



# 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?



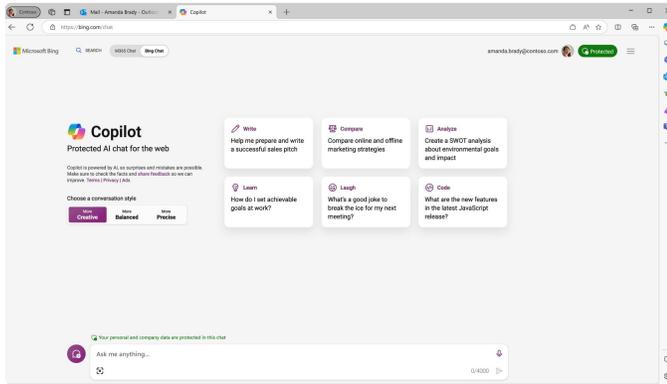
Does your organization have the necessary **infrastructure and resources** to support AI initiatives?

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.**

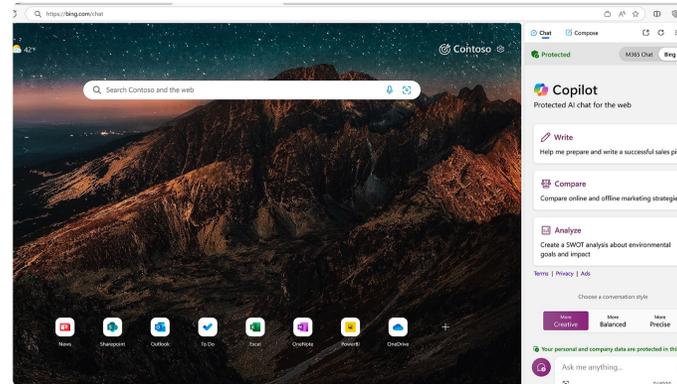
The effect of next-generation AI will be felt in three distinct ways: It will **unleash creativity, unlock productivity, and uplevel skills.**

# Copilot is everywhere!

Bing.com/chat



Microsoft Edge sidebar



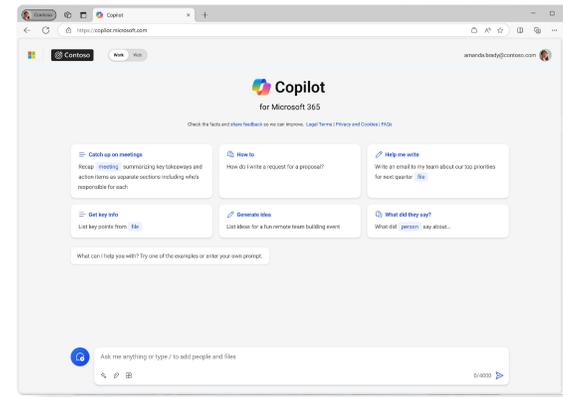
Microsoft Edge app on mobile



Windows



Copilot.Microsoft.com



# Copilot for Microsoft 365

Your AI assistant at work



# Copilot for Microsoft 365

\$30 USD per user, per month



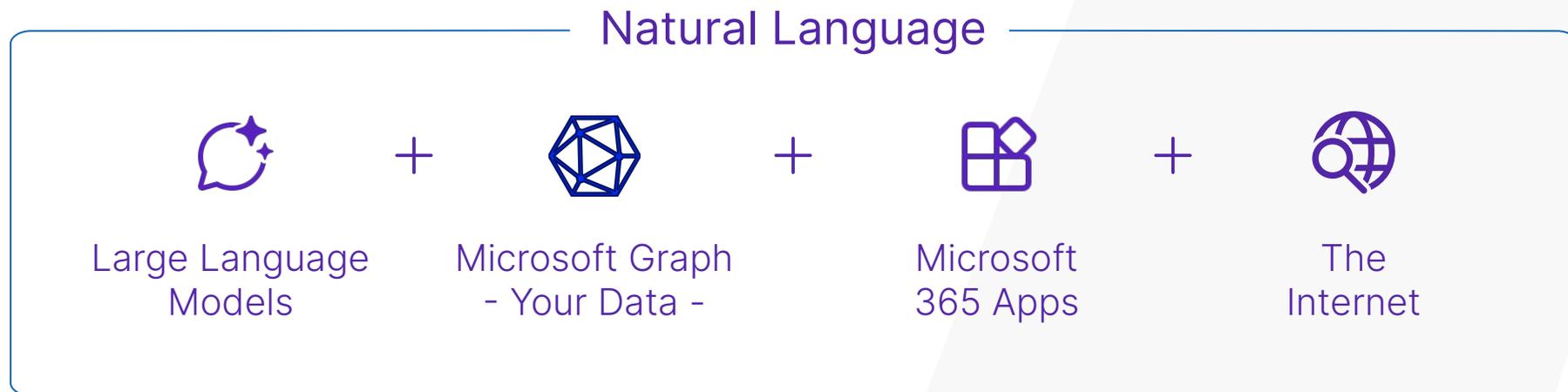


# What makes Copilot for Microsoft 365 different?

## 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

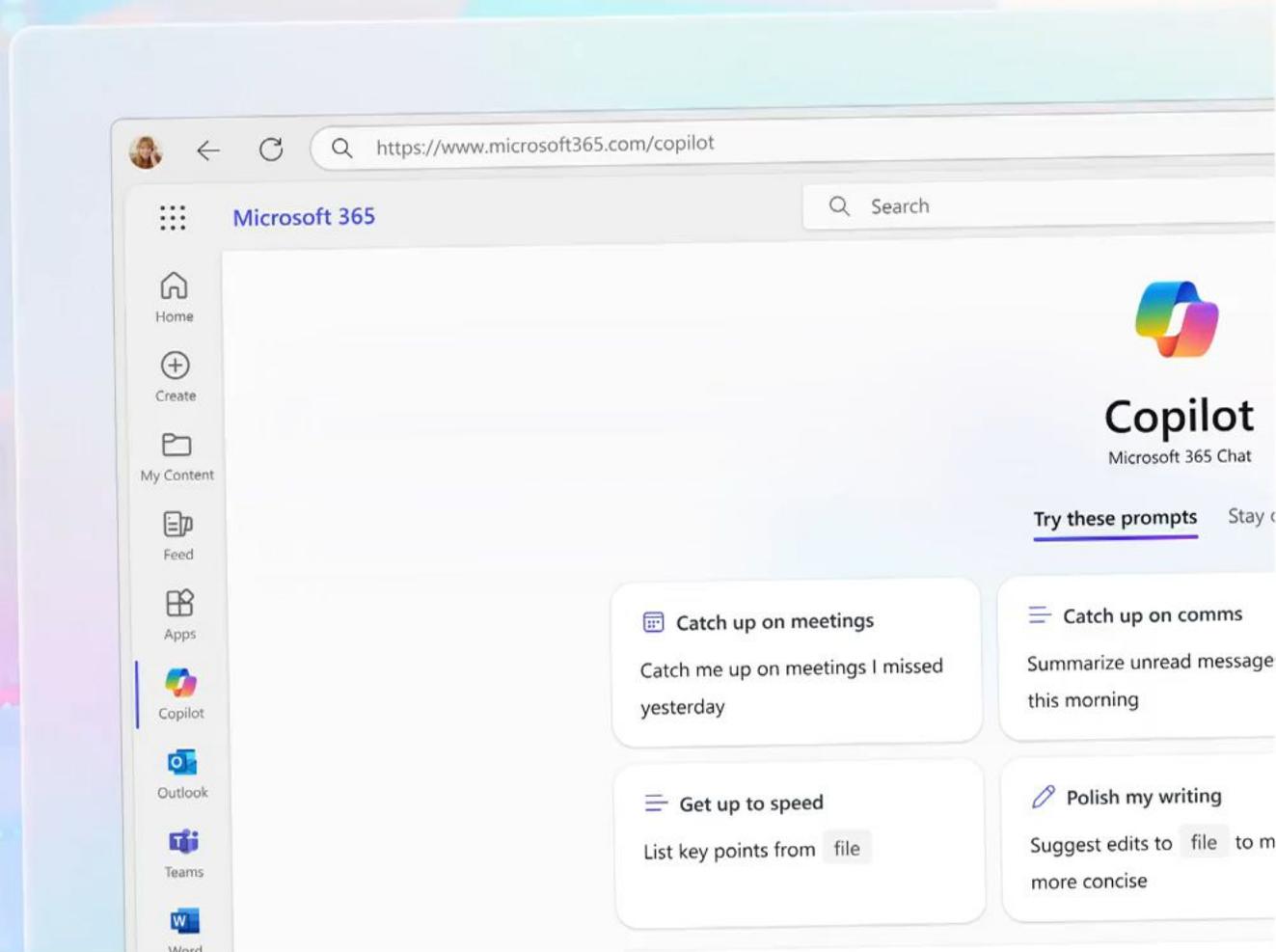


**UPLEVEL  
SKILLS**

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

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# Copilot in M365 Chat

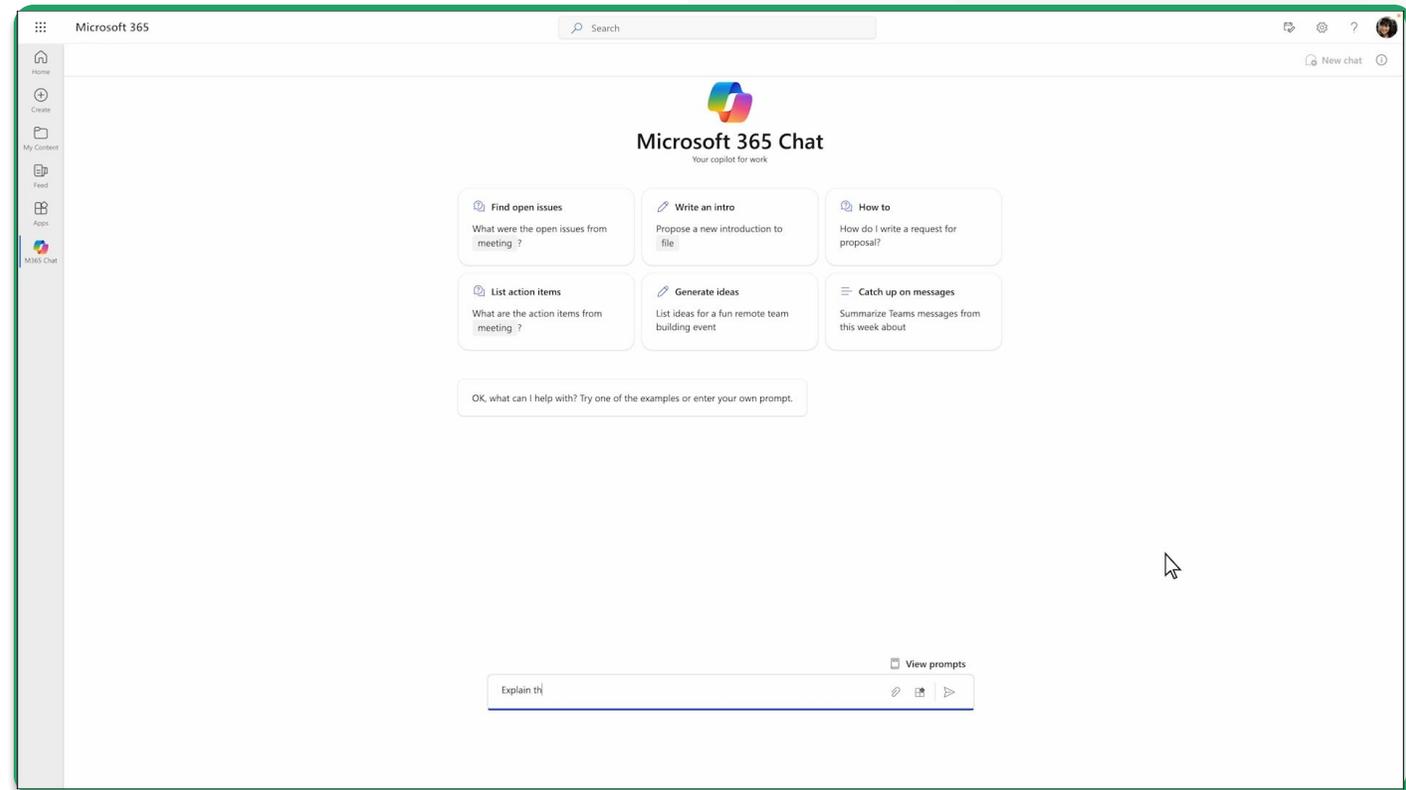




Goes far beyond simple questions and answers to tame the complexity, eliminate the drudgery, and reclaim time at work.

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

### More prompts to try

Work Personal

Apps Categories

<b>✂ Share meeting notes</b> Draft an email with notes and action items from <code>meeting</code>	<b>↪ Write a status update</b> Write a status report to my manager based on <code>file</code> . Include any upcoming deliverables, due dates, and key decisions	<b>↪ Catch up on messages</b> Summarize Teams messages from this week about...	<b>🔗 How to</b> How do I write a request for proposal?
<b>✂ Help me write</b> Write an email to my team about our top priorities for next quarter from <code>file</code>	<b>✂ Discover a company topic</b> I need to explain <code>[concept]</code> to a <code>[role/target audience]</code> . I need to include an explainer of what it is, how it works, and a	<b>✂ Draft an FAQ</b> Create an FAQ based on <code>file</code>	<b>↪ Describe something concisely</b> Summarize this doc into a high-level overview of the benefits of <code>[topic]</code>
<b>🔗 Get calendar info</b> When's my next meeting with <code>person</code> ?	<b>✂ Create a quiz</b> Write a practice quiz about <code>[Topic]</code> . Include at least 20 questions, and group questions by category. Provide a detailed	<b>✂ Create based on a topic</b> Create 5 hypothetical courses about <code>[Topic]</code> . Include a brief summary for each course and a catchy title.	<b>↪ Prep for a meeting</b> I've got an upcoming meeting with <code>person</code> . Based on my recent communication and recent news items, create a...
<b>✂ Add images</b> Add a relevant image to this	<b>↪ Get key info</b> List key points from <code>file</code>	<b>✂ Brainstorm</b> Suggest 10 compelling taglines	<b>✂ Draft an email template</b> Draft a personal email I can send

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# Copilot in Teams Meetings

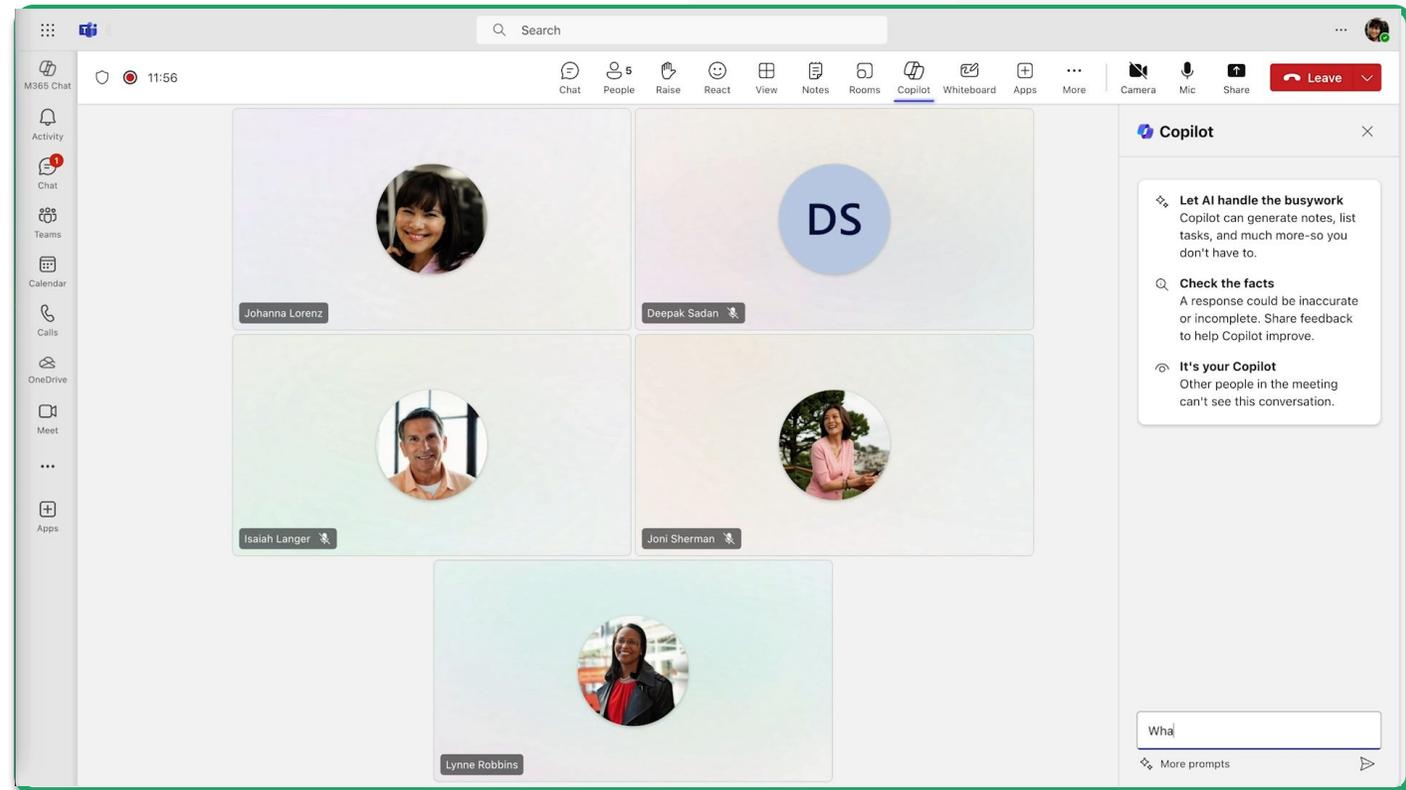
The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes the Teams logo, navigation arrows, and a search bar. The meeting title is "Core accounts business review", with tabs for Chat, Details, Files, and Recap. The meeting time is "Mar 16, 10:00 AM" and there is an "Open in Stream" button. The left sidebar contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area shows "Shared content" with a file named "Proseware Proposal.pptx". Below this is a video player showing a hand pointing at a screen, with a play button and a duration of "48m 42s". Under the video are "Speakers" and "Topics" tabs. The "Topics" tab is active, showing a list of topics: "Proseware negotiation strategy" and "Core accounts round table". On the right side, there are buttons for "Notes", "@ Mentions", and "Transcript". The "Notes" section is expanded, showing a note from "Core accounts.loop" titled "Quarterly results and forecasts for Core Account". The note includes a "Summary" section with a play button icon and a list of bullet points: "\$230K revenue shortfall in this quarter", "Inventory 15% surplus (renewable products and recycled)", "Account leads to propose discounting scenarios to lower i", and "Proseware was discussed as a leading opportunity". Below the summary is a "Notes" section with a list of notes: "Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal." and "The team identified a new opportunity with Proseware th".

# 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

The screenshot displays a Microsoft Teams meeting interface. At the top, a blue callout box labeled "Intelligent recap" points to the "Recap" tab in the meeting header. Below the header, a video player shows a "Product Roadmap Discussion" from January 21, 2023. To the right of the video, a "Content" section lists related files: "Product Roadmap...", "Marketing budget...", and "Marketing demo f...". Below this, a "Meeting notes" section contains AI-generated text: "Generated by AI. Be sure to check for accuracy." and "Meeting notes" detailing discussions about product roadmap, feature enhancements, and capacity management. A "Follow-up tasks" section lists actions for Danielle and Jon Shammass. On the right side, a "Copilot" panel is open, showing a prompt: "Create a table with pros and cons of option 1". It displays a table with two columns: "Pros" and "Cons".

Pros	Cons
Wider range of potential leads	Less persuasive
Simpler, faster sign-up process	Difficult to segment audience
Streamlines multiple campaigns	Less engaging

Below the table, there are buttons for "Copy", "Elaborate on each pro and con.", and "List more options.". At the bottom of the Copilot panel, there is a text input field: "Ask a question about this meeting".

On the left side of the Teams interface, a vertical sidebar contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. On the right side, a vertical sidebar contains navigation icons for On-demand, Based on unique prompts, Conversational interaction, and Available real-time.

- Built-in and automated
- Standardized
- Video, speaker, and chapter markers
- Available after meeting only

- On-demand
- Based on unique prompts
- Conversational interaction, with citations.
- Available real-time (during and after meeting)

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

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# Copilot in Outlook

The screenshot displays the Outlook interface for a meeting recap. At the top, the Outlook logo and a search bar are visible. The meeting title is "Marketing Sync - meganb@contoso.com" with an event type of "Meeting recap". The specific meeting is "Profitable Projects Pitch & Plan" held on Wednesday 9/8/2023 from 11:00 AM to 12:00 PM. A video gallery shows six participants. The right-hand panel features a "Content" section with a "Product Roadmap..." document, a "Notes" section with a highlighted "AI notes" button, and a "Meeting notes" section. The AI notes include a disclaimer: "AI-generated content may be incorrect". The meeting notes list key points: Daniela highlighted the effectiveness of before-and-after images, Seren suggested incorporating her suggestion into the team, and Babak suggested conducting a prosperous home improvement project.

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 effectiveness of before-and-after images in their effectiveness. Seren suggested incorporating her suggestion into the team's strategy.
- > Babak suggested conducting a prosperous home improvement project to enhance the office environment.

Speakers Topics Chapters

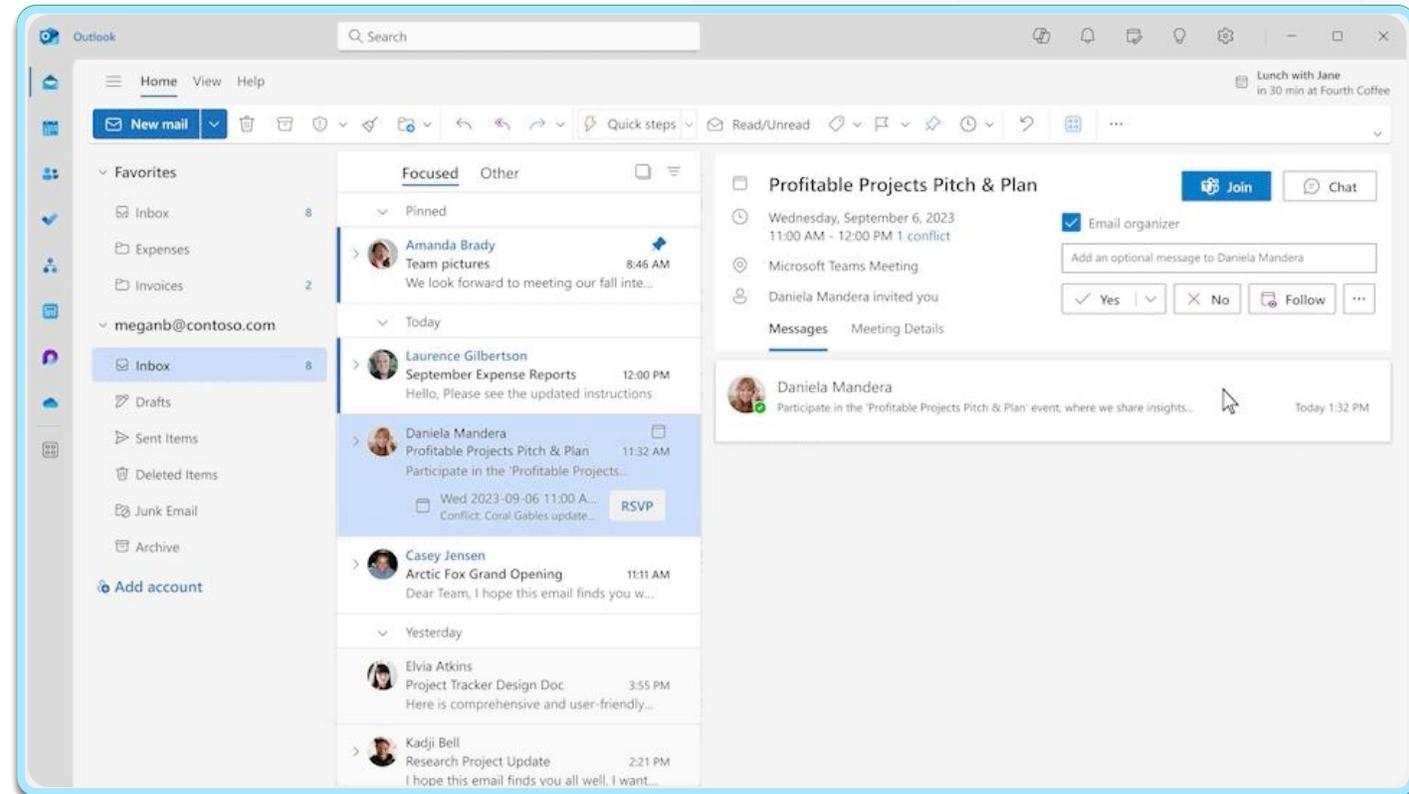
Serena Davis

# 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 outpoints
- **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
<b>Use device security and access policies to ensure only compliant devices access internal Microsoft 365 resources</b> (Basic Mobility and Security)	✓	✓
<b>Reduce the likelihood of account takeover by bad actors</b> (Single sign-on and multi-factor authentication with Entra ID Free)	✓	✓
<b>Basic email protection – antimalware, antispam and phishing that's on by default</b> (Exchange Online Protection)	✓	✓
<b>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</b> (Information Protection)		✓
<b>Protect against ransomware attacks with enterprise-grade endpoint protection</b> (Defender for Business)		✓
<b>Security against phishing and other cyberthreats in email and OneDrive including link and attachment scanning</b> (Defender for Office 365 Plan 1)		✓
<b>Help employees securely access business apps wherever they work with conditional access. Safeguard against password loss or theft with advanced multifactor authentication</b> (Entra ID Plan 1)		✓
<b>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</b> (Intune Plan 1)		✓

 For Individuals

 For Organizations

	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$20	Free	\$30
Foundational Capabilities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Web Grounding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Commercial Data Protection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Priority Model Access		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Copilot in Teams				<input checked="" type="checkbox"/>
Microsoft Graph Grounding				<input checked="" type="checkbox"/>
Enterprise-Grade Data Protection				<input checked="" type="checkbox"/>
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)<sup>1</sup>
- ✓ 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



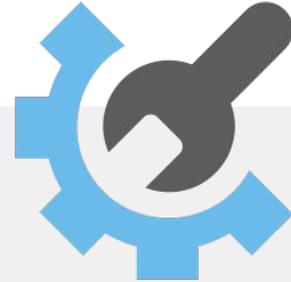
**Migrate mailbox to the cloud** and standardize on Microsoft 365 secured productivity.

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.

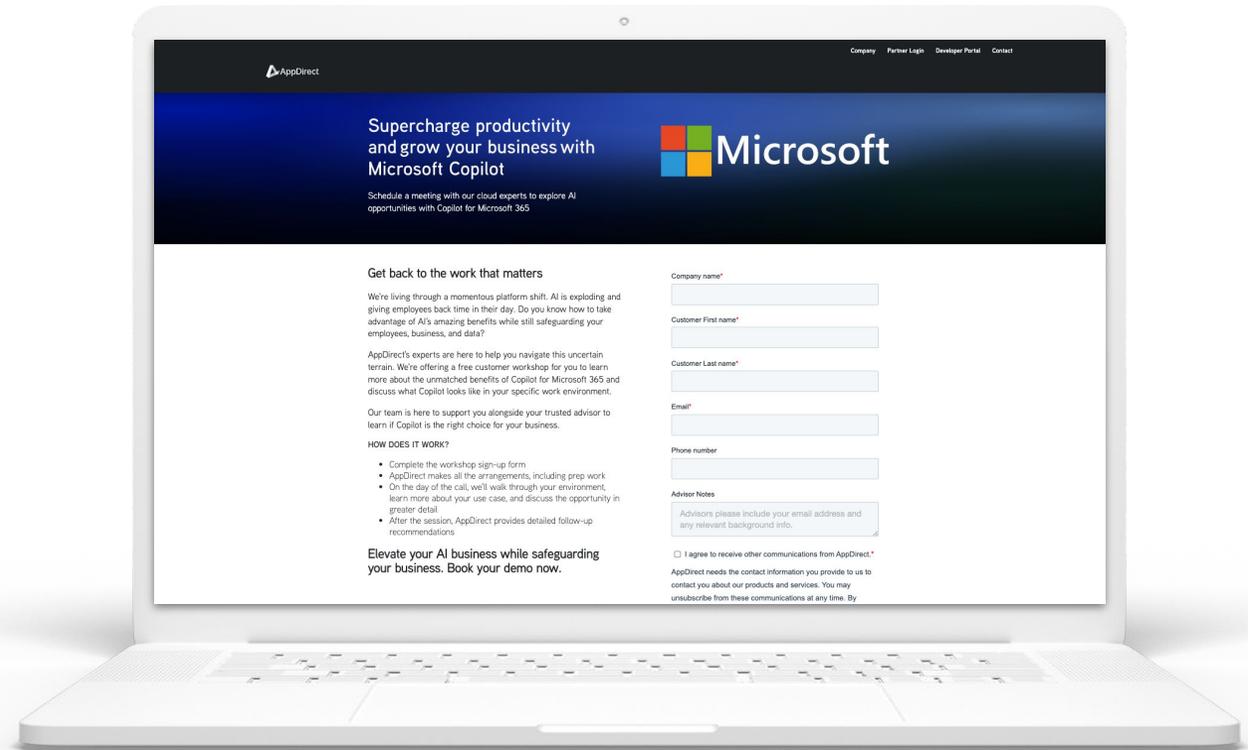
**\$3K / month**

# 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

