



MICROSOFT 365 COPILOT AI MADE EASY

PRESENTER



Chad Hiatt
CIO
Aldridge





MICROSOFT 365 COPILOT

AI MADE
RELATIVELY EASIER

PRESENTER



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WHAT IS AI?



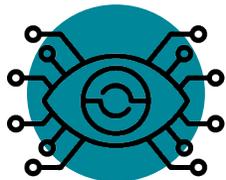
NATURAL LANGUAGE PROCESSING (NLP)

Large Language Models (LLMs) that understand and/or generate human text.
Data types: text documents and audio recordings



PREDICTIVE MODELING

Machine learning models to predict new outcomes based on historical data. *Data types:* tabular data (anything in your database or excel sheets)



COMPUTER VISION

Models to capture information (content, data, presence) from images.



<https://aldridge.com/webinar-ai-made-simple-start-transforming-your-business/>

EVOLVING FROM

TRADITIONAL SOFTWARE

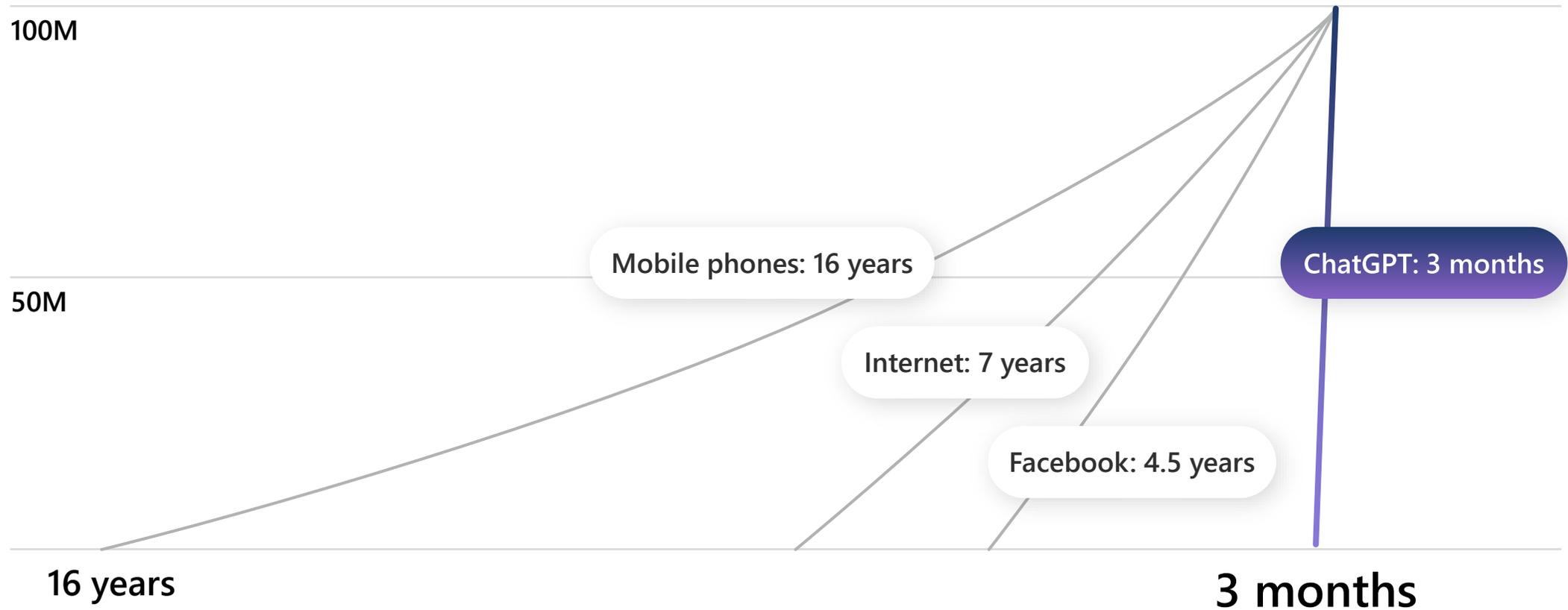
- Deterministic
- Interface via menus, commands (user skills)
- **User adapts**

AI-POWERED SOFTWARE

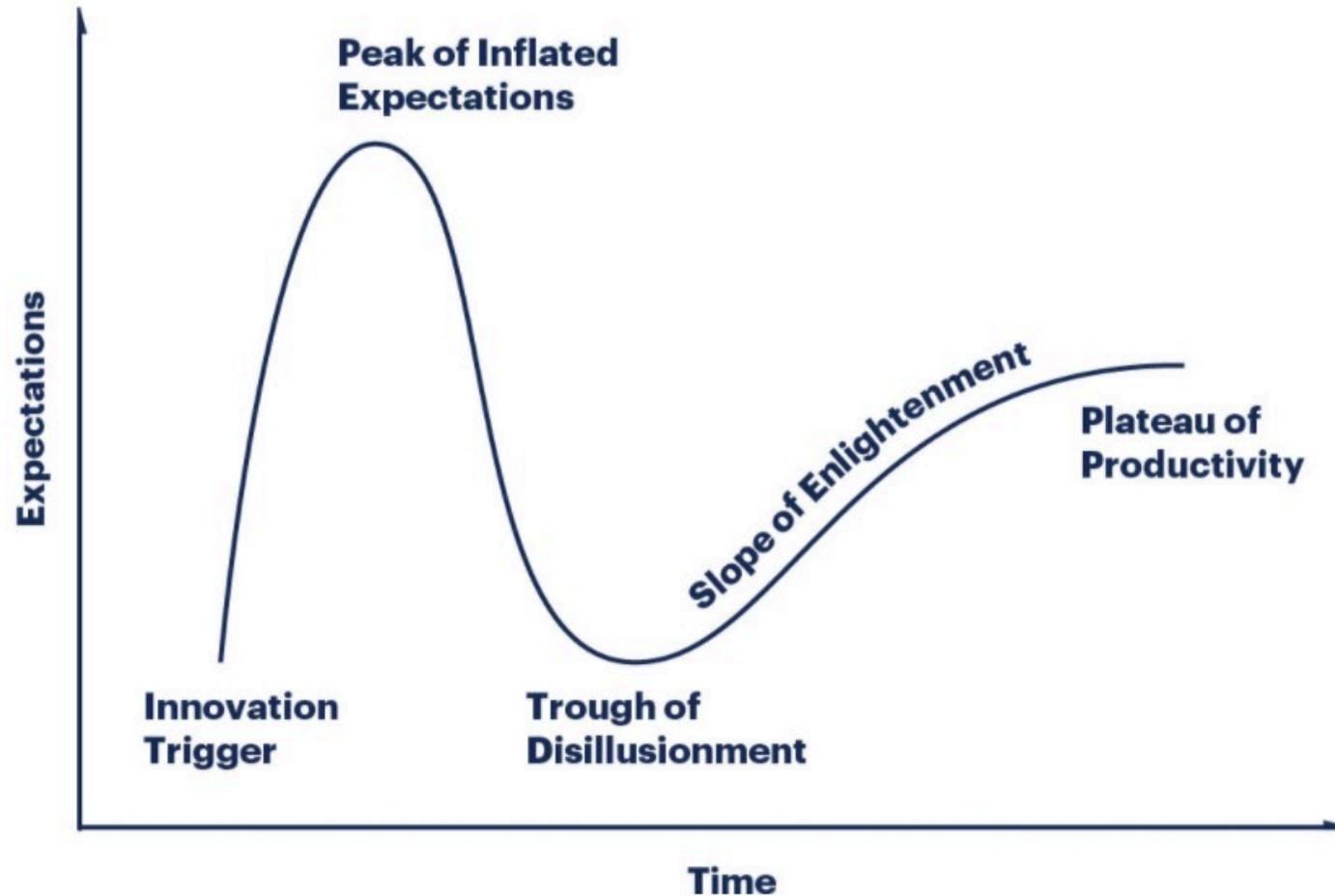
- Non-deterministic
- Interface via “I want...” (software skills)
- **Software adapts**

IS GENERATIVE AI ALL HYPE?

Time to reach 100M users



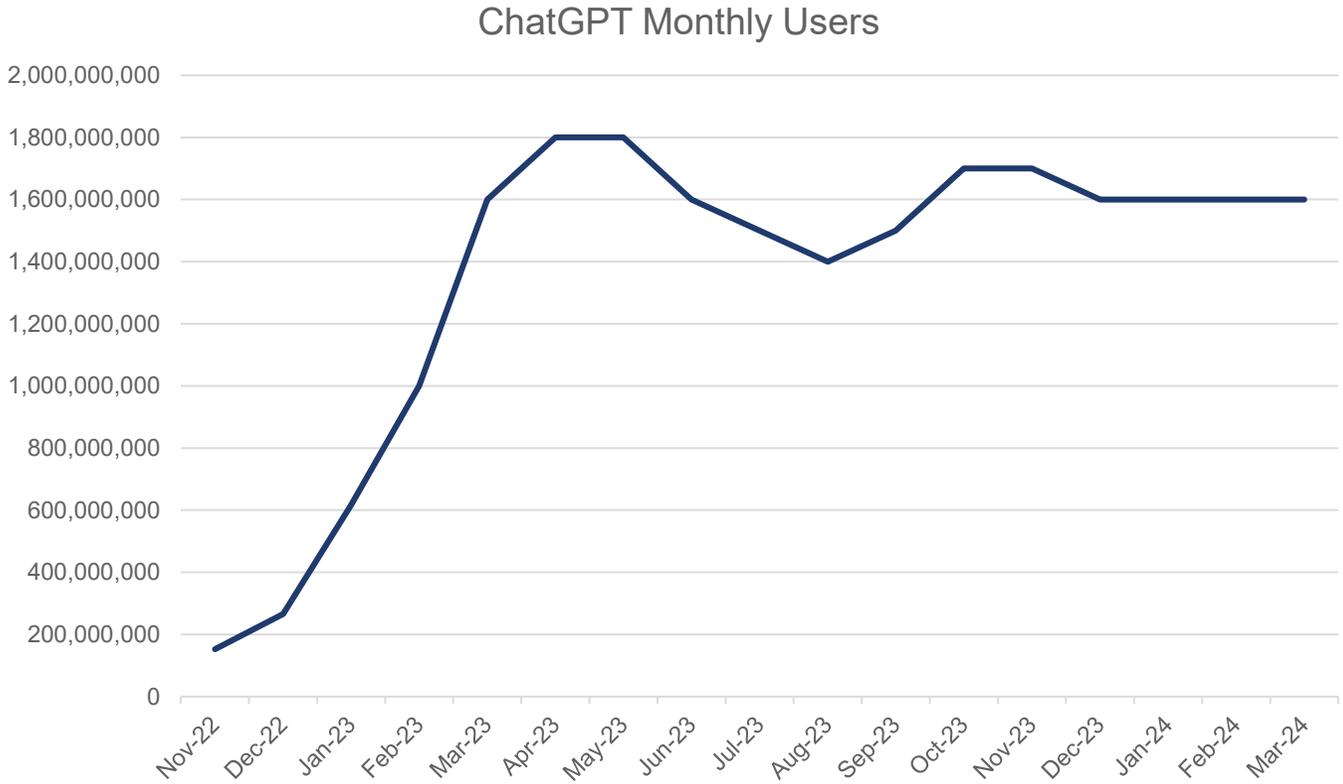
GENERATIVE AI HYPE CYCLE



Source: Gartner



CHATGPT MONTHLY USERS



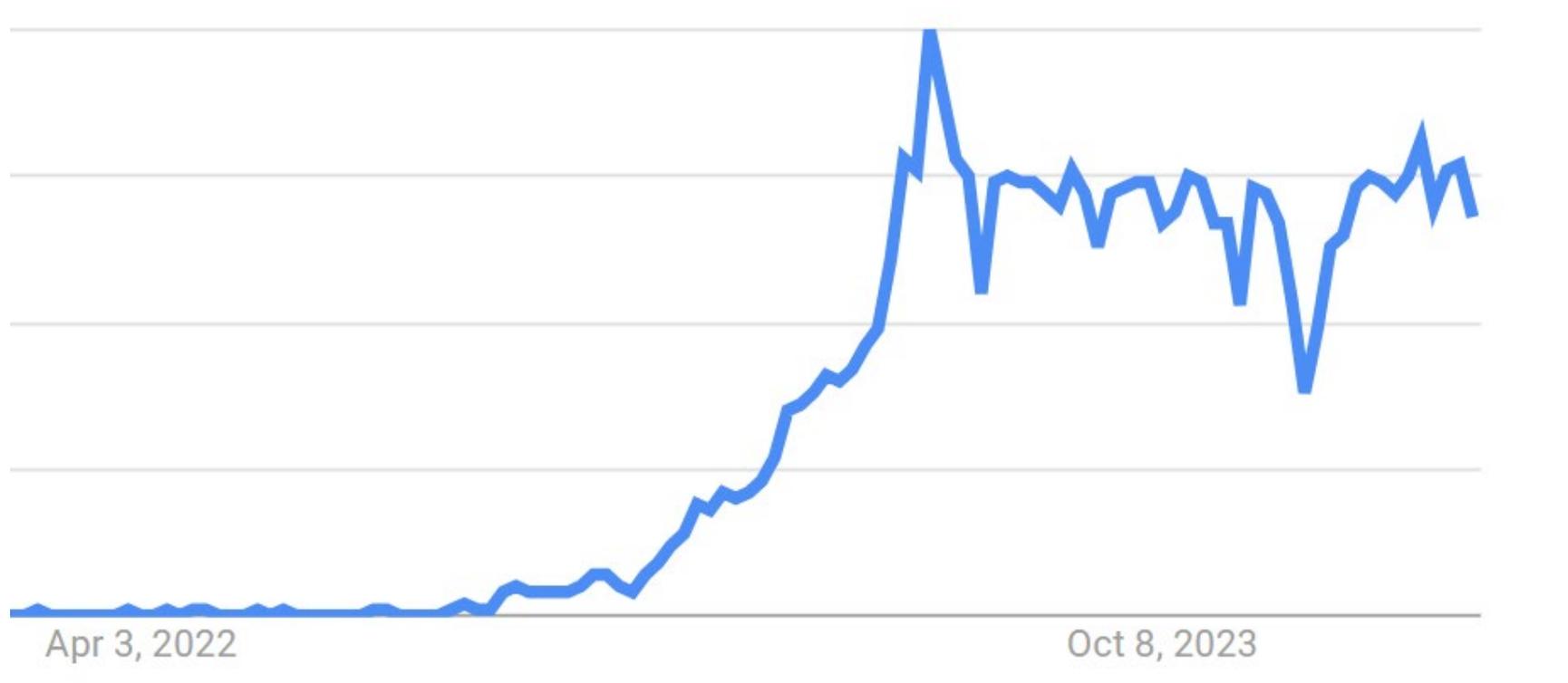
Source: [SimilarWeb](#)





GENERATIVE AI INTEREST

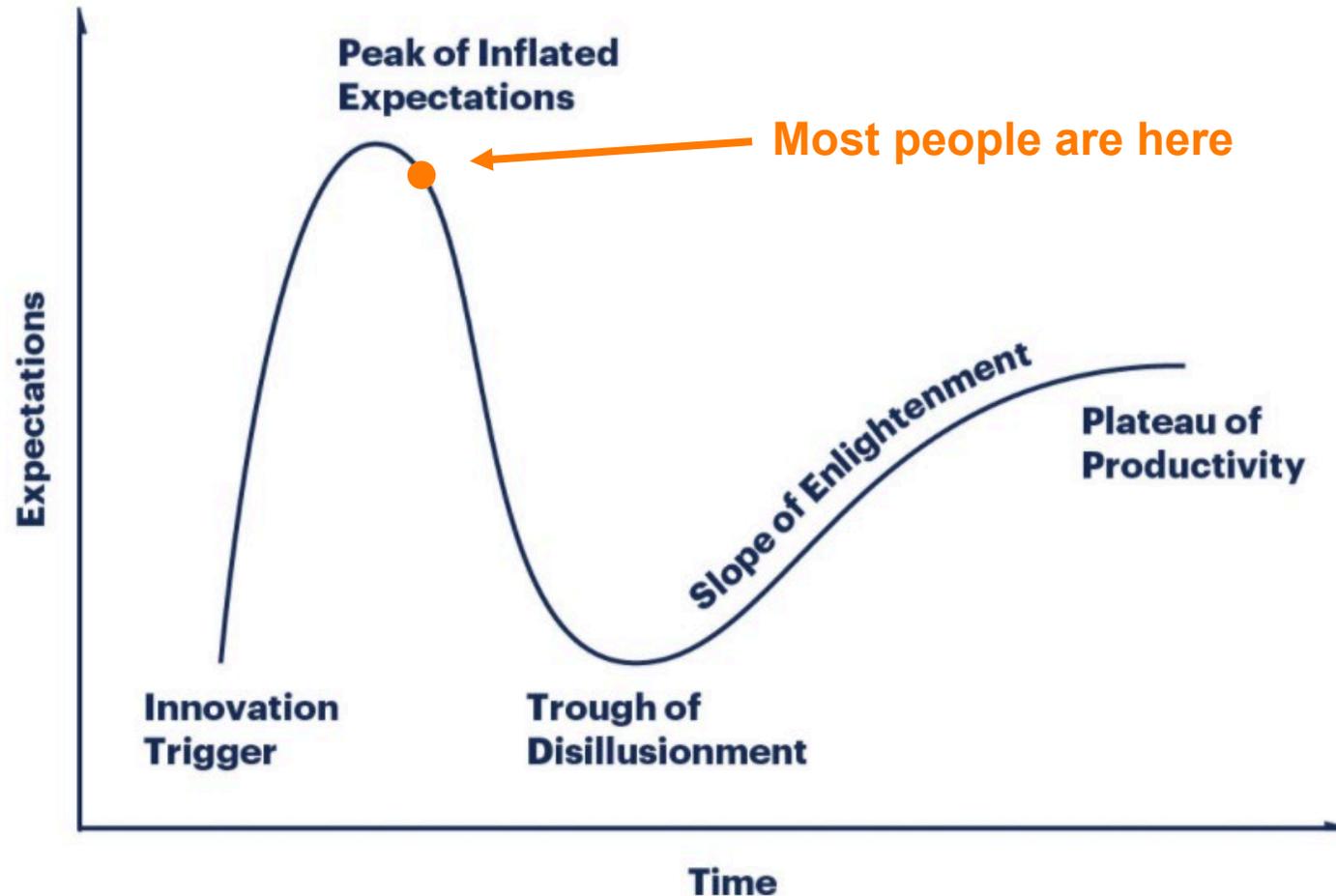
Google search trends for “Generative AI” over the past 2 years



Source: Google Search Trends

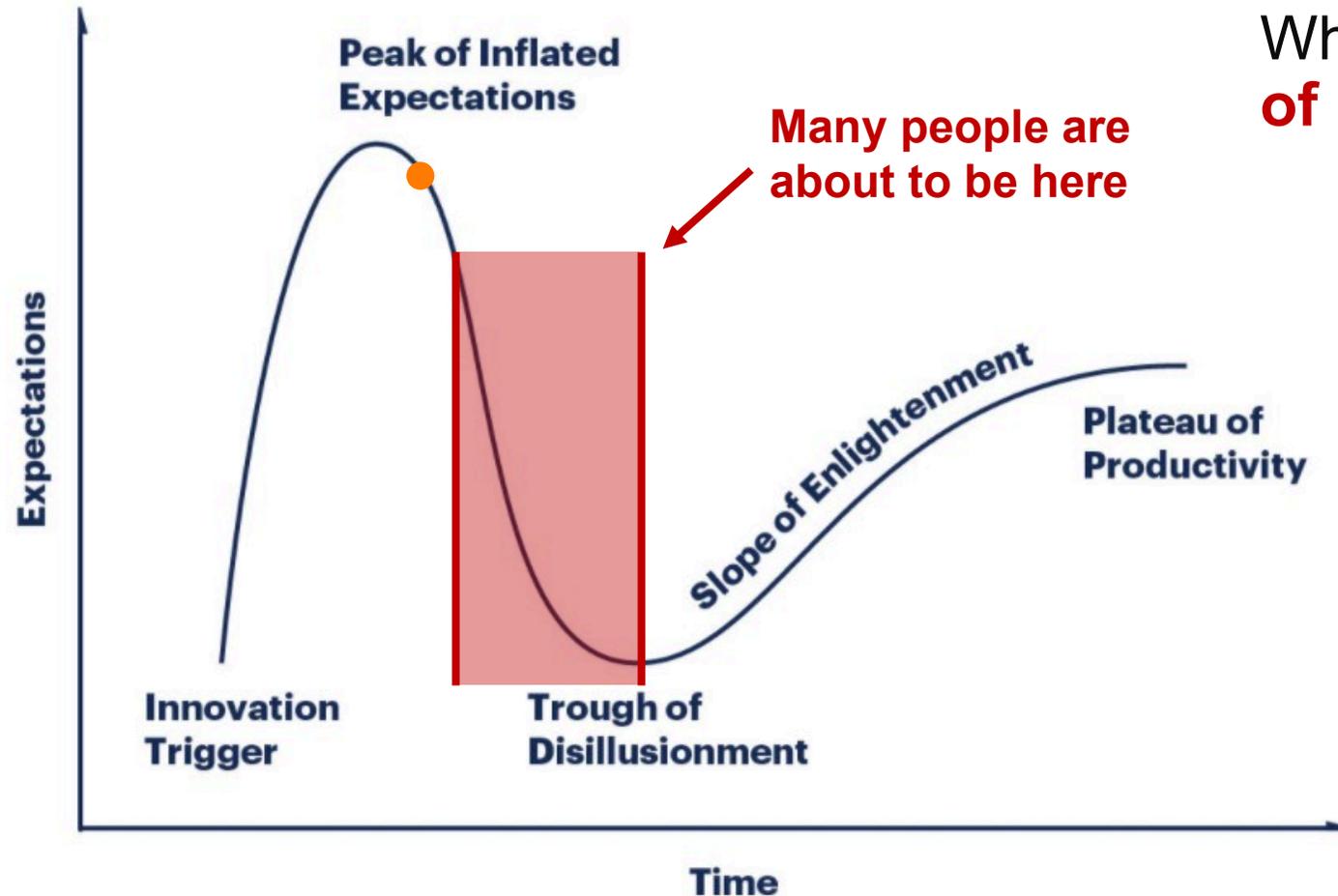


GENERATIVE AI HYPE CYCLE



Source: Gartner

GENERATIVE AI HYPE CYCLE

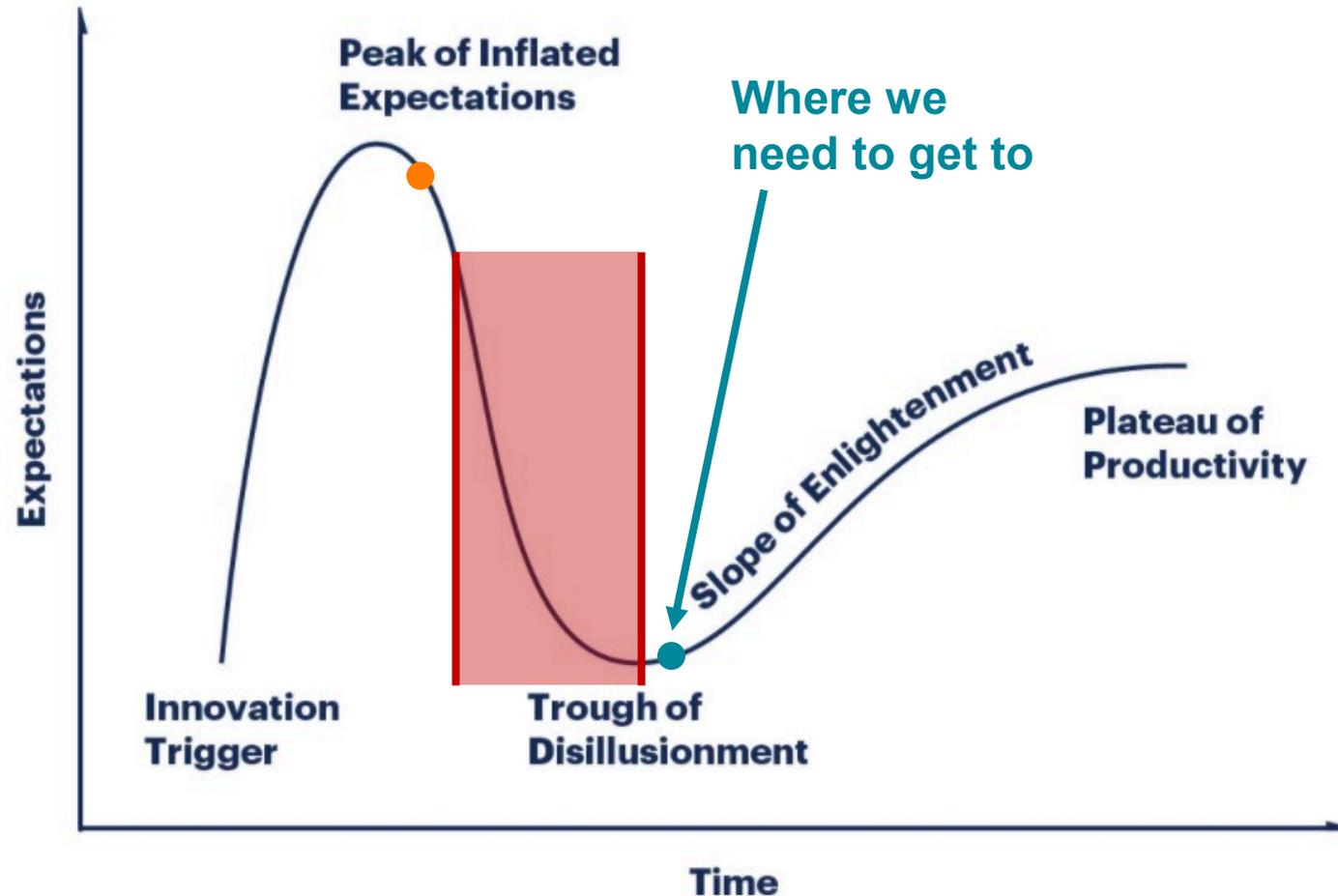


What will lead to the **Trough of Disillusionment**?

- Individuals trying out new AI tools on their own creating “Shadow IT”
- Losing control of your data and who can access privileged information
- Outputs that aren’t specific or relevant to your business
- Wasting your own time and money trying to make AI useful

Source: Gartner

GENERATIVE AI HYPE CYCLE



How do we skip the trough, and start working towards productive AI?

Successfully leveraging AI as a business toolset advantage

COPILOT: LOW-COST, LOW-RISK

Shadow IT

- Built into the daily tools you already use

Losing control of your data

- Protected under Microsoft's subscriber data privacy agreement

Irrelevant outputs

- Uses your own data to generate relevant outputs, specific to your business

Wasting your own time and money

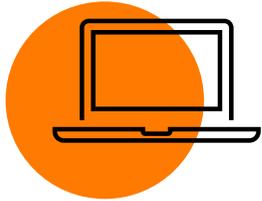
- Leverage Microsoft's R&D instead of figuring it out yourself

Copilot for Microsoft 365





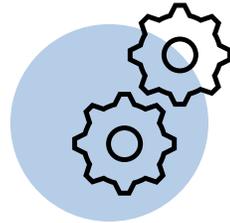
INTERACTIVE AI CONVENIENCE



WEB

Tools that you must go out and find and use generic information from the web.

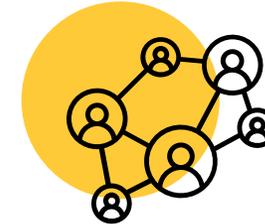
ChatGPT, Copilot



INTEGRATED

Built into your tools and can use data specific to your business for its outputs.

Copilot for Microsoft 365



ROLE-BASED

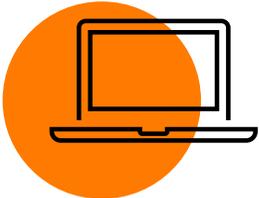
Built into your tools and trained and take proactive functions based on the role it's built for.

Harvey Legal, Copilot for Sales, Copilot for Service





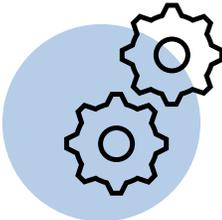
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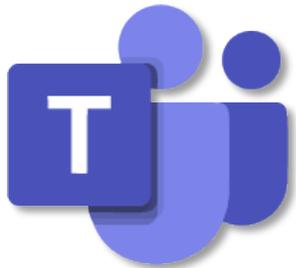


COPILOT FOR MICROSOFT 365 USES

For communications:



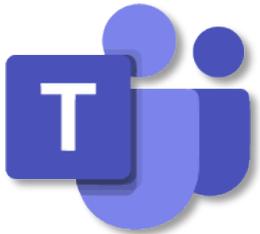
Stay on top of your emails, action items, and questions that need your attention



Get executive summaries of meetings and get quick answers about what was



MICROSOFT TEAMS & OUTLOOK COPILOT DEMO



COPILOT FOR MICROSOFT 365 USES

For productivity:



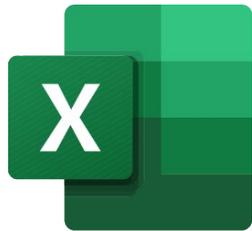
Summarize documents, write your drafts for you, and answer questions about the content



Analyze your data, generate charts based on tables, and format data without having to know any functions



MICROSOFT WORD & EXCEL COPILOT DEMO



COPILOT EXCEL EXAMPLE

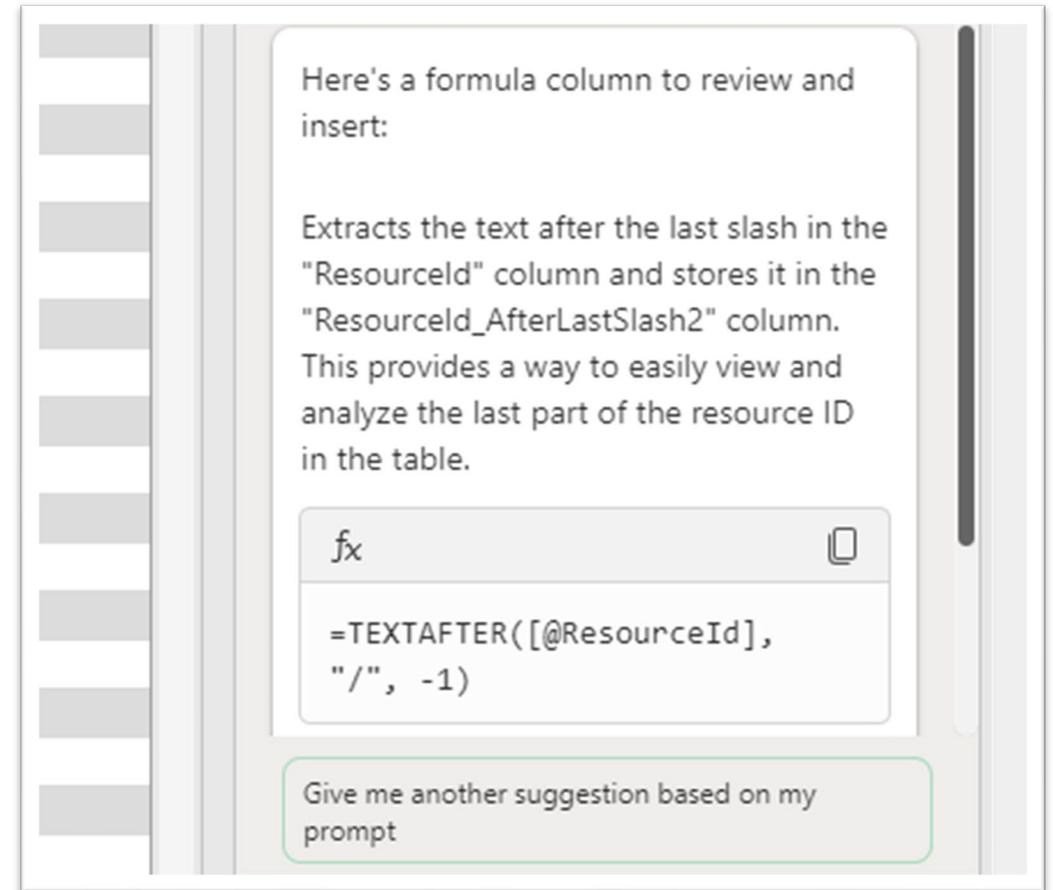
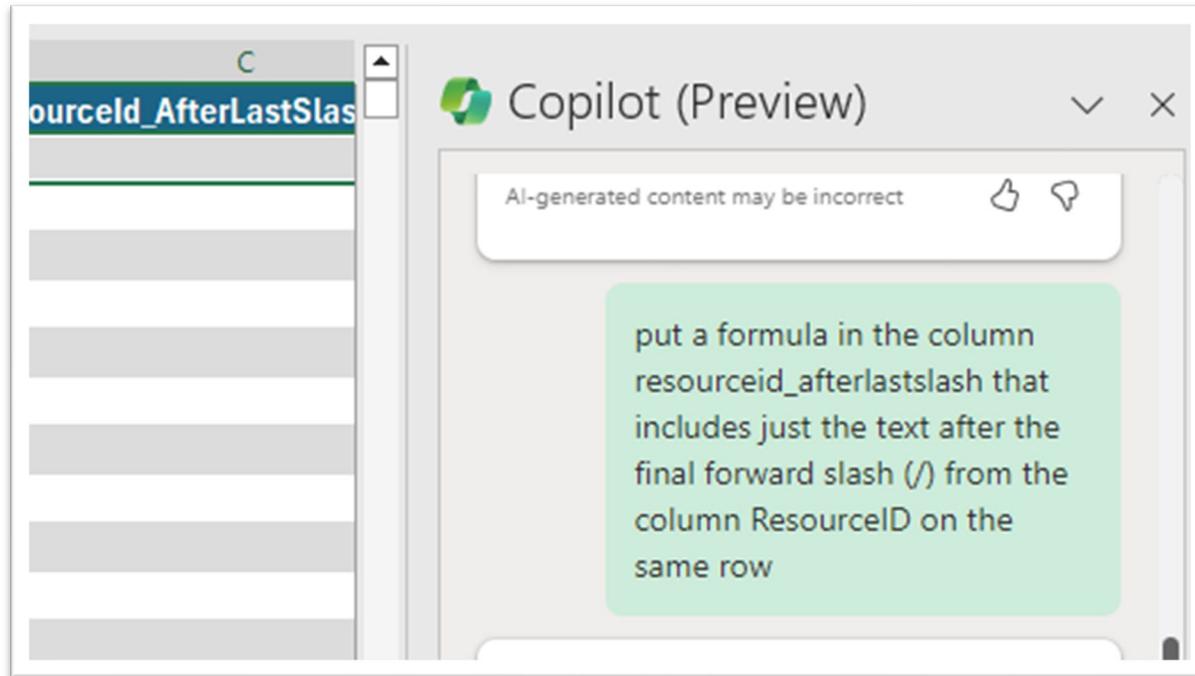
- Large set of text data from Microsoft Azure.
- Difficult to PivotTable because the text descriptions were so long.
- Only needed the last bit of the text to make it relevant for analysis.
- What was in the ResourceID column:

`/subscriptions/c023432-390f-20/resourcegroups/sampleco-corp/providers/microsoft.computer/disks/sampleco-voip-osdisk_1_73b4a8`

- All I wanted:

`sampleco-voip-osdisk_1_73b4a8`

COPILOT EXCEL EXAMPLE



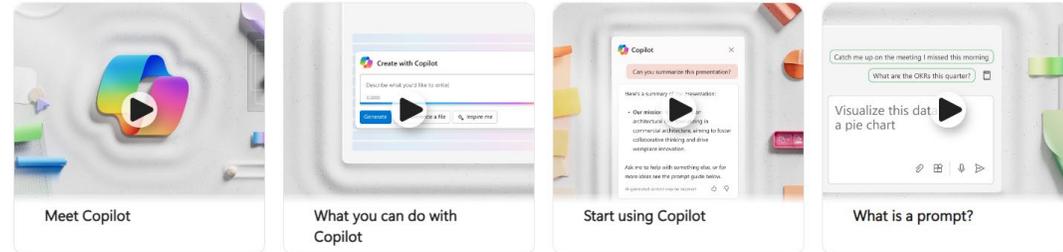
COPILOT LAB

Free resources from Microsoft to help you use Copilot

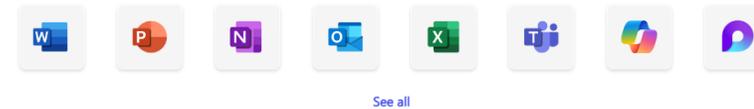
<https://copilot.cloud.microsoft/en-US/prompts>



Start your Copilot journey

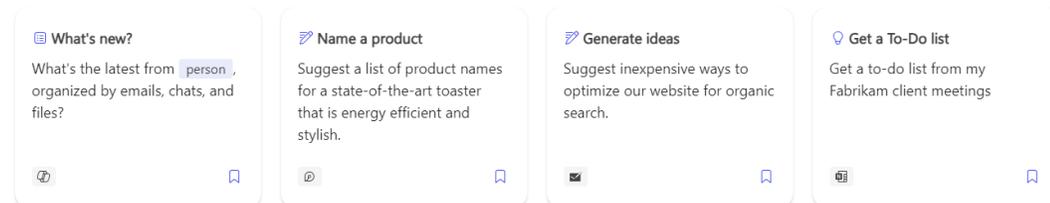


Copilot in your everyday apps



[See all](#)

Powerful prompts, a click away



COPILOT LAB



Free resources from
to help you use Copilot

<https://copilot.cloud.microsoft/>

Start your Copilot journey

The image displays several overlapping cards from the Copilot Lab interface. The cards include:

- Draft an email:** Write an email congratulating my team on the end of the fiscal year.
- Understand quickly:** Explain this document in three sentences.
- Create presentations:** Create a new presentation based on file.
- What's new?:** What's the latest from person, organized by emails, chats, and files?
- Generate ideas:** Suggest inexpensive ways to optimize our website for organic search.
- Get a To-Do list:** Get a to-do list from my Fabrikam client meetings.

...pts, a click away

HOW MUCH DOES COPILOT COST?



The two main options we're discussing...

Copilot (web version)

<https://copilot.microsoft.com>

Free -- works with public knowledge and content, not your business information.

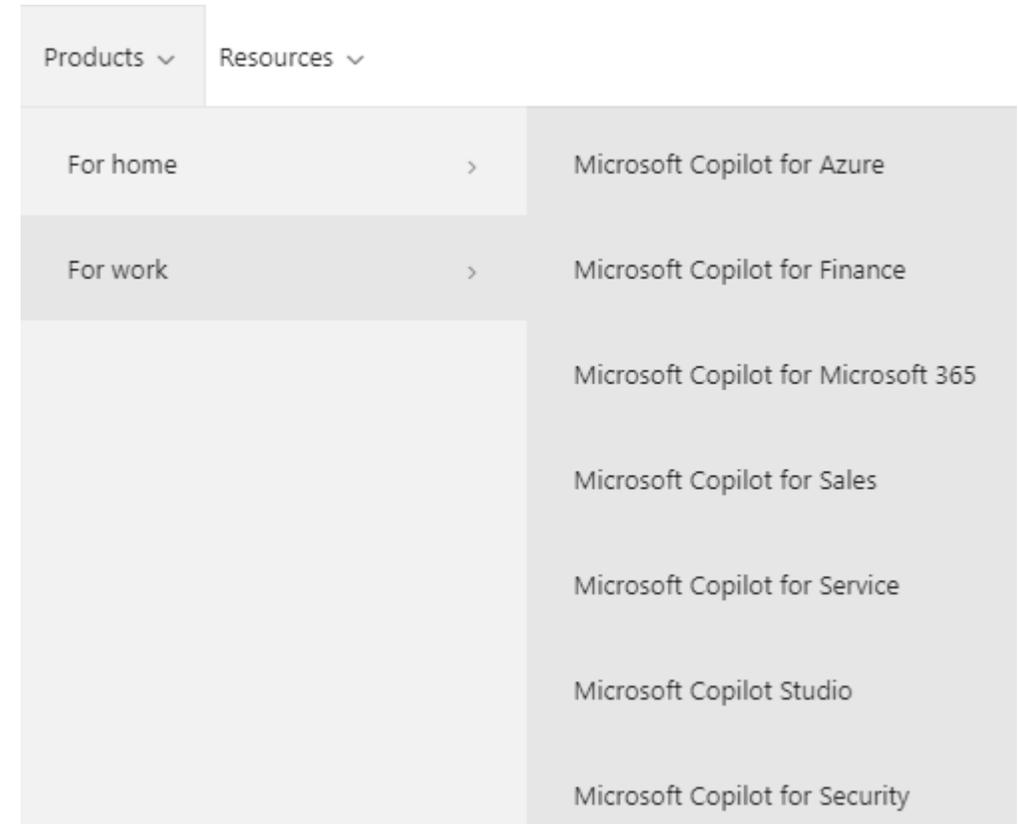
+ Included data privacy with M365 Business Premium.

+ Works with your business information if also subscribed to Copilot for Microsoft 365 (below).

Copilot for Microsoft 365

\$360/user/year

Enables Copilot AI to securely work with your Microsoft 365 business data and applications.



LAUNCHING COPILOT



1.
How significant is your potential organizational risk?



2.
How many team members should initially get it?



3.
How will you know if you're getting your money's worth?

LAUNCHING COPILOT



1.
How significant is your potential organizational risk?

- Copilot Readiness
- User Account Security
- Information Security



2.
How many team members should initially get it?



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LAUNCHING COPILOT



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2.
How many team members should initially get it?

- As many as you can!
- Early adopters, experimenters, feedback
- Working groups



3.
How will you know if you're getting your money's worth?

LAUNCHING COPILOT



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3.
How will you know if you're getting your money's worth?

- Check usage
- Wins, feedback cycle

1. READINESS & RISK MANAGEMENT

What's your organization's security posture and risk tolerance?
Microsoft Copilot adoption should align to it, not break it.

Low Concern

Your organization works with little sensitive data, or you're comfortable the risk is low

Conscientious

You want to be confident your sensitive business information is securely stored and organized

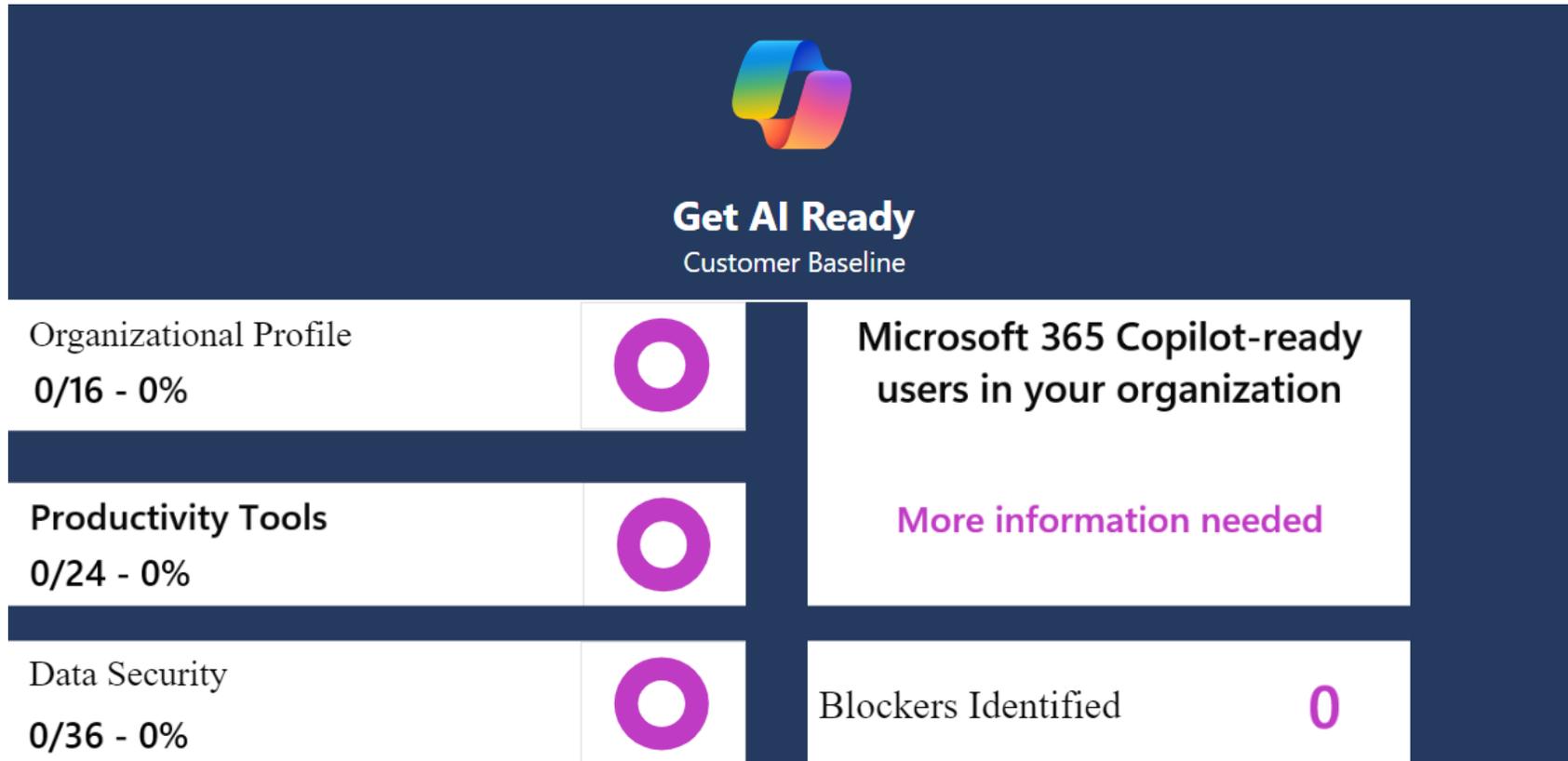
Regulated

You operate in an industry with regulatory or compliance requirements, and must exercise due care

1. READINESS & RISK MANAGEMENT

- ✔ **Microsoft Copilot Readiness Assessment**
Are you using the right M365 services and subscriptions to benefit from Microsoft Copilot?
- ✔ **Cybersecurity Posture Assessment**
Do you have appropriate protection for your user account security, information resources, and cybersecurity response readiness to reduce the risk of a threat actor abusing Copilot?
- ✔ **Data Hygiene Assessment**
Is your business data already organized and secured to restrict sensitive information to only the appropriate people and roles?

COPILOT READINESS ASSESSMENT



COPILOT READINESS ASSESSMENT

Organizational Profile	6	Has your organization requested AI capabilities (either generically or Microsoft 365 Copilot specifically) to support them in being more productive?	a) My organization is not asking for AI capabilities.
			b) Leadership has asked for AI capabilities.
			c) Specific areas of my business have requested AI capabilities (< 25% of departments).
			d) Multiple areas of my business have requested AI capabilities (> 25% of departments).
	7	Has your organization targeted any use cases or scenarios that could be supported or enhanced by AI capabilities provided by Microsoft 365 Copilot?	a) No.
			b) No, but we intend to start the process soon.
			c) Yes, as a thought exercise, but not validated.
			d) Yes, confirmed with stakeholders in the individual business area(s).
	8	How would you identify the profile of the users you are looking to target with Copilot?	a) Frontline Workers (information consumers).
			b) Knowledge Workers (information producers).

COPILOT READINESS ASSESSMENT

Data Security	22	Does your organization protect sensitive information in the organization at the individual document level?	a) Yes, using content aware document classification (e.g. Purview Information Protection).
			b) Yes, using discreet or granular file permissions.
			c) No.
	23	Does your organization have a process to regularly audit and act on stale or inactive data (i.e. Retention policies)?	a) Yes, we have processes that automatically remove or retain information based on organizational or regulatory requirements.
			b) Yes, we have published policies but do not automate enforcement.
			c) No.
	24	Does your organization protect (encrypt) data stored in Microsoft 365 at the content level using rights management?	a) Yes, we use Microsoft 365 built-in encryption keys.
			b) Yes, we leverage Bring your own key / Customer Key.
			c) Yes we leverage a) or b) along with double key encryption or hold your own key.
d) No, we do not protect data at the content level.			

CYBERSECURITY ASSESSMENT

✓ **Tools and Protection**

Do you already have the appropriate cybersecurity technologies in place?

✓ **Cybersecurity Posture**

Do you already have the right people and processes and culture to operate securely?

✓ **Organization Response Readiness**

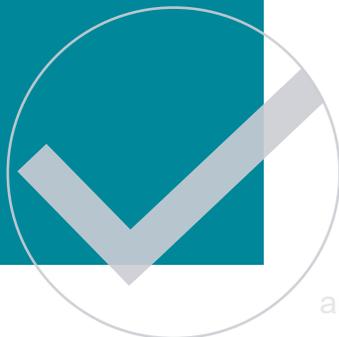
Are you ready to detect unusual cybersecurity events, investigate them, and respond to them?

*Microsoft Copilot, by itself, doesn't introduce new security vulnerabilities...
but it does make it easier to exploit existing gaps in your cybersecurity approach.*

CYBERSECURITY ASSESSMENT

- ✓ Managed Detection & Response (MDR)
- ✓ Security Awareness Training
- ✓ Phishing Testing
- ✓ Dark Web Monitoring
- ✓ Internet Web Filtering
- ✓ E-Mail Filtering for Microsoft 365
- ✓ Basic MFA for Microsoft 365

**Basic
Protection**



- ✓ Managed Detection & Response (MDR)
- ✓ Security Awareness Training
- ✓ Phishing Testing
- ✓ Dark Web Monitoring
- ✓ Internet Web Filtering
- ✓ E-Mail Filtering for Microsoft 365
- + Conditional MFA for Microsoft 365
- + Workstation Storage Encryption
- + MFA for Microsoft Windows Servers
- + External Vulnerability Scanning
- + Security Information & Event Management (SIEM)
- + Security Operations Center (SOC)
- + Aldridge Security Indicator Investigation

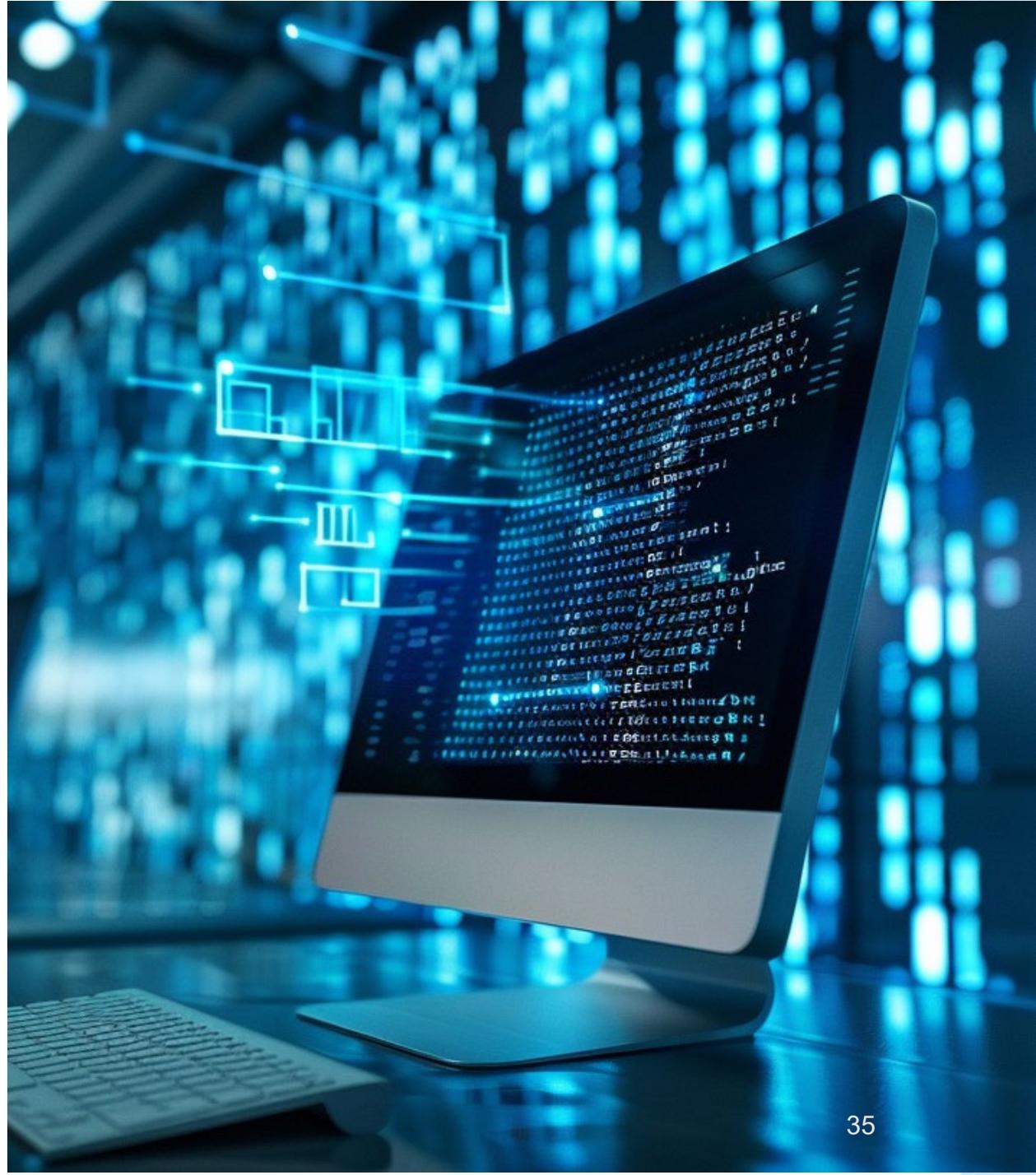
**2024
Standard**



WHY DO YOU NEED A DATA HYGIENE ASSESSMENT?

To make sure your sensitive company data is stored and shared appropriately.

What if someone asks Copilot to list everyone's salary?



COPILOT-MINDED DATA HYGIENE

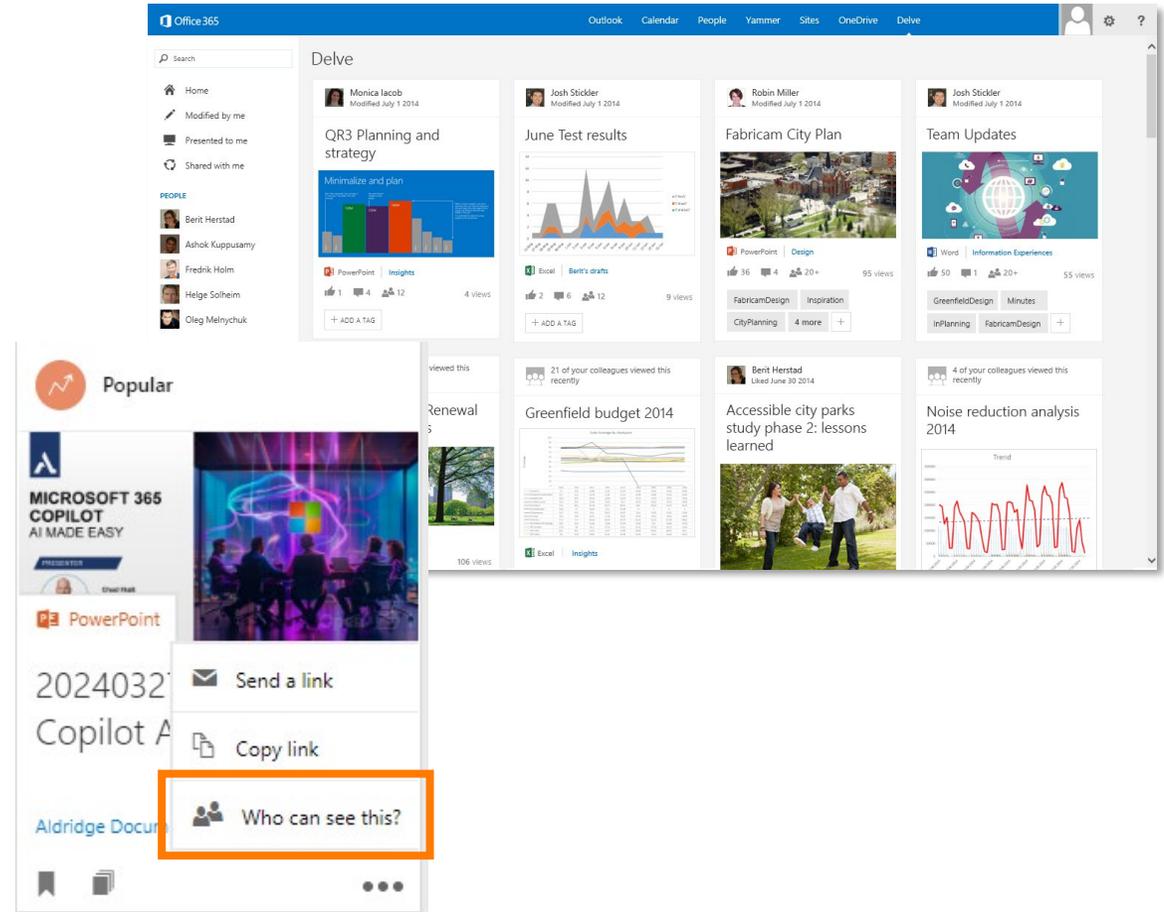
- ✔ **Documents and files organized in Microsoft SharePoint Online**
Microsoft Copilot works best with content in your organization's Microsoft 365 cloud storage.
- ✔ **Microsoft SharePoint document libraries secured by business group**
Do your privileged organization groups (HR, Executive, Legal, Product Development, etc) have their own separate libraries, secured by security groups, with appropriate membership?
- ✔ **Sensitivity Labeling and Controls**
Default and automated detection of sensitive information within content, and reasonable controls or restriction about access and acceptable actions.

All of these have benefits to your organization even beyond Microsoft Copilot. When they're in place, Microsoft respects these controls and ensures your organization team members' Copilot results are limited to content they have permission to interact with.

DATA HYGIENE SELF-TEST



1. Use Microsoft Delve (<https://delve.office.com>) for a quick spot check.
2. Search for privileged keywords you know about your organization, or common words like “payroll,” “salary,” “strategy,” or “development.”
3. Click “Who can see this?” – are just the right roles and people listed?



2. HOW MANY PEOPLE SHOULD GET IT?

- ✓ Effective zero cost if a Microsoft Copilot for Microsoft 365 license saves a \$70K/yr team member an average of one hour per month. Microsoft's data and surveys of effective adopters suggests actual average time savings are 5+ hours per month.
- ✓ Knowledge, information synthesis, and communication/coordination team members may realize the fastest benefits.
- ✓ Executive team members may appreciate the summarization and catch-up features.
- ✓ Deploy in groups of people – working team, department, or recognized early adopters.

3. WHAT'S YOUR ROI?

- ✓ **How effective is your Copilot launch?**
Get buy-in, build enthusiasm, set expectations, share training, encourage experimentation.
- ✓ **Set challenges – “how’d you use Copilot this week?”**
Think through business cases where you have to summarize, digest, convert, or create content. Challenge your team members to purposefully try to use Copilot to save time in their work.
- ✓ **Measure adoption progress**
Use Microsoft Copilot’s administration console to see who’s experimenting with Copilot, and who’s incorporated it into their daily work.

CREATE A COPILOT LAUNCH PLAN

Establish:

- ① Success criteria or expectations
- ② Process for sharing “ah-ha! moments”, feedback
- ③ User training plan – structured or experimental

CREATE A COPILOT LAUNCH PLAN

Deploy Copilot to your Early adopter group



Early Adopters uncover use cases for each role



Create processes based on early adopters' experimentation



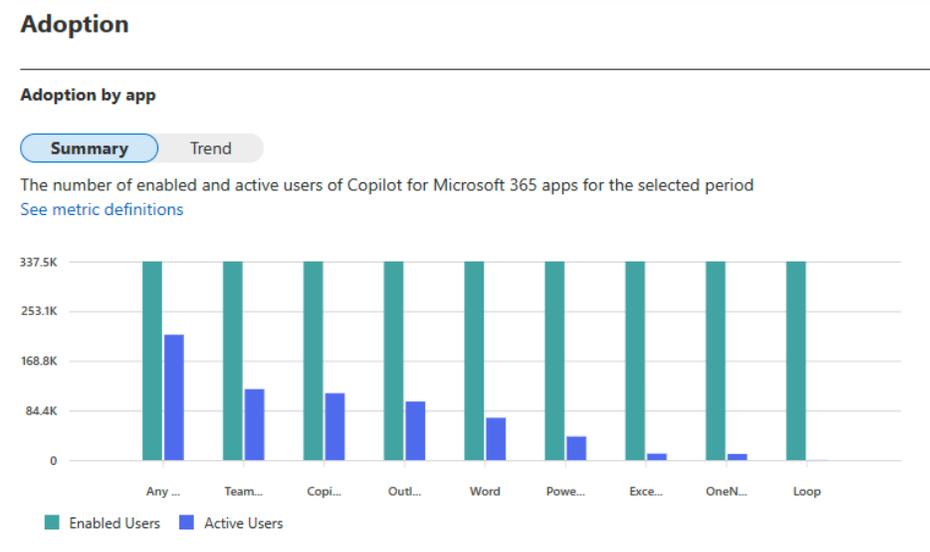
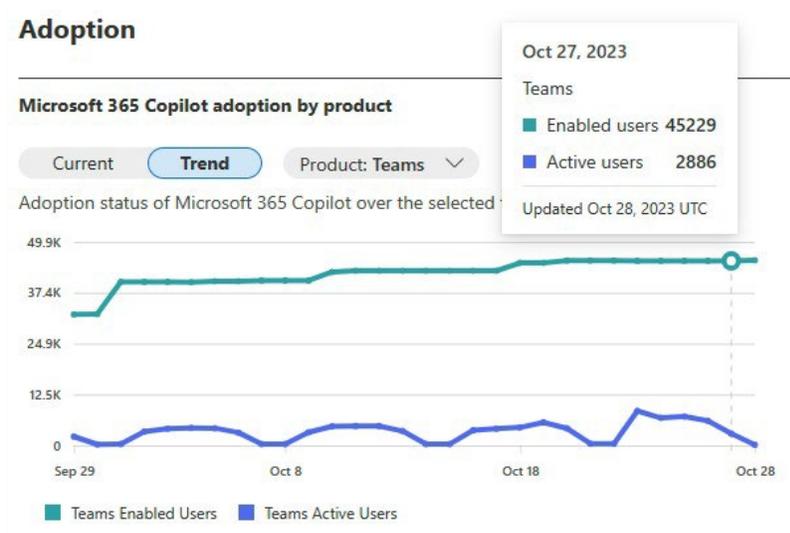
Roll out to everyone that will get value from Copilot



Monitor adoption

MEASURE COPILOT ADOPTION

Microsoft 365 reports in the Admin Center – Copilot for Microsoft 365 readiness and usage



Username	Display name	Last activity date	Last activity date of Teams...	Last activity date of Word ...
32A4EBC4A3968D48A23B26/	5549482A24321DEEB6A9A21/	Saturday, October 28, 2023	Tuesday, October 24, 2023	Saturday, October 28, 2023
FFE12963EA2E9BD356296C27	8C93BDCE7144586510361E67	Saturday, October 28, 2023	Thursday, October 12, 2023	Saturday, October 28, 2023
C15E0241004020B4B2F204DC	E897A6C102E0A70C59B13B35	Saturday, October 28, 2023	Friday, October 27, 2023	

WHEN YOU GET COPILOT...

- Assign a Copilot for Microsoft 365 license to each user.
- Within an hour or so, each user will receive a welcome e-mail.
- Welcome e-mail includes initial tips, tricks, and links to training resources.
- Meanwhile, Copilot begins assembling your private organization knowledge index.

Subject: Welcome to Microsoft Copilot for Microsoft 365

You don't often get email from microsoft365@information.microsoft.com. [Learn why this is important](#)

[External]

[View as a webpage](#)

 Microsoft 365



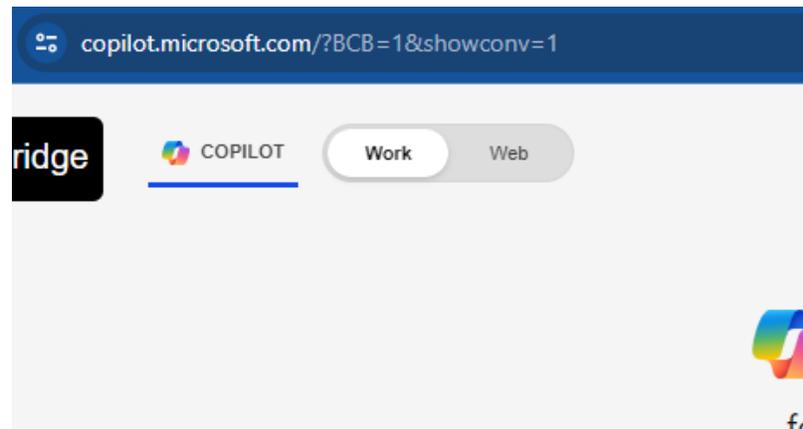
Get started with Copilot for Microsoft 365

Welcome to Microsoft Copilot for Microsoft 365. Bring generative AI to your organization using everyday apps like Word, Outlook, and Microsoft Teams. Visit the admin center for a step-by-step guide on how to get started.

[Go to the setup guide](#)

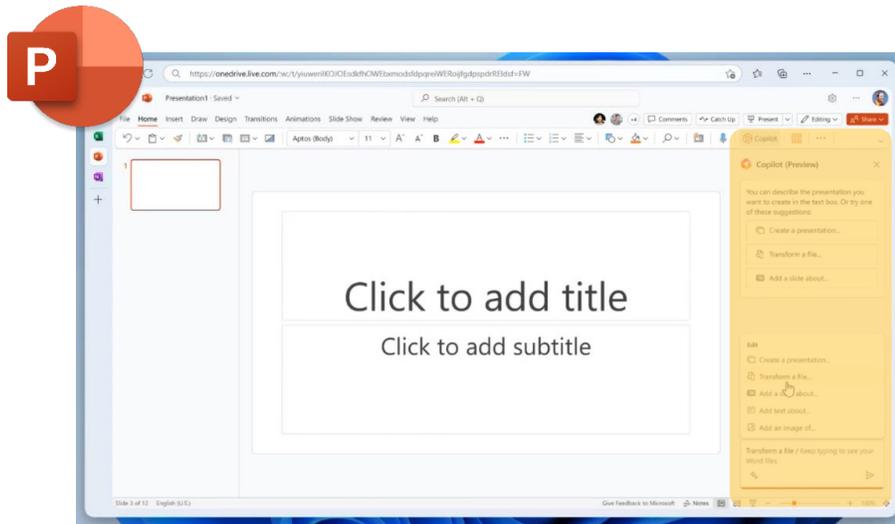
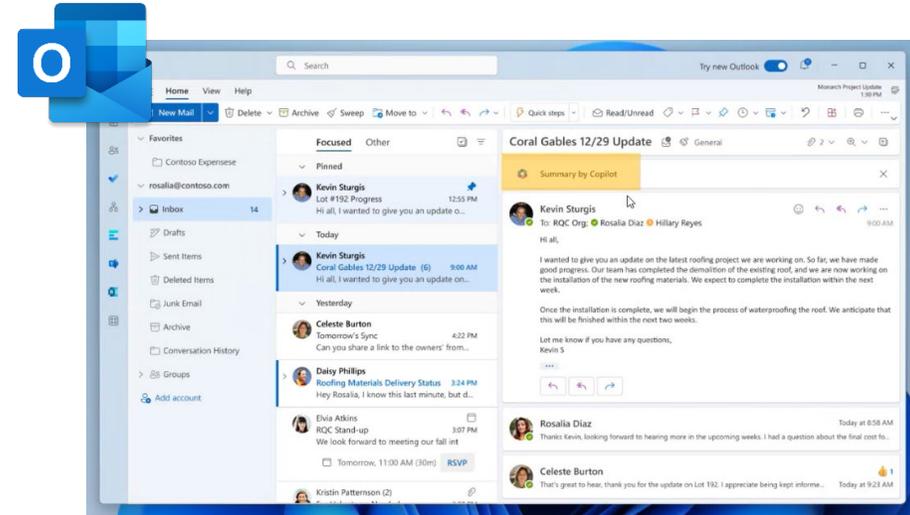
WHEN YOU GET COPILOT...

- Users will still be able to visit <https://copilot.microsoft.com>...
- But now they'll also be able to Sign In (in the upper right) to secure their queries...
- And they'll be able to toggle from “Web” to “Work” mode to begin working with their real, actual business information.



WHEN YOU GET COPILOT...

- Within a day, users will see Copilot features appear in their Microsoft Office applications.

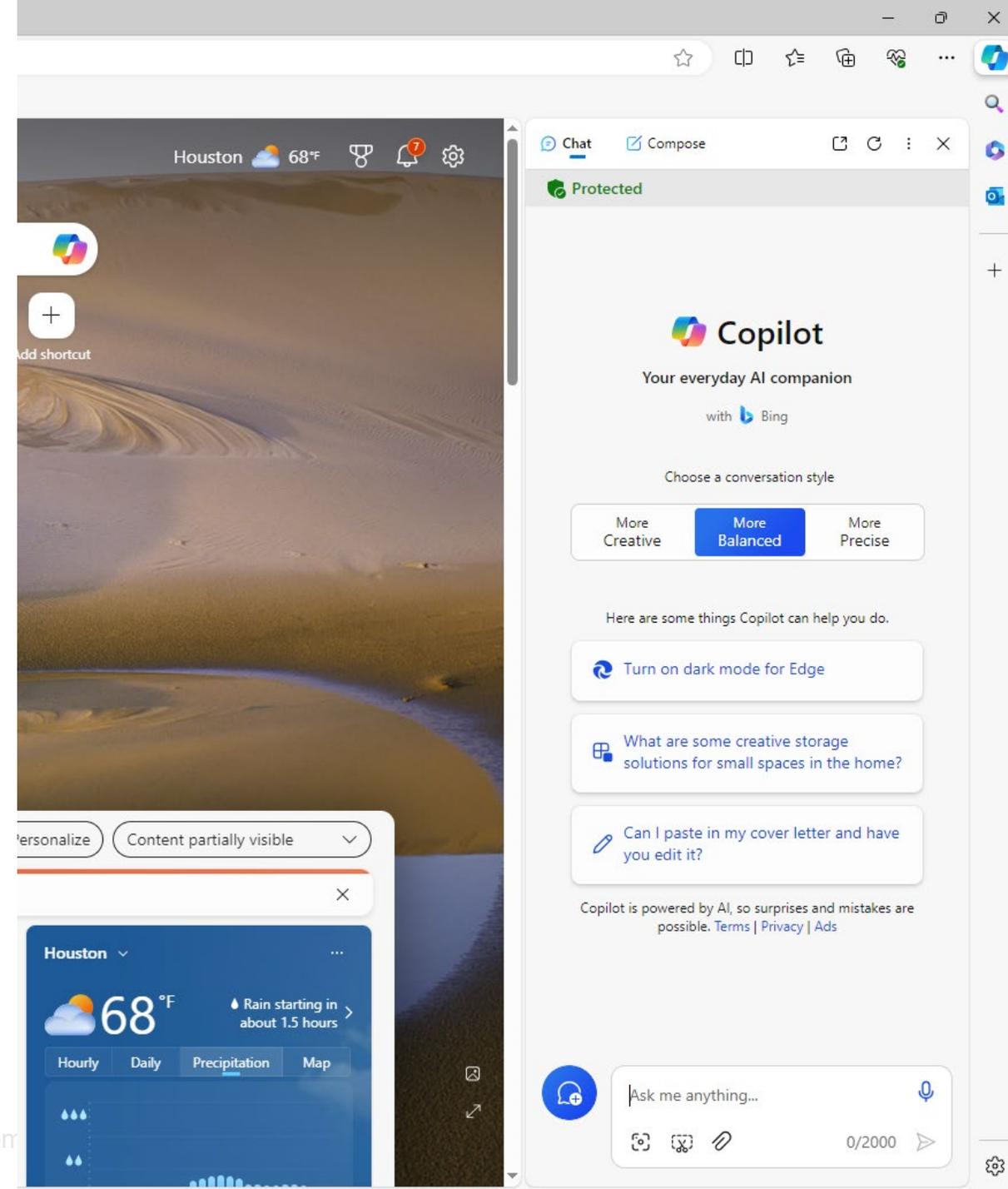




NEXT STEPS

NEXT STEPS

- Encourage (require?) your organization to avoid using free, online generative AI tools that don't have data privacy controls.
- Use <https://copilot.microsoft.com>, and Sign In with your organization Microsoft 365 Business Premium user account. It's included, and you get data privacy controls.



NEXT STEPS

- Consider your Readiness & Risk Management posture.
- Consider a Microsoft Copilot Readiness Assessment.
- Consider a Cybersecurity Posture Assessment.
- Consider a Data Hygiene Assessment.



Yes, we can help!

NEXT STEPS

Once you're ready...

- Choose your first adopters.
- Communicate, set expectations.
- Activate subscriptions.
- Solicit feedback, wins.
- Measure adoption.
- Expand usage.

