



M365 Copilot



Your SHI Team



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Public Sector Microsoft Digital Innovation Group

The mission of the Public Sector Microsoft Digital Innovation Group is to empower government entities, educational institutions, and healthcare organizations to achieve their strategic objectives through the innovative and effective use of Microsoft technologies.

Our goal is to drive digital transformation, enhance operational efficiency, strengthen security and compliance, and provide **customer-first** strategic guidance effectively positioning SHI as a trusted advisor.

Public Sector Excellence... *Delivered!*



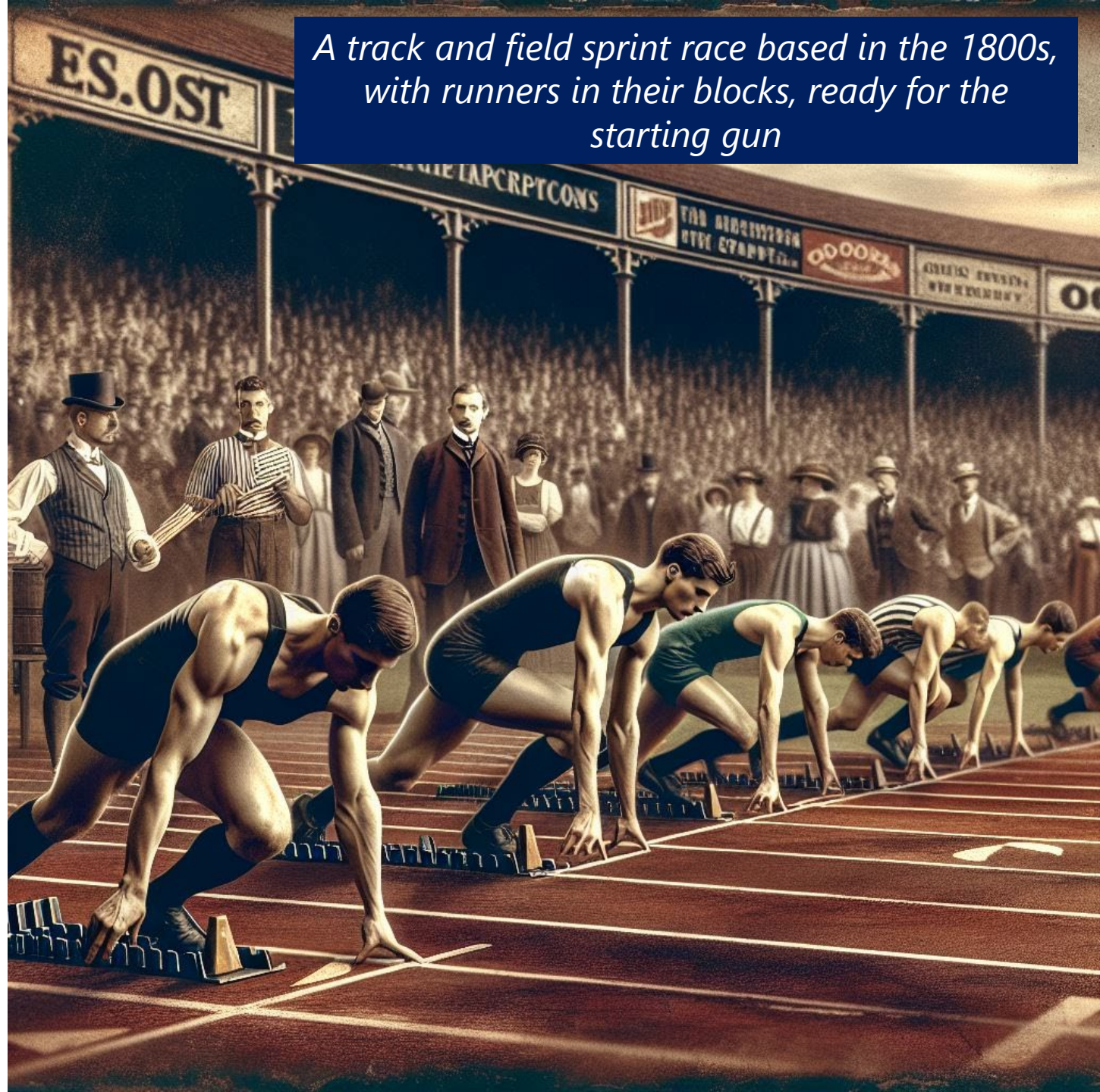
Today's Agenda

- 1) Use Cases
- 2) Technical and Strategic Implementation
- 3) Data Privacy and Security
- 4) Extending Copilot
- 5) User Training and Adoption
- 6) Future Roadmap
- 7) Performance Metrics
- 8) Licensing and Cost Management
- 9) The SHI Approach
- 10) Reference Slides

Let's GO!!!!



...as a Jackson Pollock painting



*A track and field sprint race based in the 1800s,
with runners in their blocks, ready for the
starting gun*

MSFT Family of Copilots & AI

Microsoft Copilots



Azure AI Studio



Azure OpenAI

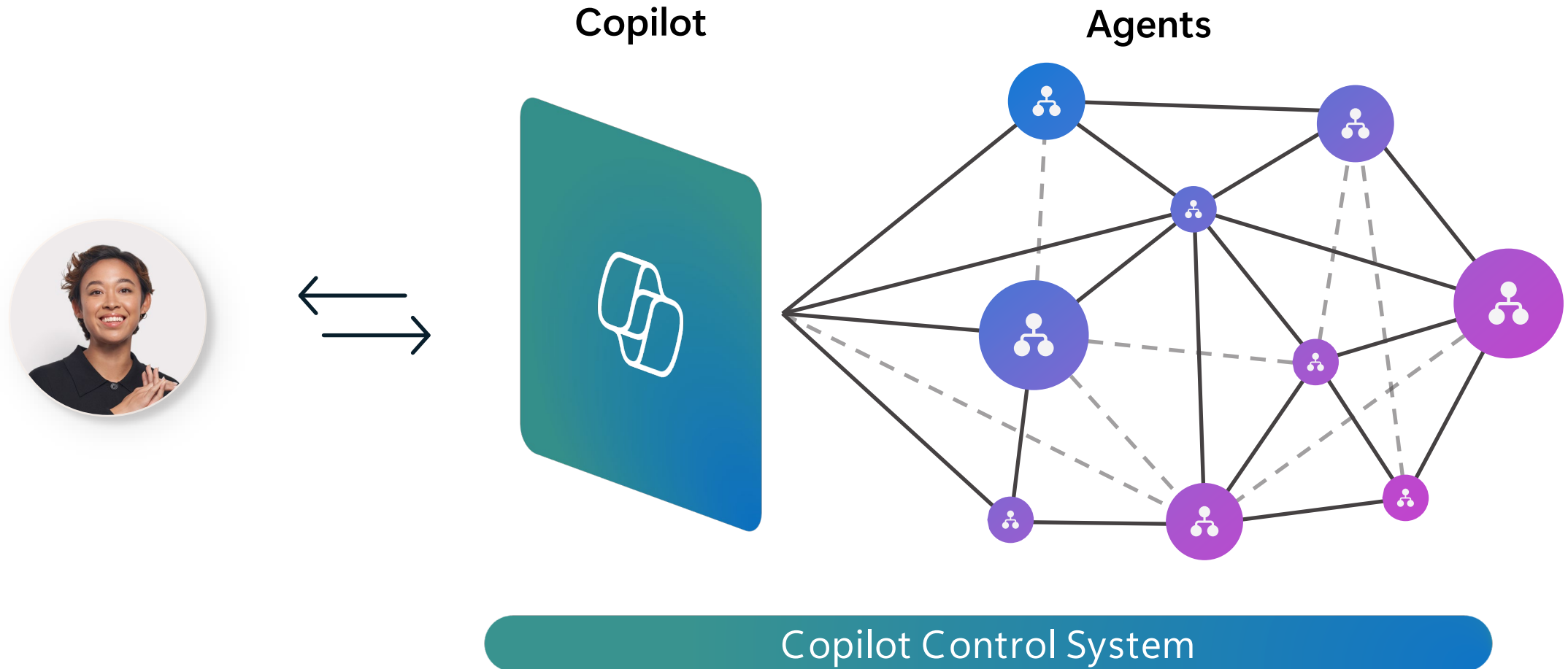


Copilot Studio



Copilot in Azure (Preview)

Copilot is the UI for AI



The AI Adoption Curve



Access

Provide broad access to AI within budget constraints



ROI

Redesign business process to realize value of AI



Governance

Deliver secure and compliant AI while managing agents

Copilot Use Cases

Start to see the value

Create an image of a local government employee seeing the value of Copilot for the first time

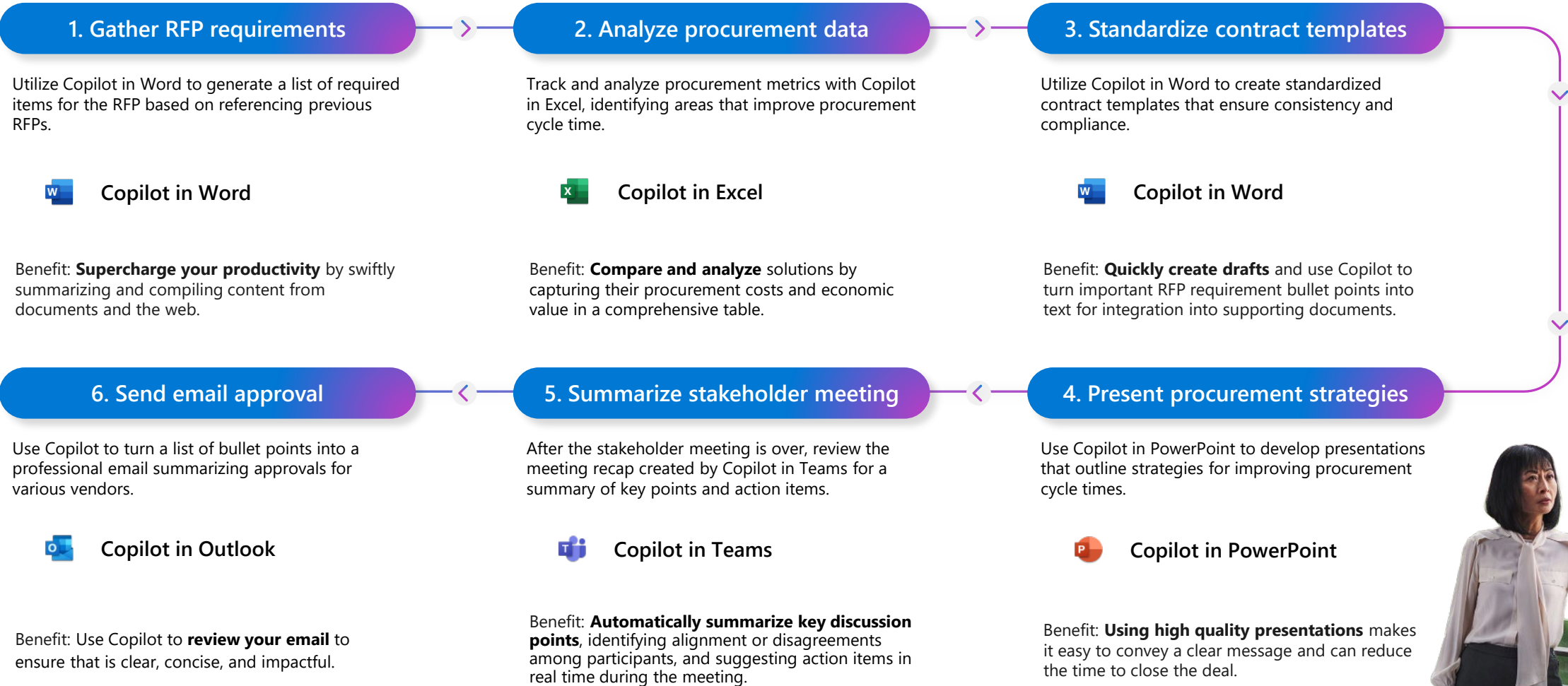


...in Minnesota

Government | Improve procurement cycle time

Available with:
Microsoft 365 Copilot

- KPIs impacted
- ✓ Deliver
- ✓ Supplier selection efficiency
- ✓ Budget adherence
- Value benefit
- ✓ Accelerated service delivery
- ✓ Enhanced decision-making
- ✓ Cost control

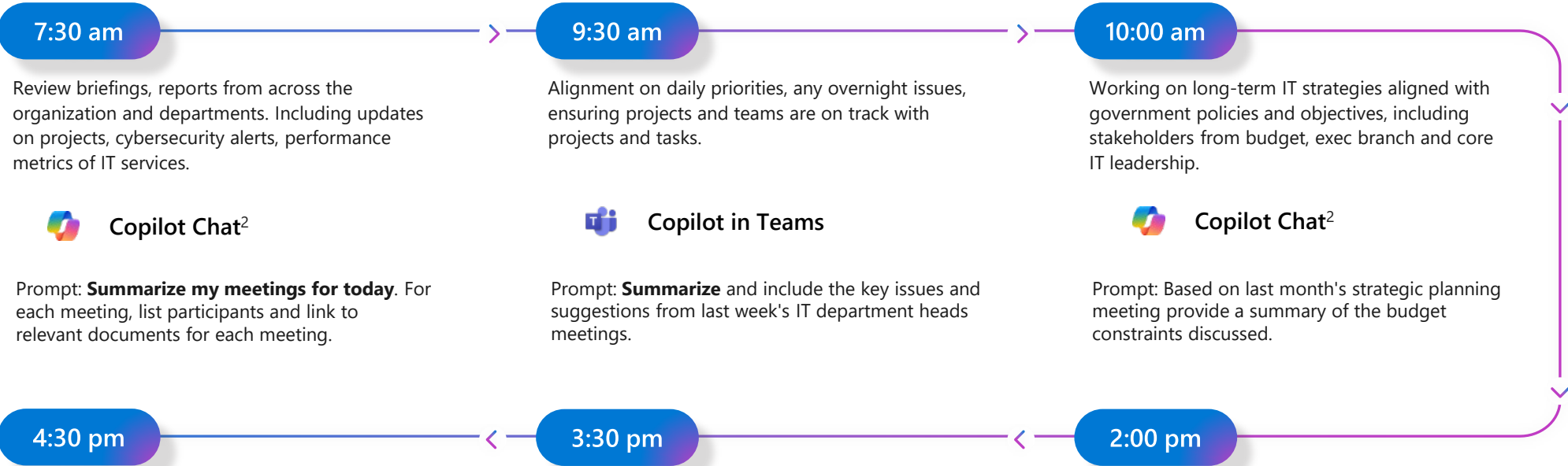


¹Access M365 Copilot Chat at m365copilot.com or the Microsoft 365 Copilot Chat mobile app and set toggle to "Web".
²Access M365 Copilot Chat at m365copilot.com, the Microsoft 365 Copilot Chat mobile app, or the M365 Copilot Chat app in Teams, and set toggle to "Work".
³Copilot agents allow Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.
The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.

A day in the life of a Chief Information Officer

Available with:
Microsoft 365 Copilot

- Benefits
- ~1 hour
- Areas of investment: Strategy
- ★ Vendor management



Ava is a CIO who seeks insights on the status of programs, projects, stakeholder insights and daily agendas.

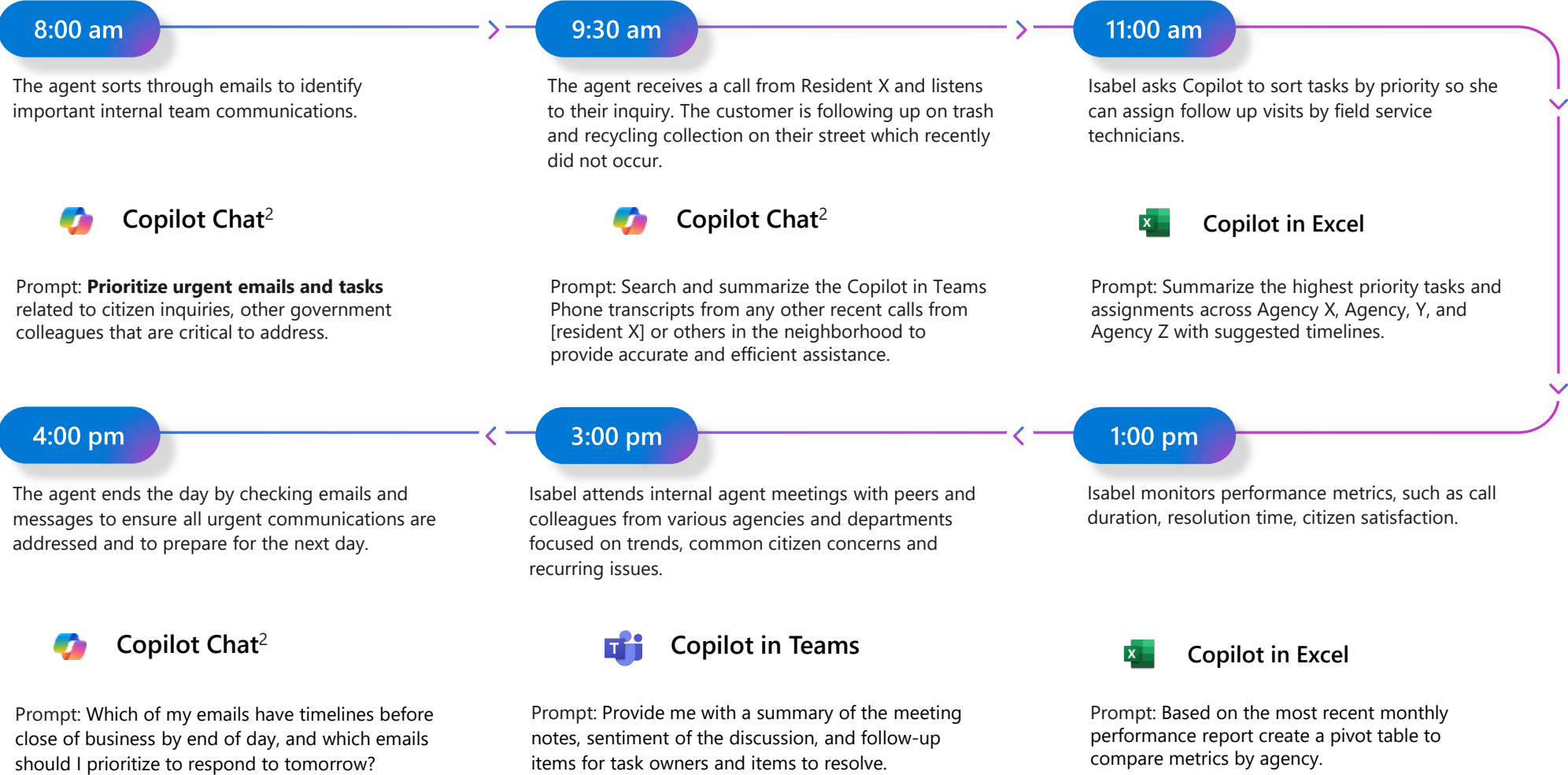


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A day in the life of a Contact Center Agent

Available with:
Microsoft 365 Copilot

- Benefits
- ⌚ ~45 minutes per day
- 🔄 Areas of investment: Documentation
- ★ Training



Isabel is non-emergency contact center agent is seeking ways to optimize insights, planning, and performance metrics tracking of citizen inquiries.



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A day in the life of a Prosecutor

Available with:
Microsoft 365 Copilot

Benefits

⌚ ~6 hours per week

🔄 Areas of investment: Research

★ Continuing education

8:00 am

Review a new case by summarizing the key points of a lengthy legal document, list the main issues and the parties involved.



Copilot Chat²

Example prompt: **Summarize key points**, list main issues and parties involved in the case from this / [legal document].

9:00 am

Create a first draft of a pleading based on the specifics of the case and a previous pleading from a similar case type.



Copilot in Word

Example prompt: **Create a draft** pleading from this / [court case file] that follows the style and layout of this / [pleading file] from similar case.

10:30 am

Summarize recent legal development and precedents, collect and provide links to current legal news and recent legal publications in area of legal specialization



Copilot Chat¹

Example prompt: **Provide a list of news articles** and publications from the last month on [area of law] summarize key points of each article and publication.

4:00 pm

In the afternoon, work on the discovery process for an ongoing case to help organize and analyze the large amount of information received from the opposing party.



Copilot Chat²

Example prompt: **Organize and categorize** the files located in this / [Folder of relevant files] summarize and list the key evidence.

2:00 pm

Spend the end of her day preparing for an upcoming trial. Ask Copilot for advice on trial strategy, potential lines of questioning, and how to present their evidence effectively.



Copilot Chat¹

Example prompt: **Provide suggested strategy** for [wrongful death case involving a vehicle accident and an impaired driver]

Natasha
is a Prosecuting
Attorney



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Copilot Studio Use Cases

- Low Code Custom Copilots
- Customize your own LLM
- Extend beyond M365
- On-premises and cloud



01

IT Support

ServiceNow
Knowledge Base,
vendor help articles,
internal solutions

02

Constituents

Aggregate disparate
systems into one
LLM for an agent

03

Regional Co-ops

LLM from multiple
agencies, news
sources.
Emergencies and
disaster response.

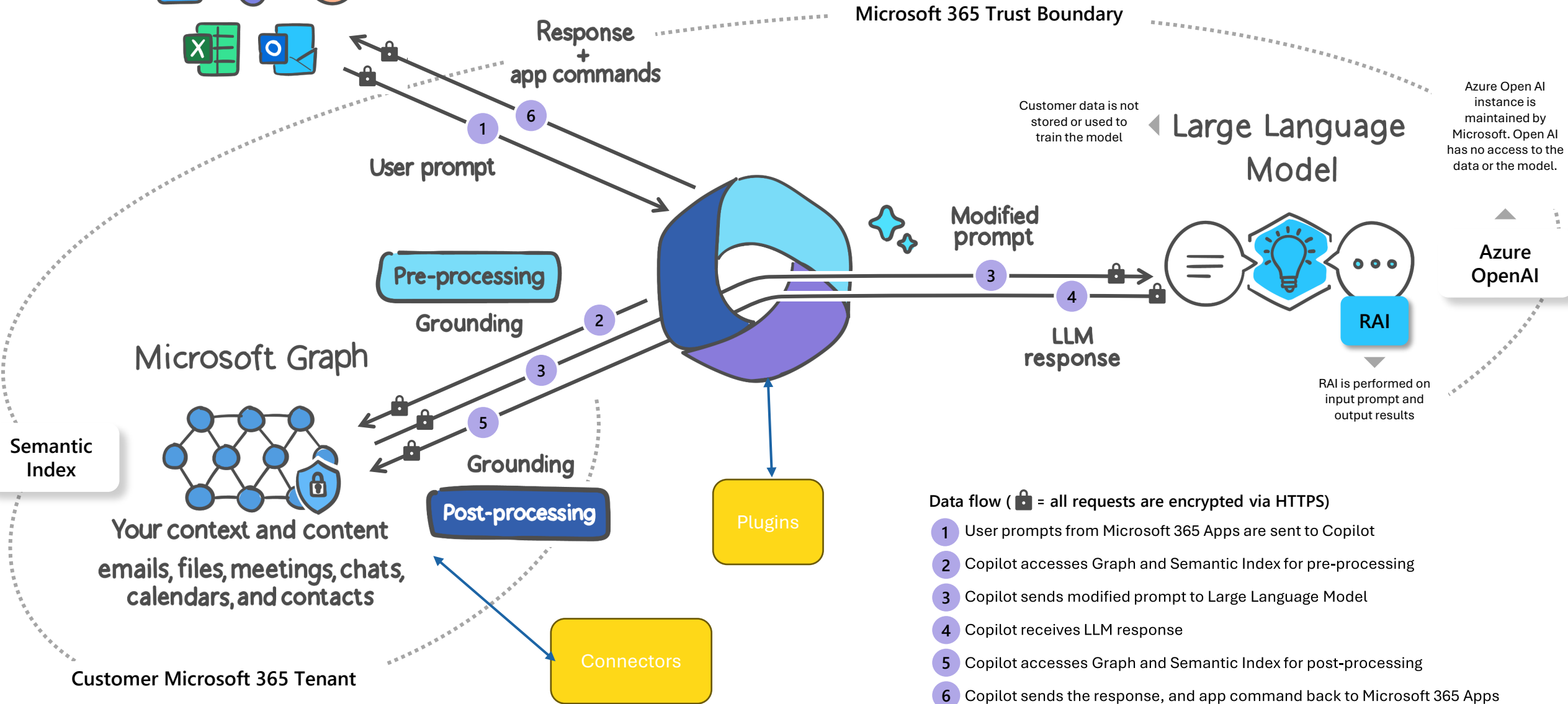
Implementation

Technical and Strategic



Microsoft 365 Apps

Microsoft 365 Copilot



Microsoft 365 Copilot Logical Architecture

Part 1

Microsoft Copilot for Microsoft 365 or Copilot introduces several components to help users make use of content and data they already have access to. Note that only data a user has access to is returned in query responses (as illustrated).

Users and devices



Microsoft 365 apps



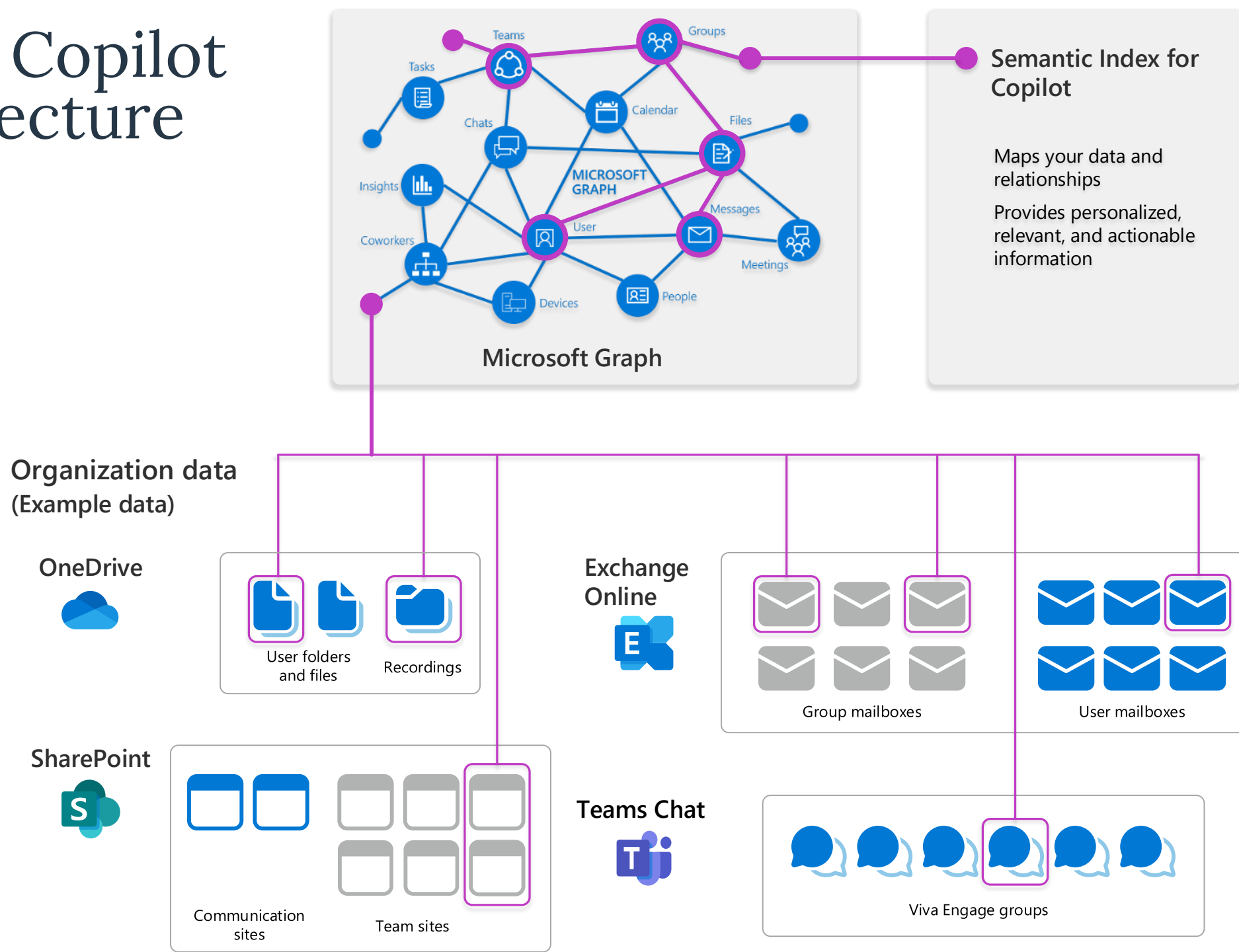
Copilot and related components



Copilot for Microsoft 365

Microsoft 365 Copilot Logical Architecture

Part 2



Your users
and devices



Apps on
your devices



4

Microsoft 365
Copilot

1

2

Microsoft Graph

3

Azure OpenAI service
subscription for
Microsoft 365

Large Language
Model (LLM)

User-accessible data

Files, mailboxes, chat data, videos, etc.



Exchange
mailboxes



OneDrive files



Microsoft
Teams data



SharePoint
files, lists, etc.

Your Microsoft 365 tenant



Data is encrypted
in transit

Microsoft 365 service boundary

3 essentials for Copilot success



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** AI Council



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Community of Practice and Copilot Dashboard



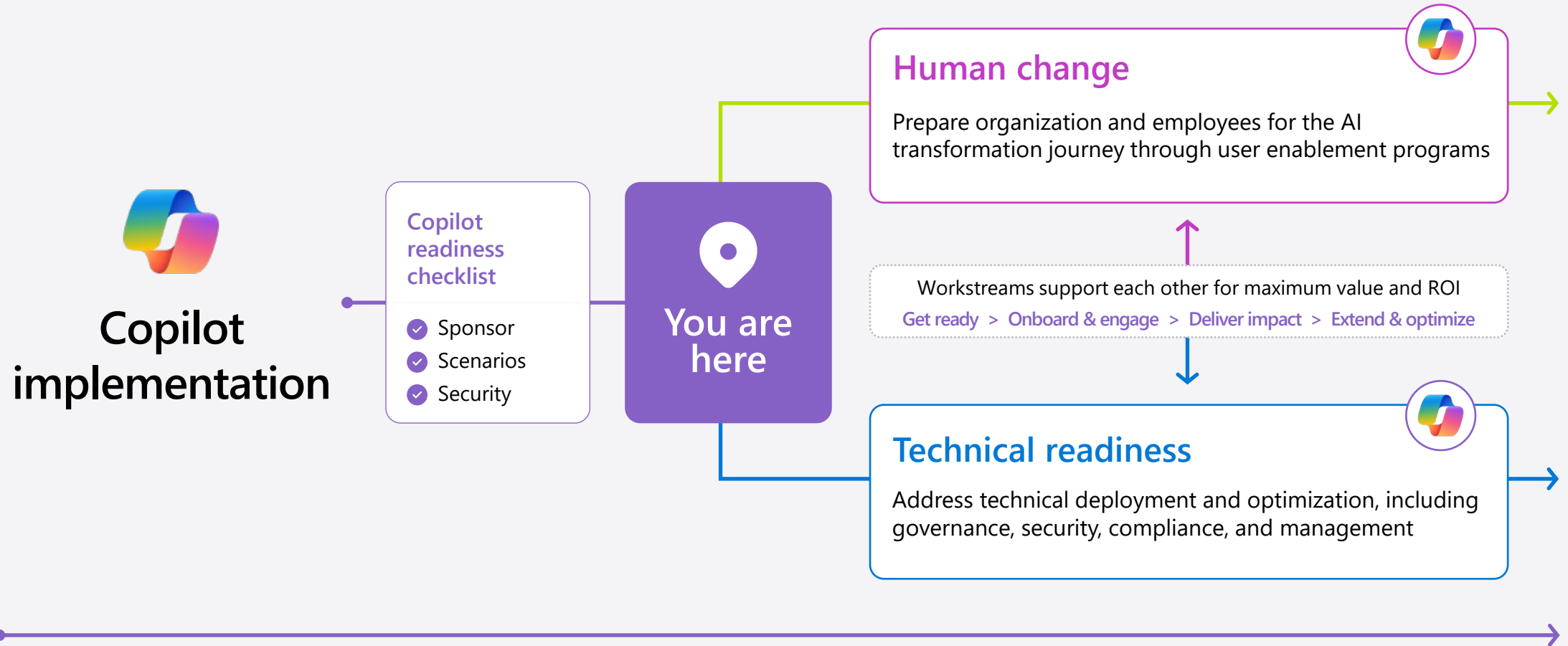
Technical readiness

Build and iterate technical skills to deliver on business results

- ✓ Secure your data infrastructure
- ✓ Policy review
- ✓ Extend to new high value line of business scenarios
- ✓ **Best practice:** Optimization Assessment

Responsible AI principles

Microsoft 365 Copilot implementation



Clarify AI value drivers



Organization and culture

Do you have an operating model to enable the adoption and use of AI?

Do you have top-down support?



Business strategy

What business outcomes are you driving?

How can AI help you achieve those outcomes?



Applied AI experience

Do your people have diverse experiences and skills with AI?

Is your organization collaborating to build experience?



AI governance

Are you implementing processes and controls that are transparent?

Are you governing data privacy and security?



Technology strategy

Do you have access to quality data?

Is your infrastructure set up to help you scale?

Implementation overview

HUMAN CHANGE

Get ready

User Enablement Workstream

- ✓ Secure exec sponsorship, create AI Council, and define RAI principles
- ✓ Identify success owners, Champions, and early adopter cohorts
- ✓ Detail high value scenarios and personas
- ✓ Be intentional with assignment and concentrate seats
- ✓ Define success criteria, KPIs, and success measurement plan

Onboard & engage

- ✓ Complete User Enablement Strategy training
- ✓ Define user experience and feedback strategy
- ✓ Design and deploy training and engagement community (Center of Excellence/Champion Platform)
- ✓ Launch employee communications and Champion program
- ✓ Onboard executives and user cohorts
- ✓ Deliver user Champions and support staff training

Deliver impact

- ✓ Review success measures and user survey results
- ✓ Conduct feedback and reporting analysis
- ✓ Deliver extended training and adoption support
- ✓ Identify additional optimization scenarios
- ✓ Iterate user experience strategy
- ✓ Gather and amplify success stories

Extend & optimize

- ✓ Extend to new high value scenarios
- ✓ Deliver business process transformation with Copilot Studio, plugins, and connectors
- ✓ Drive group and cross-organizational productivity and innovation
- ✓ Understand custom line of business opportunities

TECHNICAL READINESS

Technical Readiness Workstream

- ✓ Perform the Microsoft 365 Copilot Optimization Assessment
- ✓ Address data security, governance, and data access questions
- ✓ Build shared Microsoft 365 Copilot implementation plan with User Enablement team

- ✓ Ensure appropriate Data Security controls are in place
- ✓ Prepare your organization for Microsoft 365 Copilot with setup guide: deploy Microsoft 365 apps, if needed; assign licenses
- ✓ Assign permissions by role to provide access to the Microsoft 365 Copilot usage report

- ✓ Establish service management plan
- ✓ Analyze Microsoft 365 Copilot usage reports and the Microsoft Copilot Dashboard to observe user adoption, retention, and engagement

- ✓ Design, build, and publish Copilot agents to deliver unique experiences
- ✓ Build your own custom agents

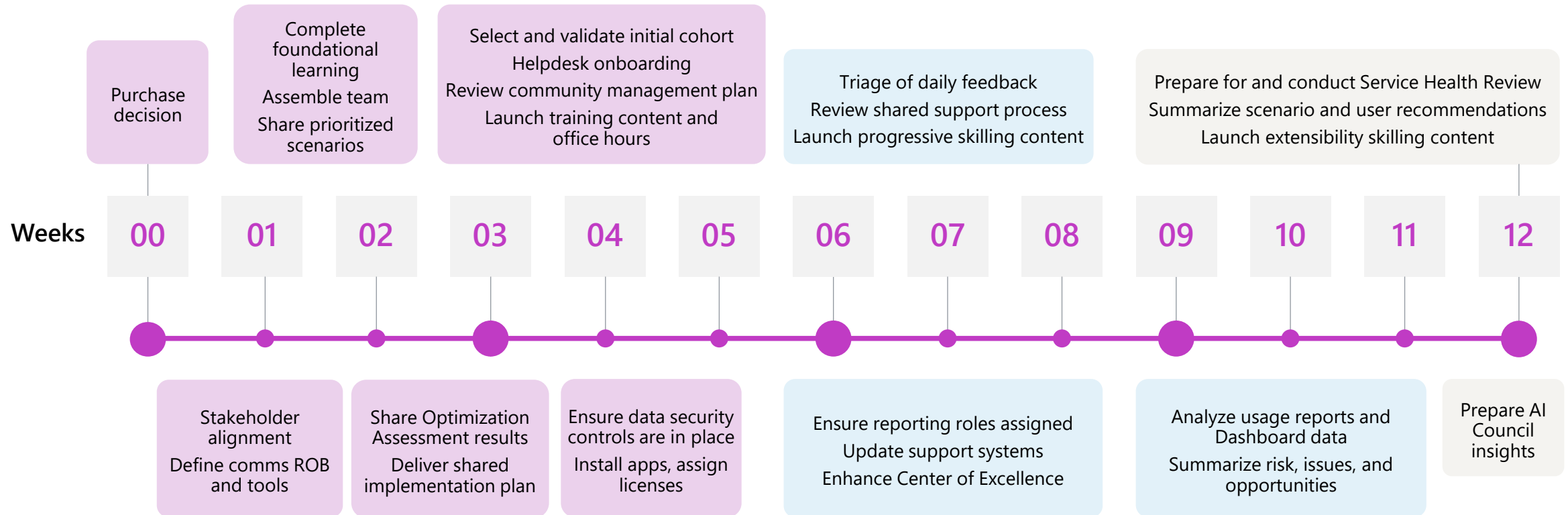
Implementation project summary

Shared milestone view

First 30 days

30-60 days

Recurring tasks



Data Privacy and Security Concerns



Rules

Responsible AI Standard



Records

our practice of [Responsible AI by Design](#) – the proactive ways in which we guide the design, build, and testing of AI systems



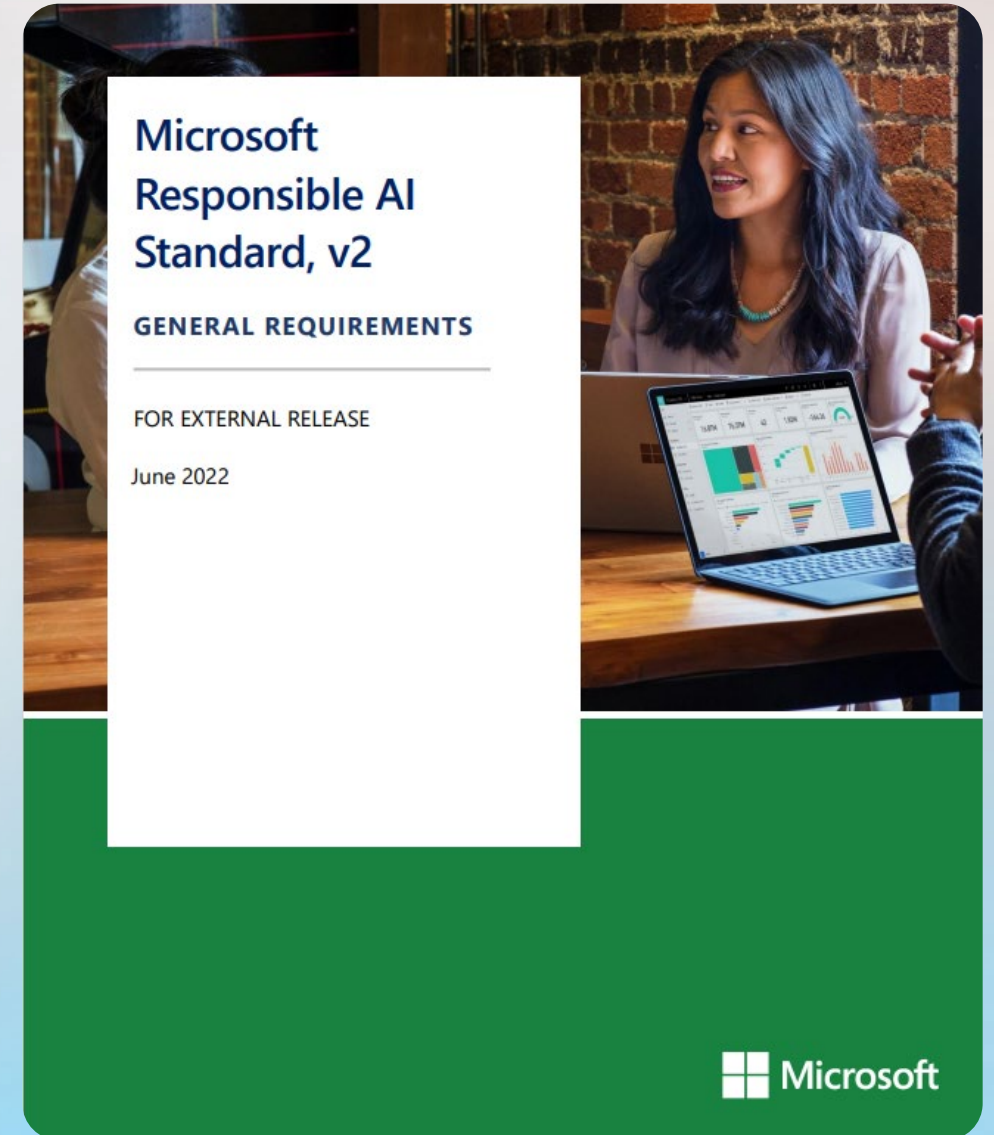
Establishes

a [durable framework](#) for the maturing practice of responsible AI and evolving regulatory requirements



Reflects

our [deeper exploration](#) of what our six AI principles mean and the steps we must taken to uphold them



The Standard's goals at-a-glance

Accountability

- A1:** Impact assessment
- A2:** Oversight of significant adverse impacts
- A3:** Fit for purpose
- A4:** Data governance and management
- A5:** Human oversight and control

Transparency

- T1:** System intelligibility for decision making
- T2:** Communication to stakeholders
- T3:** Disclosure of AI interaction

Fairness

- F1:** Quality of service
- F2:** Allocation of resources and opportunities
- F3:** Minimization of stereotyping, demeaning, and erasing outputs

Reliability & Safety

- RS1:** Reliability and safety guidance
- RS2:** Failures and remediations
- RS3:** Ongoing monitoring, feedback, and evaluation

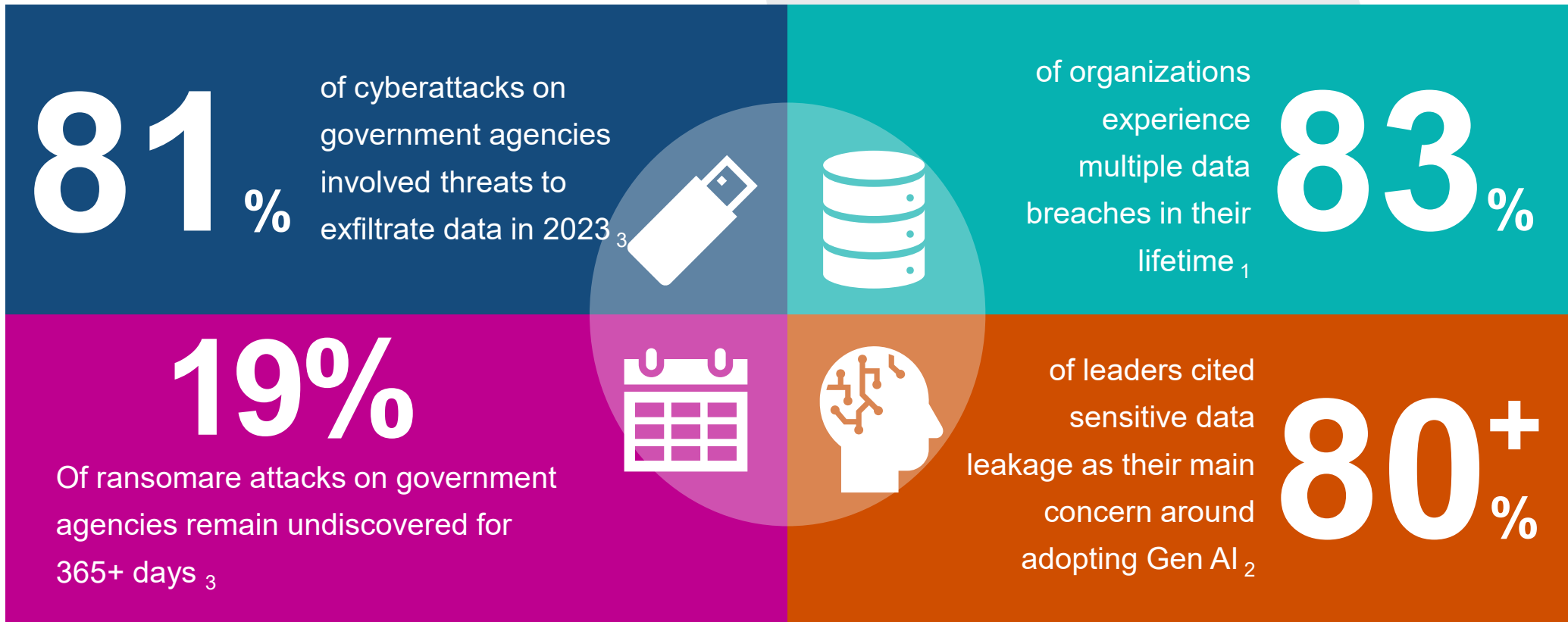
Privacy & Security

- PS1:** Privacy Standard compliance
- PS2:** Security Policy compliance

Inclusiveness

- I1:** Accessibility Standards compliance

Data is your MOST VALUABLE ASSET



Source:

- 1 Microsoft Data Security Index report
- 2 First Annual Generative AI Study: Business Rewards vs. Security Risks, Q3 2023, ISMG, N=400
- 3 [Data Exfiltration: Public Enemy No. 1 for the Public Sector](#)

Sensitive and Protected Data

Do *YOU* know the complete picture?



HIPAA

- Nurses Station
- Jail Medical
- Health Dept
- Clinical Trials
- 911 / Dispatch
- HR Benefits



CJIS

- Courtroom
- Case History
- Law Enforcement
- 911 / Dispatch
- Campus Police
- Legal & Counsel
- CA/DA Offices



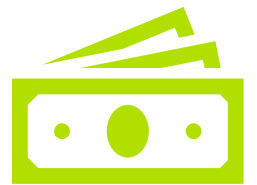
State Specific

- Consumer Privacy
- Hazmat
- Incident Response
- Judicial
- Legal
- CJIS Enhancements
- Infrastructure



FERPA

- Student Records
- Juvenile Programs
- Children's Care
- Victim's Assistance



PCI DSS

- Registrar
- Billing
- Tax Collection
- Parks Dept
- Insurance Dept
- Court Fines
- Athletics Dept
- Motor Vehicles

Secure and govern Copilot with Microsoft Security



Security



Compliance



Privacy



Responsible AI



with



Discover AI risks

Identify sensitive data in Copilot interactions with **ready-to-use classifiers and labeling**

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

Identify potentially overshared content by **reviewing SharePoint site permissions**



Protect sensitive data

Protect access to sensitive data in Copilot interactions with **persistent labeling and DLP policies**

Restrict or block risky access with **risk-based conditional access and endpoint management**

Prevent idle or excessive access with **SharePoint site wide access controls**



Govern Copilot usage

Retain and log Copilot interactions, **automatically remove inactive content**

Use built-in classifiers to **detect non-compliant use of Copilot**

Preserve, review, and analyze prompts and responses to **investigate security and compliance incidents**

Microsoft Purview

- Gain **visibility** into data across your organization
- Safeguard and manage sensitive data across its lifecycle, **wherever it lives**
- Govern data **seamlessly** in new, comprehensive ways
- Manage critical data **risks** and regulatory **requirements**



Microsoft Purview Data Security

KNOW

- Sensitive Info Types
- Trainable Classifiers
- Data Classification

Sensitive Info Types

200+ built in and custom regular expressions

Credit card, blood test terms, IP address, passport, SSN, etc...

Trainable Classifiers

Identify sensitive data with uploads of unique content

Org specific identifiers
le: Inmate number, customer information

PROTECT

- Sensitivity Labels
- Message Encryption
- Purview Info Protect Client
- Rights Management Connector
- Info Protection Scanner
- Purview Data Map

PREVENT

- Purview DLP
- Endpoint DLP
- Chrome Extension
- On-Premises DLP
- Teams DLP Functions

Sensitivity Labels

What can they do?



Encrypt

Group based,
time based, user
settings



Mark

Add
watermarks,
headers, footers



Protect

Containers,
Sites, Groups



Apply

Automatically
or recommend
label

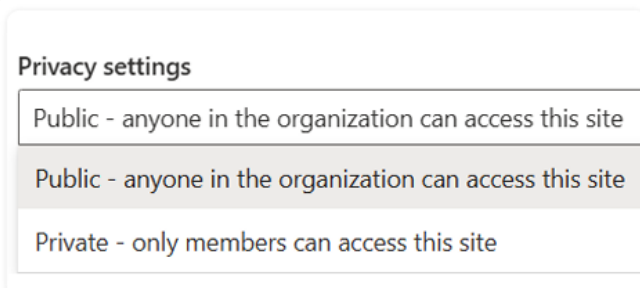


Sharing

Set default link
type



Common causes of Copilot oversharing in SharePoint



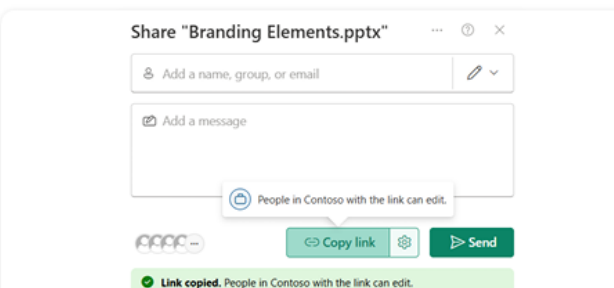
Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public



Share "Branding Elements.pptx"

Add a name, group, or email

Add a message

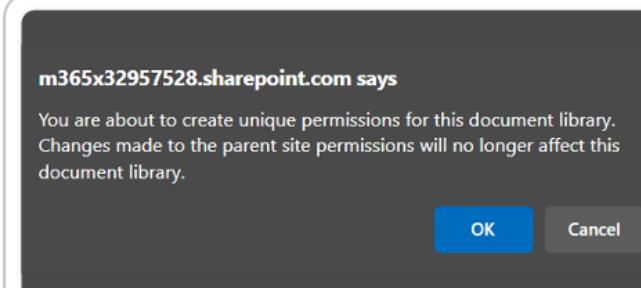
People in Contoso with the link can edit.

Copy link

Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

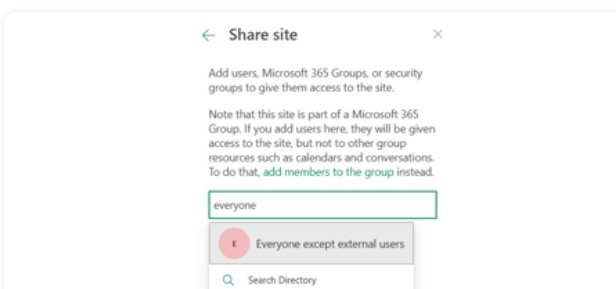


m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK Cancel

Broken permission inheritance



Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

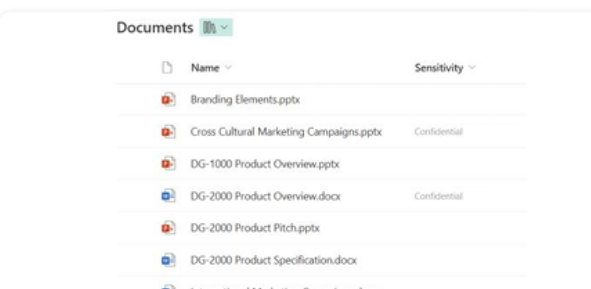
Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

everyone

Everyone except external users

Search Directory

Use of "everyone except external users" domain group












Documents

Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels

Apply appropriate controls to address oversharing

Get started quickly and continue to optimize along the way

	Pilot (Optional) 	Deploy 	Operate 
Activities	<ul style="list-style-type: none">Identify most popular sites & assess oversharingGrant Copilot access to popular, low risk sitesTurn on proactive audit and protection	<ul style="list-style-type: none">Discover oversharing risksRestrict sensitive info from Copilot access and/or processingIncrease site privacy	<ul style="list-style-type: none">Further reduce risk and simplify oversightFurther secure sensitive dataImprove Copilot responses
Outcomes	 Deploy copilot to sub-set of users with up to 100 sites	 Copilot fully deployed in your organization	 Continuous improvement of data security practices
Effort*	 2–4 days	 2–4 weeks	 More than one month

*Suggested efforts should be reviewed into timelines based on your tenant size and organizational complexity

Last updated December 10, 2024

Restricted SharePoint Search

This is intended as a temporary solution to give you time to review and audit site permissions, while implementing robust data security solutions from Microsoft Purview and content management with SharePoint Advanced Management.

- **Restricted SharePoint Search** is designed for organizations particularly concerned about unintentional oversharing of content
- When enabled, Copilot experiences and organization-wide search are limited to a select set of SharePoint sites, as well as the individual user's files and content



PREREQUISITES

- Available to tenants with Microsoft 365 Copilot subscriptions
- Activation requires Global/Tenant/SharePoint admin rights

IMPACT

Restricted SharePoint Search disables organization-wide search, while allowing you to select sites that you trust. This means users in your organization can use Copilot to reason over:

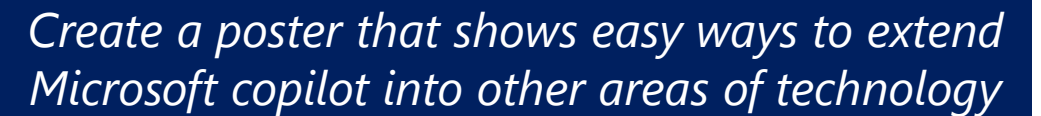
- An allowed list of curated SharePoint sites set up by admins (up to 100 SharePoint sites), honoring existing permissions on a site
- Users' OneDrive for Business, chats they are part of, emails they send and receive, calendars to which they have access, etc.
- Files that are shared with, and accessed by users
- Content from users' frequently visited sites

Turning on Restricted SharePoint Search does not affect the site's index or associated DLP and labeling policies.

Access this [blog](#) for more info.

Additional Controls

- The primary way that IT admins can control access to web search is by using the **Allow web search in Copilot** policy, which is available only in [Cloud Policy service for Microsoft 365](#). This policy applies to both Microsoft 365 Copilot and Microsoft 365 Copilot Chat.
- If you turn off connected experiences that analyze your content on devices in your organization, Microsoft 365 Copilot features won't be available to your users in the following apps: Excel, Word, PowerPoint, Outlook, OneNote (*Windows, OSX, iOS, Android...*)
- If the IT admin doesn't configure the **Allow web search in Copilot** policy, web search will be turned off in GCC, regardless of how the **Allow the use of additional optional connected experiences in Office** policy is configured.
- **SharePoint Premium Advanced Management Capabilities**
 - Restrict site access to specific groups, even after oversharing content
 - Use restricted SharePoint search to limit which sites copilot can reference content from
- Purge unneeded data to limit data sprawl
 - Retention policies with delete trigger is smart data management
- Apply sensitivity labels
- Use Purview Data Security Posture Management for AI (in preview) for actionable insights





Extending Microsoft 365 Copilot



Your AI platform



Declarative agents

Customized Microsoft 365 Copilot with specific domains



Connectors

for integrating external services and data sources

- Graph connectors
- Power Platform connectors



Plugins for calling services

- API plugins
- Message extensions
- Copilot Studio Actions

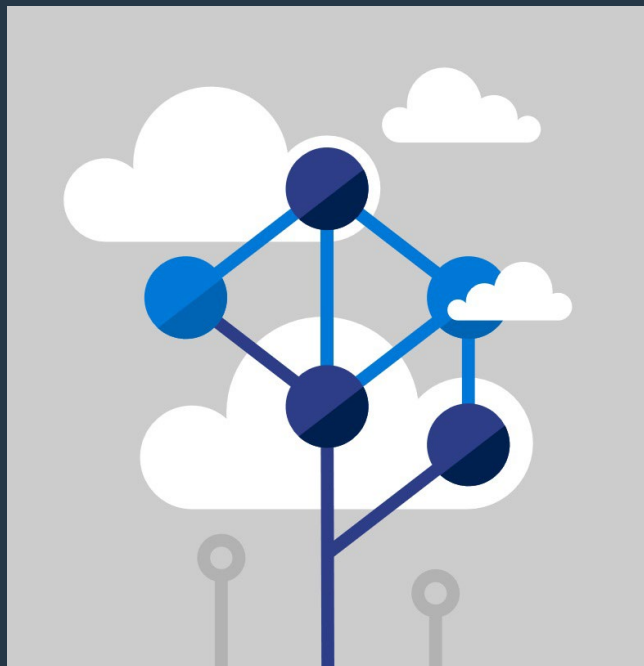


Custom engine agents

Enterprise conversational agents built on custom foundation models

Microsoft Copilot UX

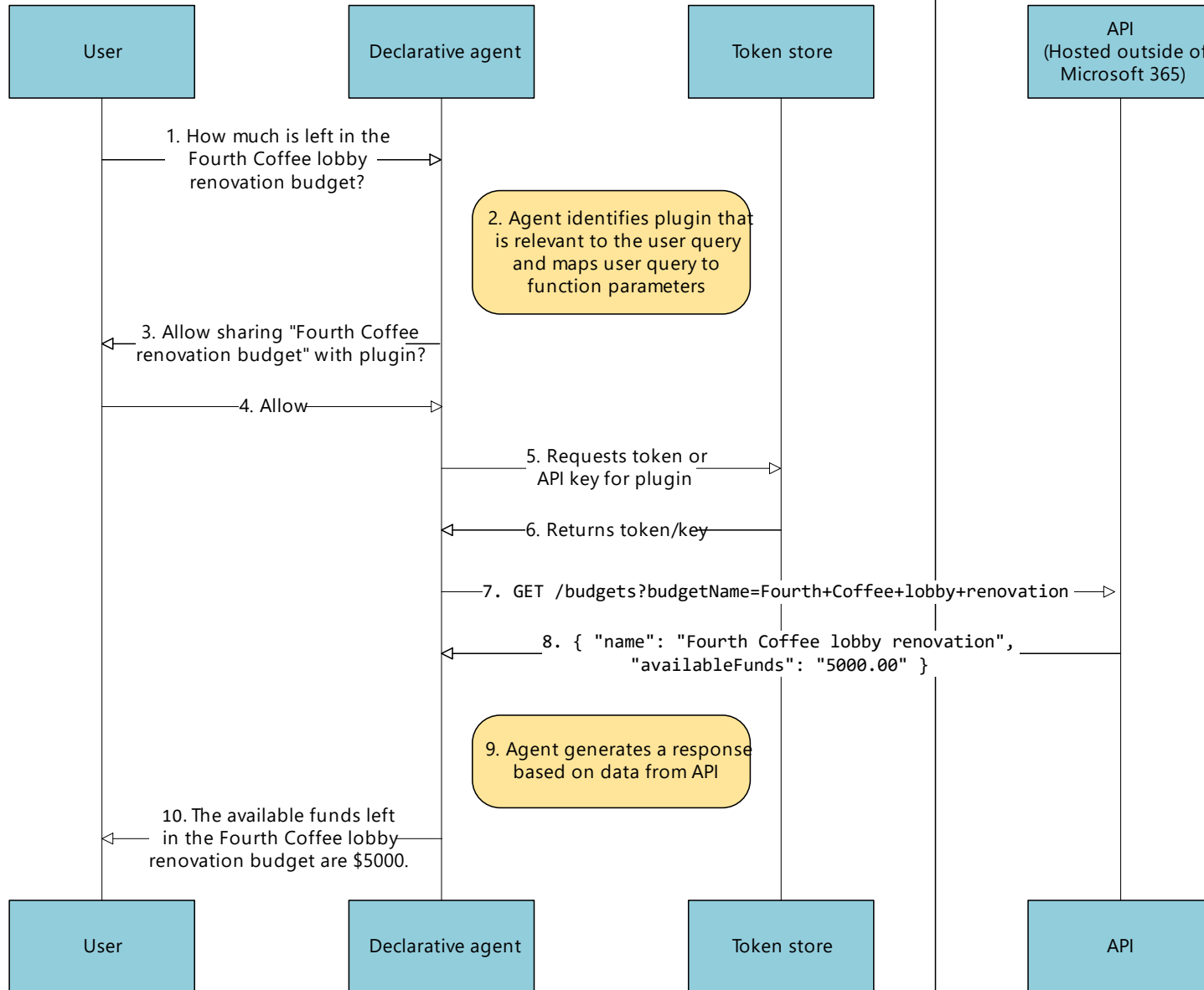
Graph Connectors



Graph Connector Library

Popular Connectors

Connector Name	Description
Azure DevOps	Connects Azure DevOps data to Microsoft Graph for enhanced project management.
Salesforce	Integrates Salesforce data for CRM and sales insights within Microsoft 365.
ServiceNow	Connects ServiceNow data for IT service management and workflow automation.
Google Drive	Integrates Google Drive files for seamless access and collaboration.
Box	Connects Box storage for secure file sharing and collaboration.
MediaWiki	Integrates MediaWiki content for knowledge management and search.
Atlassian Confluence	Connects Confluence data for enhanced collaboration and content management.
Adobe Acrobat Sign	Integrates Adobe Acrobat Sign for secure document signing and management.
SAP	Connects SAP data for enterprise resource planning and business management.
Oracle	Integrates Oracle databases for comprehensive data management and analytics.
Dropbox	Connects Dropbox files for easy access and collaboration within Microsoft 365.
Zendesk	Integrates Zendesk data for customer support and service management.
Jira	Connects Jira data for project tracking and agile management.
Slack	Integrates Slack messages and channels for enhanced team collaboration.
GitHub	Connects GitHub repositories for code management and collaboration.

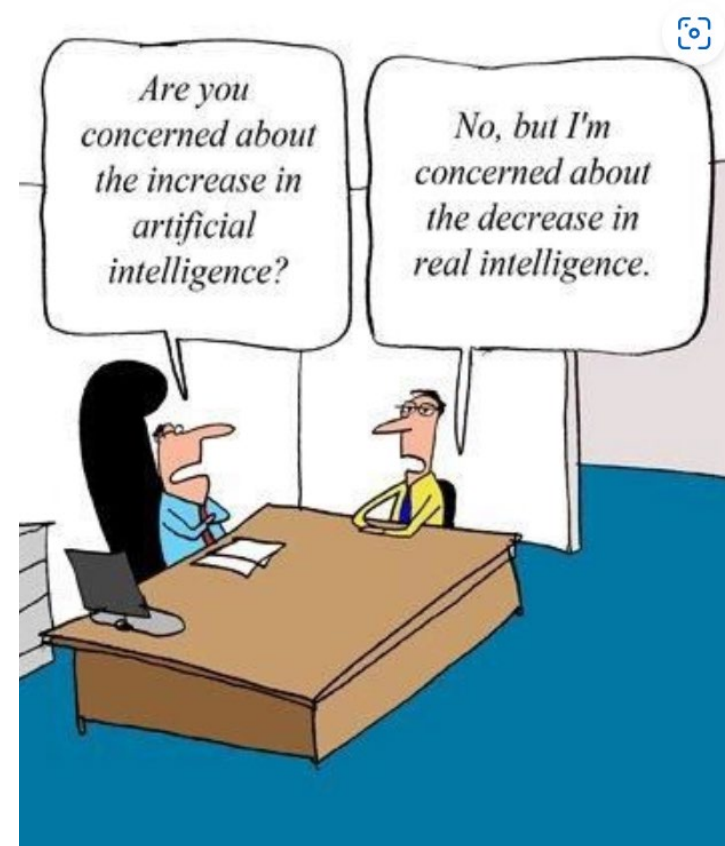


API Plugin Flow Example

API Plugins: These enable Copilot to interact with REST APIs, allowing users to query, create, update, and delete data through natural language prompts

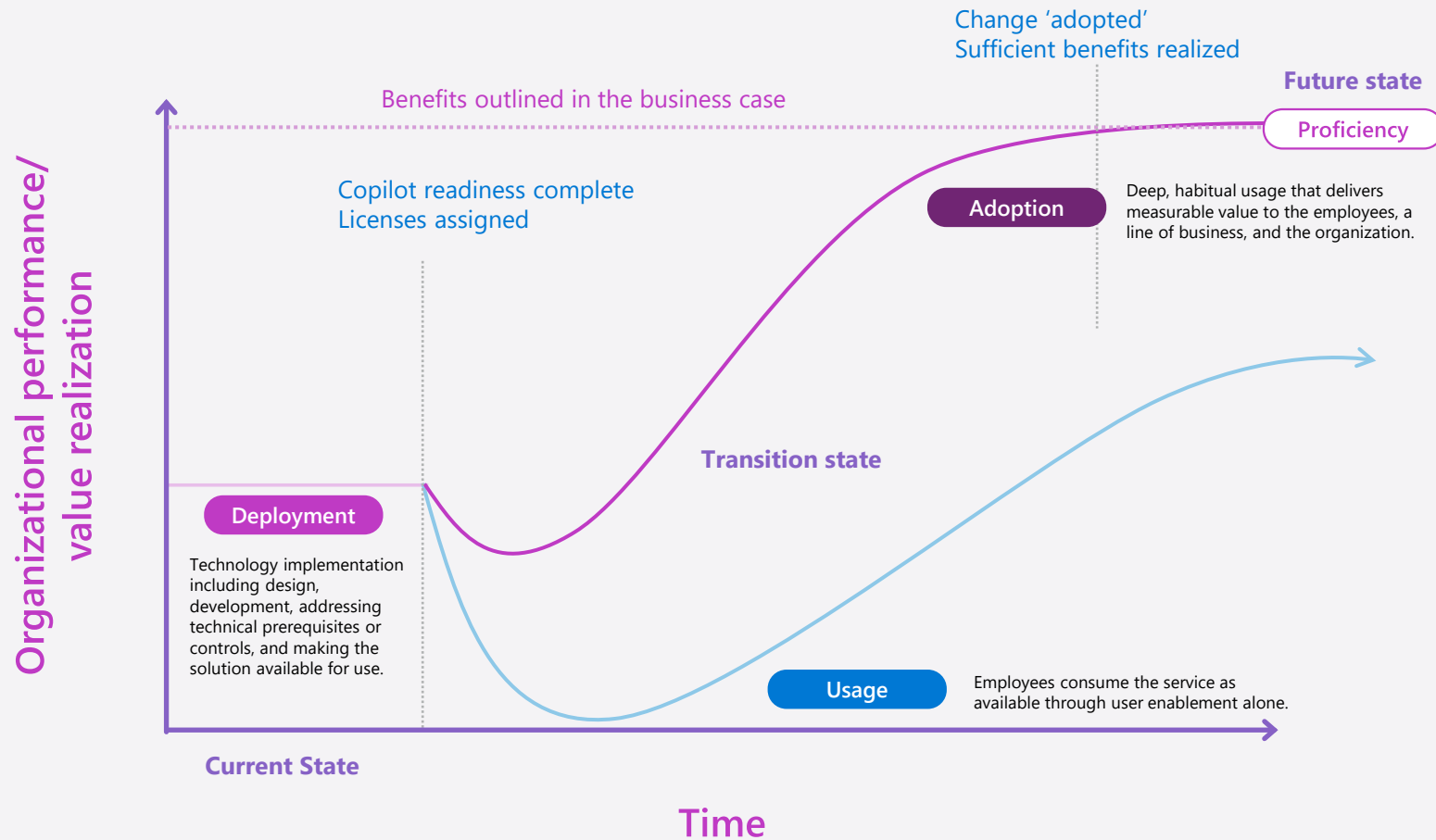
Training and Adoption

VITAL to Success



<https://techresearchonline.com/blog/funny-tech-memes/>

Drive human change with best practices



With change management

Higher likelihood of Copilot adoption and benefits realization.

Without change management

More challenging transition, fewer employees 'on board,' and more resistance. Longer time to benefits realization.

7x

More likely to meet or exceed project objectives when have excellent change management practices, compared to poor change management practices (Prosci, 2024)

Who should be involved in your adoption effort?

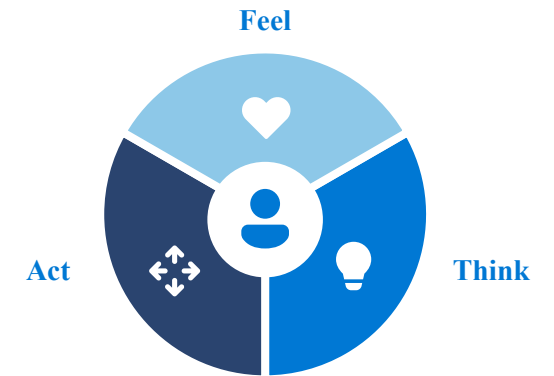
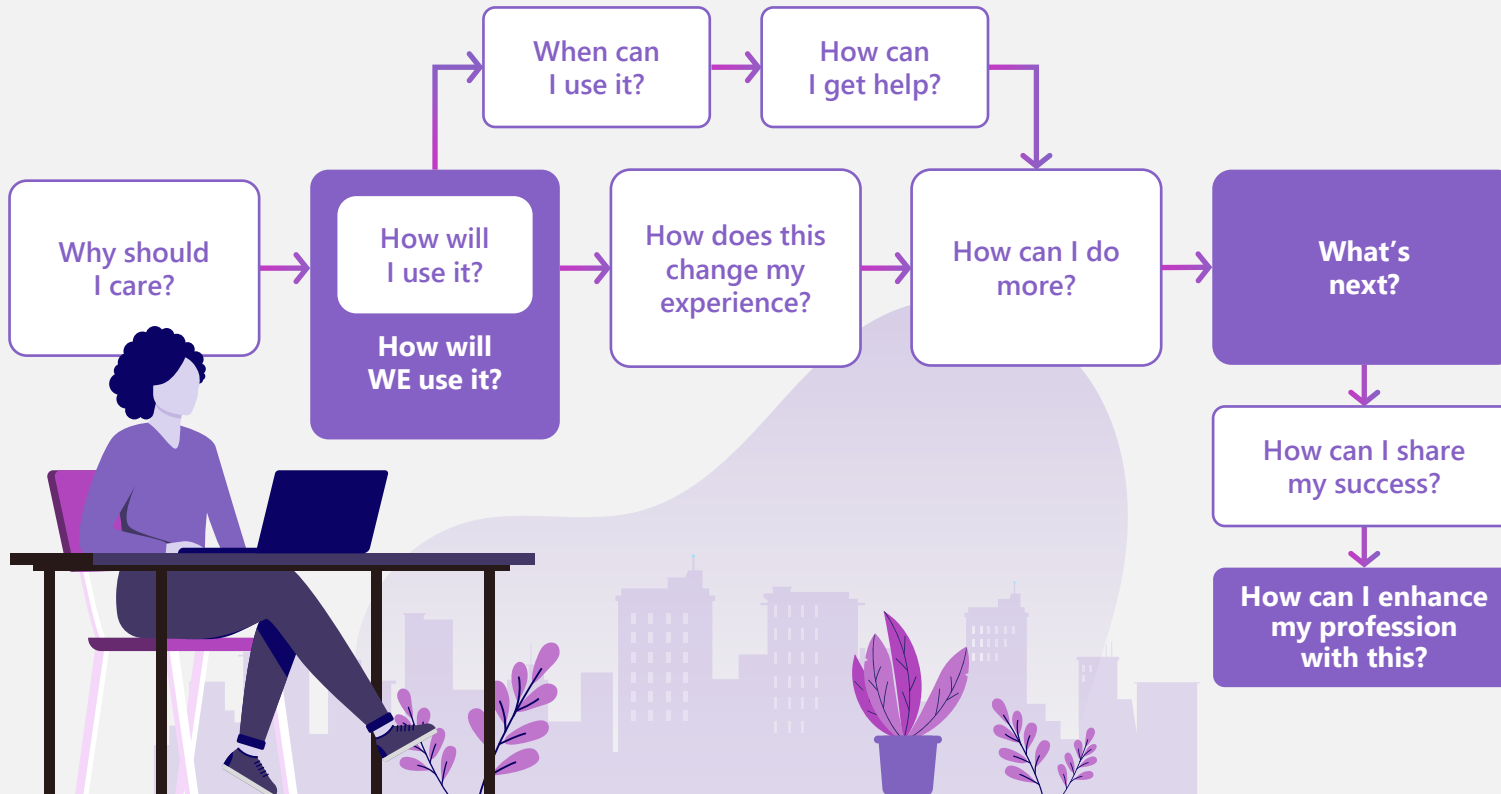
- Executive Sponsors
- Success Owner
- Early Adopters
- Champions
- Technical team



Create an image of a baby that is up for adoption with the Copilot logo on the clothing

Understanding the user journey

Getting to “Aha!”



The Think-Act-Feel framework is grounded in decades of research showing a whole human understanding – including feelings – is critical to business outcomes.

Building on this framework we understand that **delivering accelerated change is based on trust.**

An aha moment is defined as “a moment of sudden insight or discovery”.

Build a sustainable Champions community



Champions help build, grow, and sustain your Copilot implementation by gathering feedback, supporting the human change lifecycle, and providing peer to peer guidance.

Champions:

- 1 Should be formally trained to increase their depth and breadth of knowledge.
- 2 Should be encouraged and empowered to guide, teach, and train their peers.
- 3 Need consistent positive reinforcement that affirms the impact of their efforts.
- 4 Need a clear plan upon which to execute.

The Champions program checklist

- ✓ Find enthusiastic Champions who can commit time and effort.
- ✓ Build a Viva Engage or Microsoft Teams Group for Champions to share updates and successes. (See our Build Your Experience and Microsoft Viva for Copilot Enablement guides).
- ✓ Provide materials ready to support their work on the group with teams and individuals (e.g., lunch and learn sessions).
- ✓ Ensure a regular rhythm for discussions with the Champions on what's working and what's not.
- ✓ Design a program to engage and recognize their effort, such as providing privileged access to relevant events or speaking engagements.
- ✓ Communicate to individuals about the Champions role and where they can be found – remember, they are not an IT support function but business representatives.
- ✓ Incorporate Microsoft 365 training resources into your own internal training site.
- ✓ Create a contest (e.g., scavenger hunts and giveaways) between departments to encourage people to interact with Microsoft 365.

Copilot resources on Microsoft Adoption

One site for all your Copilot needs

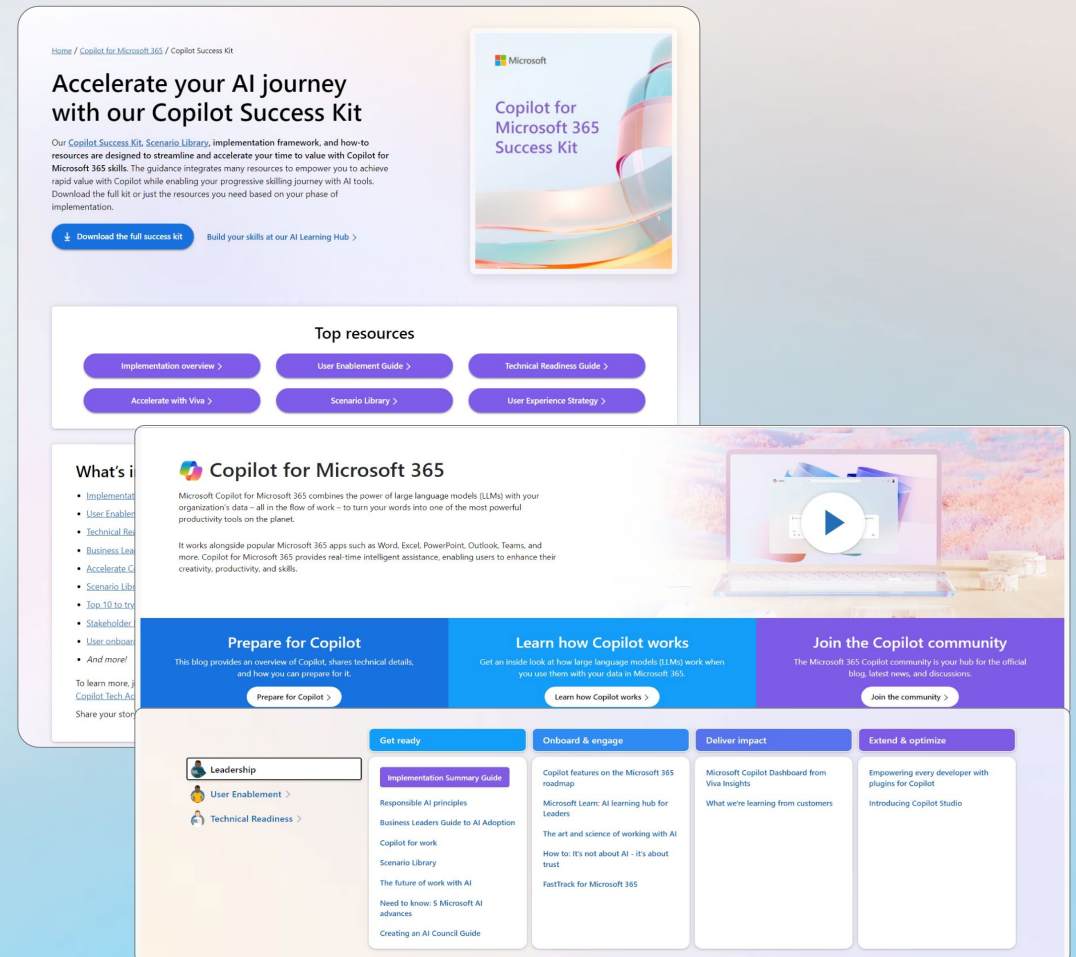
<https://adoption.microsoft.com/copilot>

- Resources by role
- Interactive Scenario Library
- Product announcements and news
- Links to all other Microsoft sites
- Extended links for Small/Medium business, Copilot in Sales, Microsoft Viva, and more



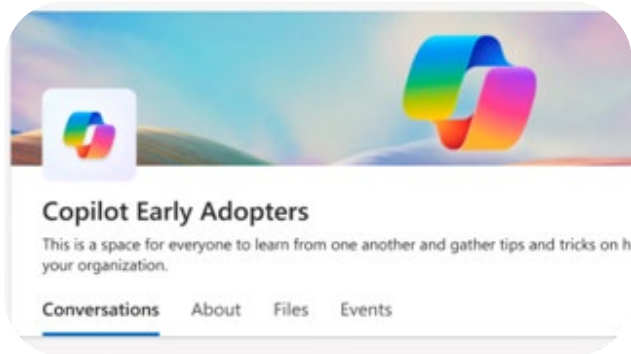
Take the Class!

Earn your User Enablement badge & validate your skills with [MS-4007](#) available today!



Accelerate your AI workforce transformation

Communications

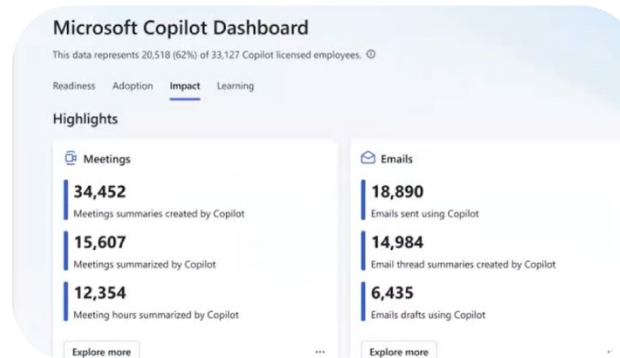


Copilot Communities to facilitate user enablement

- Share best practices
- Access company announcements
- Seek support from peers and IT

aka.ms/CopilotCommunities

Measurement



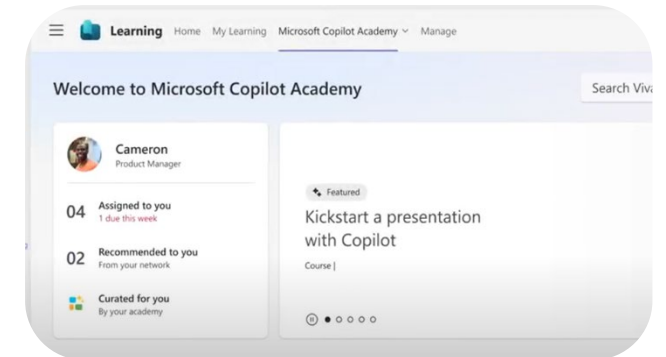
Copilot Analytics for ROI and impact assessment

- Copilot Dashboard for leaders
- Viva Insights for customizable analysis
- Copilot business impact reports

aka.ms/CopilotAnalytics

aka.ms/CopilotDashboard

Skilling



Copilot Academy for user skill development

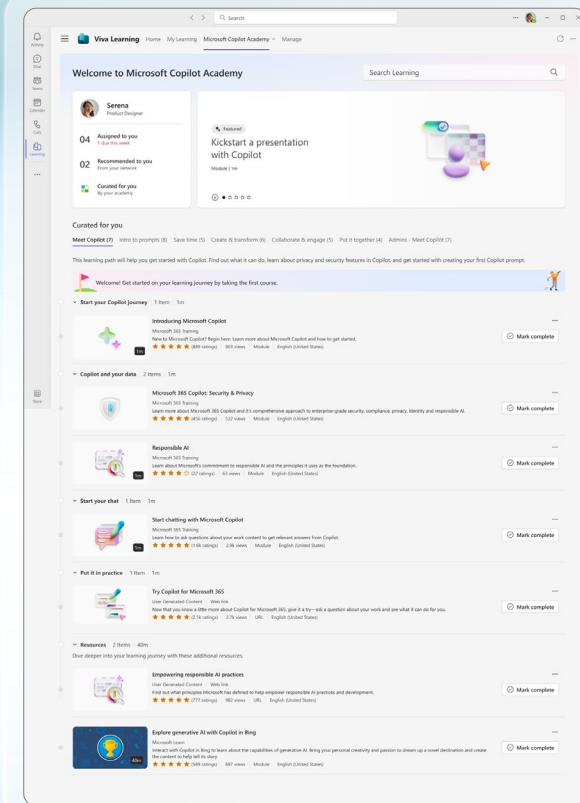
- Curated learning paths
- Hands-on prompt guidance
- Content created by Microsoft experts

aka.ms/CopilotAcademy



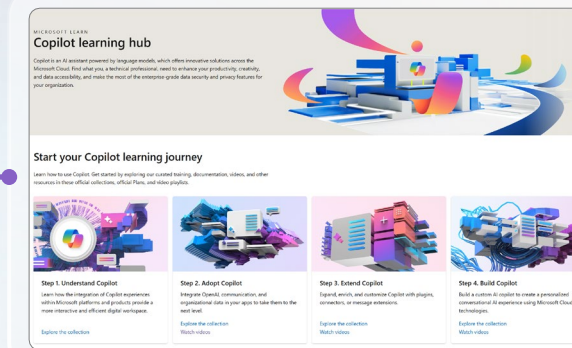
Microsoft 365 Copilot

Skilling experiences



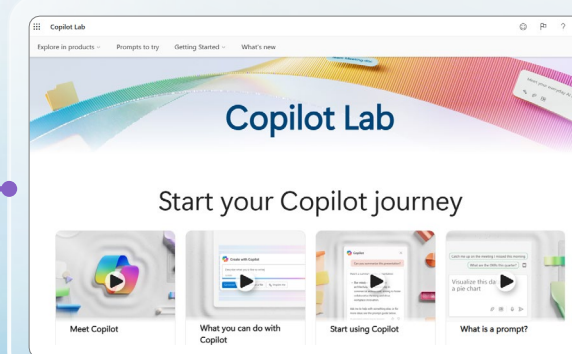
Microsoft Copilot Academy

- Available to all Microsoft 365 Copilot customers
- Centralized location to help with the basics of Copilot learning and upskilling, pulling the best content from available free Microsoft sources
- Structured content in easily consumable learning paths curated by Microsoft experts
- Develop your AI interaction skills from your Viva Learning app in Teams or webapp



Microsoft Learn

- Free, on-demand training content for skill development
- Step-by-step exercises guiding learners through common Copilot prompts and use cases



Copilot Prompt Gallery

- Free location to meet, learn about, and test the capabilities of Copilot
- Improve your prompt engineering skills in an interactive hands-on environment

Downloadable assets for customization available at adoption.microsoft.com/copilot

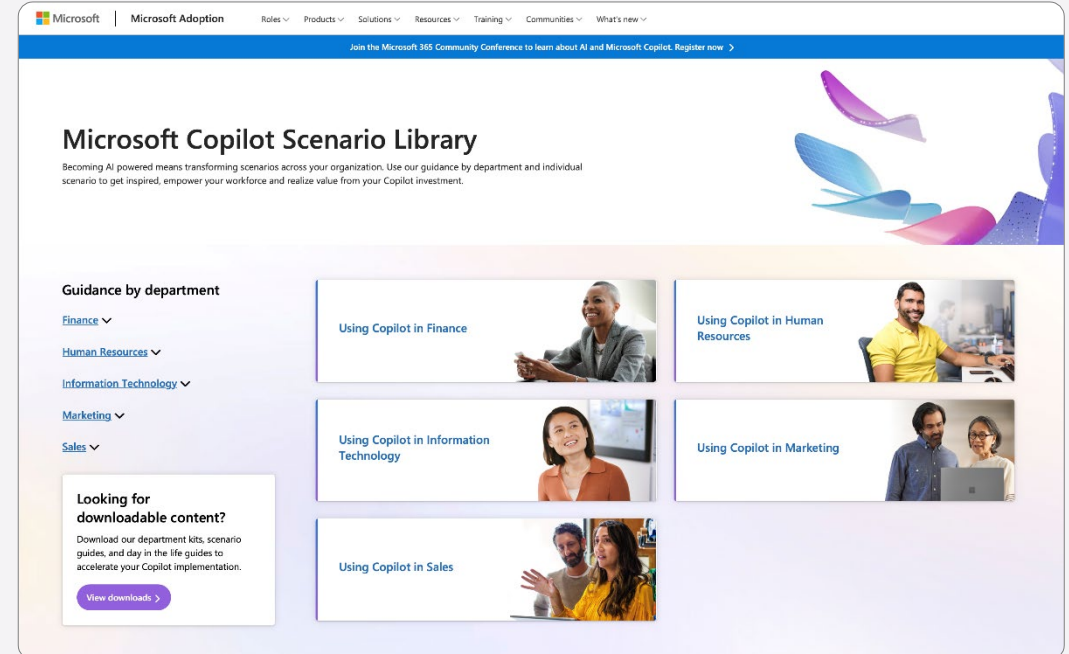
Copilot Scenario Library



Copilot brings AI value
across **lines of business**

Use the [Scenario Library](https://aka.ms/Copilot/ScenarioLibrary) to identify top use cases and business metrics you would like to improve in that functional area.

<https://aka.ms/Copilot/ScenarioLibrary>



All roles & execs

Improve meetings
Content creation
Manage daily agenda

HR

Cost per hire
Employee turnover
Compliance risk reduction

Marketing

Leads created
Brand value
Cost per lead

Operations

Customer retention
Product time to market
Supply chain efficiencies

IT

Outstanding support tickets
Application downtime
Departmental spending

Sales

Number of opportunities
Close rate
Revenue per sale

Finance

Accelerate cash flow
Spend on ERP system
Risk reduction

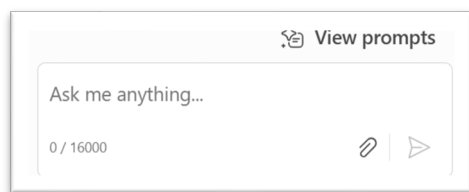
<https://aka.ms/Copilot/ScenarioLibrary>

Roadmap



M365 Copilot GCC Phases

What's On Tap?



GCC: Web grounding is NOT enabled by default



Generally Available



Copilot in Word, Excel, PowerPoint,
Teams Chat/Channel,
M365 Copilot Chat



Q1 CY 2025

Teams Meeting Copilot
Outlook Mail & Calendar
Loop, Stream, OneNote
SharePoint Agents
Deeper Purview Integration



CY 2025+

Copilot Whiteboard
Microsoft Copilot Dashboard
Usage and Readiness reports
SharePoint Copilot
Connectors into Power Platform
and the Microsoft Graph
*External connections and 3rd party connectors
are not enabled by default*

Roadmap Items of Note

Microsoft Teams: Meeting organizers can enable transcription in multilingual meetings (Copilot and Teams Premium)

■ □ □ IN DEVELOPMENT

ROLLOUT START

April 2025

Microsoft Teams

Microsoft Copilot (Microsoft 365)

We're introducing a new organizer-level control that no longer requires all meetings to have one common spoken language to be set across all participants. Meeting organizers with Copilot or Teams Premium licenses will see a new control in meeting options called "Enable multilingual speech recognition." When this is enabled before a meeting, each meeting participant will be able to set their own spoken language during the meeting, and the meeting transcript can accurately reflect each participant's language of choice.

Roadmap ID
473434

Cloud instances(s)
Worldwide (Standard Multi-Tenant), GCC

Platform(s)
Android, Desktop, iOS, Mac, Web

Release phases(s)
General Availability, Targeted Release



Visit Microsoft's
Copilot Roadmap

Roadmap Items of Note

Outlook: Copilot highlights important meetings to prep for

■ □ □ IN DEVELOPMENT

ROLLOUT START

June 2025

Microsoft Copilot (Microsoft 365)

Outlook

In this update, Copilot in the calendar will highlight important meetings to prep for today and in the upcoming week with a reason for the recommendation. Users can use Prepare with Copilot to get started.

Roadmap ID

481515

Cloud instances(s)

Worldwide (Standard Multi-Tenant)

Platform(s)

Desktop, Web

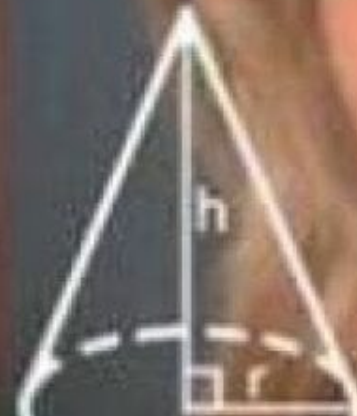
Release phases(s)

General Availability, Targeted Release



Visit Microsoft's
Copilot Roadmap

$$V = \frac{1}{3} \pi r^2 \cdot h$$



Metrics & ROI

$$ax^2 + bx + c$$

$$x_{1,2} = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

$$= \sqrt{b^2 - 4ac}$$



Common Tasks Comparison

With Copilot v/s Without



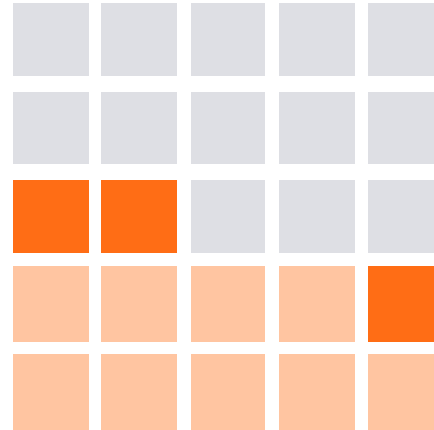
Summarize missed meeting



32 Minutes Saved



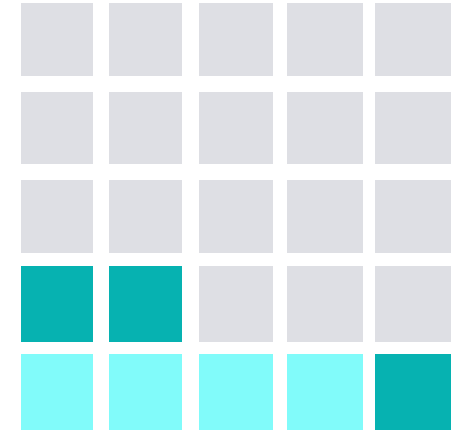
Search for information



6 Minutes Saved



Write a first draft



6 Minutes Saved

What are your success metrics?



Employee Wellbeing

- Reduce turnover and associated hiring costs
- Speed up onboarding
- Promote upskilling



Citizen Engagement

- AI technology increases rate of engagement
- New public facing tools and systems



Cost Savings & Avoidance

- Reduce outsourcing/contracting costs
- Avoid technology expenses
- Avoid additional hiring

Customer Service



Microsoft Copilot KPI impact

Customer service is a vital function for any business to retain and grow its customer base. However, customer service also faces many challenges, such as high volume of requests, diverse customer needs, complex issues, limited resources, and changing expectations. Copilot for Microsoft 365 and Copilot for Service are powerful tools that can help you overcome these challenges and improve your customer service performance.

KPI	DESCRIPTION	USE CASES	ANNUAL BENEFIT
Calls handled by agents	Organizations can use Copilot to develop self-service options for customers whether that is natural language search on a website or automated call systems. These solutions can reduce the number of calls that require a customer service agent.	<ul style="list-style-type: none">• Simplify documentation• Create personalized communications• Self-service bots	% change in calls handled
Average resolution time	Agents need to quickly find relevant information, suggest solutions, and automate tasks to increase customer satisfaction, and boost loyalty. Microsoft Copilot can help with lowering resolution times which in turn leads to increased agent productivity and higher customer satisfaction rates.	<ul style="list-style-type: none">• Access product information• Access customer data	12% reduction in call handling time
First call resolution	First Call Resolution (FCR) is a game changer because it improves customer satisfaction, enhances agent efficiency, and fosters long-term customer loyalty.	<ul style="list-style-type: none">• Access product information• Access customer data	% improvement in FCR

SOURCES

- Percentage improvements were calculated based on a sample set of Copilot for Service customer deployments, third-party analyst reports from Boston Consulting Group, Bain & Company, and McKinsey, and Microsoft’s internal business value management database.

IT / Help Desk



Microsoft Copilot KPI impact

Copilot for Microsoft 365 offers a cost-saving benefits for IT departments. By fostering increased collaboration, it streamlines knowledge sharing and problem-solving, reducing the need for redundant efforts. Copilot's enhanced communication tools ensure efficient coordination among team members, minimizing delays and costly misunderstandings.

KPI	DESCRIPTION	USE CASES	ANNUAL BENEFIT
Average support ticket resolution time	Enhances customer support by integrating AI assistance into workflows. With AI-assistance through bots, documentation and enhanced collaboration, your support team can work together seamlessly, ensuring consistent and effective service delivery.	<ul style="list-style-type: none">• Access product information• Access customer data	12% reduction in average handling time
IT outsourcing costs	Reduction in IT outsourcing costs as a result of reduced time spent per call. Through bots, documentation and enhanced collaboration, your support team can work together seamlessly, ensuring consistent and effective service delivery.	<ul style="list-style-type: none">• Improve troubleshooting• Create a project plan• Simplify administration tasks	10% reduction in IT contractor costs
Application downtime	Enhances support times to respond to emails, improve analysis of monitoring, faster access to documentation and speed to communicate.	<ul style="list-style-type: none">• Improve troubleshooting• Improve trend analysis• Simplify administration tasks	% reduction in lost productivity

SOURCES

- Study conducted by Microsoft's Office of the Chief Economist, in partnership with the Dynamics 365 product group. The initial results shared here reflect those of 11.5K agents, with 6.5K agents who used Copilot and the control group of 5K agents who did not use Copilot.
- Forrester TEI of Copilot for Microsoft 365 - up to 10% reduction in IT contractor costs

Legal

Microsoft Copilot KPI impact



Forrester TEI survey respondents also expected agency/professional service costs to be reduced across many categories, including data analysis (65%), consulting (52%), IT (48%), administrative support (41%), and graphic design (31%).

KPI	DESCRIPTION	USE CASES	ANNUAL BENEFIT
Outside counsel spend	Reduce time spent on routine tasks, enhance work product quality, and improve client interactions to drive increased business velocity. These capabilities can free up time to handle more work in house.	<ul style="list-style-type: none">• Reduced time to produce documents• Summarization and review• Speed of access to content• Drafting and editing of documents• Comparison of documents	% reduction in outsourcing costs
Cost per document review request	Efficiently find relevant information to facilitate rapid decision making and draft guidance with clear and relevant advisory points.	<ul style="list-style-type: none">• Summarization and review• Speed of access to content• Drafting and editing of documents• Comparison of documents	% reduction in review time

SOURCES

- Forrester TEI of Copilot for Microsoft 365

Enablement outcome examples

Organizational

Cultural transformation
Employee retention
Talent acquisition
Social engagement
Operational agility

Cultural

Employee sentiment
Employee recommendations
Customer feedback
Innovation measures,
e.g., idea forum
contributions

Business process

Customer experience
impact
Cost savings
Revenue generation
Data security
Process simplification

Individual

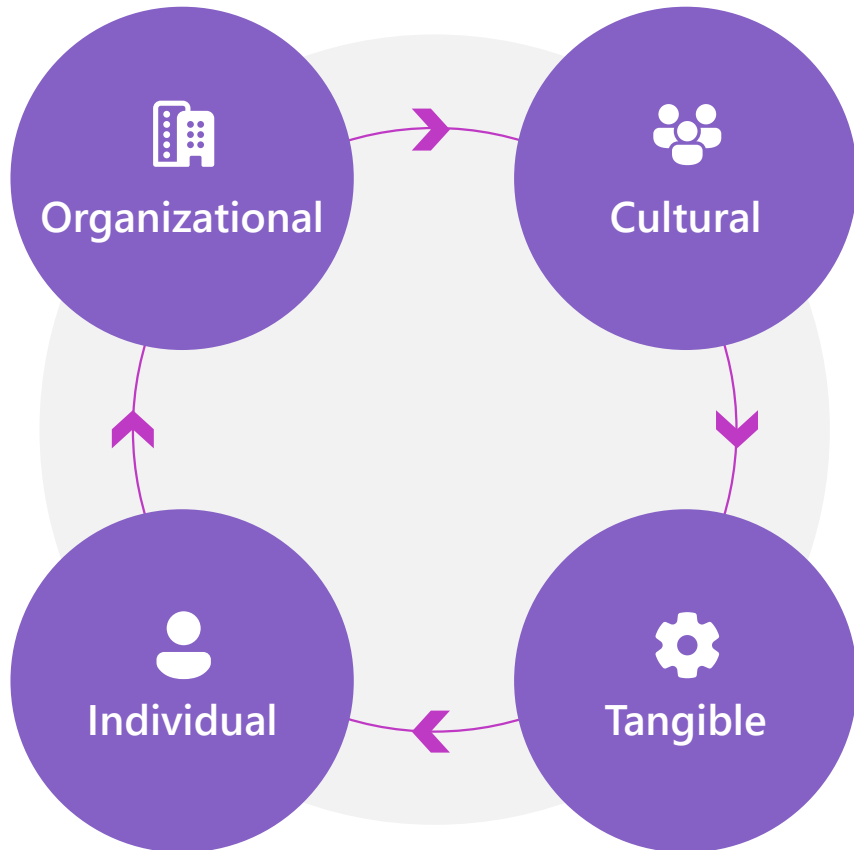
Use of AI capabilities
Employee morale
Employee productivity
Employee engagement
Idea generation

Questions

How is your organization progressing on these measures?
What is your business transformation process today?

Review your progress

The enablement outcomes matrix



$$\frac{\text{Tangible measures}}{\text{Individual sentiment}} = \text{Change quotient}$$

Prioritize the section of outcomes that are most important for your business

Simplify your investment strategy in adoption activity against these outcome segments

Use these dimension to ascertain where you have resource or skills gaps in your organization to achieve your goals.

Deliver impact: Access usage reports

Interpret the Microsoft 365 Admin Center Usage Report

The Microsoft 365 Copilot usage report includes two sections: Readiness and Usage.

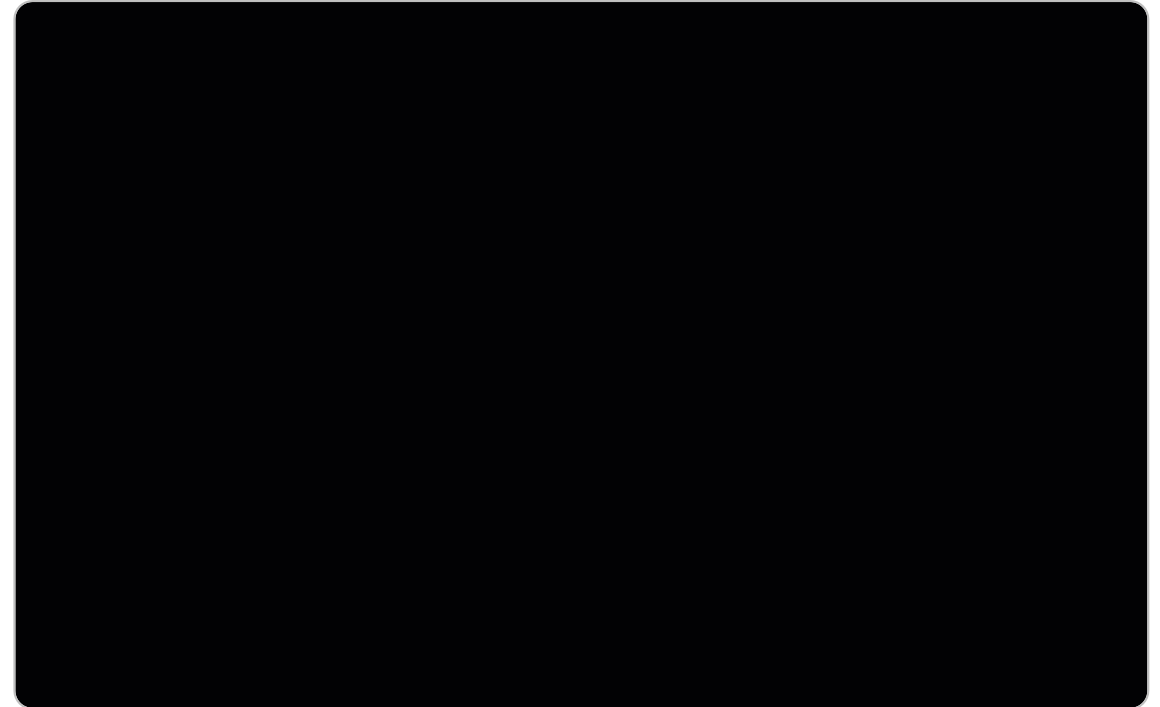
In the [Readiness section](#), you can review technical eligibility, license assignment, and users who are in a strong position to get value from Microsoft 365 Copilot.

In the [Usage section](#), you can view a summary of Microsoft 365 Copilot adoption with visibility into users' last Microsoft 365 Copilot activity.



Interpret the Readiness section by analyzing assigned and available Copilot licenses, how many users are technically eligible, and how many are in a strong position to get value from Microsoft 365 Copilot.

If needed, you can export the report data into an Excel .csv file by selecting the Export link. This exports the Microsoft 365 Copilot last activity data of all users and enables your identified report readers to do simple sorting, filtering, and searching for further analysis.

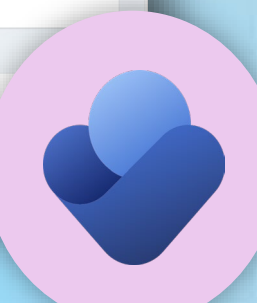
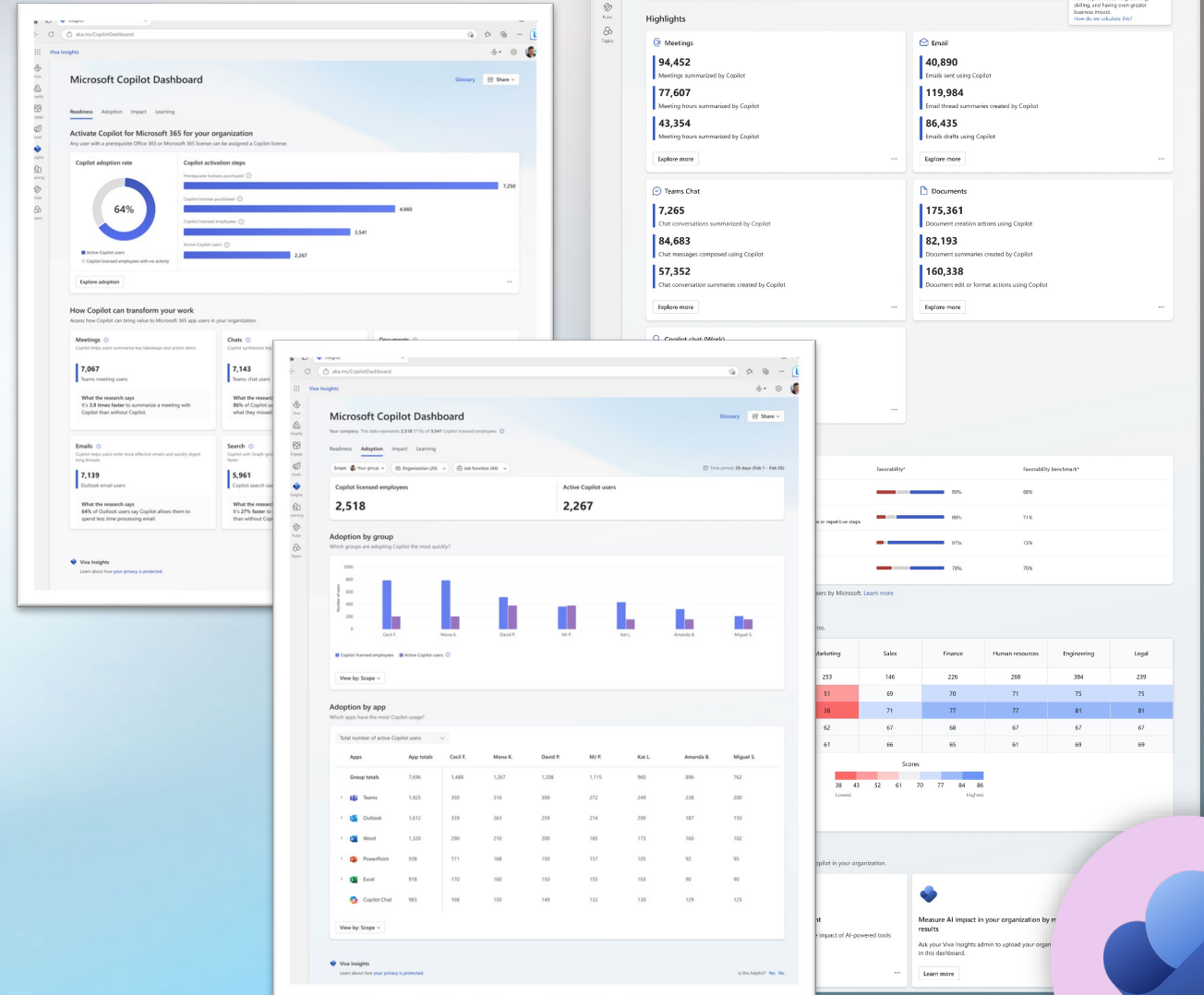


Copilot Dashboard

Measure Copilot adoption and impact

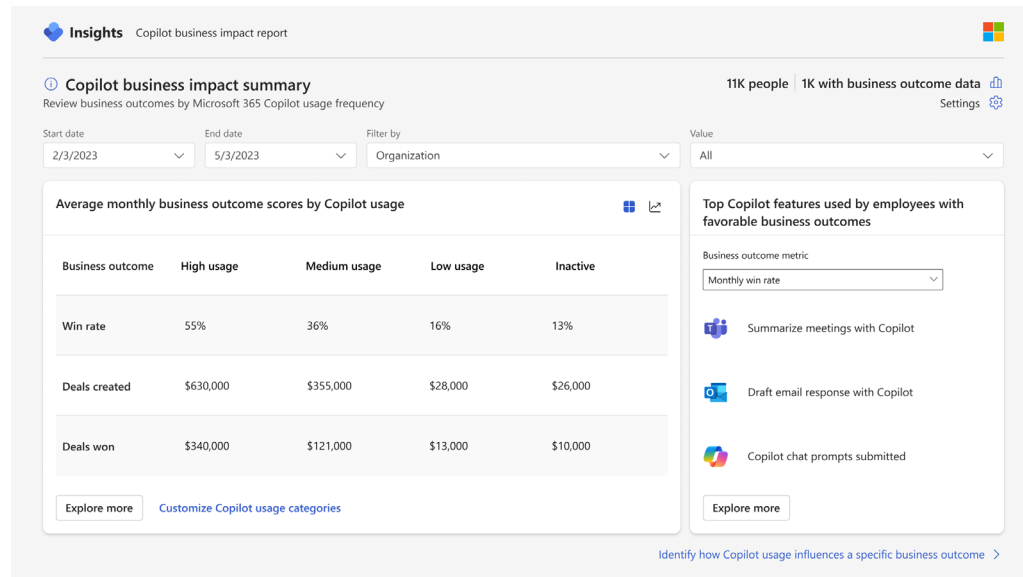
Pre-built dashboard for business leaders to prepare for their Copilot rollout, understand and drive usage and adoption, and measure the impact of their investments.

- **Access directly at** aka.ms/CopilotDashboard
- **Readiness tab** to see licensing and copilot activation status across the tenant
- **Adoption tab** to see Copilot trends and usage down to the app feature level, with filters to drill down by group, organization, and job function.
- **Impact tab** to view Copilot actions by productivity categories, Copilot assisted hours and related value calculator and how Copilot usage is correlated with behavioral patterns in your business. Sentiment data from uploaded survey results is also available.
- **Learning tab** for research and best practices to inform your AI journey
- Use the [Copilot Dashboard metrics eBook](#) to help understand and interpret the data



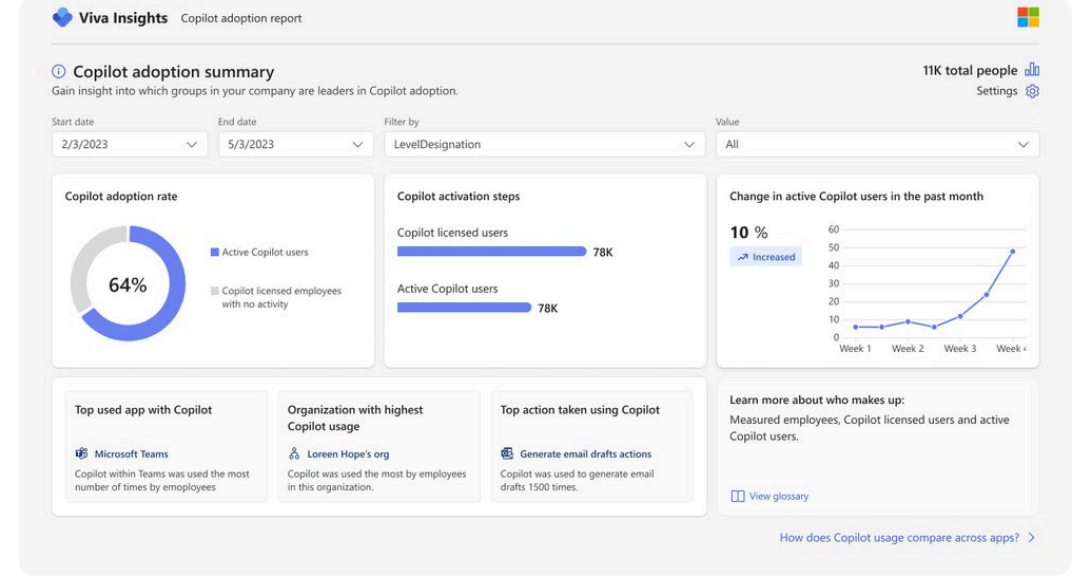
Viva Insights advanced impact reports

Included with Microsoft 365 Copilot



Copilot business impact reports

Measure the value of Microsoft 365 Copilot with your key business metrics.



Advanced adoption and impact reports

Get a deeper look into Microsoft 365 Copilot adoption and impact trends with a customizable, prebuilt report.

Copilot Licensing Requirements

Customers must be licensed for one of the following:

- M365 Apps for enterprise
- M365 F1, F3, E3/G3, E5/G5
- Office 365 E1/G1, E3/G3, E5/G5, or F3
- EXO Kiosk, P1, P2
- ODfB P1, P2
- SPO P1, P2

Education

- M365 A1, A3, or A5 for faculty
- Office 365 A1, A3, or A5 for faculty or higher education students aged 18+



Create a sketched style image of a Minnesota police officer holding their hand out and asking for requirements

M365 Copilot Licensing

- Is considered an add-on license
- Priced ~ \$28-34 a month, depending on contracts, discounts, current MSRP

A Microsoft 365 Copilot license includes the following features and capabilities:

- Microsoft 365 Copilot Chat, including Pages
- Copilot in Microsoft 365 apps, including Teams
- SharePoint agents
- Agent capabilities in Copilot Studio, when used in Microsoft 365 Copilot, Teams, SharePoint
- Copilot Analytics (Microsoft Copilot Dashboard, prebuilt business impact reports that are customizable, and advanced analytics from Viva Insights)
- SharePoint Advanced Management



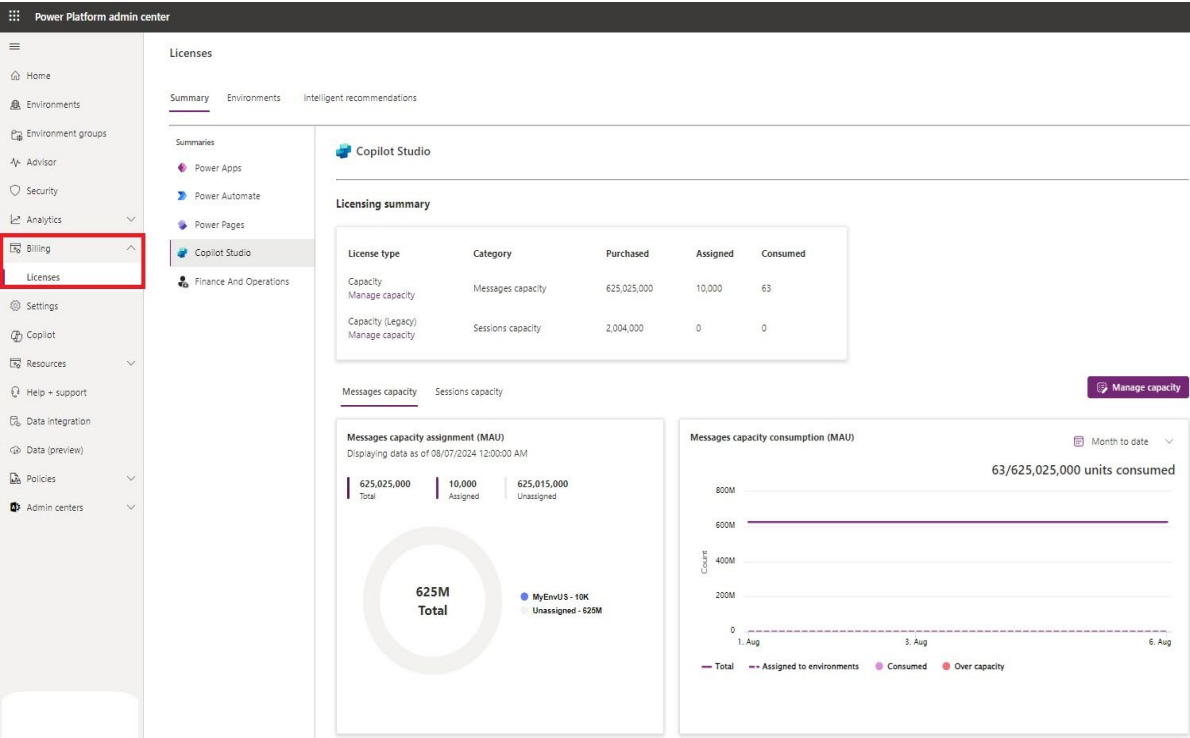
Create a mclovin' style image of a young person getting their license to use Microsoft copilot

Copilot Studio Licensing

- Pay as you go - \$0.01 per message
- Message packs - ~\$200 per tenant, per month (25k messages)
- For the Copilot Studio in Microsoft 365 Copilot license, agents built in Copilot Studio for Microsoft Teams, SharePoint, and Microsoft 365 Copilot, are included at no extra charge.
- EAs with Power Virtual Agents will be renewed with the Copilot Studio equivalent

M365 Copilot and Copilot Studio GCC

- FedRAMP High compliant
- Your organization's customer content is physically separated from customer content in non-US-Government plans for Copilot Studio.
- Your organization's customer content is stored within the United States.
- Access to organization's customer content is restricted to screened Microsoft personnel.



Manage Copilot Studio messaging capacity and view utilization reports in the Power Platform admin center

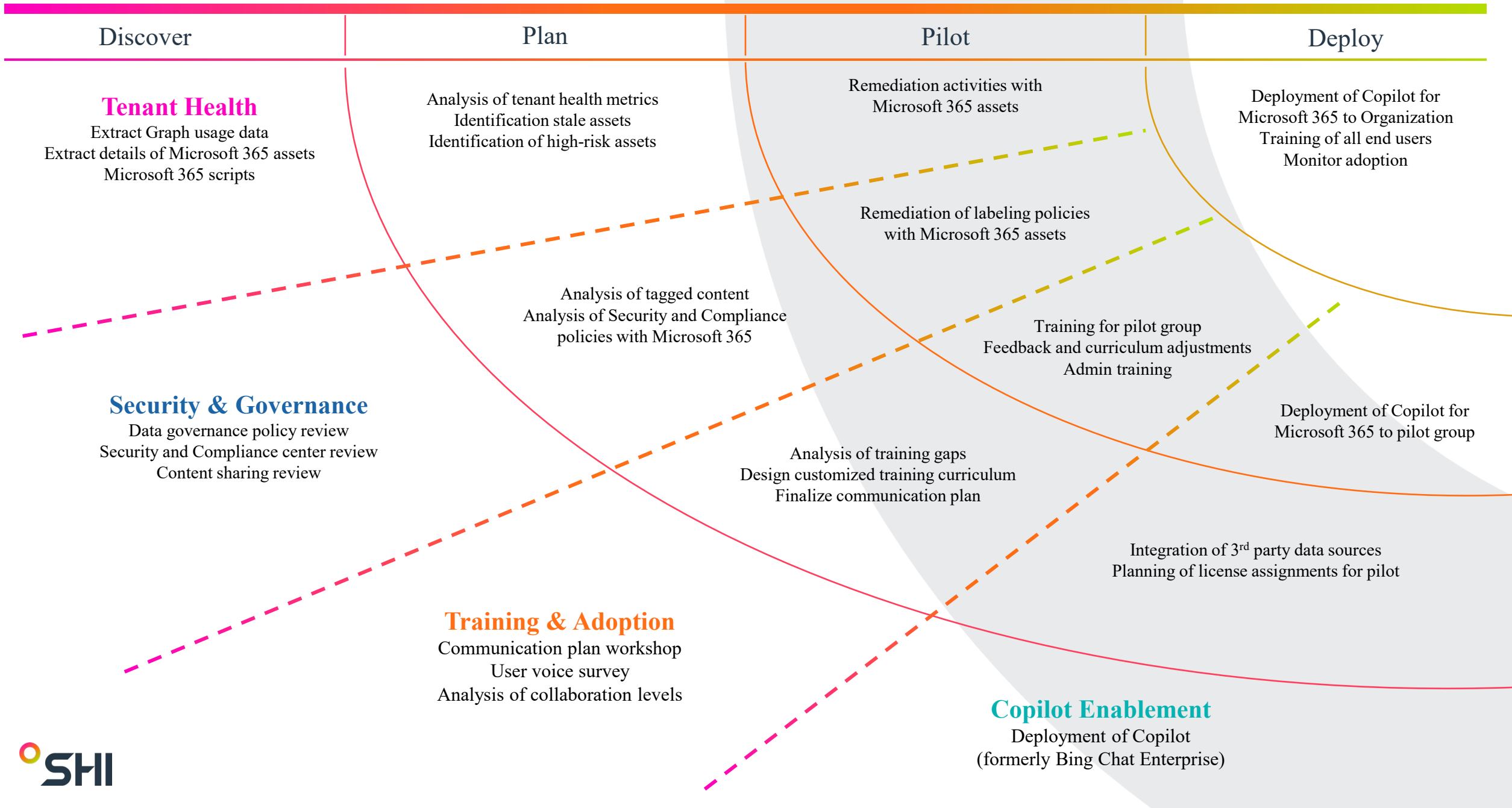


Copilot Studio message scenarios, management, and best practices

What is SHI's Approach?



Journey to a successful Copilot for Microsoft 365 Experience: The SHI approach



SHI Copilot Enablement Strategy

OBJECTIVES CORE

Discover (1-2 weeks)

Gather requirements, plan for AI integration, identify goals and outcomes through discovery sessions with stakeholders, and activate Copilot (formerly Bing Chat Enterprise).

Design (2-3 weeks)

Capture the technical details and personality traits of 365 usage within the organization to develop a training and communication plan customized to the organization's needs.

Build (1 month)

Evaluate AI priority personas, rollout Copilot for Microsoft 365 to launch groups, establish early adoption framework and education, and understand gaps from initial experience.

Train & Deploy (1 month)

Deploy Copilot for Microsoft 365 to the organization and provide a clear path forward with training and reinforcement to solidify tool adoption.

Strategy Sessions

Focus Groups

Interviews & Surveys

Working Sessions

Communication Plan

Stakeholder Deck

Deploy to Launch group

Launch Group Training

Feedback Loops

Deploy to all users

Live Instructor-Led Training

AI Adoption Report

STATS HIGHLIGHTS

Users

Ideal: 10%

Cost

Variable

Timeline

~3 m

DELIVERABLES ARTIFACTS



Discovery Engagements

Focus groups, interviews, and/or Surveys to gather relevant information; medium will vary by customer needs and preference



Copilot

Copilot (formerly Bing Chat Enterprise) configured and deployed so the organization can start learning how to use AI



Communication Plan

A strategy timeline and suggested resources designed to inform and equip end users



AI Practice Analysis Report

Results from a deep tenant, user, and data forensics analysis will be provided in this document.



Launch Group Training

Customized outlines and live Instructor-Led Training delivered to support Copilot Deployment



End User Training

Customized outlines and live Instructor-Led Training delivered to support Copilot Deployment



AI Adoption Report

Documentation as the result of workshops, configuration, and recommendations



Copilot for Microsoft 365

Copilot for Microsoft 365 configured and deployed to all 300 end users

Reference Slides





Training and documentation by phase


User Enablement


Technical Readiness


Get ready


 [Copilot Experiences Explained](#)
(11 mins)


 [Leading in the Era of AI:
Creating an AI Council](#)


 [Discover how to drive enablement
of Microsoft 365 Copilot in your
organization](#) (2.5 hrs)


 [Prepare your organization for
Microsoft 365 Copilot](#) (1.5 hrs)

 [How Microsoft 365 Copilot works](#)
(11 mins)


 [How to get ready for Microsoft
365 Copilot](#) (9 mins)


 [Data, Privacy, and security for
Microsoft 365 Copilot](#)

 [Microsoft 365 Copilot requirements](#)

 [Microsoft deployment blueprint to
implement internal oversharing
protections for Microsoft 365 Copilot](#)


Onboard & engage


 [User Experience Strategy template](#)

 [Copilot Prompt Gallery](#)
(including app specific guidance)


 [Leading in the Era of AI:
It's about Trust](#)

 [Learn about Copilot prompts](#)

 [Get started with Microsoft 365
Copilot](#) (2 hrs)


 [Admin steps to get ready for
Microsoft 365 Copilot](#) (46 secs)


 [Apply principles of Zero Trust to
Microsoft 365 Copilot](#)

 [Enable users for Microsoft 365
Copilot](#)


 [Get Ready for Microsoft 365 Copilot
with SharePoint Adv Management](#)


Deliver impact


 [Empower your workforce with
Microsoft 365 Copilot Use Cases](#)
(7 business group use cases)

 [Craft effective prompts for
Microsoft 365 Copilot](#) (2 hrs)

 [Get better results with
Copilot Prompts](#)


 [Edit a Copilot prompt to
make it your own](#)


 [Share your best prompts](#)


 [Microsoft 365 Copilot
Documentation](#)


 [Copilot Dashboard
implementation](#)


Extend & optimize

 [Modern Collaboration Architecture](#)
people-centric scenario guidance

 [Extend Microsoft 365 Copilot](#)

 [Create agents with Microsoft
Copilot Studio](#) (4 hrs)

 [Optimize and extend Microsoft
365 Copilot](#) (1 hr)

 [Extend and manage Microsoft
Copilot Studio agents](#) (2 hrs)

 [Build connectors and plugins for
Microsoft 365 Copilot](#) (3 hrs)

Top 10 to try first with Microsoft 365 Copilot

 Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from [meeting](#)



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from [file](#)



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about [topic](#) organized by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on [file](#)



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did [person](#) say about [topic](#)



9

How do I ...

– let Copilot help you build or fix formulas in Excel.

→ How do I sum values that are greater than 0?



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit the Copilot Prompt Gallery at: aka.ms/prompts

Links to learn more (1 of 2)

[Copilot Readiness Hub](#)

What is Copilot?

- [Introducing Microsoft 365 Copilot](#)
- [The Copilot System](#)
- [ChatGPT vs. Microsoft 365 Copilot: What's the difference?](#)

How Copilot works

- [How Microsoft 365 Copilot works: Microsoft Mechanics video](#)
- [Semantic Index for Copilot](#)
- [Microsoft Graph](#)
- [Microsoft Graph connectors](#)
- Additional copilot experiences across the Microsoft Cloud
 - [Microsoft Dynamics 365 Copilot](#)
 - [Copilot in Power Platform](#)
 - [Microsoft Security Copilot](#)
 - [GitHub Copilot](#)
 - [Copilot in Microsoft Stream](#)

Privacy

- [Microsoft's privacy policy](#)
- [Microsoft Privacy Statement](#)
- [Trust Center data protection and privacy](#)
- [Data, privacy, and security for Microsoft 365 Copilot](#)
- [Data, privacy, and security for Azure OpenAI Service](#)
- [Role-based access control](#)
- [User permissions and permission levels in SharePoint Server](#)
- [Customer Lockbox requests](#)
- [Microsoft 365 isolation controls](#)
- [Data Protection Addendum](#)

Links to learn more (2 of 2)

Data residency and storage

- EU Data Boundary
 - [Website](#)
 - [Blog](#)
 - [Documentation](#)

Compliance

- [Microsoft Compliance](#)
- [Service Trust Portal](#)
- [Compliance offering definitions](#)
- General Data Protection Regulation (GDPR)
 - [Full summary](#)
 - [Short summary](#)

Security

- [Configure usage rights for Azure Information Protection \(AIP\)](#)
- [Universal Licensing Terms for Online Services](#)
- [Data Protection Addendum](#)
- [Isolation and Access Control in Microsoft 365](#)

How to prepare for Microsoft 365 Copilot

- [Learn about Microsoft feedback for your organization](#)
- [Manage Microsoft feedback for your organization](#)
- [How to manage Microsoft Search](#)
- [Microsoft 365 Product Terms](#)
- [Content management and security in SharePoint, OneDrive, and Teams](#)
- [Transcription Management in Microsoft 365 Copilot](#)
- [Get Ready for Microsoft 365 Copilot with SharePoint Advanced Management](#)
- [Microsoft deployment blueprint to implement internal oversharing protections for Microsoft 365 Copilot](#)

Responsible AI

- Responsible AI core principles
 - [Videos](#)
 - [Documentation](#)
- [Microsoft Responsible AI Standard](#)
- [Governing AI: A Blueprint for the Future](#)

Thank you

