Employee
Technology Experience

usbank.