

Microsoft Co-Pilot for Education

Everything you need to know!



Presented by:

Carlton Card, Microsoft

Modern Workplace Sr. Specialist

Matt Raida, Softchoice

Manager, Workplace Practice



Resource Program Team

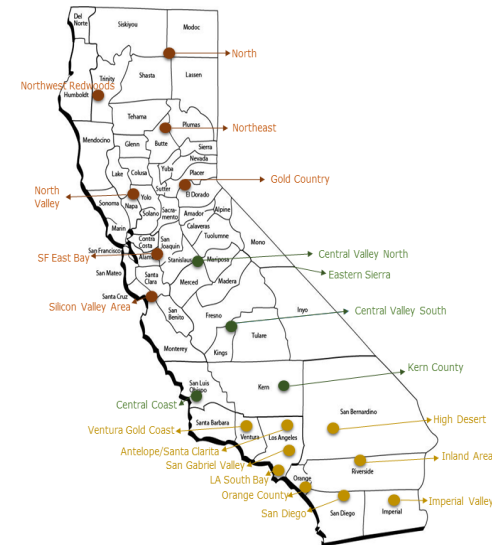


Libbi Nelson
Director of Resource & Service Programs
California IT in Education



Crystal Ibarra
Resource Programs Specialist
California IT in Education

- Member driven organization
- Not for profit
- 1800+ member districts



Agenda

- Welcome and Introductions
- Microsoft AI and Co-Pilot – Carlton Card
- Building Efficiency through AI – Matt Raida
- Questions and Answers...

Your Softchoice Support Team



Dave Tomke
Territory Sales Director
US Public Sector

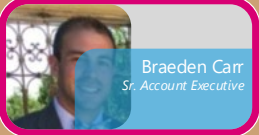


William Miller
Territory Sales Manager
US SLED West

Contract Support

Sales Support

Operations



Braeden Carr
Sr. Account Executive



Madeline Pokora
Sr. Account Executive



Shirion Simmons
Sr. Administrator
Public Sector Contracts & Programs



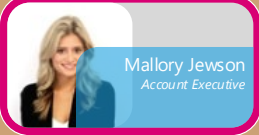
Brian Burns
Sales Architect



Pratik Patel
Licensing Operations



Alyssa Alonzo
Account Executive




Mallory Jewson
Account Executive



David Butkiewicz
Contracts Program Manager



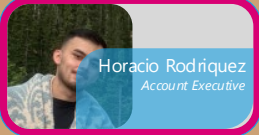
Richard Nice
Microsoft Sales Specialist



Roma Javaid
Licensing Operations



Maureen Copeland
Sr. Account Executive



Horacio Rodriguez
Account Executive



Dhawal Geed
Contracts Program Associate



Bis Fremichael
Account Executive



Michelle Dahmer
Account Executive

Microsoft removes 300-seat minimum for Copilot



What did Microsoft announce?

- The launch of Microsoft 365 Copilot for CSP (Cloud Solution Provider).
- Customers of any size can now get access to Microsoft's AI technology for \$30 per user per month, or \$360 per year — with no seat minimum order required — with an annual commitment, paid upfront.
- EA customers can also benefit from the removal of the seat minimum.

Where can I learn more?

- Read more on the Microsoft Blog [here](#).



Microsoft AI and Co-Pilot

Carlton Card, Modern Workplace Sr. Specialist



Microsoft's AI principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

Microsoft Cloud — AI you can trust

Your data is **your** data.

Your data is **not** used to train the OpenAI foundation models without permission.

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



The extended Microsoft Copilot family

Azure & AI

Copilot

OpenAI



Power Platform



D365



M365



Security



Windows



Bing



GitHub



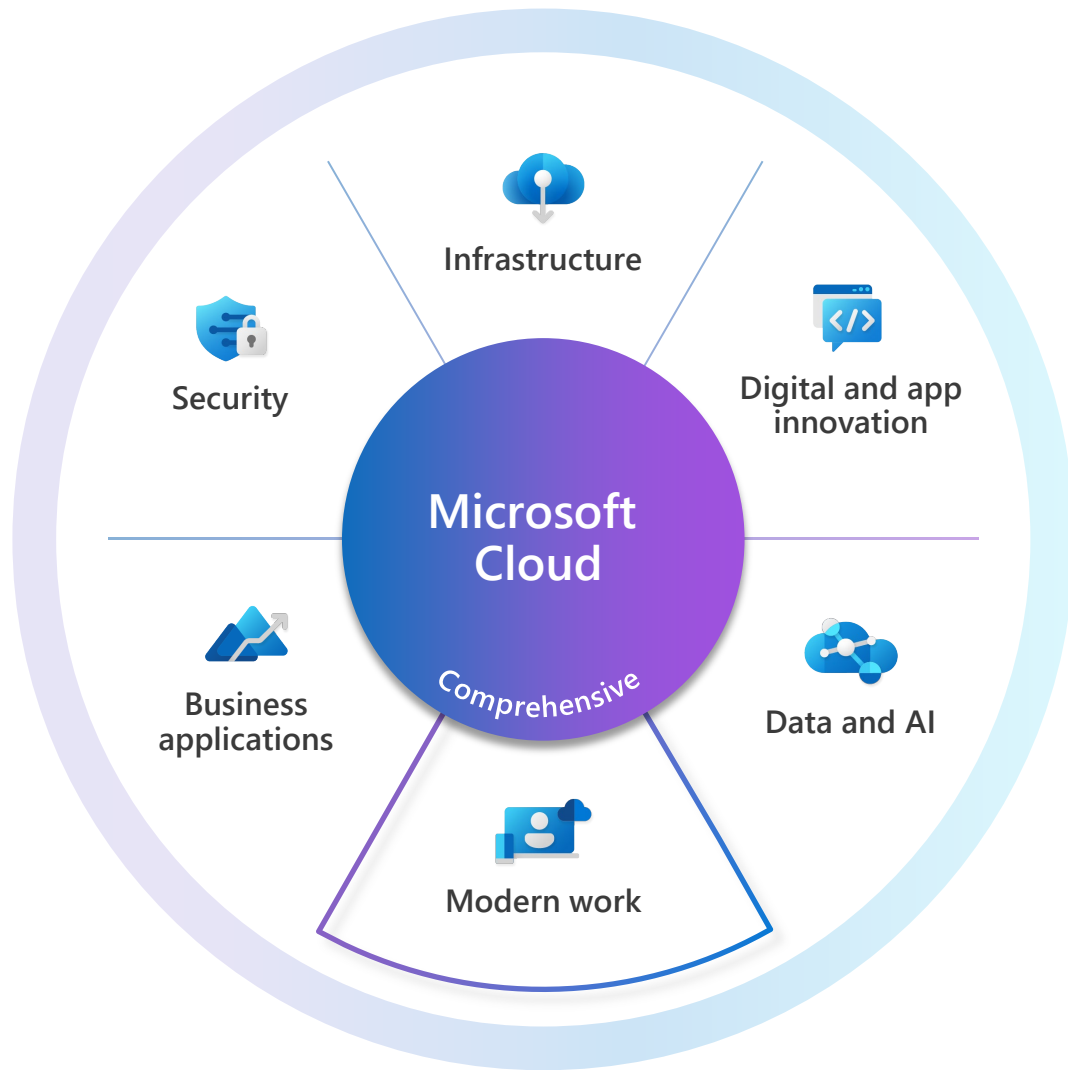
Azure OpenAI Service



Cognitive Services

The Flavors of Copilot








Microsoft Cloud

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

Differentiate from the competition with intelligent apps using AI

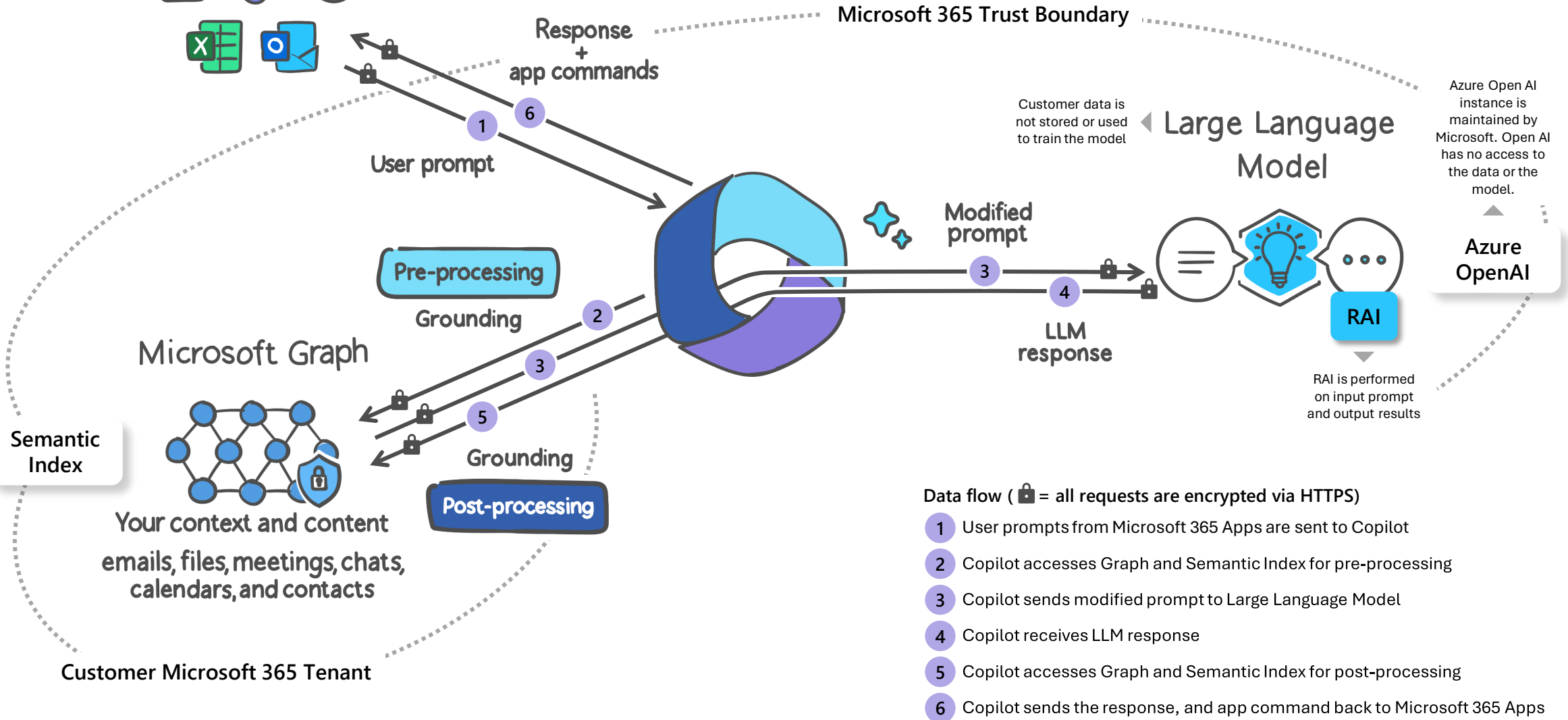
Future of Modern Work

	 Bing Copilot	 Bing Copilot Data Protected	 Microsoft 365 Copilot
	Personal	Work	Work
GPT Large Language Model	✓	✓	✓
AI-Powered Web Search	✓	✓	✓
Commercial Data Protection		✓	✓
Enterprise Security, Privacy & Compliance			✓
Microsoft 365 Graph (content & context)			✓
Microsoft 365 Apps			✓

Microsoft 365 Apps



Microsoft 365 Copilot



Ignite 2023

New features coming to Copilot for Microsoft 365



Teams

- Ask for more specific notes like "Capture what Beth said as a quote"
- Generate summaries, action items, or ask any specific questions about the conversation after a call has finished with [Copilot in Teams Phone](#)

Available early CY2024.



Outlook

- Generate a detailed summary of upcoming meetings
- Schedule a follow-up meeting from an email summary

Available early CY2024.



Word

- Catch up and comprehend what others have changed in a document

Available early CY2024.



Excel

- Unlock Python in Excel capabilities using natural language

[Preview late CY2023.](#)



Whiteboard

- Turn meeting participants' spoken ideas and topics into a visual collaboration space in Whiteboard
- Suggest more ideas to add to Whiteboard as the meeting conversation happens

Available mid CY2024.

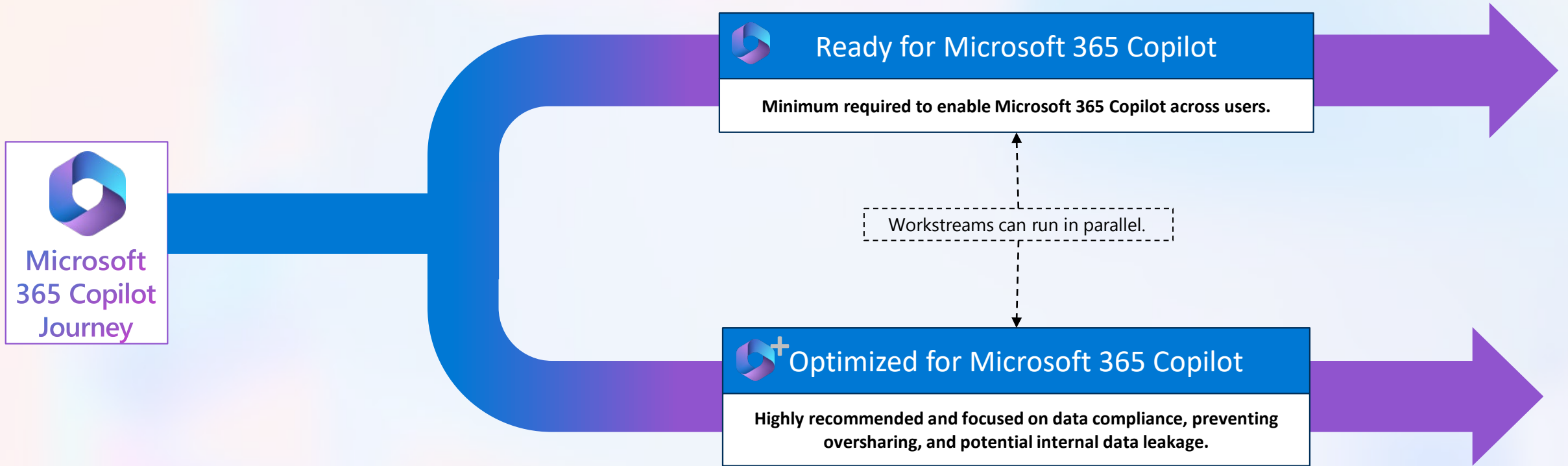


Viva

- Better understand team health [Copilot in Viva Insights](#)
- Get help generating and refining goals [Copilot in Viva Goals](#)
- Inspire leaders to post to conversations using AI-created starters and prompts [Copilot in Viva Engage](#)
- Enable joint Viva and SAP SuccessFactors customers to use AI [Copilot in Viva Learning](#)
- Easily explore survey feedback [Copilot in Viva Glint](#)

Private preview early CY2024; requires both Microsoft 365 and the Viva suite.

Microsoft 365 Copilot readiness journey



What does it take to be ready for Microsoft 365 Copilot?



- ✓ Microsoft 365 A3 or A5.
- ✓ Microsoft Entra ID account (formerly Azure Active Directory (Azure AD)).*
- ✓ Some features (like file restore and management) require a OneDrive account.
- ✓ WebSocket items allowed from user endpoints to the [endpoints in ID 46](#).
- ✓ Word, Excel, and PowerPoint are available in web versions and in desktop.
- ✓ Outlook users need to be using the new Outlook for [Windows](#) or [MacOS](#).
- ✓ Teams users can use Teams desktop client or the web app. Both the current and the new versions of Teams are supported. In order to take advantage of Microsoft 365 Copilot [transcription needs to be enabled in meetings](#).
- ✓ Cross-app experience depends on data indexed with a semantic index.
- ✓ For more information, see [Get started with Microsoft 365 Copilot -Microsoft 365 admin | Microsoft Learn](#).

Optimized for Microsoft 365 Copilot



The following aren't required for Microsoft 365 Copilot but are recommended to provide optimal data governance.

- ✓ [Information protection labelling¹](#)
- ✓ [Content migration and data migration for semantic indexing](#)
- ✓ [SharePoint site restrictions configured](#)
- ✓ [Access reviews²](#)
- ✓ [Data loss prevention \(DLP\)](#)
- ✓ [Retention policies](#)

1. Enhanced automation capabilities are Included in Microsoft 365 E5 Compliance.

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

Deploying Copilot Ready and Optimized Settings



Copilot for Microsoft 365

inherits your security, compliance, and privacy policies

1

Manage
overprivileged
and risky users



Microsoft Entra ID

2

Mitigate
Device
Risk



Microsoft Intune

3

Prevent
over-exposure
of data



Microsoft Purview
Information Protection

4

Discover and
control the use
of AI apps



Microsoft Defender for
Cloud Apps

Govern access to Copilot

Microsoft Entra ID

Users and Devices

1 Manage overprivileged and risky users with Identity and access management

Microsoft Entra ID

2 Mitigate Device Risk with Endpoint management

Microsoft Intune



Copilot for Microsoft 365



- ✓ Login to Microsoft 365 with a single & managed corporate identity.
- ✓ Evaluate login attempts based on the user or group membership, IP location, device state, application, risk detection.
- ✓ Decide access level with Conditional Access policies.
 - Allow access
 - Require MFA
 - Limit access
 - Password reset
 - Monitor access
- ✓ Monitor critical events and issue access tokens that can be revoked immediately.

Manage device real-estate


Microsoft Intune

Users and Devices

1 Manage overprivileged and risky users
with Identity and access management

 Microsoft Entra ID

2 Mitigate Device Risk
with Endpoint management

 Microsoft Intune



Copilot for Microsoft 365



Ensure the Microsoft 365 apps are securely installed on the user's device and kept up to date.



Limit the use of work apps, including Copilot, on personal devices



Implement App protection policies to limit the actions users can take on devices:

- Save generated files to unsecured apps
- Restrict copying and pasting to non-work apps



Wipe all work content if the device is lost or disassociated with the company or the user.

Protect business information and restrict actions

Microsoft Purview Information Protection

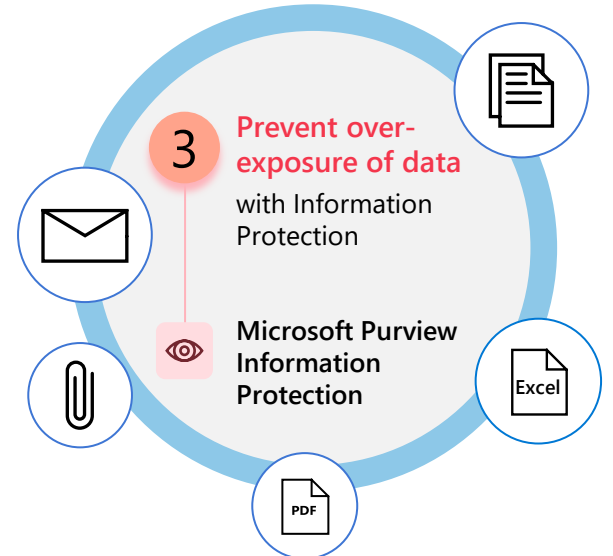
- ✓ Data consumption and processing with Copilot is limited to the user's permissions.
- ✓ Copilot inherits sensitive documents' sensitivity labels and applies them to its output and references.
- ✓ If Copilot generates sensitive data and saves it in Microsoft 365, Data Loss Prevention policies will apply.
- ✓ Interactions with Copilot are logged for auditing purposes and business, or code of conduct violations can be detected.



Copilot for
Microsoft 365

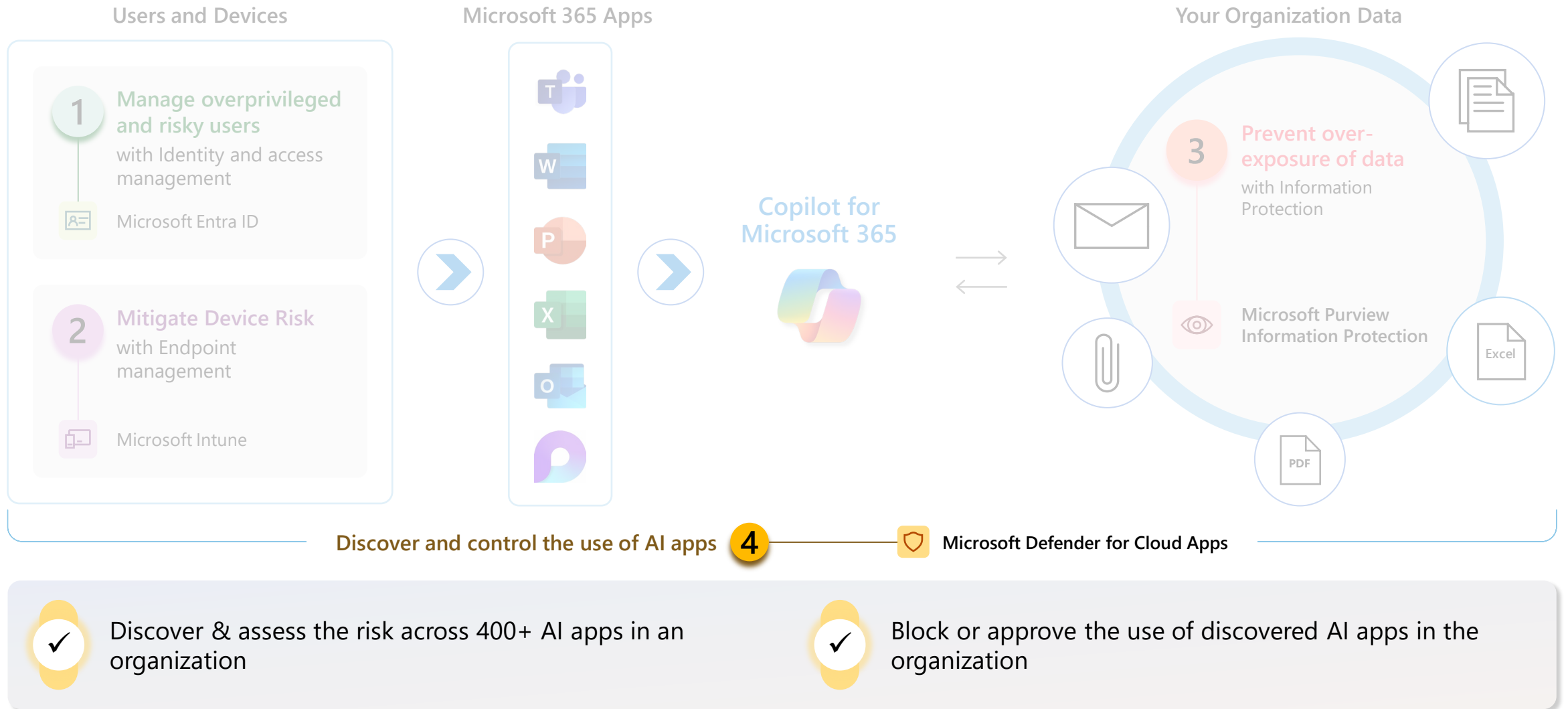


Your Organization Data

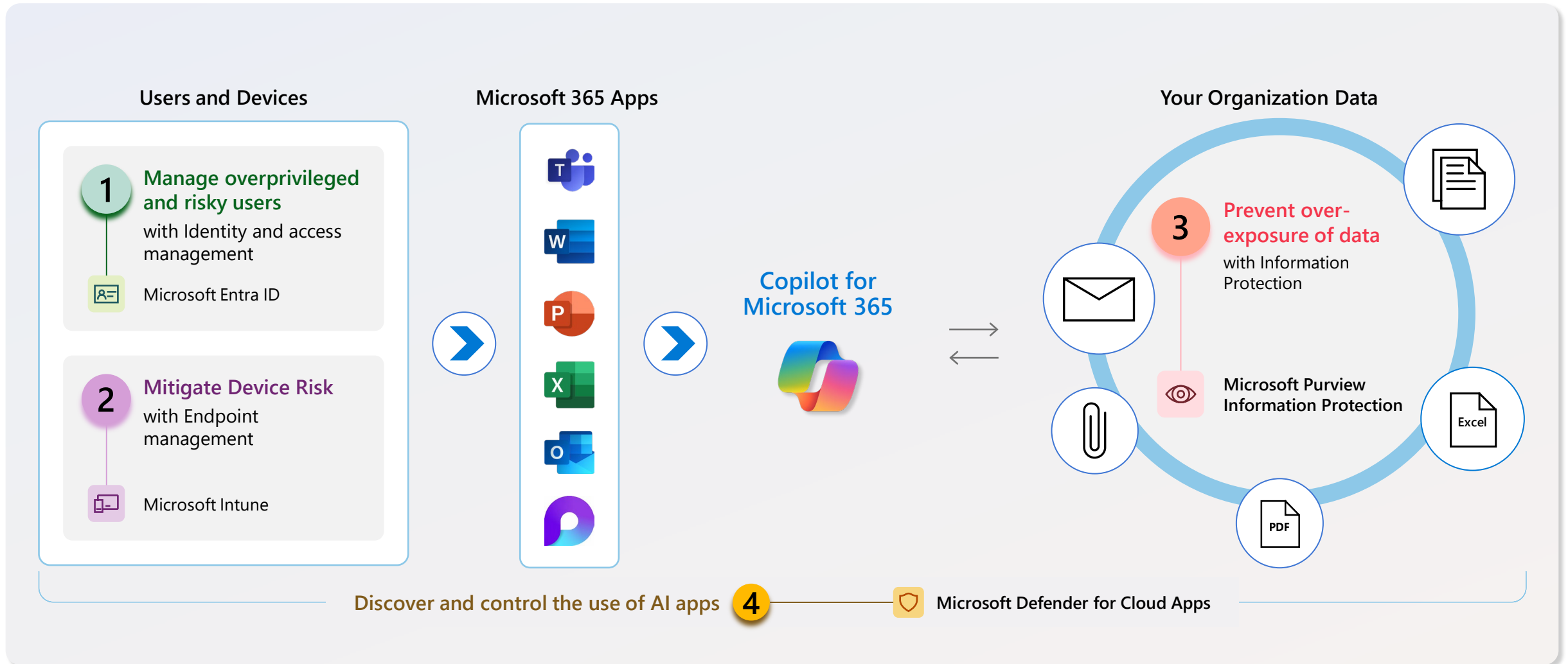


Discover and control the use of AI apps

Microsoft Defender for Cloud Apps



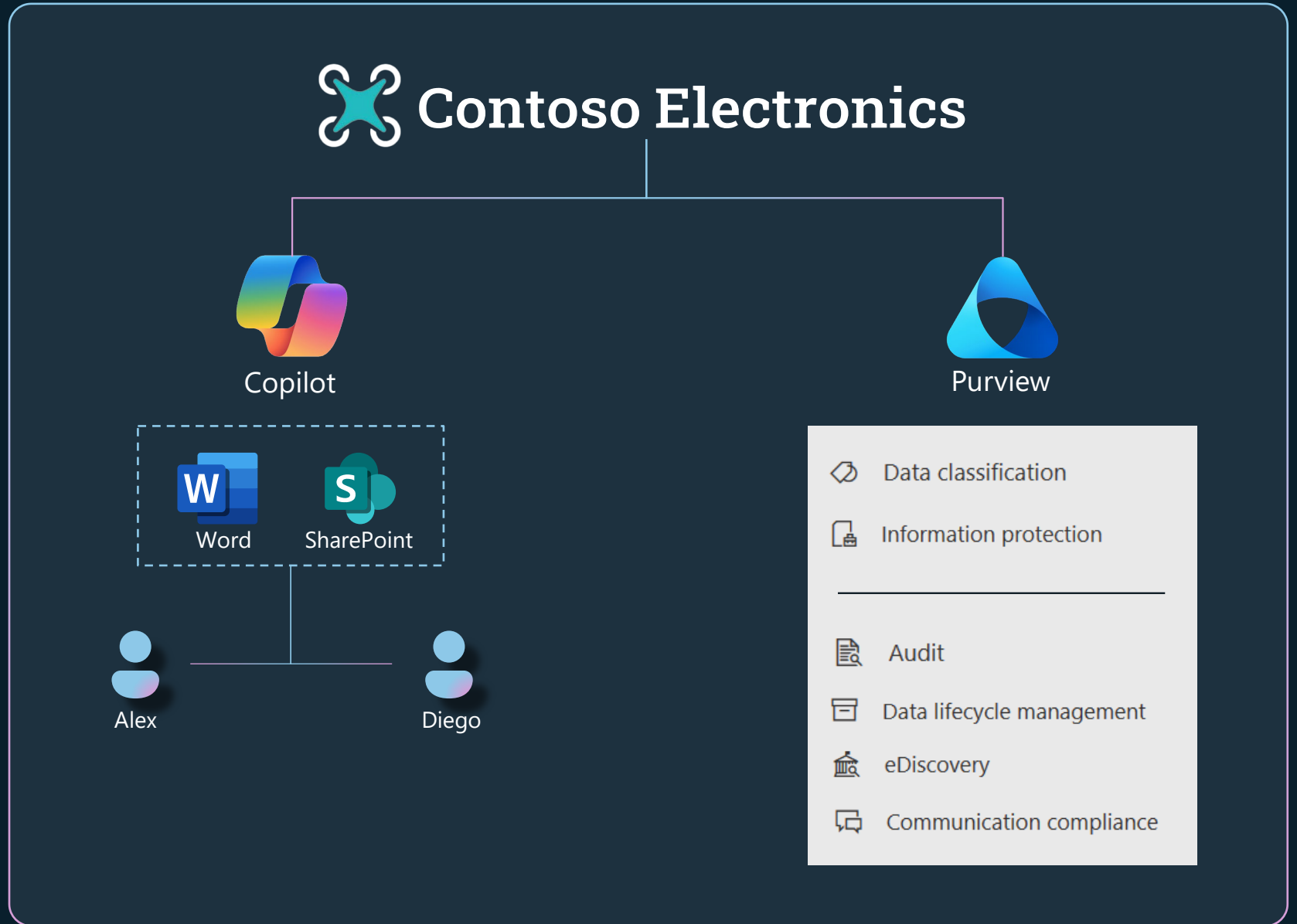
Security and compliance controls for Copilot for Microsoft 365



Microsoft 365 Copilot Demo



Demo flow outline



User experience: *Alex*

Demo flow outline

The screenshot shows a SharePoint 'Following' page for 'Contoso Electronics'. The page lists several sites, each with a security annotation overlaid on it. The annotations describe the access level, data labeling, and encryption status for each site.

Site Name	Access Level	Data Labeling	Encryption
Obsidian Group	Access restricted to fewer users	Data is labeled with special label	Data is protected with copy-restricted encryption
Drone workshop	Open to everyone	Data is labeled	No encryption applied
Fly Safe Conference	Open to everyone	Data is labeled	No encryption applied
The Perspective	Open to everyone	Data is labeled	No encryption applied
Contoso Works	Open to everyone	Data is labeled	No encryption applied
Benefits	Open to everyone	Data is labeled	No encryption applied
Global Sales	Open to everyone	Data is labeled	No encryption applied
Global Marketing	Open to everyone	Data is labeled	No encryption applied
Give	Open to everyone	Data is labeled	No encryption applied
Contoso Brand	Open to everyone	Data is labeled	No encryption applied
Contoso News	Open to everyone	Data is labeled	No encryption applied

Obsidian

Private group | Confidential \ Project Obsidian ☆ Not following 👤 5 members

- Home
- Conversations
- Documents**
- Shared with us
- Notebook
- Pages
- Site contents
- Recycle bin
- Edit

[+ New](#)
[Upload](#)
[Edit in grid view](#)
[Share](#)
[Copy link](#)
[Sync](#)
[Add shortcut to OneDrive](#)
[All Documents*](#)

Documents > General

Name	Modified	Modified By	Sensitivity	+ Add column
Design update.docx	Monday at 10:17 PM	MOD Administrator	Confidential \ Project Obsidian	
kickoff.pptx	Monday at 2:01 PM	MOD Administrator	Confidential \ Project Obsidian	
Next generation chip.docx	Monday at 10:31 PM	MOD Administrator	Confidential \ Project Obsidian	
Project Osiris.pdf	Monday at 10:21 PM	MOD Administrator		

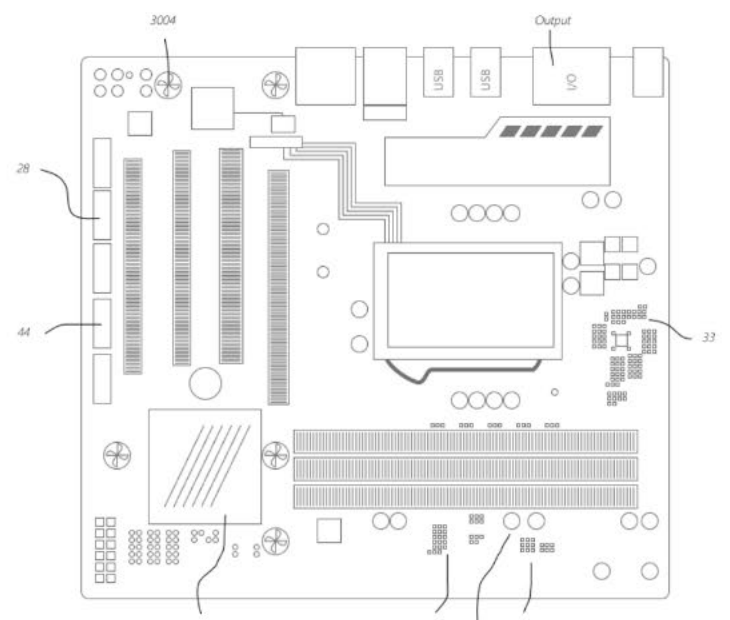
[Return to classic SharePoint](#)

Project Obsidian

Updated Engine Chip Design

Automated Car Team
October 21, 2023

Contacts	Email	Timeline
Lidia Holloway	lidia@contosoelectronics.com	Q4 FY 24



With our new investments in automated cars we need to redesign the AI500 chip to pull more throughput and reduce overheating.

We have attached more fans to the base chip but need more focus on the transistors across the entire board.

- Home
- Create
- My Content
- Feed
- Apps
- M365 Chat
- Outlook
- Teams
- Word
- Excel
- PowerPoint

M365 Chat
What are the important documen...

New chat

November 9, 2023 at 07:58 PM

What are the important documents for Project Obsidian?

Here are some important documents for Project Obsidian:

- **"Project Plan for Project Obsidian"** is a document authored by **Alex Wilber** and was last modified Tuesday evening. It provides an overview of the project objectives, scope, deliverables, timeline, and resources. ¹

¹ **Project Plan for Project Obsidian**
 Confidential\Project Obsidian
 Word | Alex Wilber modified on 11/07/23
 "Project Plan for Project Obsidian A brief overview of the project objectives, scope, Project Objectives The main objective of Project Obsidian is to develop a web-based project ..."

... authored by **Alex Wilber** and was last modified Tuesday evening. It is a ... ment tool. ²

... entation authored by **MOD Administrator** and was last modified Monday ... bsidian kickoff. ³

... authored by **Alex Fromm and MOD Administrator** and was last ... vides an update on the engine chip design for automated cars. ⁴

... ment authored by **MOD Administrator** and was last modified Tuesday ... r building dedicated chips to power future cars and compares the ... f ARM and x86 chip architectures. ⁵

Copy

5 references

1/30 AI-generated content may be incorrect

- Who is Alex Fromm?
- What is the latest update on the engine chip design?
- What is the Obsidian FAQ about?

Ask a work question or use / to reference people, files, and more

- Home
- Create
- My Content
- Feed
- Apps
- M365 Chat
- Outlook
- Teams
- Word
- Excel
- PowerPoint

M365 Chat
What are the important documen...

New chat

evening. It is about the Project Obsidian kickoff. ³

- **"Design update"** is a document authored by **Alex Fromm and MOD Administrator** and was last modified Tuesday morning. It provides an update on the engine chip design for automated cars. ⁴
- **"Next generation chip"** is a document authored by **MOD Administrator** and was last modified Tuesday morning. It discusses the need for building dedicated chips to power future cars and compares the advantages and disadvantages of ARM and x86 chip architectures. ⁵

Copy

Confidential\Project Obsidian
Project Obsidian

5 references ^

1/30 AI-generated content may be incorrect

- Project Plan for Project Obsidian**
Confidential\Project Obsidian
Word | Alex Wilber modified on 11/07/23
"Project Plan for Project Obsidian A brief overview of the project objectives, scope, Project Objectives The main objective of Project Obsidian is to develop a web-based project ..."
- Obsidian FAQ**
- Onbsidia**
- Design update**
- Next generation chip**

Who is Alex Fromm? What is the latest update on the engine chip design? What is the Obsidian FAQ about?

Ask a work question or use / to reference people, files, and more

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard Font Paragraph Styles Editing Voice Sensitivity Add-ins Editor Copilot

Calibri (Body) 11 B I U x₂ x² A No Spacing Heading 1 Find Replace Select Dictate Sensitivity Add-ins Editor Copilot

Draft with Copilot

Using [DG-2000 Product Specification.docx](#) generate a short FAQ

61/2000

Generate Reference a file

File Home Insert Draw Design Layout References Mailings Review View Help
Clipboard Font Paragraph Styles Editing Voice Sensitivity Add-ins Editor Copilot

SENSITIVITY Due to content created by Copilot, your organization automatically applied the sensitivity label: Confidential\Anyone (unrestricted)

display.
• The keyboard is foldable and detachable, allowing you to use it as a stand-alone accessory or as part of the device.
• The processor is faster and more efficient, enabling you to run multiple applications and programs smoothly.
• The packaging is more eco-friendly and minimalist, using recycled cardboard and less plastic.
• The design is more modern and elegant, with clean lines and a single brand color.
How can I get DG-2000?
DG-2000 will be available in both physical and virtual storefronts, starting from April 5. You can pre-order it online from our website or from our authorized retailers. You can also visit our stores or our partner outlets to see and try the product in person. We offer free shipping and a 30-day money-back guarantee for online orders.
Where can I find more information about DG-2000?
You can visit our website, our social media pages, or our blog to learn more about DG-2000 and its features. You can also watch our video tutorials, read our user reviews, or contact our customer service team for any questions or concerns. We are always happy to hear from you and to help you get the most out of your DG-2000.

Confidential\Anyone (unrestricted)
Anyone (unrestricted)

Using DG-2000 Prod... 1 of 1 AI-generated content may be incorrect

Classified as Confidential Keep it For example, "Make it formal"

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard Font Paragraph Styles Editing Voice Sensitivity Add-ins Editor Copilot

Calibri (Body) 11 A Aa Font icons Paragraph icons Styles: Normal, No Spacing, Heading 1

Find, Replace, Select, Dictate, Sensitivity, Add-ins, Editor, Copilot

Draft with Copilot [Close]

Write a short FAQ on Project Obsidian

37/2000

Generate Reference a file

POLICY TIP Your organization automatically applied the sensitivity: Confidential\Project Obsidian. The organization has detected sensitive content and automatically applied a corresponding label to protect the data. OK

FAQ on Project Obsidian

- What is Project Obsidian?
- Project Obsidian is a research initiative that aims to develop a novel framework for secure and scalable distributed computing. The project is led by a team of experts from academia and industry, and is funded by a grant from the National Science Foundation.
- What are the main goals of Project Obsidian?
- The main goals of Project Obsidian are to:
 - Design and implement a new protocol for consensus and fault tolerance in large-scale networks
 - Develop a new programming language and runtime for writing and executing distributed applications
 - Provide a platform for testing and benchmarking the performance and security of distributed systems
 - Explore the applications and implications of distributed computing in various domains, such as cloud computing, blockchain, IoT, and machine learning
- How can I get involved in Project Obsidian?
- Project Obsidian is an open and collaborative project that welcomes contributions from anyone who is interested in distributed computing. You can get involved in Project Obsidian by:
 - Joining the project mailing list and Slack channel to stay updated and communicate with the

Write a short FAQ on... < 1 of 1 > AI-generated content may be incorrect

Keep it For example, "Make it formal" →

User experience: Diego

Sorry, you don't have access.

I'd like access, please.

Request Access

Diego tries to access the Project Obsidian site



Home



Create



My Content



Feed



Apps



M365 Chat



Outlook



Teams



Word



Excel



PowerPoint



M365 Chat

what is Project Obsidian about...



New chat



Copilot chats and more

November 8, 2023 at 02:42 PM

what is Project Obsidian about?

I'm sorry, but I couldn't find any specific information about Project Obsidian in my search results. Could you provide more context or details about the project so I can better assist you?

Copy

1/30 AI-generated content may be incorrect

Who is the project lead?

What is the goal of the project?

Can you help me with something else?



Ask a work question or use / to reference people, files, and more





Microsoft 365 Copilot:

The art and science of prompting

1. Tell Copilot what you need

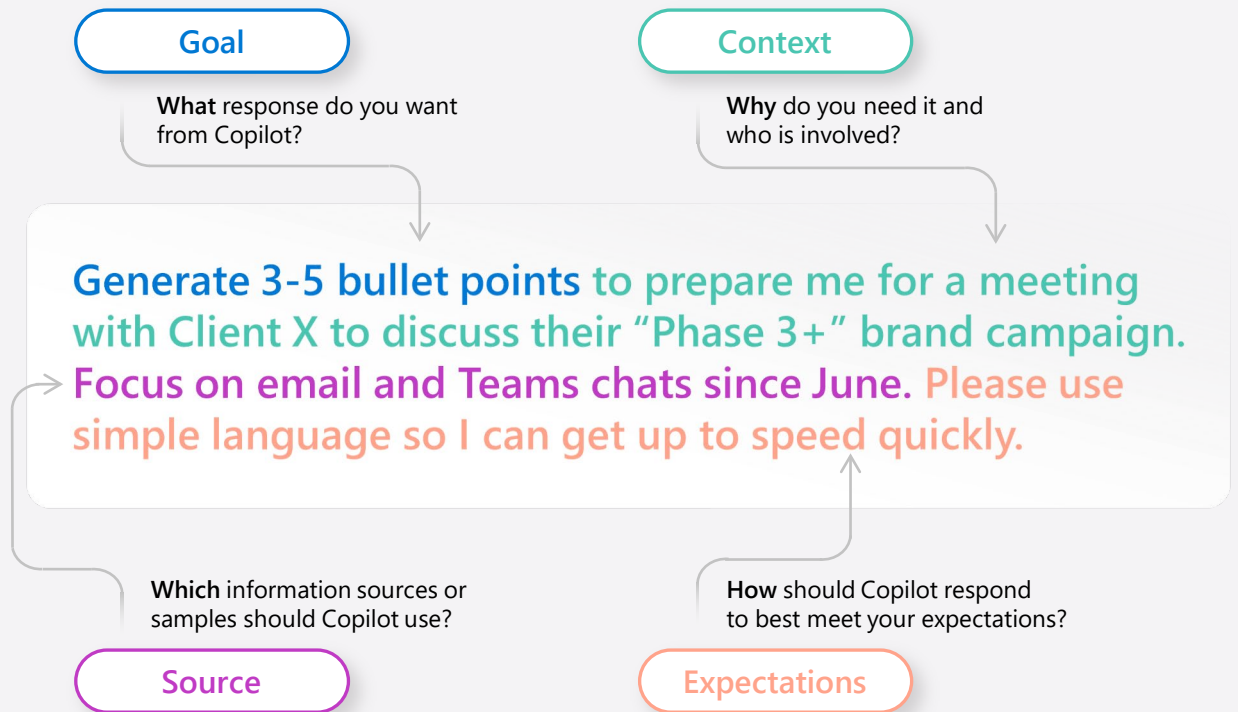
There are many types of prompts you can use depending on what task you want done.

- ✓ **Learn about projects and concepts:**
"What is [Project X] and who are the key stakeholders working on it?"
- ✓ **Edit text:**
"Check this product launch rationale for inconsistencies."
- ✓ **Transform documents:**
"Transform this FAQ doc into a 10-slide onboarding guide."
- ✓ **Summarize information:**
"Write a session abstract of this [presentation]."
- ✓ **Create engaging content:**
"Create a value proposition for [Product X]."
- ✓ **Catch-up on missed items:**
"Provide a summary of the updates and action items on [Project X]."

Prompts are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.





Microsoft 365 Copilot:

The art and science of prompting

3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.



Generating content ideas

Lead with broader requests, then give specific details about the content.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations

Copilot is limited to your current conversation, so give lots of details.

Use quotation marks

This helps Copilot know what to write, modify, or replace for you.

Be professional

Using polite language improves Copilot's response.

Communicate clearly

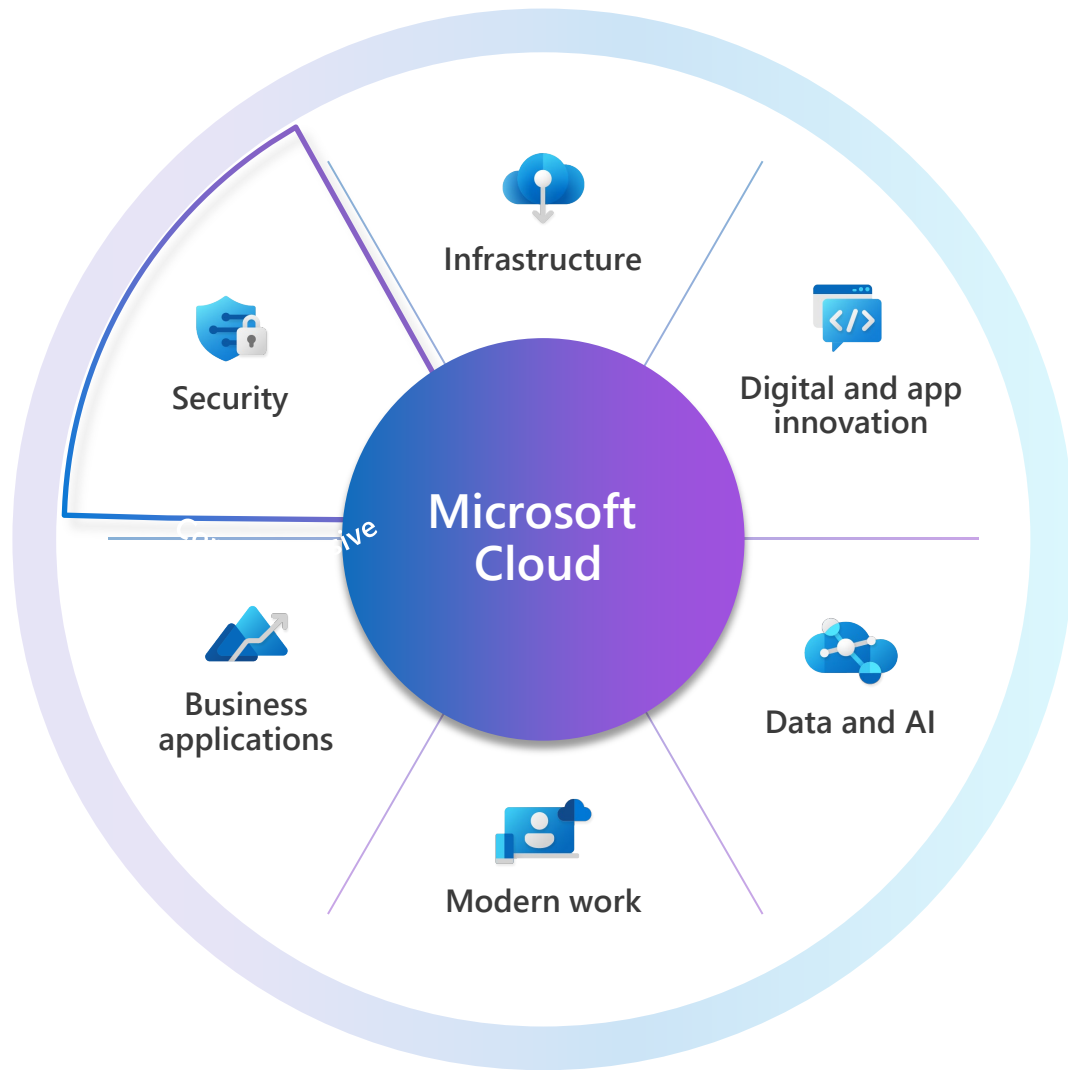
Pay attention to punctuation, grammar, and capitalization.

Start fresh

Avoid interrupting and type "new topic" when switching tasks.



Learn more on our [Microsoft Copilot help & learning page](#).



Microsoft Cloud

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

Differentiate from the competition with intelligent apps using AI

Hands on scenarios: current product use cases

PowerPoint (web)

Writing

- Create first drafts
- Add more content
- Edit content and format
- Transform existing content into PPT

Reading

- Summarize deck content
- Extract next steps

Outlook (web)

Writing

- Reply to thread
- Author new email
- Get Coaching on an email

Reading

- Summarize long threads

Word (web)

Writing

- Create first drafts
- Add more content

Reading

- Summarize long documents
- Ask questions about document content

Teams

In-meeting

- "Catch me up"
- Ask questions about discussion so far
- General business chat
- Wrap up

Post-meeting

- Create notes and actions
- Recap and querying

Chat

- Summarize and ask questions about content in a group, mtg, or 1-1 chat

Loop (web preview)

Writing

- Brainstorm
- Collaborative authoring
- Collaborative planning



K-12/Dept. Of Education Use Cases

K-12 Use Cases

Lesson planning

Class Design

Provide real time feedback

Spark tool for learning

Teachable agent

DOE Use Cases

Secure Chat-GPT environment

Increase teacher-student ratio

Personalized communications

Student progress summaries

Teacher PD planning & assessment

School Level Use Cases

Principals aid to write observations

Data analytics summaries

Accessibility Services

Resource allocation

Aid teachers grade assignments

Support Services Use Cases

Transportation

Food services

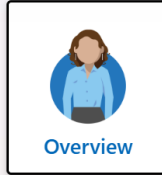
Facility service tickets

Help desk automation

Schedule assistant

Microsoft Copilot Adoption Guide

[Copilot for Microsoft 365 – Microsoft Adoption](#)



Overview



Business User



Leader



Adoption Manager



IT Professional



Developer

Overview

Copilot is designed to benefit everyone in an organization. From leaders to IT professional managers, Copilot offers features that streamline tasks, automate workflows, and enhance collaboration. Its adaptability means that it can be customized to meet the unique needs of any organization. The ability to extend its capabilities through plugins makes it a continually evolving asset that can adapt to the ever-changing landscape of business needs.

To understand the vision for Microsoft 365 Copilot business, we recommend starting with [Satya Nadella's announcement](#) and the resources below, then click through to see tailored resources for specific roles.

Get started with Microsoft 365 Copilot

[Introducing Microsoft 365 Copilot – your copilot for work >](#)

[Announcing Microsoft Copilot, your everyday AI companion >](#)

[The Copilot System: Explained by Microsoft >](#)

[How to prepare for Copilot >](#)

[Copilot requirements >](#)

Additional resources

[How Copilot works from Microsoft Mechanics \(video\) >](#)

[Frequently asked questions: AI, Microsoft 365 Copilot, and Microsoft Designer >](#)

[Copilot features on the Microsoft 365 Roadmap >](#)

[The principles of responsible AI >](#)

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

[Productivity gains for Copilot users whitepaper >](#)

Get Started with Microsoft 365 Copilot | Customer Resources

Introducing Microsoft 365 Copilot



- [Copilot for Work](#)
- [Introducing Microsoft 365 Copilot | Blog](#)
- [Microsoft 365 Copilot Ignite 2023 Announcements](#)
- [Video: Introducing Microsoft 365 Copilot | Your Copilot for Work Video](#)
- [Unleash your productivity with AI and Microsoft 365 Copilot](#)
- [Video: How Copilot Works](#)
- [Video: Semantic Index for Copilot: Explained by Microsoft](#)
- [Microsoft 365 Copilot YouTube Channel](#)

Value of Copilot



- [Realize Business Value with AI](#)
- [What Can Copilot's Earliest Users Teach Us About Generative AI at Work? Work Trend Index Report](#)
- [Will AI Fix Work? Work Trend Index Report](#)
- [Podcast: How Leaders will use AI to Unleash Creativity](#)
- [Podcast: How generative AI can help you increase the top line—and find new ways to innovate](#)

Rethink Work with Copilot



- [How Copilot Turns Everyone Into A Manager](#)
- [What We Mean When We Say AI is "Usefully Wrong"](#)
- [With Copilot, Every Meeting is a Digital Artifact](#)
- [How AI Gives You Data Synthesis Superpowers](#)
- [How 6 Experts use Next Generation AI](#)
- [Worklab Guide: How Sellers Can Use AI to Better Engage With Customers](#)
- [Worklab Guide: How Marketers Can Use AI to Unlock Breakthrough Creativity](#)

Security in Copilot



- [Data, Privacy, and Security in Microsoft 365 Copilot Whitepaper](#)
- [New era in content management and security in SharePoint, OneDrive, and Teams](#)
- Public [MS](#) and [SharePoint](#) permission policies

Getting Ready for Copilot



- [Preparing for AI: Are you ready for a new era of work? E-book](#)
- [Microsoft 365 Copilot Requirements](#)
- [How to prepare for M365 Copilot | Blog](#)
- [Video: How to get ready for M365 Copilot](#)

Getting Set Up with Copilot



- [Microsoft Copilot for Microsoft 365 documentation](#)
- [Get Started with Microsoft 365 Copilot \(admin setup\)](#)
- Support guides: [Word](#), [PPT](#), [Teams](#), [Outlook](#) [Excel](#)
- [M365 Copilot FAQ](#)
- In-product assistance through Copilot onboarding wizard directly in the Microsoft 365 Admin Center: set up Copilot and walk through key readiness and adoption steps

End User Adoption Resources

Get started

- [Microsoft 365 Copilot Adoption Site](#)
- [Explore What's Possible with Copilot across Microsoft 365: Word, Teams, Outlook, PowerPoint, Excel, Microsoft 365 Chat, OneNote, Loop, Whiteboard](#)
- [End User Training Handouts](#) – download folders & share
- [Microsoft 365 Copilot Lab](#) (Available with Copilot License)

Do more

- [The Art and Science of Working with AI](#)
- [Seven Tips for Having a Great Conversation with Copilot](#)
- [The Key Ingredient in Every Copilot Conversation](#)
- [Why Using a Polite Tone with AI Matters](#)
- [How I Prompt: Leaders Share Their Favorite AI Timesavers](#)

Adoption Resources by Role

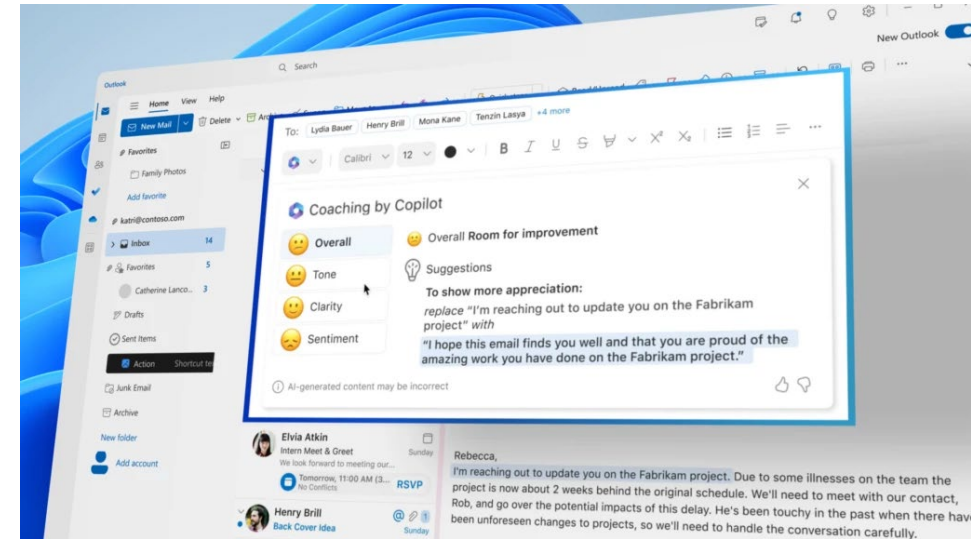
- [IT Administrators Quick Reference](#)
- [Adoption Manager Quick Reference](#)
- [Executive / CXO Quick Reference](#)
- [Business User Quick Reference](#)
- [Developer Quick Reference](#)

Building efficiency through AI

Matt Raida

Manager, Workplace Practice

Softchoice M365 Copilot EAP

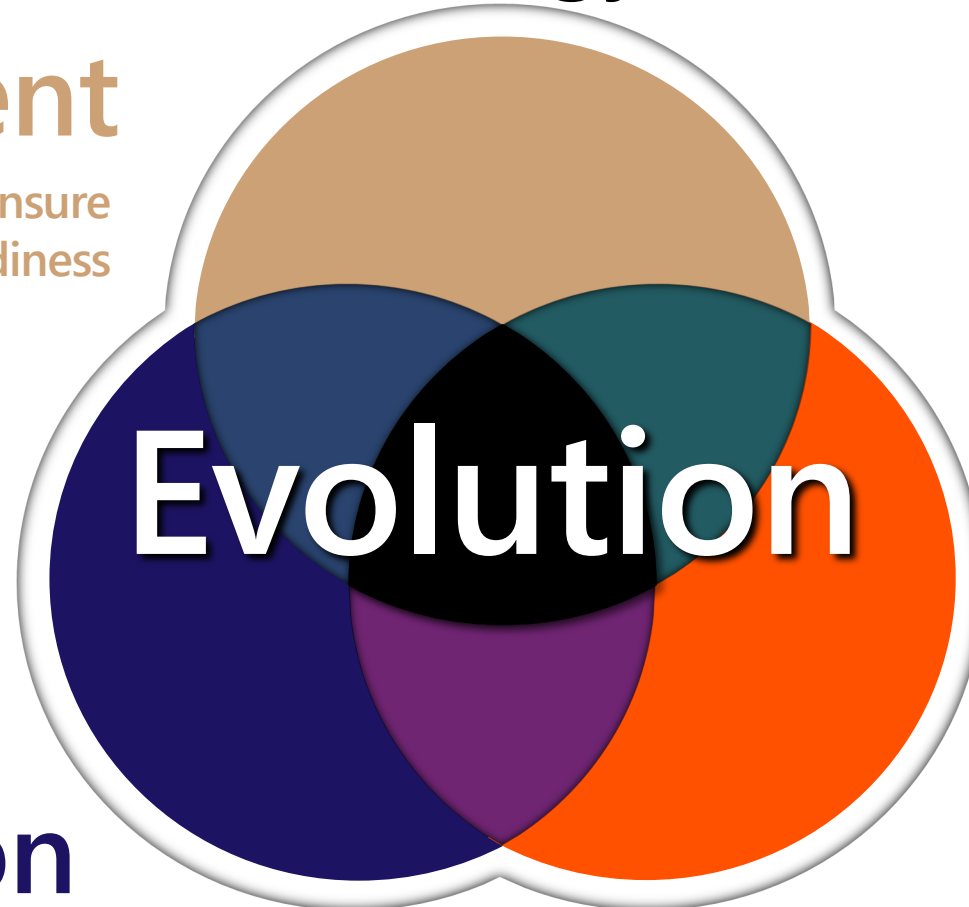


- Kicked off the Customer EAP in October
- Currently have users enabled across IT, GTM, and Services
- Project Charter developed
- Utilizing our own Readiness and Implementation offers in house to accelerate and enhance our rollout process
- Anticipating a full rollout of licenses by Q1 2024

A successful Microsoft 365 Copilot enablement strategy:

Assessment

Review the environment to ensure Copilot Readiness



Optimization

Ensure customers environment is fully optimized to enable Copilot

Adoption

Empower users to properly utilize Copilot and maximize ROI

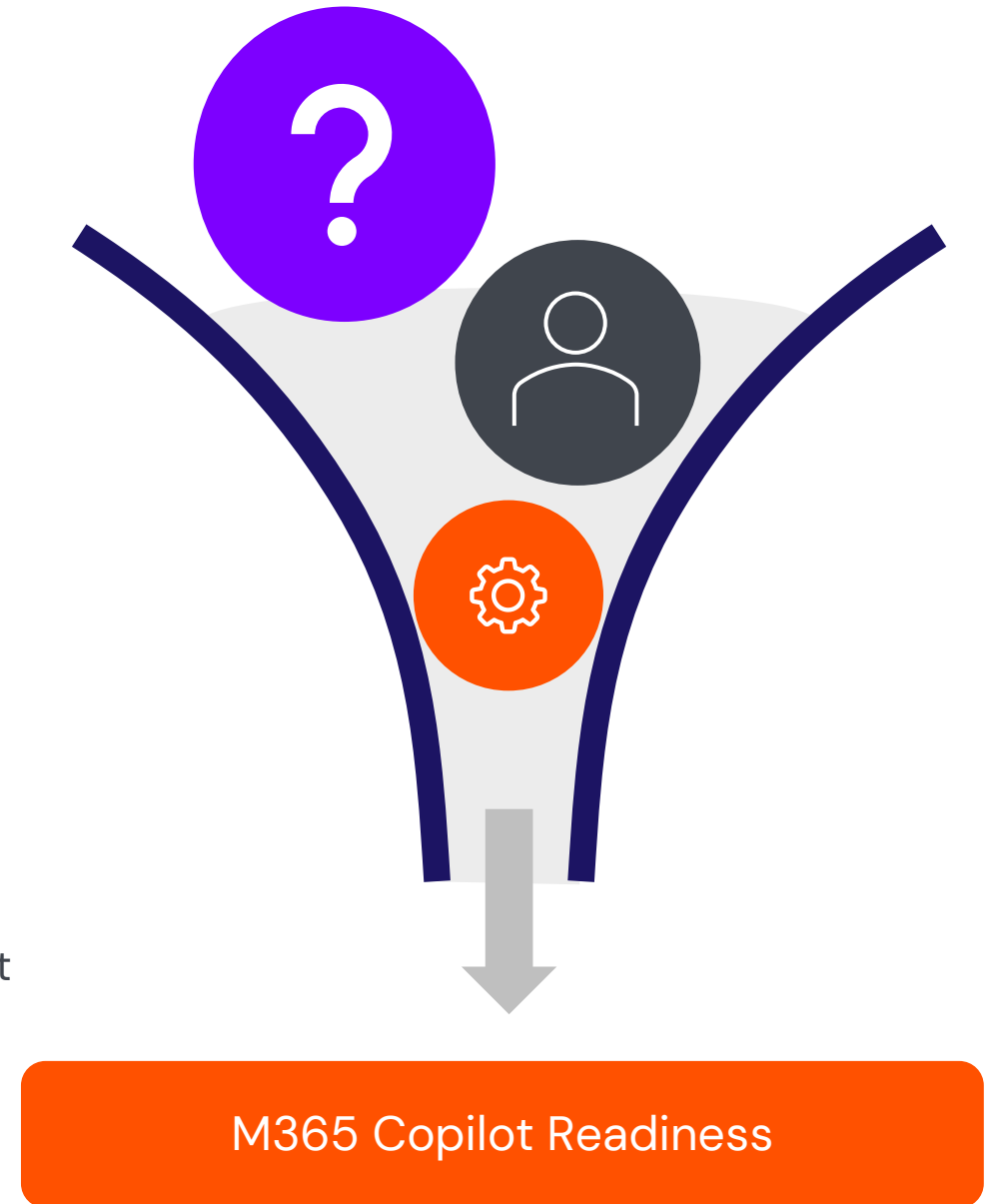


Microsoft 365 Copilot Readiness Assessment

Why do customers need an M365 Copilot Readiness Assessment?

The WHY:

- Softchoice has worked with Microsoft, and our internal Solutions Development team to create a comprehensive review of M365 Copilot that highlights readiness, persona development and use cases
- Designed to build awareness to the Copilot functionality and capability for **Copilot Readiness**
- Define **Copilot Ready** and **Copilot Optimized** states for the customer, and where they are on their Copilot journey
- Define **user personas** that will maximize ROI for additional Copilot licensing
- Review what is needed to properly **adopt** Copilot within the organization



How the Readiness Assessment works?

The WHAT:

- Illustrates an overall picture of M365 Copilot and core components
- Builds customer awareness on core M365 Copilot integration requirements (Licensing, Identity, Security/Governance, permissions)
- Provides use cases that are customized to the customer environment
- Provides a Readiness Assessment that can lead to future services-related tasks within the customer environment.

M365 Copilot Readiness Assessment

When deploying M365 Copilot, deployment readiness is key. Softchoice has worked together with Copilot developers to provide a readiness assessment to ensure customers have identified specific requirements and provide recommendations to ensure the environment and overall business are ready for M365 Copilot.

This assessment will look at current Microsoft requirements and provide an "Assessment Score" to ensure your environment, licensing, and Data permissions standards meet the requirements of Microsoft 365 Copilot

The Assessment Score is as follows:

Green – The current environment settings comply with the Microsoft requirement to deploy M365 Copilot.

Yellow – The current environment settings may comply with the current requirements but may require additional review or detailed assessment.

Red – These settings do not meet the minimum requirements to deploy M365 Copilot within the environment. These settings must be remediated before Copilot can be enabled.

Licensing

Microsoft M365 Copilot requires a core licensing stack to be able to enable Copilot within the organization. Copilot requires Microsoft 365 E3/E5, Office 365 E3/E5, Office 365 Business Standard, or Office 365 Business Premium licenses as a pre-requisite for Copilot enablement.

[Is your organization's licensing model Office 365 E3/E5, Microsoft 365 E3/E5, Office 365 Business Standard, or Office 365 Business Premium?](#)

Yes – This standard meets the base requirement to unlock the capabilities of Microsoft 365 Copilot. As your organization does qualify to license M365 Copilot capabilities Microsoft requires additional Copilot licensing at 30 dollars per user per month.

Assessment Score – Green **

Softchoice Recommendation – Softchoice recommends a licensing and capabilities review to ensure all users are properly licensed.

What are the components of the offering?

As part of this Readiness Assessment, customer will participate in the following:

Copilot Overview

Overview of M365 Copilot and Core Components
Breakdown of specific M365 Copilot Scenarios

Persona Planning

Use Case/Persona Review – “Where can my users use this?”
Licensing Justification – “What users can get the most out of the M365 Copilot license”

Readiness Assessment

Overall Readiness Review with Scorecard
Licensing
Security/Governance
Permissions/Data Access
Adoption
Output – Readiness Scorecard with Softchoice recommended remediation tasks

Adoption Planning/Review

Adoption – “How will my users be enabled for this technology?”

Offer Overview

- This assessment helps customers **identify insecurities** within their M365 data infrastructure, provides an overall **scoring for M365 readiness**, and identifies exposure to major **security threats**.
- Our specialists provide **an actional remediation plan** to prepare customers for future adoption of Microsoft 365 Copilot.

What is the cost of this offering?

Softchoice Microsoft 365 Readiness Assessment

Cost – 5K

5–6 hours with the customer for an overview of the Copilot material

Separated into 4 Modules

History of AI and Copilot Overview

Persona Planning/Design

Readiness Assessment

Closeout with findings and recommendations document

Customers gain:

Understanding what Copilot is and how they can utilize it

Determine what group of customers would get the most out of a 30-dollar Copilot license

Review how customers are going to deploy/adopt Copilot

Detailed findings and recommendations document that provides next steps to enable

Closeout for executives

M365 Copilot Readiness Assessment

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Assessment Score – Green **

Softchoice Recommendation – Softchoice recommends a licensing and capabilities review to ensure all users are properly licensed.

Customer Success Story

Fast Facts

Customer Size: 4,000 Users

Industry: Manufacturing

Segment: Enterprise

Key Technology

- M365 Copilot

Softchoice Solution

- M365 Copilot Readiness Assessment

Softchoice Team

- Rushabh Shah
- Mark Hoenig
- Matthew Raida
- Alex Daskas
- Crawford Healy

Customer is leading provider of industrial process automation solutions in Canada, assists customers in optimizing their operations, reducing expenses, and enhancing safety and environmental performance

The Customer Challenge



Customer had been interested in entering the AI space for a while and was seeking a product that could be easily integrated and simple to use. They wanted a solution that could help them manage daily tasks and reduce the workload of time-intensive activities

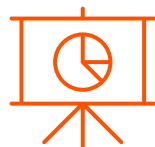
The Softchoice Solution & Strategy



M365 Copilot Assessment was recommended by Softchoice to start exploring the AI space and to assess how well the customer's environment aligns with M365 Copilot's best practices towards Data Governance and Compliance, SharePoint Oversharing Remediations and Persona Planning to focus on the Priority Groups for Deployment

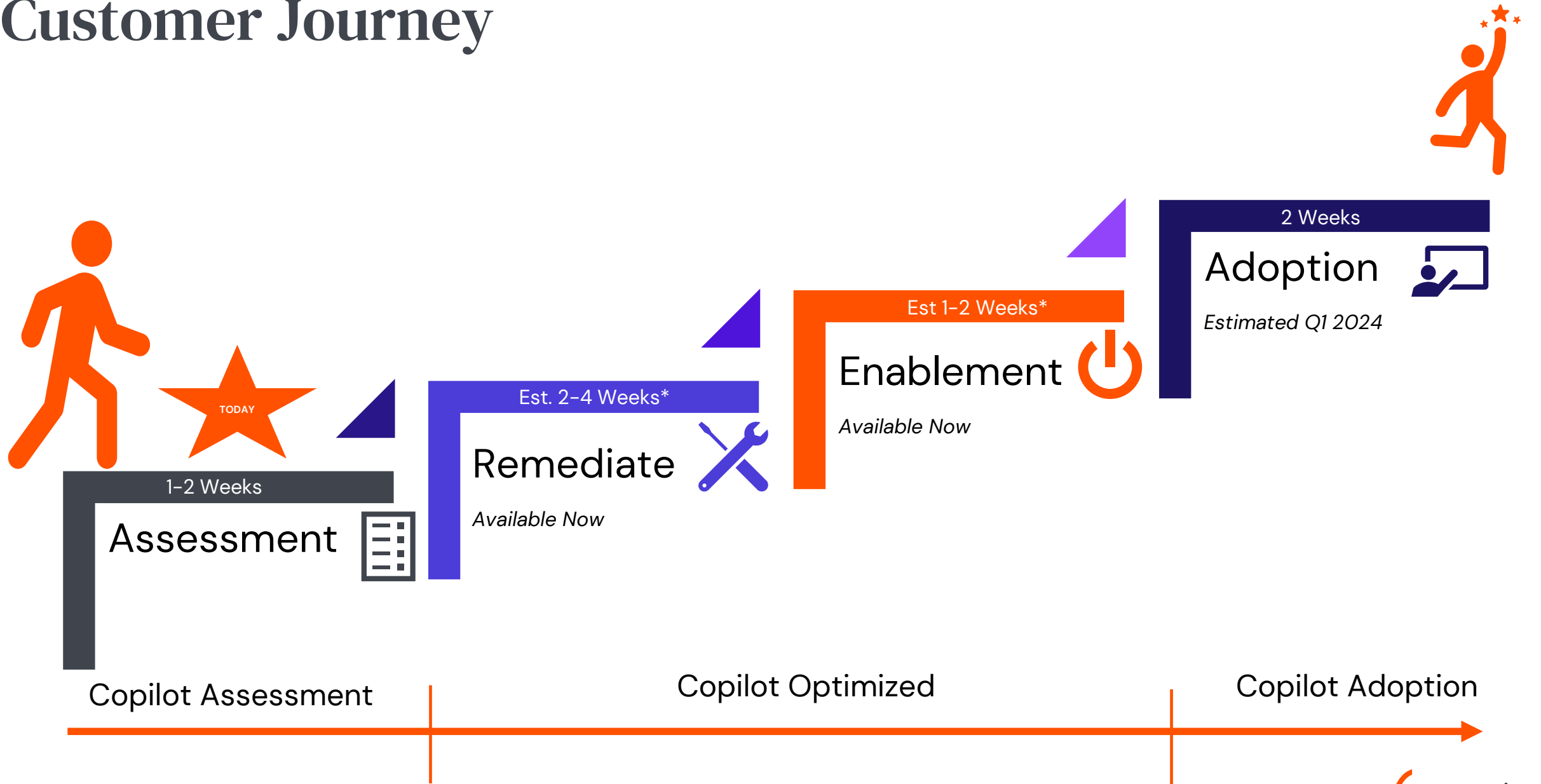
The Results and Value Delivered

Customer experienced significant advantages from the M365 Copilot Assessment Review solution, including:



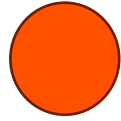
- Defining the use cases and personas for adopting M365 Copilot in their environment
- Enhanced customer satisfaction and trust in Softchoice as a partner for future collaborations
- A better understanding of their current data compliance and governance, as well as a roadmap to achieve the optimized state of M365 Copilot.

Customer Journey

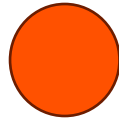


Technical Overview

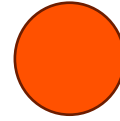
Assessment



Copilot
Overview



Persona
Planning



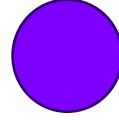
Readiness
Assessment

Review:
Licenses
Microsoft 365 Tenant
Persona Reviews
Informative Workshops
Assessment

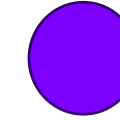
Implementation: Remediation



Technical
Requirements



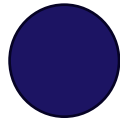
Security
Governance
Actions



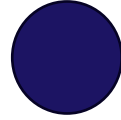
Permissions &
Data Access

Execute on remediating
governance and security
policies and data file
permissions review
DLP, Sensitivity Labels,
Retention Policies

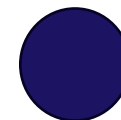
Implementation: Enablement



Copilot License
Deployment



Policy
Testing



End User
Testing

Enabling Licenses to
Users/Groups
M365 Copilot Testing and
Review

Adoption

Adoption TBD



Helpful Links

GTM Motions

Embracing the Future Webinar – [Link](#)

M365 Copilot Readiness Blog – [Link](#)


Copilot Readiness Podcast – [Link](#)

Softchoice M365 Copilot Readiness

Assessment Landing Page – [Link](#)

AppSource Page – [Link](#)

Consulting services > Microsoft 365 Copilot Implementation Service



Microsoft 365 Copilot Implementation Service

Softchoice

[Identity & Access Management](#) [Information Protection & Governance](#) [Teamwork Deployment](#)

Pricing CA\$20,596 [Contact me](#) ☆ Save to my list

[Overview](#) [Additional information](#)

Helping customers to be prepared to properly prepare, deploy, and adopt Microsoft 365 Copilot.

As many customers are looking to deploy Copilot and Generative AI based solution, readiness is key to proper enablement of AI based solutions. The Microsoft 365 Copilot Implementation Service provides customers with the knowledge and preparedness to ensure licensing, security, governance, permissions, and technical requirements for Microsoft 365 Copilot are identified. Our teams will provide an overview of the current Copilot System, and where Microsoft 365 Copilot fits within your environment. We also cover the critical topic of customer use case and personas to ensure the proper user groups such as ELT and IT are licensed and enabled to take full advantage of the features of Microsoft 365 Copilot.

The arrival of Microsoft 365 Copilot brings the power of artificial intelligence to your favorite Microsoft apps. While there's apparent excitement about its capabilities, the path to preparation will require thorough environment setup, document security enforcement, and robust governance measures. Softchoice's solution for this is the professional services offer, Microsoft Copilot Implementation Service.

Objectives of the Microsoft 365 Copilot Implementation Service

We begin with an in-depth assessment of your current environment, providing a clear snapshot of your organization's environment. This is followed by our optimization practice of remediation and enablement. The remediation actions will provide a secure and technically sound Microsoft tenant along with appropriate user permissions and access. Which then leads to the facilitation of Microsoft 365 Copilot enablement (dependent on licensing availability) with administrator and user testing.

What you gain from the Microsoft 365 Copilot Implementation Service

We designed the Microsoft 365 Copilot Implementation Service to address each of these challenges explicitly, helping you understand and build an proper readiness plan. We do this by giving you:

- An understanding of current Copilot capabilities and system components like the Large Language Model, Microsoft Graph, and how each components interacts with Microsoft 365 Copilot and application
- Identify user personas that will maximize the ROI of a Microsoft 365 Copilot license
- Gain an overall Microsoft 365 Copilot Readiness picture from primary topics like licensing, Identity, Security, Permissions, and Governance
- Conceptual design session around user adoption
- Clear alignment on the way forward to remediate and deploy Microsoft 365 Copilot within your environment
- Expert setup to mitigate risks related to security, data migration, and legacy system compatibility

The assessment is customized to your organization. In addition to alignment and readiness, you will receive the following:

- **Workshop summary** with discussion points and findings
- **Assessment Document** with recommendations to advance the Microsoft 365 Copilot journey

Microsoft 365 Copilot

Introduction to M365 Copilot – [Link](#)

How Does Copilot Work? – [Link](#)

Getting ready for M365 Copilot – [Link](#)

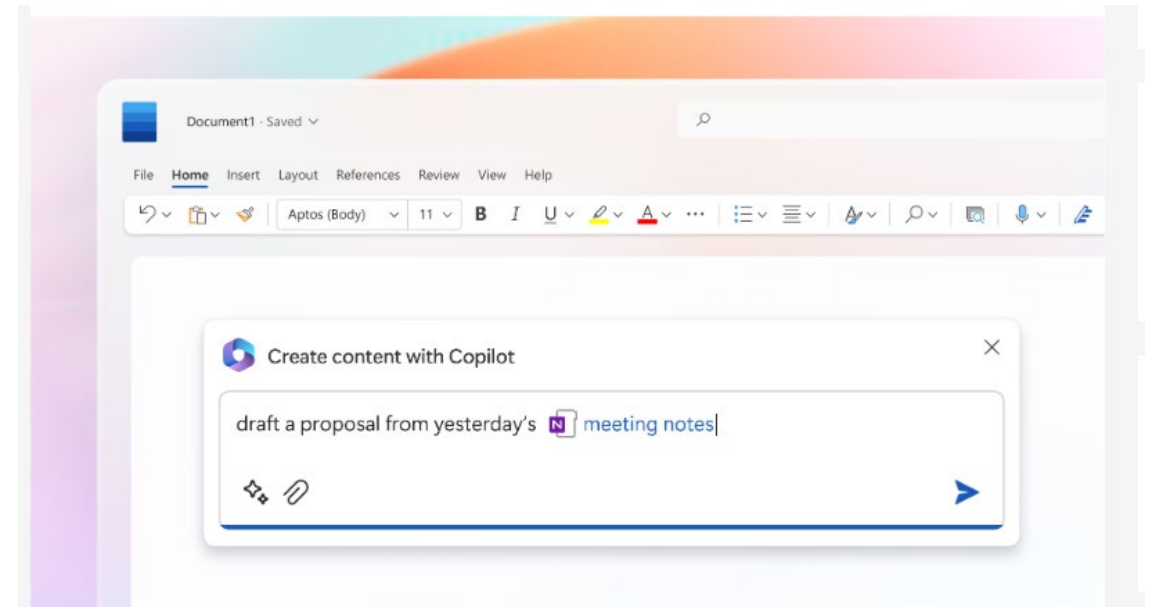
Data privacy for M365 Copilot – [Link](#)

Microsoft Copilot

Introduction to Microsoft Copilot – [Link](#)

Managing Microsoft Copilot – [Link](#)

Microsoft Copilot activation for your tenant – [Link](#)



A man with glasses is looking at a computer monitor in a dark room. The monitor displays code in a dark-themed editor. A large orange and pink diagonal graphic is overlaid on the right side of the image.

Reference Slides

Copilot Deck

- Customers will understand the core components and their role in the Copilot infrastructure
 - Large Language Model
 - Microsoft Graph/Semantic Index
 - Interconnectivity with M365 Apps
- Gain knowledge on how Copilot functions within the customers environment
- Defining how users interact with Copilot data from a security and governance perspective
- Define specific use cases for all M365 application usage scenarios
- Demonstrations of M365 Copilot capabilities based on application and workflow



Persona Planning

- Copilot may not be an enterprise-wide change, the persona planning session builds on that expectation and breaks users down into various categories based on you business model
 - Business Unit
 - User Group
 - Department
- Review application usage related to job responsibility and industry
- Define the users that would maximize the ROI of Copilot licensing
- Categorization of users based on usage of M365 applications, and who would be good candidates for M365 Copilot
- Demonstrations of M365 Copilot capabilities based on application

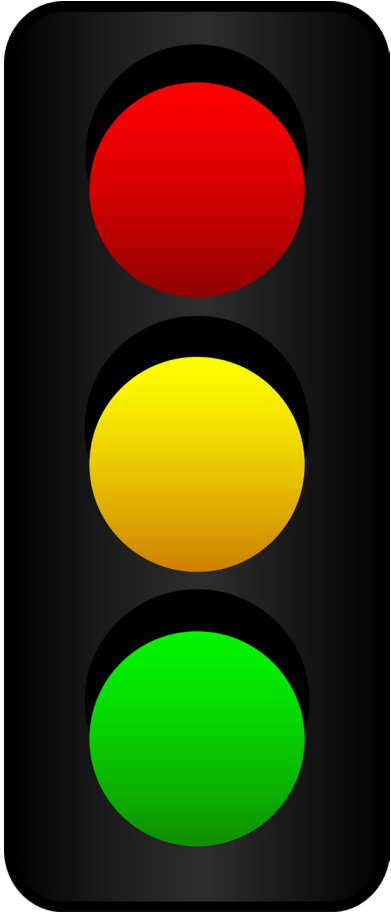


Readiness Assessment

- The Softchoice Copilot Readiness Assessment reviews the current landscape as it relates to these topics
 - Licensing
 - Identity
 - Data Security
 - Data Governance
 - File Permissions/Oversharing
 - Adoption
- Provides details of the current environment and provides a “Stop Light” scoring mechanism to ensure the customer knows what are showstoppers, and what requires additional review to achieve Copilot Ready, and Optimized States
 - **Red** – These controls must be remediated prior to enabling Copilot within the organization
 - **Yellow** – These controls need further review and remediation for Copilot Optimized Copilot state
 - **Green** – These controls are ready to enable Copilot



Readiness Assessment



Current State

Recommendation

<ul style="list-style-type: none">• Data not synced to cloud• Entra ID not enabled• Mixed licensing environment (M365 Apps)• Unsupported software versions	<ul style="list-style-type: none">• Review the current state and remediate prior to enabling Copilot
<ul style="list-style-type: none">• Data is stored on cloud• Permissions and governance partially deployed• Mixed Licensing (E3/E5)• Versions of M365 apps are mixed	<ul style="list-style-type: none">• Review Data Scanning and Classification• Review DLP and Governance Policies• Review Data Sharing Permissions
<ul style="list-style-type: none">• E3/E5 Licensing for all identified users• Customer is using Azure AD Authentication• Current Channel application versions deployed	<ul style="list-style-type: none">• Suited for Copilot

Adoption Planning/Review

- The Softchoice Copilot Readiness Assessment addresses a key component to project success: Adoption
 - Proper user enablement
 - Centers of Excellence
 - Copilot Champions Program
- Softchoice work with Adoption stakeholders to review best practices to ensure adoption is key within the planning process
- Utilizing your current adoption methods, Softchoice reviews the requirements of a successful M365 Copilot rollout



What's Next?

Microsoft Copilot Implementation Service | M365 Overview

Technical Requirements – *Readiness Assessment Findings/Recommendations*

- Licensing: E3 / E5 – M365 Copilot
- Microsoft Entra ID: Work Account in AAD
- Microsoft 365 Apps for Enterprise
- Teams: Current and the new versions of Teams supported
- Microsoft Loop (optional)
- Semantic Index (confirmation)

Security

Governance – *Remediate the right information access controls and policies and enablement*

- Microsoft Purview
 - Data Loss Prevention (DLP)
 - Sensitivity Labels – Automatically classifying data
 - Retention Policies

Permissions & Data Access – *Remediate information access explicitly to what users should have access to and guide the customer to enable the right permissions*

- Remediate “oversharing” by using labelling and policies, providing Just Enough Access to users, restricting access to everything

Microsoft 365 Copilot

- Pilot Testing and Review
- Enabling Licenses to Users/Groups



Questions and Answers

For more information email: camsa@softchoice.com

CITE CAMSA website: <https://www.cite.org/camsa>

Escalations: Shirion Simmons, Sr. Program Administrator
Shirion.Simmons@Softchoice.com

THANK YOU FOR YOUR ATTENTION & TIME!