



Microsoft 365 Copilot The AI-Powered Future of Work

March 2024

The pace of work is outpacing our ability to keep up

Digital debt is impacting business and stifling innovation

64%

of employees don't have
enough time or energy
to do their job

57%

of employees'
time is spent
communicating

43%

of employees'
time is spent
creating

Source: [Work Trend Index Annual Report: Will AI Fix Work?](#) Microsoft, 9 May 2023

Preparing for the era of **AI**



What are your organization's **goals** for using AI?



What are your organization's **pain points** that AI can address?



What are your organization's **current capabilities** in terms of AI?



Does your organization have a **data strategy** in place?



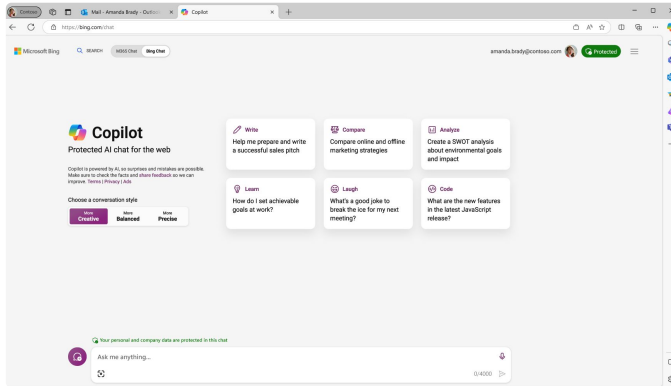
Does your organization have the necessary **infrastructure and resources** to support AI initiatives?

AI-powered tools represent an enormous opportunity for organizations to break the cycle of stagnant productivity – and set the stage for **a new era of innovation.**

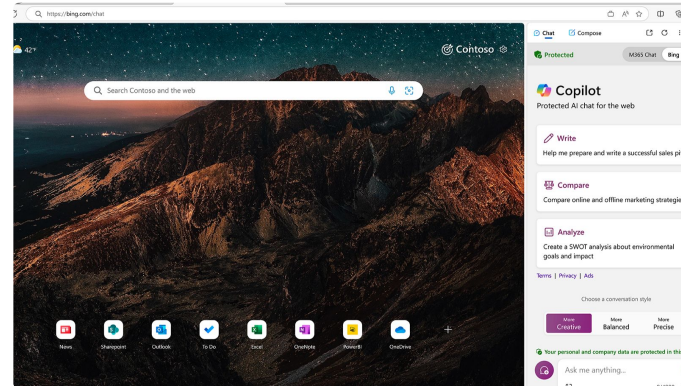
The effect of next-generation AI will be felt in three distinct ways: It will **unleash creativity, unlock productivity, and uplevel skills.**

Copilot is everywhere!

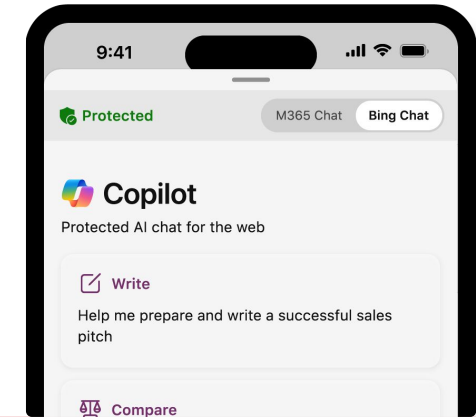
Bing.com/chat



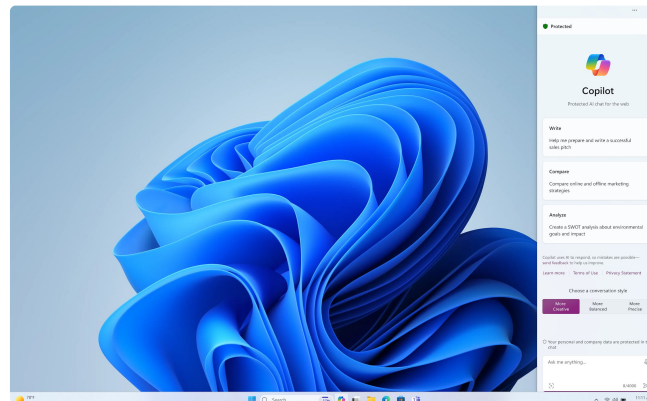
Microsoft Edge sidebar



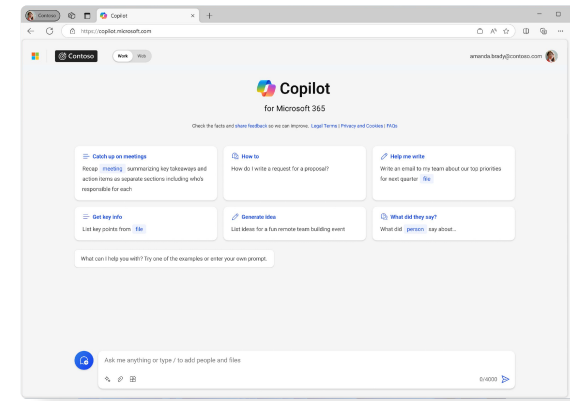
Microsoft Edge app on mobile



Windows



Copilot.Microsoft.com



Copilot for Microsoft 365

Your AI assistant at work



Copilot for Microsoft 365

\$30 USD per user, per month



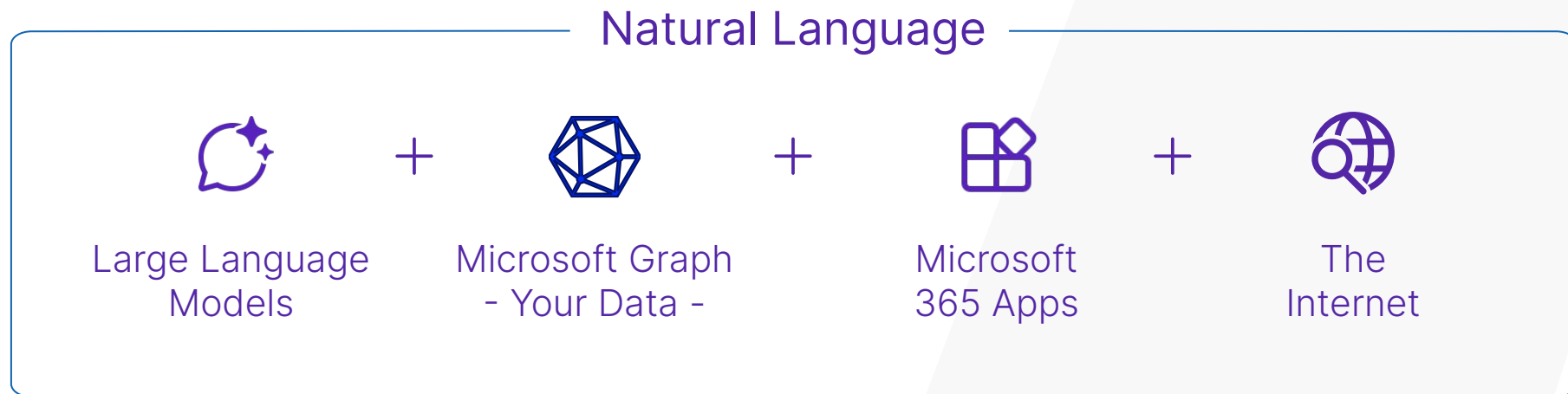


What makes Copilot for Microsoft 365 different?

Drive innovation and supercharge productivity with the power of AI

Copilot for Microsoft 365 is an **AI-powered productivity tool** that uses large language models (LLMs) and integrates your data with the Microsoft Graph and Microsoft 365 apps and services. It works alongside popular Microsoft 365 apps such as Word, Excel, PowerPoint, Outlook, Teams, and more

Unlock productivity and unleash creativity



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

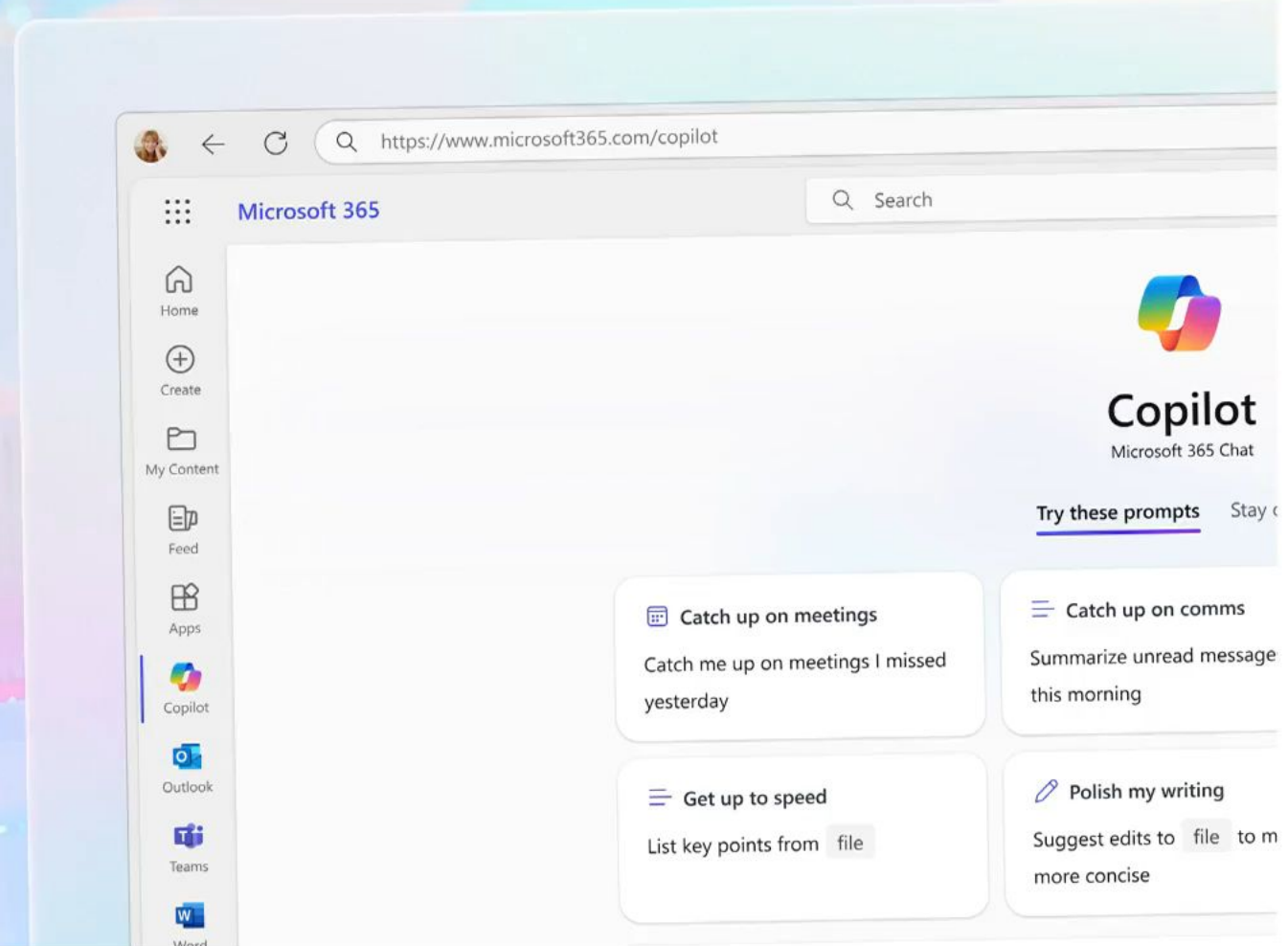


UPLEVEL SKILLS

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

MICROSOFT 365

Copilot in M365 Chat

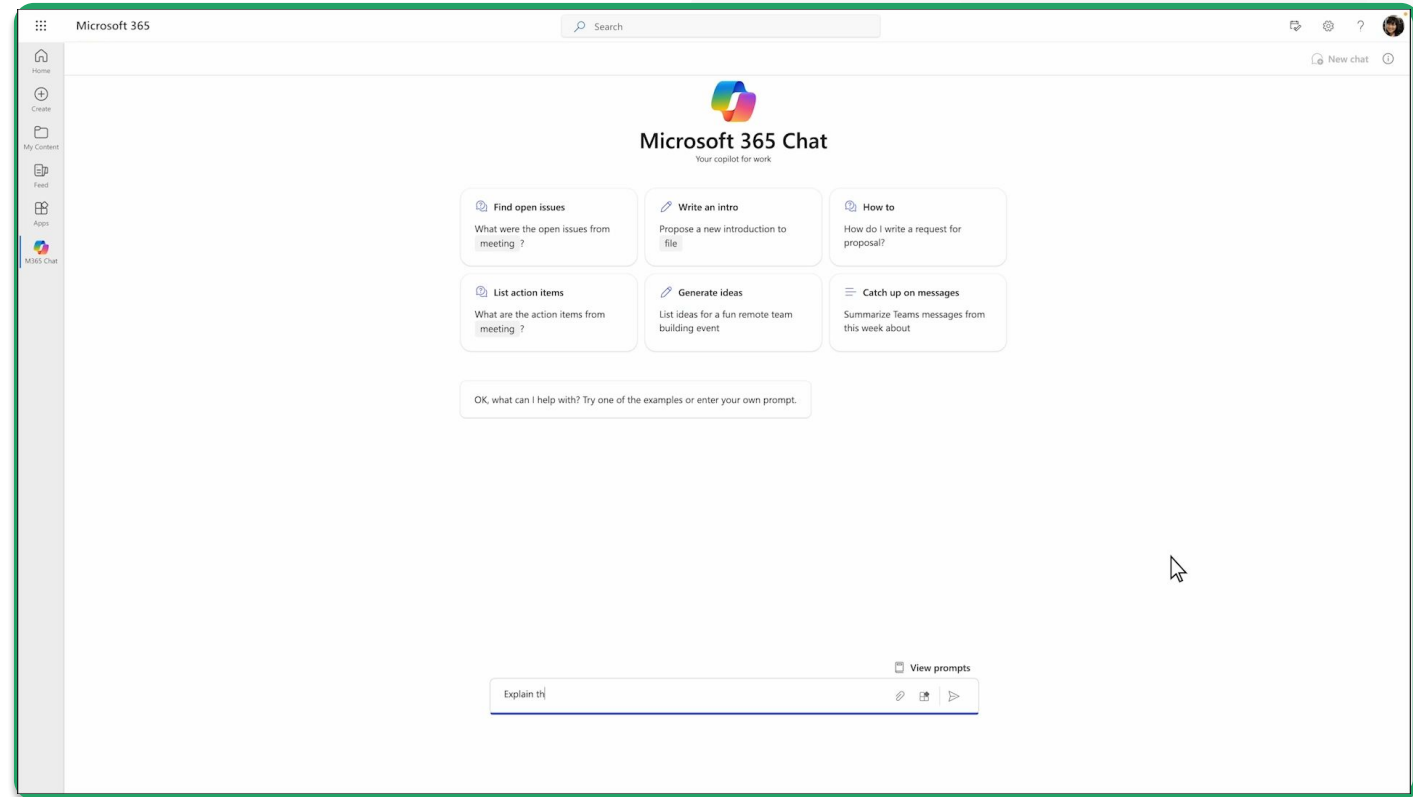




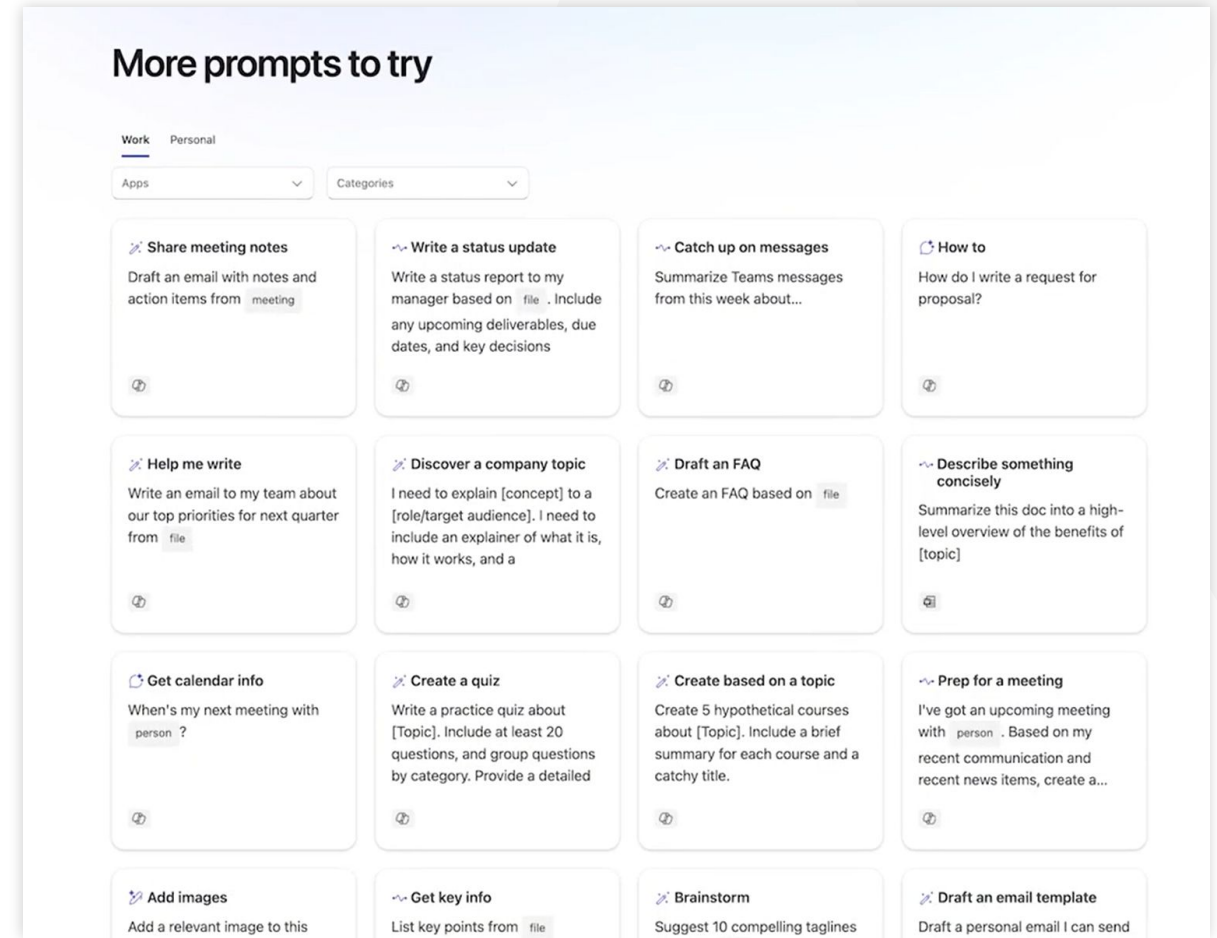
Goes far beyond simple questions and answers to tame the complexity, eliminate the drudgery, and reclaim time at work.

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.



- A collection of prompts that can be used to explore and experiment with Copilot
- Learn the art and science of prompt Engineering in an easy way
- Provides latest information and resources
- Evolves and adapts as AI becomes more advanced



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Copilot in Teams Meetings

The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes a search bar and navigation icons. The left sidebar shows standard Teams navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main meeting area is titled "Core accounts business review" and includes tabs for Chat, Details, Files, and Recap. The meeting date and time are "Mar 16, 10:00 AM", and there is an "Open in Stream" link. Below the meeting header, the "Shared content" section displays a file named "Proseware Proposal.pptx". A video player shows a hand pointing at a screen with a play button and a duration of "48m 42s". Below the video, there are buttons for "Speakers" and "Topics". The "Topics" section lists two items: "Proseware negotiation strategy" and "Core accounts round table". On the right side, the "Notes" section shows a summary of the meeting, titled "Quarterly results and forecasts for Core Accounts", generated by "Core accounts.loop". The summary includes a list of key points discussed during the meeting.

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 Accounts

Summary

Based on what attendees said in the meeting

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

Notes

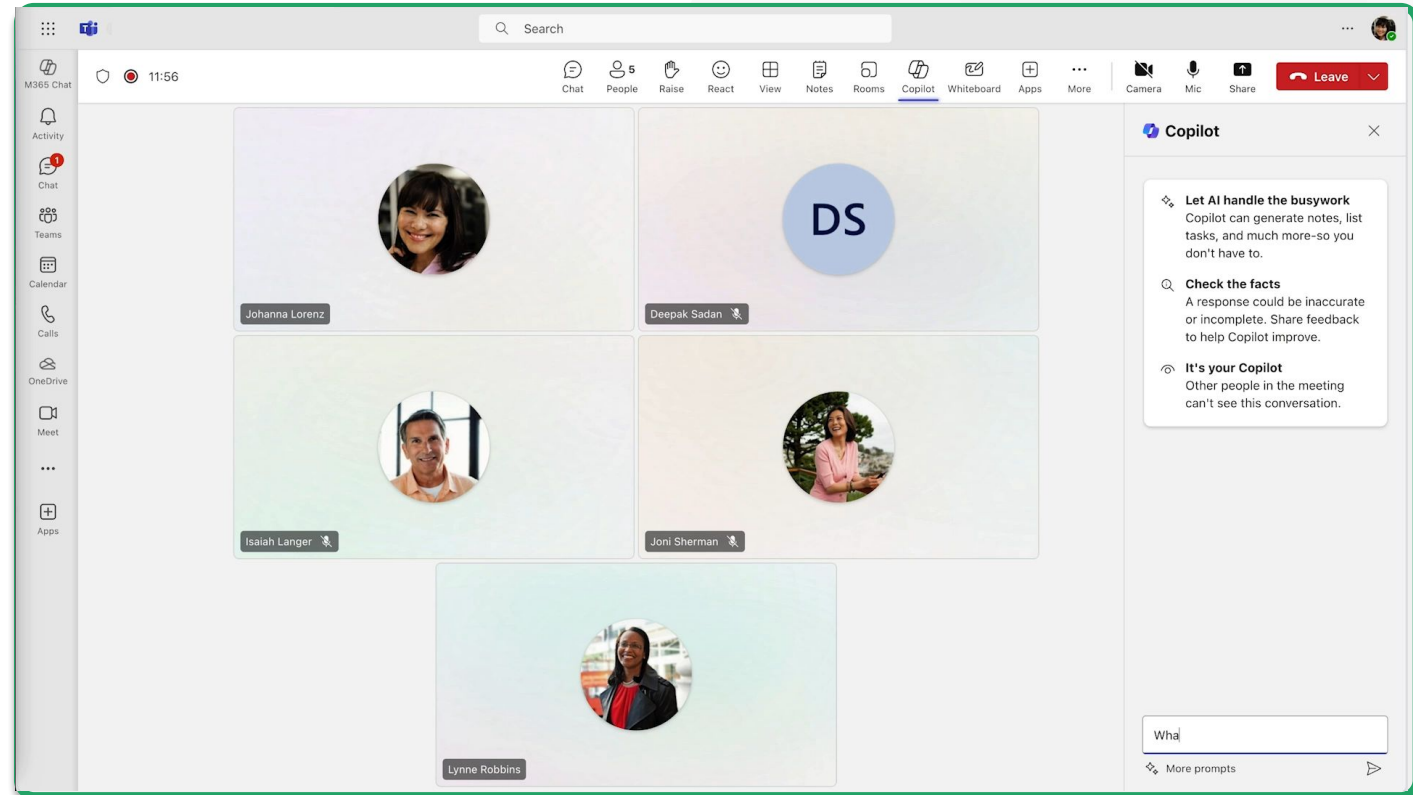
- Beth emphasized importance of Proseware negotiation strategy with offers - this is a must win deal.
- The team identified a new opportunity with Proseware through their negotiation strategy.

Copilot in Teams

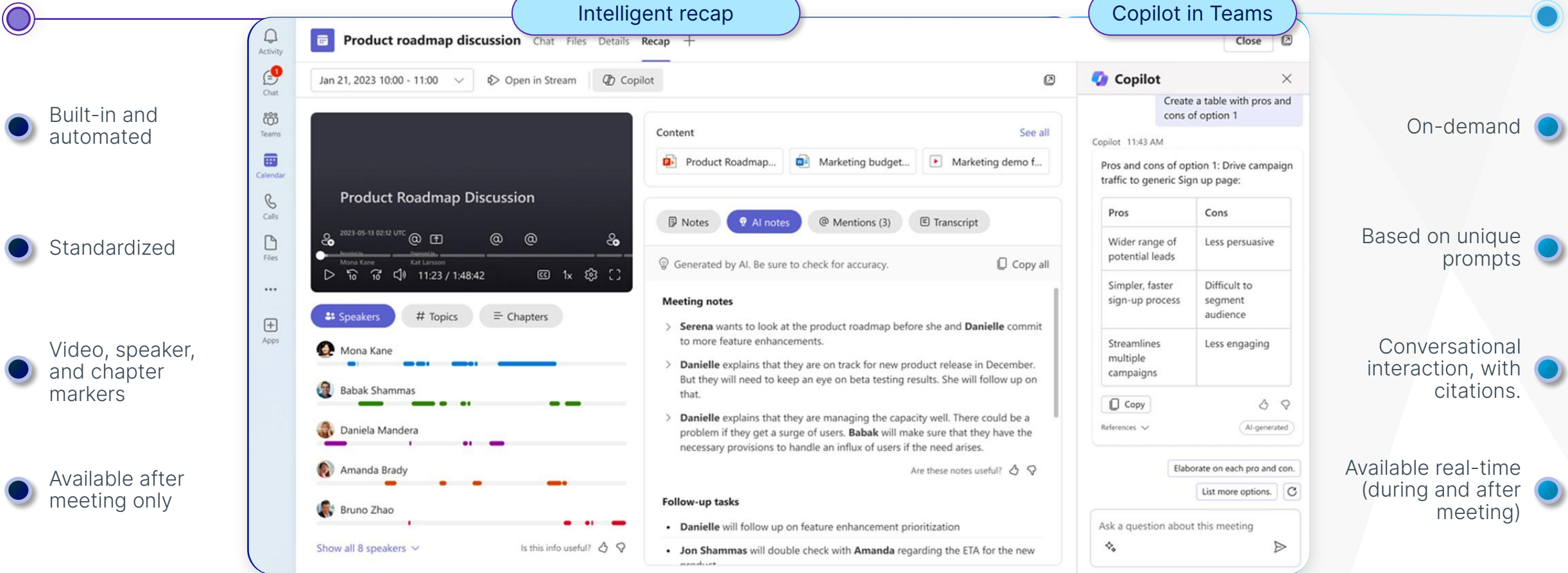
Copilot helps you run effective meetings, get up to speed, organize key discussion points, and summarize actions.

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 in Teams



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

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Copilot in Outlook

The screenshot displays the Outlook application interface. At the top, the 'Outlook' logo and a search bar are visible. Below this, the email header for 'Marketing Sync - meganb@contoso.com' is shown. The main content area features a meeting recap for an event titled 'Profitable Projects Pitch & Plan', which took place on Wednesday 9/8/2023 from 11:00 AM to 12:00 PM. The recap includes a video player with six participants: a woman in a hijab, a man with a headset, a woman with long dark hair, a woman with glasses, a man in a suit, and a man with a beard. Below the video player are tabs for 'Speakers', 'Topics', and 'Chapters'. To the right of the video player, there is a 'Content' section with a link to 'Product Roadmap...', a 'Notes' section with a toggle for 'AI notes', and a 'Meeting notes' section with a list of notes. The bottom of the interface shows the name 'Serena Davis'.

Outlook

Search

Marketing Sync - meganb@contoso.com

Event [Meeting recap](#)

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

Content

[Product Roadmap...](#)

Notes **AI notes**

AI-generated content may be incorrect.

Meeting notes

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

Speakers # Topics Chapters

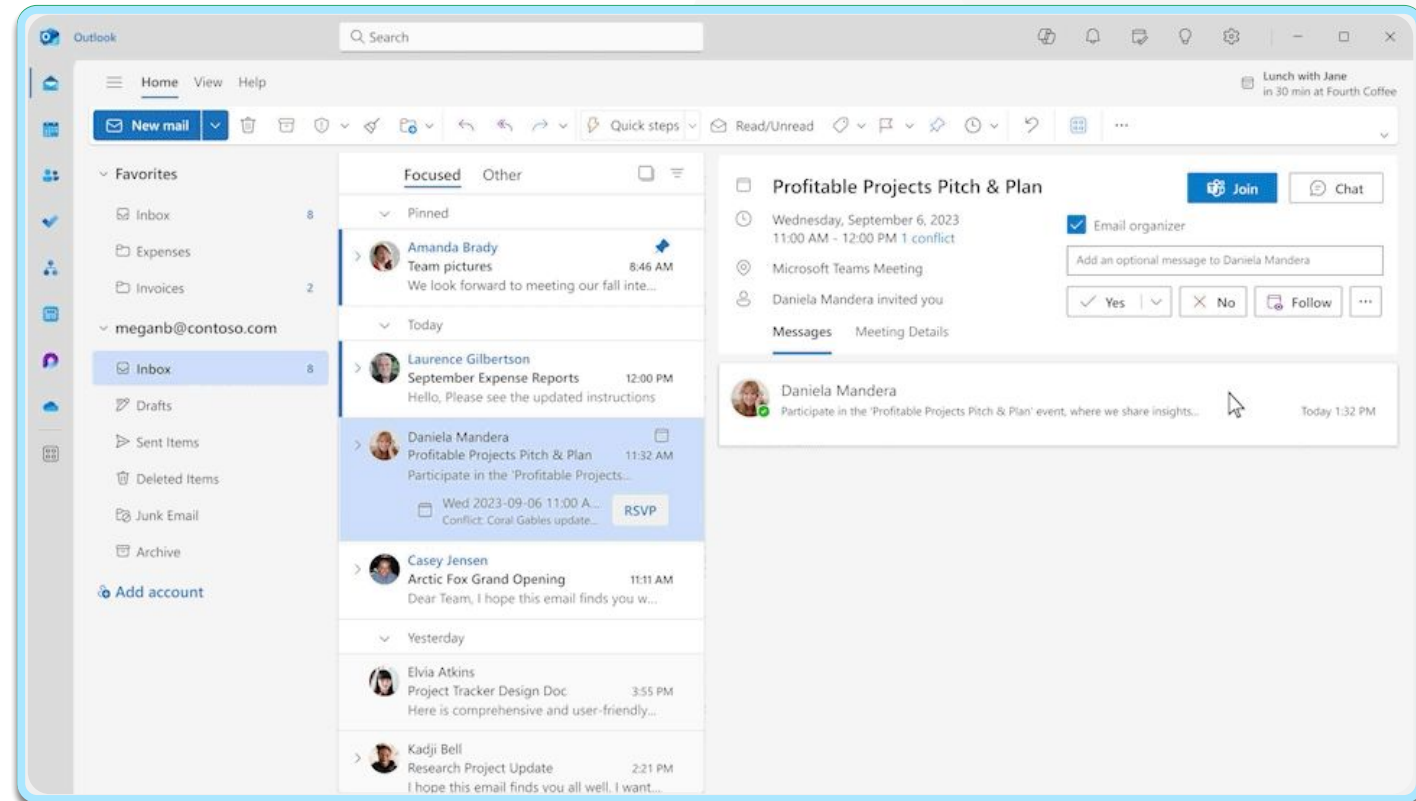
Serena Davis

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.



Secured Productivity



Security and compliance controls



Foundational security controls

Copilot + Microsoft 365 Business Standard

- **Multi-factor authentication and security defaults** when accessing Microsoft 365 to use Copilot
- **Basic security controls for mobile devices** accessing Microsoft 365 resources
- **Basic content search** for Copilot prompts and interactions
- **Audit logs and retention or deletion policies** for Copilot interactions
- **Prohibit copilot from including sensitive data in responses** for users that have no extract permissions
- **Exclude sensitive files from being processed by Copilot** for users that have no view permission



Comprehensive security controls

Copilot + Microsoft 365 Business Premium

Everything in Microsoft 365 Business Standard, plus:

- **Conditional Access** policies based on identity, device, location, and network to access Microsoft 365 resources when using Copilot
- **Manage the access and use of Microsoft 365 apps across devices** when they use Copilot
- **Manually label and protect Microsoft 365 content (files and emails only)** used by Copilot and inherit and cite sensitivity labels in Copilot outputs
- **Protect sensitive Microsoft 365 data** generated by Copilot from exfiltration (files and emails only)
- **eDiscovery, case management and legal hold** capabilities for Copilot prompts and interactions

Business Premium provides comprehensive protection for Copilot

Safeguard
business data

Enable secure remote
access and protect identity

Defend against
cyberthreats

Manage personal and
company owned devices

Security capabilities to help protect Microsoft 365	Microsoft 365 Business Standard	Microsoft 365 Business Premium
Use device security and access policies to ensure only compliant devices access internal Microsoft 365 resources (Basic Mobility and Security)	✓	✓
Reduce the likelihood of account takeover by bad actors (Single sign-on and multi-factor authentication with Entra ID Free)	✓	✓
Basic email protection – antimalware, antispam and phishing that's on by default (Exchange Online Protection)	✓	✓
Encrypt sensitive emails, restrict copying and forwarding of confidential business information, and control who has access to sensitive data by classifying, labeling, and protecting data (Information Protection)		✓
Protect against ransomware attacks with enterprise-grade endpoint protection (Defender for Business)		✓
Security against phishing and other cyberthreats in email and OneDrive including link and attachment scanning (Defender for Office 365 Plan 1)		✓
Help employees securely access business apps wherever they work with conditional access. Safeguard against password loss or theft with advanced multifactor authentication (Entra ID Plan 1)		✓
Apply security policies to help protect work data on company-owned and employee devices. Keep company data within approved apps. Remove business data from lost or stolen devices (Intune Plan 1)		✓

	For Individuals		For Organizations	
	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$20	Free	\$30
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.

Prerequisites & Technical Requirements

Prerequisites for using Copilot for Microsoft 365

If your on Business Premium today, then you likely meet most of these prerequisites



Microsoft 365 Apps
for enterprise



Microsoft Entra ID



Microsoft OneDrive



Microsoft Outlook



Microsoft Teams



Microsoft Loop



Microsoft
Whiteboard

Technical requirements for Copilot for Microsoft 365

- ✓ Microsoft 365 E3 or E5
Microsoft 365 Business Premium or Business Standard
- ✓ Microsoft Entra ID account (Entra ID)¹
- ✓ 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 supported
- ✓ 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

Getting Started with Copilot

AppDirect Cloud Services



Copilot Customer Readiness Workshops

AI Powered Productivity

Description: Prepare SMBs for the AI revolution in the field of Modern Work. This briefing will **demonstrate the benefits of Copilot for Microsoft 365** and help customer understand how to safeguard data and drive adoption.

Audience: **Business or IT decision makers for SMBs up to 300 seats**, especially those who have a stake in their organization's AI and digital transformation story.

Registration: [Copilot Customer Workshop](#) landing page

Agenda | 90 mins:

- The AI-Powered Future of Work
- Copilot for Microsoft 365 Overview
- Productivity Demo
- Readiness Checklist
- Copilot Offers

Outcomes: **Readiness Resources**

Copilot Technical Briefing

Description: Prepare SMBs for a successful Copilot for Microsoft 365 implementation. This briefing will cover Copilot for Microsoft 365 technical readiness topics and help IT admins jumpstart their AI journey.

Audience: **Admins or IT decision makers for SMBs up to 300 seats**, especially those who have responsibility for Microsoft 365 tenant security and configurations.

Registration: [Copilot Customer Workshop](#) landing page

Agenda | 2 hrs:

- Copilot for Microsoft 365 Overview
- Functional Architecture
- Securing Copilot for Microsoft 365
- Technical Requirements & Setup Guide
- Adoption & Usage Reports
- Copilot Offers

Outcomes: **Readiness Resources**

AppDirect Cloud Services Offers

Cloud Migration



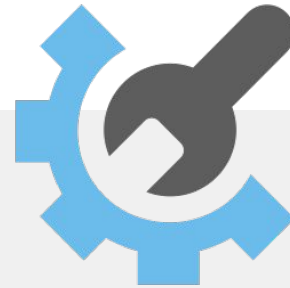
Migrate mailbox to the cloud and standardize on Microsoft 365 secured productivity.

Setup tenant environment, configure identity services, deploy Exchange Online and Teams services.

Includes AI Chat quickstart.

\$20 / mailbox*

Copilot Readiness



Conduct Copilot for Microsoft 365 **technical and security assessment**.

Provide high-level guidance on data governance, compliance, and security optimization..

Deliver Microsoft 365 Copilot deployment and readiness checklist.

\$4,975*

Copilot Activation



Bundled with 30 Copilot licenses.

Discover Microsoft 365 Copilot business scenarios. Conduct **training and adoption workshops**.

Provide best-practices to enable key scenarios — deploy Copilot for defined pilot users.

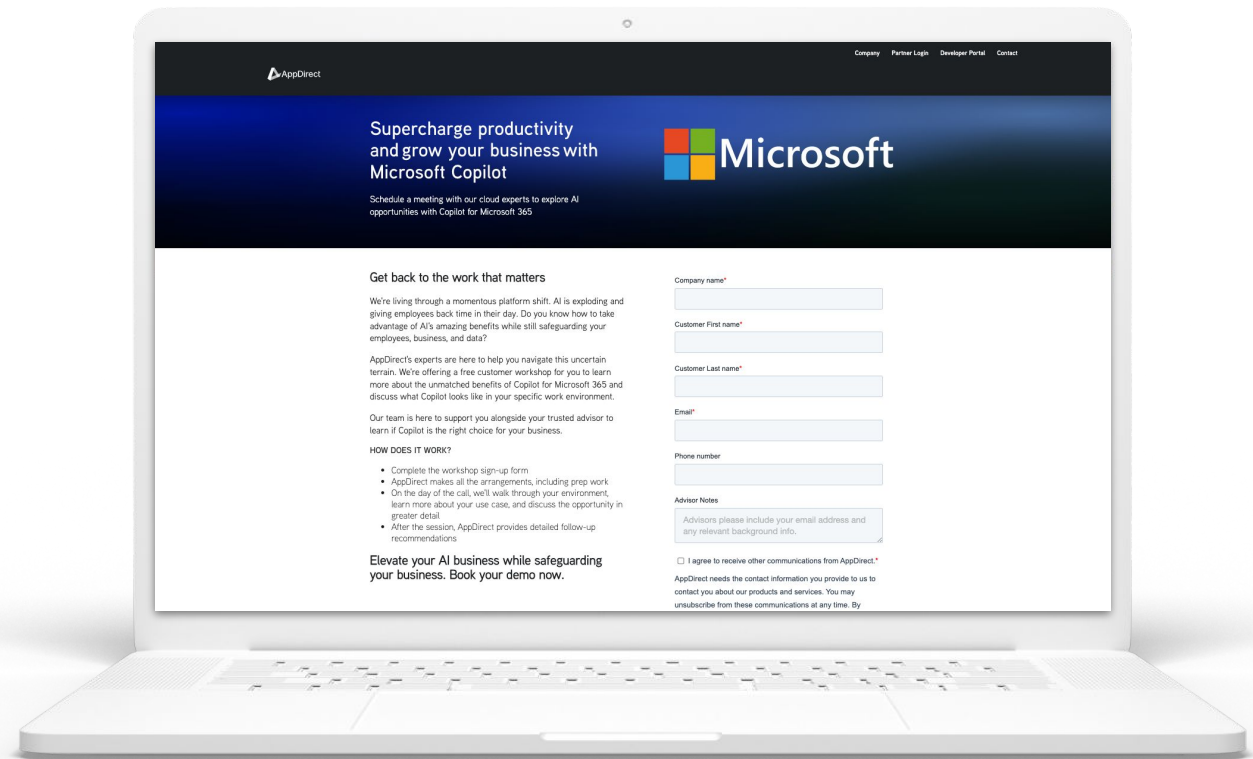
\$3K / month

What can AI do for your business?

Register now for a Copilot Briefing with AppDirect

Ready to be more creative,
and productive with the
power of AI so you can
focus on what matters?

Find out how Copilot for
Microsoft 365 can help in a
productivity briefing
featuring live demos and
real-life scenarios.



Thank You

