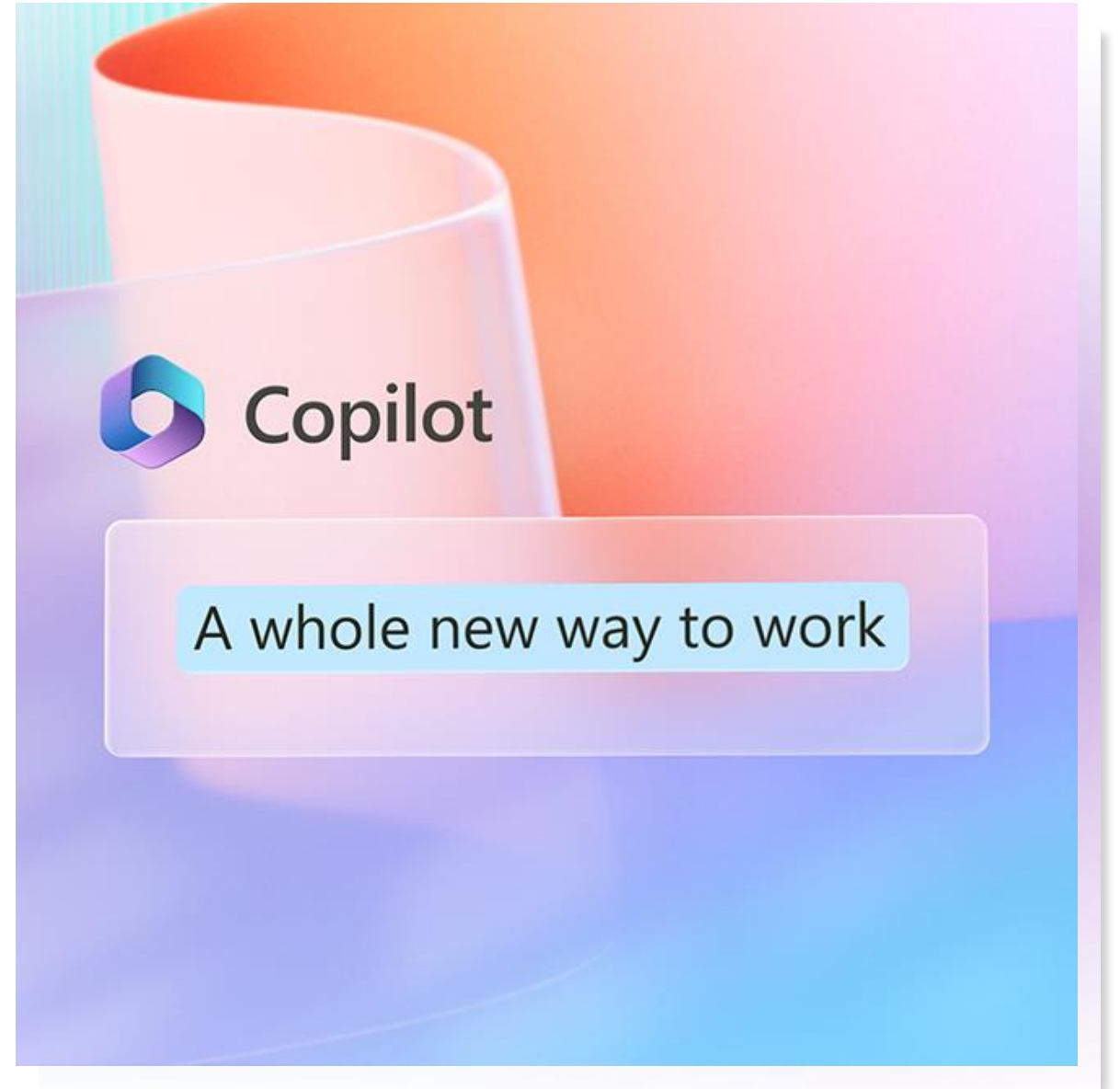




# Introducing Microsoft 365 Copilot The AI-Powered Future of Work

The partner guide to Microsoft 365  
Copilot readiness and customer  
adoption



“Today marks the next major step in the evolution of how we interact with computing, which will fundamentally change the way we work and unlock a new wave of productivity growth.”

“With our new copilot for work, we’re giving people more agency and making technology more accessible through the most universal interface – natural language.”



**Satya Nadella**  
Chairman and CEO, Microsoft

# The age of AI

---

AI will break the world out of its stagnant productivity cycle – and set the stage for **a new era of innovation.**

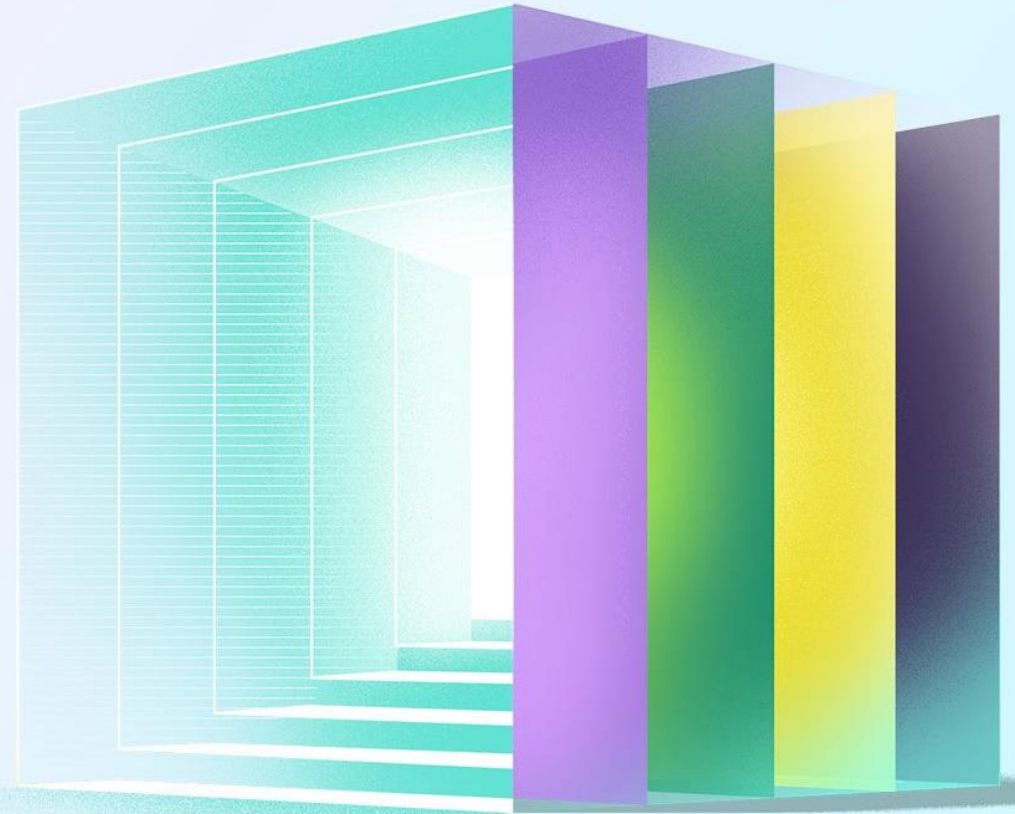
WorkLab

# Forecast 2023

# AI

**A whole  
new way  
of working**

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



The pace of work is outpacing our ability to keep up

# AI-powered tools represent an enormous opportunity

64%

of people have struggled with finding time and energy to get their work done.

3x

Amount by which time spent in Microsoft Teams meetings and calls has increased per week since February 2020.

70%

Share of people who would delegate as much as possible to AI to lessen their workloads.

2x

Likelihood of a leader to say AI will provide value by boosting productivity vs. cutting headcount.

# Our customers want a new way of working

## We must overcome the drudgery of work

- **68%** of people say they don't have enough uninterrupted focus time.
- **62%** of people are spending too much time searching for information.
- **57%** of an employee's time is spent on communicating (in meetings, email, and chat).

## To rediscover the soul of work

What customers want:

- Simple-to-use solutions designed to work together.
- Best-of-breed protection and productivity.
- AI to fuel productivity and innovation.

**70% of people say they would delegate as much work as possible to AI to lessen their workloads.**

# Microsoft is fueling AI innovation

Decades  
of research &  
development

Committed to  
advancing  
Responsible AI

Secure  
from  
the start

Reliability &  
performance at scale  
for large AI models

Trusted by  
AI leaders  
like OpenAI

# Build the future faster with Microsoft AI

Discover powerful foundational models and capable copilots accessible via natural language

## Limitless innovation & possibility

Write better code faster in dozens of languages with **GitHub Copilot**.

[Learn more](#)

## Unleashed creativity & productivity

Unleash creativity and unlock productivity with **Microsoft 365 Copilot**.

## Faster threat detection & response

Detect and respond to incidents faster with **Microsoft Security Copilot**.

[Learn more](#)

## Superior search on the web

Ask questions and get relevant answers with **AI-powered Bing**.

[Learn more](#)

## Intelligence for every line of business

Bring AI-powered, interactive assistance to CRM and ERP with **Dynamics 365 Copilot**.

[Learn more](#)

## Access to timely data for accelerated sales

Spend more time selling and less time searching for customer data with **Microsoft Viva Sales**.

[Learn more](#)

## Personalized & intelligent meetings

Make the meetings you attend more productive with **Microsoft Teams Premium**.

[Learn more](#)

## No-code dev using everyday language

Build apps using natural language and no code with **Copilot in Power Platform**.

[Learn more](#)





**Microsoft 365 Copilot**



# Microsoft 365 Copilot

Natural Language



+



+



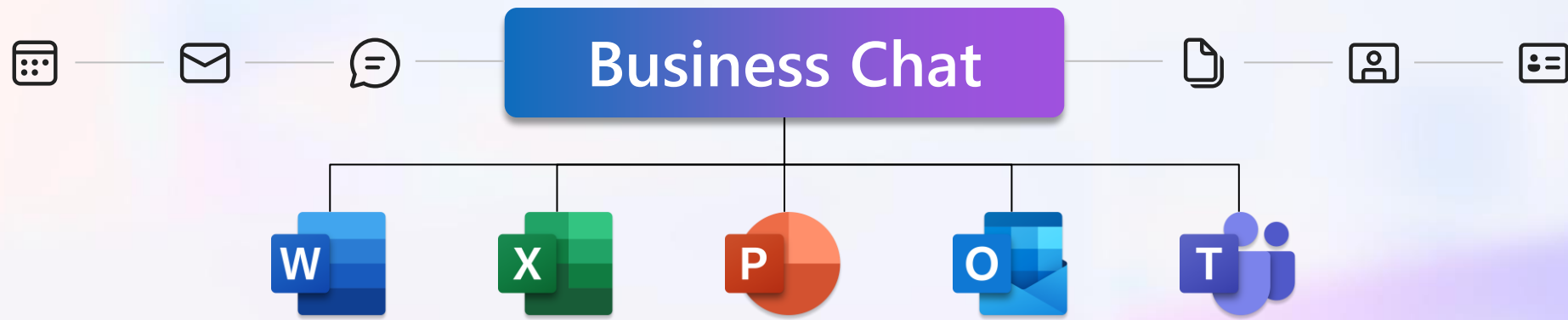
Large Language  
Models

Microsoft 365  
Apps

Microsoft Graph  
- Your Data -



# Microsoft 365 Copilot



Embedded across Microsoft 365 apps



# Microsoft 365 Copilot

Built on Microsoft's **comprehensive approach**



Security



Compliance



Privacy



Responsible AI



# Microsoft 365 Copilot

Access to your business **content** and **context**



# Microsoft 365 Copilot



## Unleash creativity

Harness Copilot's power so you never start from scratch



## Unlock productivity

Let Copilot summarize actions for you, and optimize your time

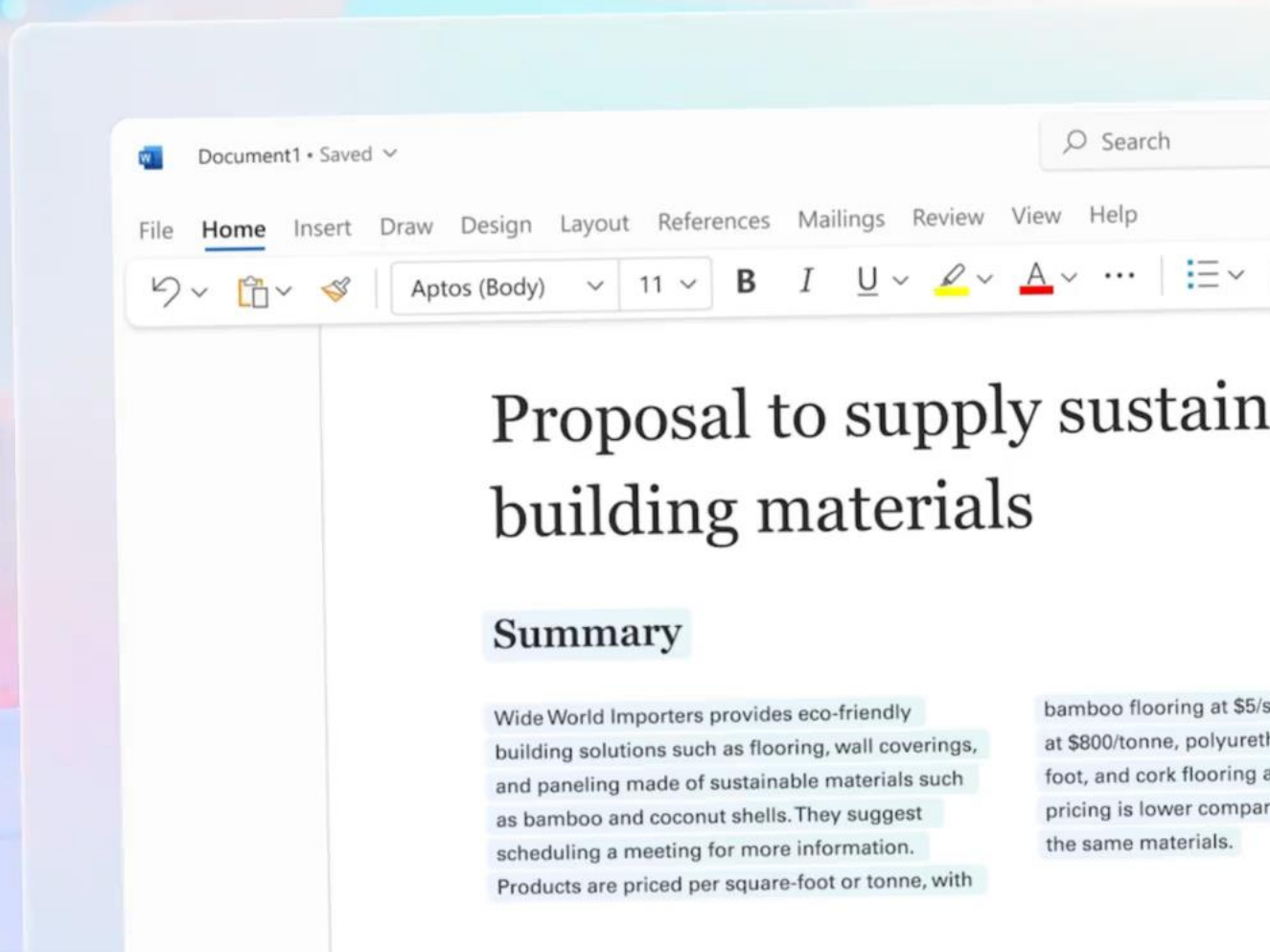


## Uplevel skills

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

MICROSOFT 365

# Copilot in Word



# Microsoft 365 Copilot



## Unleash creativity

Harness Copilot's power so you never start from scratch



## Unlock productivity

Copilot summarize actions for you, and optimize your time



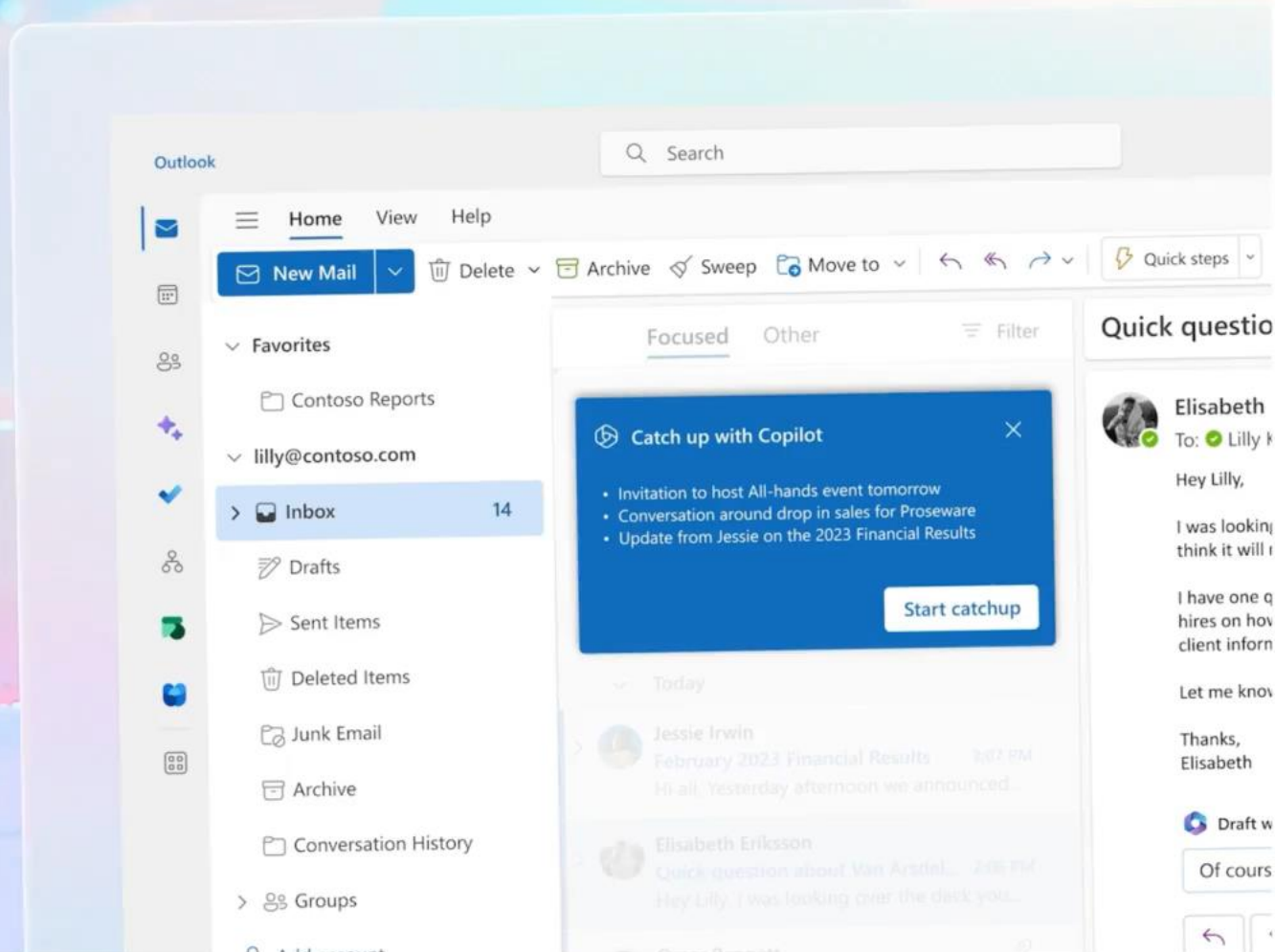
## Uplevel skills

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



MICROSOFT 365

# Copilot in Outlook



MICROSOFT 365

# 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" sections. The "Topics" section lists "Proseware negotiation strategy" and "Core accounts round table". On the right, 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 materials)", "Account leads to propose discounting scenarios to lower inventory", and "Proseware was discussed as a leading opportunity". Below the summary is a "Notes" section with a list of notes, including one mentioning "Beth emphasized importance of Proseware negotiation strategy with offers - this is a must win deal." and another mentioning "The team identified a new opportunity with Proseware that...".

# Microsoft 365 Copilot



## Unleash creativity

Harness Copilot's power so you never start from scratch



## Unlock productivity

Let Copilot summarize actions for you, and optimize your time



## Uplevel skills

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

MICROSOFT 365

# Copilot in Viva Sales

The screenshot displays the Microsoft Outlook interface. At the top, there is a search bar and navigation tabs for Home, View, and Help. Below this is a toolbar with buttons for New Mail, Delete, Archive, Sweep, and Move to. The main area is divided into a 'Focused' tab and an 'Other' tab. The 'Focused' tab shows a list of emails:

- Today**
  - MR Maya Robinson**  
[External] Re: XL Recycled bottles 12:55 PM  
Hi, Thanks for your time, this is a great su...
  - AB Alberto Burgos, Kevin Smith..**  
[External] Pricing Information 9:00 AM  
Hi all, according to our discussion yesterday
- Yesterday**
  - Wanda Howard**  
[External] Urgent: Open cases are... 4:22 PM  
Can you share a link to the marketing do
  - Kristin Pattersonson (2)**  
[External] Fw: Help with concerns... 3:07 PM  
+1 - This should be ASAP

On the right side, a conversation summary is displayed for the selected email:

**[EXTERNAL] RE: XL Recycled bottles**

**Conversation summary**

- Maya approved the deal
- Maya is looking for pricing for the XL product
- She requested pricing for 5000 and 10,000 Un 10 countries.
- The launch date for their new product is Marc

A button labeled **Close as won** is visible, along with a note that there are 3 references. Below the summary, the start of the email body is visible, showing a message from **MR Maya Robinson** to **Samantha Cantrell** with the text "Hi," and "Thanks for your time, this is a great summary of".

# Retrieval Augmented Generation

How it works



# Microsoft 365 Copilot

Natural Language



Large Language  
Models

+



Microsoft Graph  
- Your Data -

+



Microsoft 365  
Apps



Microsoft 365 Copilot

# Data access and permissions

How it works



# Prompts and turns

How it works



# Microsoft 365 Copilot

How to get ready

# Microsoft Graph and search

Just enough access





nable



Meet the team!



Launching new product innovation



Ideas and innovation at Green Energy

12:39

54



**Just enough access**

**Tool recommendations**

- Home
- Sites
  - Active sites
  - Deleted sites
- Policies
- Settings
- Content services
- Migration
- Reports
- More features
- Customize navigation
- Show all

## Active sites

Use this page to sort and filter sites and change site settings.  
[Learn more about managing sites](#)

1.43 TB available of 1.46 TB

+ Create   ↓ Export   ↗ Track view

🕒 Your recent actions

☰ Sites connected to Teams \* ▾

Site name ↑ ▾	URL ▾	External sharing ▾	Sensitivity ▾	Storage used (GB) ▾	Primary admin ▾	Files v
Communications	.../sites/Communications	On	General	0.00	👤 Group owners	0
Contoso	.../sites/Contoso	On	General	0.00	👤 Group owners	0
Contoso marketing	.../sites/Contosomarketing	On	General	0.00	👤 Group owners	0
Design	.../sites/Design	Off	Confidential	0.01	👤 Group owners	0
Digital Initiative Public Relations	.../sites/DigitalInitiativePublicRelations	Off	Confidential	0.23	👤 Group owners	0
Mark 8 Project Team	.../sites/Mark8ProjectTeam	Off	Highly Confidential	0.26	👤 Group owners	0
Remote living	.../sites/Remoteliving	On	General	0.01	👤 Group owners	0
Retail	.../sites/Retail	On	General	0.04	👤 Group owners	0
Sales and Marketing	.../sites/SalesAndMarketing	Off	Confidential	0.04	👤 Group owners	0
SOC Team	.../sites/SOCteam	Off	Highly Confidential	0.00	👤 Group owners	0

🔄

💬

- Home
  - Compliance Manager
  - Data classification
  - Data connectors
  - Alerts
  - Policies
  - Roles & scopes
  - Trials
- 
- Solutions
- Catalog
  - Audit
  - Content search
  - Communication compliance
  - Data loss prevention
  - eDiscovery
  - Data lifecycle management
  - Information protection
  - Information barriers
  - Insider risk management

Communication compliance ...

## Minimize communication risks

Quickly setup policies to monitor user communications across channels for inappropriate and sensitive content so they can be examined by designated reviewers.  
[Learn more about communication compliance](#)

**Recently detected**

Communications containing	Instances
New Zealand Social Welfare ...	14
Portugal Tax Identification N...	9
Polish REGON Number	8
New Zealand Inland Revenu...	8
Credit Card Number	5

[Get started](#)

Active alerts

Adaptive Protection ...

## Automatically mitigate potential risks with Adaptive Protection

Adaptive Protection combines data loss prevention (DLP) & insider risk management capabilities and to help minimize risky activity early.

- Define risk priorities for your org
- Dynamically enforce DLP actions for riskiest users
- Automated risk-adaption balances security and productivity

**What's set up when you turn on Adaptive Protection**

- Insider risk management policy
- Built-in risk levels for Adaptive Protection
- DLP policy in test mode

Turn on Adaptive Protection now to test it out before activating.

[Turn on Adaptive Protection](#) [Learn more](#)

Microsoft Purview Insider Risk Mana ...



## Did you know businesses are spending \$500,000 per breach?

Source: Communication Compliance Microsoft Market Research, May 2021

Start identifying insider risks within your organization with Microsoft Purview Insider Risk Management today.

[Get started](#)

Compliance Manager ...



- ☰
- 🏠 Home
- 🕒 Compliance Manager
- 🔗 Data classification ^
  - Overview
  - Classifiers**
  - Content explorer
  - Activity explorer
- 🔌 Data connectors
- ⚠ Alerts
- ⚙ Policies
- 🔍 Roles & scopes v
- 📄 Trials

---

- Solutions**
- 📊 Catalog
- 📄 Audit
- 🔍 Content search
- 🗨 Communication compliance
- 🔒 Data loss prevention v
- 🏛 eDiscovery v
- 📅 Data lifecycle management v

# Classifiers

Trainable classifiers   Sensitive info types   EDM classifiers

Use built-in or custom classifiers to identify specific categories of content based on existing items in your organization. Once created, classifiers can be used in several compliance solutions to detect related content and classify it, protect it, retain it, and more. [Learn more](#)

📘 To set you up for creating trainable classifiers, we're currently scanning your content locations to generate analytics that will help us learn what type of content is in your organization. This process will take 7 to 14 days to complete. [Learn about trainable classifiers](#)

+ Create trainable classifier   🔄 Refresh

93 items   🗑 Group v

Filters:   Language: **Any** v   Type: **Any** v   Name: **Any** v   Status: **Any** v   🗑 Filters

<input type="checkbox"/>	Name	Accuracy	Status	Type	Language	Created by	Last modified	Last mod
v Published (93)								
<input type="checkbox"/>	Agreements	🔗 -	Ready to use	Built-In	English	Microsoft	5/24/2023	Microsof
<input type="checkbox"/>	Bank statement	🔗 -	Ready to use	Built-In	English	Microsoft	5/18/2023	Microsof
<input type="checkbox"/>	Budget	🔗 -	Ready to use	Built-In	English	Microsoft	5/18/2023	Microsof
<input type="checkbox"/>	Business plan	🔗 -	Ready to use	Built-In	English	Microsoft	12/31/0000	
<input type="checkbox"/>	Completion Certificates	🔗 -	Ready to use	Built-In	English	Microsoft	6/7/2023	
<input type="checkbox"/>	Construction specifications	🔗 -	Ready to use	Built-In	English	Microsoft	6/7/2023	
<input type="checkbox"/>	Corporate Sabotage	🔗 -	Ready to use	Built-In	English	Microsoft	4/6/2023	Microsof
<input type="checkbox"/>	Customer Complaints	🔗 -	Ready to use	Built-In	English	Microsoft	3/21/2023	Microsof



Trials

Solutions

- Catalog
- Audit
- Content search
- Communication compliance
- Data loss prevention ▼
- eDiscovery ▼
- Data lifecycle management ▼
- Information protection ▲
  - Overview
  - Labels**
  - Label policies
  - Auto-labeling
- Information barriers ▼
- Insider risk management
- Records management
- Privacy risk management ▼
- Subject rights requests

## Labels

Sensitivity labels are used to classify email messages, documents, sites, and more. When a label is applied (automatically or by the user), the content or site is protected based on the settings you choose. For example, you can create labels that encrypt files, add content marking, and control user access to specific sites. [Learn more about sensitivity labels](#)

+ Create a label
🗨️ Publish labels
⬇️ Export
🔄 Refresh
6 items

<input type="checkbox"/>	Name	Order	Scope	Created by	Last modified
<input type="checkbox"/>	Personal	⋮ 0 - lowest	File, Email		Mar 24, 2023 8:59:36 AM
<input type="checkbox"/>	Public	⋮ 1	File, Email		Mar 24, 2023 8:59:37 AM
<input type="checkbox"/>	> General	⋮ 2	File, Email		Mar 24, 2023 8:59:38 AM
<input type="checkbox"/>	> Confidential	⋮ 5	File, Email		Mar 24, 2023 8:59:39 AM
<input type="checkbox"/>	Confidential - Finance	⋮ 7	File, Email	Megan Bowen	Mar 24, 2023 1:59:04 PM
<input type="checkbox"/>	> Highly Confidential	⋮ 8	File, Email	Megan Bowen	Mar 24, 2023 1:59:06 PM

- Home
- Compliance Manager
- Data classification
- Data connectors
- Alerts
- Policies
- Roles & scopes
- Trials
- Solutions
  - Catalog
  - Audit
  - Content search
  - Communication compliance
  - Data loss prevention
    - Overview
    - Policies
    - Alerts
    - Endpoint DLP settings
    - Activity explorer
  - eDiscovery

# Policies

Use data loss prevention (DLP) policies to help identify and protect your organization's sensitive info. For example you can set up policies to help make sure information in email and docs isn't shared with the wrong people. [Learn more about DLP](#)








+ Create policy   ↓ Export   ↻ Refresh   4 items  

<input type="checkbox"/> Name	Order	Last modified	Status
<input type="checkbox"/> U.S. Financial Data	⋮ 0	Mar 24, 2023 2:26 AM	On
<input type="checkbox"/> General Data Protection Regulation (GDPR)	⋮ 1	Mar 24, 2023 2:26 AM	On
<input type="checkbox"/> Default policy for Teams	⋮ 2	Mar 24, 2023 8:58 AM	On
<input type="checkbox"/> Default policy for devices	⋮ 3	Mar 24, 2023 8:59 AM	On

- Name
- Admin units (preview)
- Locations**
- Advanced DLP rules
- Policy mode
- Finish

## Choose locations to apply the policy

We'll apply the policy to data that's stored in the locations you choose.

Status	Location	Included	Excluded
<input checked="" type="checkbox"/> On	 Exchange email	All <a href="#">Choose distribution group</a>	None <a href="#">Exclude distribution group</a>
<input checked="" type="checkbox"/> On	 SharePoint sites (including Microsoft Teams files)	All <a href="#">Choose sites</a>	None <a href="#">Exclude sites</a>
<input checked="" type="checkbox"/> On	 OneDrive accounts	All <a href="#">Choose account or distribution group</a>	None <a href="#">Exclude account or distribution group</a>
<input checked="" type="checkbox"/> On	 Teams chat and channel messages	All <a href="#">Choose account or distribution group</a>	None <a href="#">Exclude account or distribution group</a>
<input checked="" type="checkbox"/> On	 Devices	All <a href="#">Choose user or group</a>	None <a href="#">Exclude user or group</a>
<input checked="" type="checkbox"/> On	 Microsoft Defender for Cloud Apps	All <a href="#">Choose instance</a>	None <a href="#">Exclude instance</a>
<input checked="" type="checkbox"/> On	 On-premises repositories	All <a href="#">Choose repositories</a>	None <a href="#">Exclude repositories</a>

Back

Next

Cancel

- ✓ Name
- ✓ Admin units (preview)
- ✓ Locations
- **Advanced DLP rules**
- Policy mode
- Finish

## Edit rule

### Conditions

Define the conditions that must be met for this policy to be applied. Include specific content, senders, and recipients that you want the rule to detect. For more complex rules, create groups to exclude or include items. [Learn how the condition builder works](#)

Quick summary

Content is shared from Microsoft 365 **only with people inside my organization**

And

Content contains any of these sensitive info types: **Credit Card Number, U.S. Bank Account Number, ABA Routing Number**

### Actions

Use actions to protect content when the conditions are met.

#### Restrict access or encrypt the content in Microsoft 365 locations

- Block users from receiving email or accessing shared SharePoint, OneDrive, and Teams files.  
By default, users are blocked from sending Teams chats and channel messages that contain the type of content you're protecting. But you can choose who is blocked from receiving emails or accessing files shared from SharePoint, OneDrive, and Teams.
  - Block everyone. ⓘ
  - Block only people outside your organization. ⓘ

+ Add an action

### User notifications

Use notifications to inform your users and help educate them on the proper use of sensitive info.

On

**Save** Cancel

New Mail Delete

Inbox Filter

johndavis@outlook.com

Inbox 14

- Drafts
- Sent Items
- Deleted Items
- Junk Email
- Archive
- Conversation History
- Groups
- Add account

- Microsoft**  
**Collab insights for the week** 9:00 AM  
 Weekly digest for SharePoint collaboration
- Yesterday**
- Colin Ballinger** Tue 13:45  
 Re: Upcoming Trip  
 I found these restaurants near our hotel, what ...
  - Elvia Atkins** Tue 11:01  
 New Hires  
 I'd like to introduce some new people joining ...
  - Kristen Patterson** Tue 10:44  
 Fw: Volunteers Needed  
 Hey, We're looking for volunteers for ...
  - Elvia Atkins** Mon 11:01  
 Growth mindset  
 This is nothing new, but we want to remind you...
  - Kristen Patterson** Mon 10:44  
 Projections  
 Hi team, our research team has been working...
  - Microsoft 365 Admin Center** Fri 13:45  
 Security essentials  
 Find out what security measures are included...

Collab insights for the week

**Microsoft**  
 Sat 2022-10-01 10:00 AM  
 To: John



Your collaboration insights for this week

Top collaborative user

Display name	Files viewed or edited	Total file interaction
Megan Bowen	156	210

Top collaborative site

Site	URL	Number of times shared externally
Project Apollo	/site/projectapollo	138

Top collaborative OneDrive

Username	Files shared internally	Files shared externally
----------	-------------------------	-------------------------



# Microsoft 365 Copilot

Admin setup guide

- Home
- Users
- Groups
- Billing
- Setup
- Edit navigation pane
- Show all

Home > Setup

# Setup

Discover, learn about, and set up services, solutions, and add-ins available with your <Subscription Name> subscription.

## Featured collections

Lists of related actions to help you manage a scenario or meet a goal.

**Healthcare basics**  
Actions to help healthcare organizations run more smoothly while following industry regulations.

**Viva**  
Actions to help you migrate email, data, and content to Microsoft 365.

**Advanced deployment guides & assistance**  
Detailed guides to help larger organizations with complex deployment tasks.

**Remote v**  
Actions to help you improve productivity.

**Migration**  
Actions to help you migrate email, data, and content to Microsoft 365.

## Sign-in and security

Name ↓	Status	Description
Add or sync users to your Microsoft account	<input type="radio"/> Not started yet	Your journey to the cloud starts with your users and getting their accounts into Microsoft 365.
Configure multifactor authentication (MFA)	<input type="radio"/> Not started yet	Provide an additional level of security for sign-ins using multifactor authentication (MFA) to access company resources.
Get your custom domain set up	<input type="radio"/> Not started yet	Connecting a domain will allow users in your organization to send and receive email from a custom domain name.
Limit admins to the access they need	<input type="radio"/> Not started yet	Limit risk to your organization by reassigning some global admins to more limited admin roles, removing access to critical features that they don't need.
Set passwords to never expire	<input checked="" type="radio"/> Complete	Setting passwords to never expire is more secure and leads to fewer work stoppages.



- ✓ Overview
- ✓ Readiness
- Licenses**
- Email announcement
- Finish

## License your Microsoft 365 Copilot users

Make sure your users have been assigned the correct license. Your organization must have a Microsoft 365 E3 or E5 subscription that includes Microsoft 365 Apps for Enterprise.

### Assign licenses to your users or groups:

+ Assign group license

3 items

Name ↑	Available licenses
Microsoft 365 Copilot	20
Microsoft 365 E3	159
Microsoft 365 E5	46

### Learn more

[Microsoft AI help & learning](#)

Back

Next

Cancel

- ✓ Overview
- ✓ Readiness
- ✓ Licenses
- Email announcement**
- Finish

## Promote Microsoft 365 Copilot features to your users

Now that you've prepared and configured your environment for Microsoft 365 Copilot services, we've provided an email announcement to send to your users.

To have Microsoft send emails to your users, set your organization's preferences in [Microsoft communication to users](#).

Send email to the following recipients (optional)

### Preview


















- Home
- Users
- Active users
- Contacts
- Guest users
- Deleted users
- Devices
- Teams & groups
- Billing
- Setup

Home > Active users

# Active users

[Add a user](#)
[Multi-factor authentication](#)
[Refresh](#)
[Delete user](#)
[Reset password](#)

<input type="checkbox"/>	Display name ↑		Username
<input checked="" type="checkbox"/>	Adele Vance	 	AdeleV@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Alex Wilber		AlexW@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Automate Bot		AutomateB@M365x49837946.OnMicrosoft.c
<input type="checkbox"/>	Bianca Pisani		BiancaP@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Brian Johnson (TAILSPIN)		BrianJ@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Cameron White		CameronW@M365x49837946.OnMicrosoft.c
<input type="checkbox"/>	Christie Cline		ChristieC@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Adams		Adams@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Baker		Baker@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Crystal		Crystal@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Hood		Hood@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Rainier		Rainier@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Conf Room Stevens		Stevens@M365x49837946.OnMicrosoft.com
<input type="checkbox"/>	Debra Berger		DebraB@M365x49837946.OnMicrosoft.com



## Adele Vance

[Reset password](#)
[Block sign-in](#)
[Delete user](#)

[Change photo](#)

[Account](#)
[Devices](#)
[Licenses and apps](#)
[Mail](#)
[OneDrive](#)

### Select location \*

United States

### Licenses (3)

- Enterprise Mobility + Security E5**  
0 of 20 licenses available
- Microsoft 365 E5**  
23 of 25 licenses available
- Microsoft 365 E5 Compliance**  
0 of 20 licenses available
- Microsoft Power Automate Free**  
17 of 20 licenses available
- Microsoft 365 Copilot**  
1 of 2 licenses available
- Office 365 E5**  
2 of 20 licenses available

[Save changes](#)



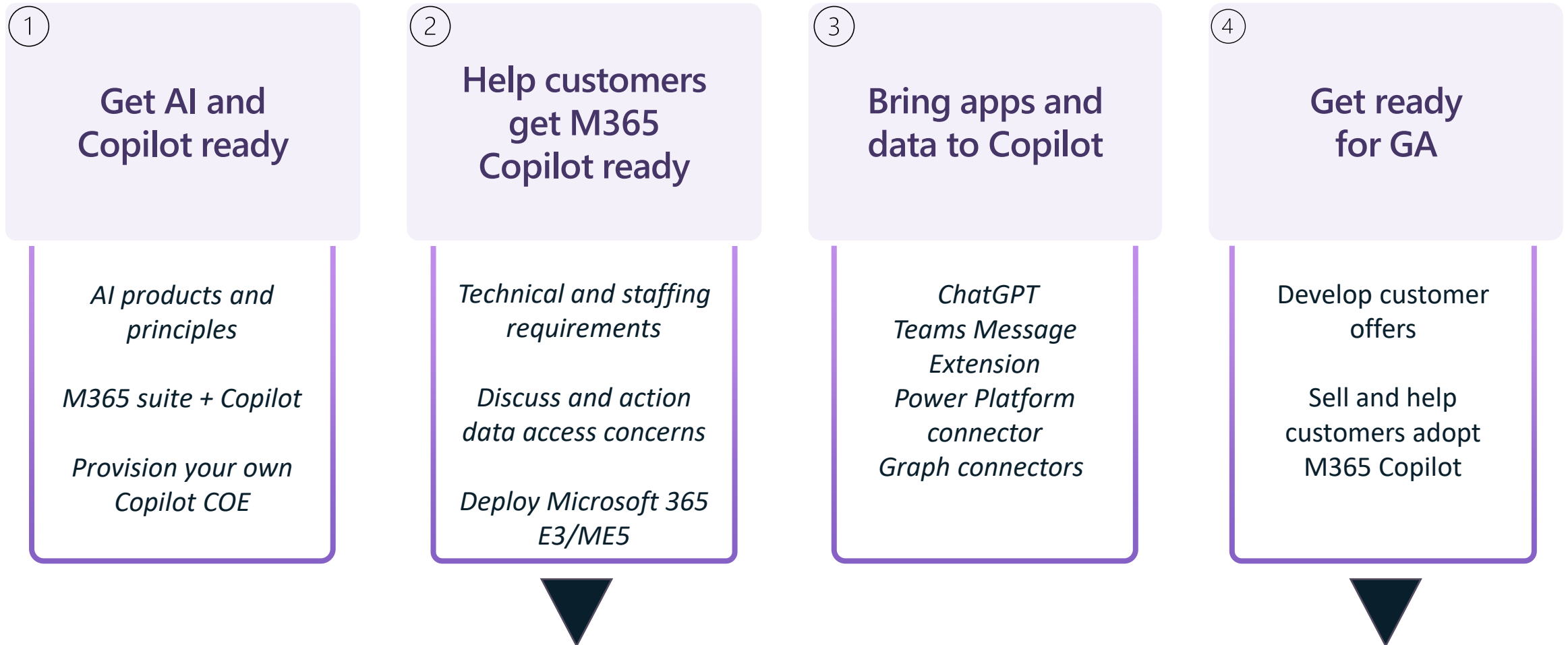
# Microsoft 365 Copilot

Adoption & success

**What is next?**

# Road to Microsoft 365 Copilot Partner GTM

The ecosystem for the new wave of productivity



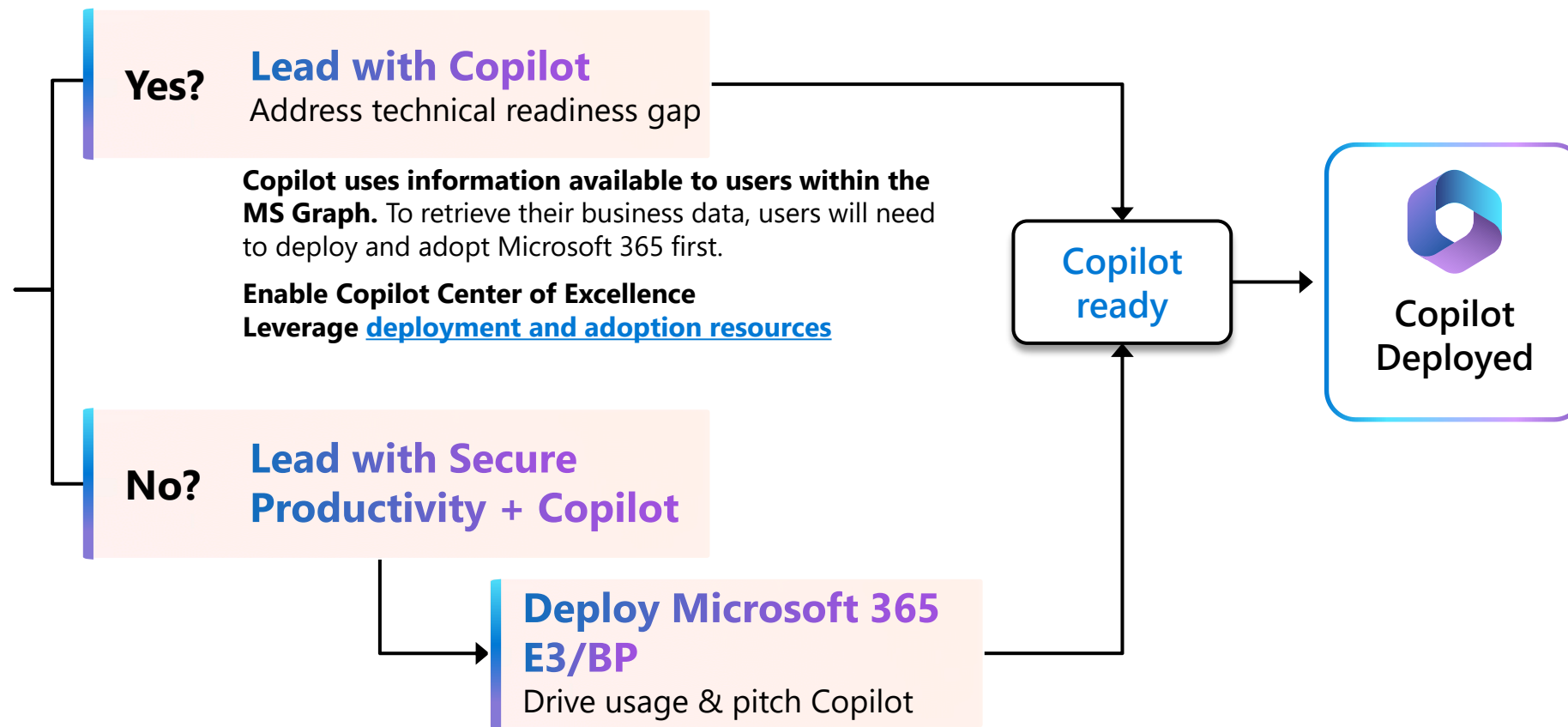
# Accelerate customer AI readiness before deploying Copilot

Proactively get customers ready to embrace the AI-powered future of work:

1. Move customers to **AI-ready licenses** within the Microsoft 365 suite
2. Prepare customers to meet Copilot **technical requirements**
3. Reassure customer **data privacy** concerns and ensure comprehensive **compliance and security** controls

# Microsoft 365 Copilot | Winning Customers

**Customer on**  
Microsoft 365  
E3/ME5  
/Biz Premium



**Microsoft 365 is foundational to being AI ready.** Although Copilot will be a difference license, customers will need to be on Microsoft 365 E3/E5 as a base license.

Leverage the [Microsoft 365 E3 offers and promos](#)



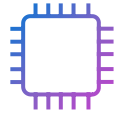
The era of AI is here

# Unify a complex, disconnected IT ecosystem into a single secure foundation



## Devices

that meet specific  
job requirements



## Operating system

that's secure, easy to manage,  
update, and use



## Security

that defends against  
cyberattacks across  
multiple platforms



## Management

that is built for a  
heterogenous device estate,  
including personal devices



## Collaboration

that connects every  
employee  
across all devices

# Help customers meet the technical requirements

Act now and prepare your customers' Microsoft 365 environments for Copilot

- ✓ Customers must be on Microsoft 365 E3 or E5.
- ✓ Users must have Azure Active Directory -based accounts ([Learn More](#)).
- ✓ Several features require users to have a OneDrive account ([Deploy OneDrive](#)).
- ✓ **Copilot in Outlook:** Users will need to be using the new Outlook for Windows (which is publicly called “the new Outlook for Windows.” This version is currently in public preview. Users can load the new Outlook by toggling or use Outlook Mobile ([Getting Started with the New Outlook for Windows - Microsoft Support](#)).
- ✓ **Copilot in Teams:** Users will need to enable the Teams desktop client ([Deploy Teams](#)) as well as transcription ([Configure Transcription](#)).
- ✓ **Copilot in Loop:** Tenants must have Loop enabled ([Learn How to Enable Loop](#)).
- ✓ **Cross-app intelligence:** The richness of the experience will depend on the data sources indexed by Microsoft 365. Tenants with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, and Teams) will get the best results.

# Proactively address customer security concerns

## Reassure customers that Microsoft 365 Copilot was designed for enterprise security needs

### Address sensitive information and customer data inquiries

#### Is the LLM model trained with customer data?

- No, Microsoft does not use customer data to train or improve the LLMs.
- Refer customers to [Microsoft's privacy policy and service documentation](#).

#### How does Microsoft 365 Copilot protect sharing of sensitive content?

- It only presents data that each individual user has access to.
- It uses the same data access controls as other Microsoft 365 services.
- It inherits the tenant's security, compliance, and privacy policies.

#### Who owns the IP of content generated by AI?

- Microsoft does not claim ownership of the prompts or the generated responses.

### Address data processing and privacy inquiries

#### Microsoft 365 Copilot falls under the [Microsoft 365 Product Terms](#).

#### Where does data processing occur for Microsoft 365 Copilot?

- Currently, all LLM data processing is done in North America (Canada and the USA).

#### Does Microsoft 365 Copilot support multi-geo data processing?

- The Microsoft 365 Copilot Preview does not currently support multi-geo SKUs.

#### Will Microsoft 365 Copilot be available in GoLocal countries?

- Yes, Copilot will be available in GoLocal countries. Dates will be shared in the near future.
- Stay informed by following the [Microsoft 365 Blog](#) as well as the [Tech Community Microsoft 365 Blog](#).

### Address questions related to GDPR data compliance

#### Is GDPR delaying the deployment of Microsoft 365 Copilot in the EU?

- No, Microsoft's GDPR commitments underway are not blocking or delaying EU deployment.
- Microsoft will start offering Microsoft 365 Copilot in the EU once the newly announced EU data region commitments have been reached.

#### Learn more about Microsoft's EU Data Boundary commitment:

- [Microsoft announces the phased rollout of the EU Data Boundary for the Microsoft Cloud, begins January 1, 2023](#)
- [What is the EU Data Boundary?](#)

#### How is data stored and processed to comply with privacy laws?

- The Microsoft 365 Copilot experience does not change Microsoft's data security and privacy principles.
- Copilot is integrated into Microsoft 365 and adheres to all existing privacy and compliance obligations.

### Deploy additional Microsoft Security solutions

#### Set up a strong Zero Trust foundation for your customers in Microsoft 365:

- Secure and manage identities with [Microsoft Entra Identity Governance](#).
- Defend against threats across multiple platforms with [Microsoft Defender for Endpoint](#), [Microsoft Intune](#), [Windows Autopatch](#), and [Windows 11 Enterprise](#).
- Protect sensitive information across data estates with [Microsoft Purview Information Protection](#).

#### Help your customers streamline endpoint management for company-owned and BYO devices:

- Ensure that both hardware and software are working together to keep people, data, and devices protected and private with [Windows 11 Enterprise](#).
- Manage and protect any endpoint in the cloud with [Microsoft Intune](#).
- Simplify and optimize endpoint estates to improve IT efficiency with [Endpoint Analytics](#), [Universal Print](#), and [Organizational Messages](#) in Microsoft Intune.

# Reduce costs with Microsoft 365 E3

## Reduce operation costs



## Reduce license costs

- 35% • Reduction in the likelihood of a data breach
- 23% • Cut spending on employee devices
- 25% • Cut time deploying, managing new software
- 75% • Cut endpoint configuration times
- 15% • Cut help desk tickets and resolution time
- 25% • Cut costs on travel and expenses
- 60h • Improvement of end-user productivity

Savings of \$18.35 /user/month

\$91 per user/month

\$36 per user/month

Communication e.g., Zoom, Webex
Collaboration e.g., Slack, Google Meet / Hangouts
File Sharing e.g., Box, Confluence
Endpoint Mgmt. e.g., Workspace ONE, MaaS360
Email e.g., Gmail, MDAemon
Storage e.g., Box, Dropbox
Mobile Device Mgmt. e.g., Mobile Iron, Airwatch
Identity & Access e.g., Okta, Henge
Labeling & Encrypt e.g., SolarWinds, CoSoSys
Endpoint Protection e.g., CrowdStrike, Fortinet

60% savings

Microsoft  
365 E3  
\$36

Savings of \$55 /user/month

# Build your AI competency to shape the future of work

## For System Integrators and Cloud Solution Providers...

Help customers take Microsoft 365 to its fullest potential by leveraging next-generation AI to boost productivity with in-app assistance and cross-app intelligence.

## For Developers and Independent Software Vendors...

Integrate your apps and services into Microsoft 365 Copilot with plugins to reach hundreds of millions of people where they work every day.

# Learn and adapt the Microsoft 365 Copilot roadmap

## Deepen your knowledge of Microsoft AI products and principles

### AI fundamentals training

- [Microsoft AI help & learning](#)

### Privacy and compliance training:

- <https://aka.ms/CopilotPrivacyOverview>
- [Integrated Cloud Platform for Cloud Solutions | Microsoft Cloud](#)
- [Responsible AI principles from Microsoft](#)
- [Get the Responsible AI Standard](#)
- [Get the Responsible AI Reference Guide](#)

### Microsoft's approach to AI governance:

- [Governing AI: A Blueprint for the Future](#) (video)
- [Governing AI: A Blueprint for the Future](#) (executive summary)
- [Governing AI: A Blueprint for the Future](#) (download the report)
- [Governing AI: A Blueprint for the Future](#) (podcast episode)
- [Microsoft announces new supercomputer, lays out vision for future AI work](#)
- [Microsoft's framework for building AI systems responsibly](#)

### Product differentiation:

- [Differences](#) between OpenAI/ChatGPT and Microsoft Copilot add-ons
- Differences between Teams Premium and Microsoft 365 Copilot **Coming Soon**

## Drive Microsoft 365 suite adoption as a prerequisite for Copilot adoption

### Pitch Microsoft 365 E3:

- [DMWL Microsoft 365 E3 landing page for partners](#)
- [1:Many DMWL E3 Workshop content](#)
- [Snackable 10 min video](#) on value of Microsoft 365 E3

### Technical Readiness

#### Become familiar with [technical readiness materials](#)

- [Harness the power of AI: Extend Copilot and beyond](#)
- [Building an AI Copilot with Semantic Kernel in the GPT-4 era](#)

#### Introduction

- [Intro to Microsoft Graph + Q&A](#)

#### Technical:

- [Build plugins for Microsoft 365 Copilot](#)
- [Build Microsoft Graph Connectors](#)
- [The future of AI and generative code](#)
- [UX designing for Copilot](#)

## Land the Microsoft 365 Copilot marketing message

### Customer-ready YouTube videos:

- [Introducing Microsoft 365 Copilot with Outlook, Excel, PowerPoint, and OneNote](#)

### Microsoft 365 Copilot AI event:

- [Full recording](#)
- [Three-minute recap](#)

### Microsoft Blogs:

- [Introducing Microsoft 365 Copilot—your copilot for work](#)
- [Introducing Microsoft 365 Copilot—A whole new way to work](#)

### Data Privacy in Copilot:

- [Microsoft's Privacy Policy and Service Documentation](#)
- [Administration of Microsoft 365 in the era of remote work](#)

# Create and integrate next-gen, AI apps, and services

## Innovate with a new Copilot extensibility model that uses plugins

Integrate apps and services into Microsoft 365 Copilot with ChatGPT plugins, Teams message extensions, and Power Platform connectors to reach hundreds of millions of people where they work every day.

### Overview of plugins:

- Watch a demo: [Plugins for Microsoft 365 Copilot](#)
- Watch a demo: [Multi-turn demo using Atlassian plugins for Microsoft 365 Copilot](#)
- [Empowering every developer with plugins for Microsoft 365](#)

### Learn how to create Teams message extensions with Teams Toolkit for Visual Studio, Visual Studio Code, and CLI:

- Watch a demo: [Building a new plugin with Teams Toolkit for Visual Studio Code](#)
- [Sign up for the developer early access program](#)

## Supercharge data with Semantic Index for Copilot

Bring your data to Microsoft Graph and Graph connectors that enable you to take advantage of the Semantic Index for Copilot to deliver more personalized and actionable responses.

### Overview of Semantic Index for Copilot

- Watch a demo: [Semantic Index for Copilot: Explained by Microsoft](#)

### Learn how to access structured data from Microsoft Dynamics 365 and Microsoft Power Platform stored in Microsoft Dataverse:

- [New Dataverse enhancements and AI-powered productivity with Microsoft 365 Copilot](#)
- Watch a demo: [Microsoft 365 Copilot + Power Platform – Microsoft Official](#)
- Watch the Power Platform Build 2023 keynote: [The future of app development with the Microsoft Power Platform](#)
- Watch the Power Platform and Dataverse Build 2023 discussion: [Data-drive app and web development with Microsoft Power Platform. Q&A](#)
- [Learn how Common Data Service became Dataverse](#)
- Get started with Dataverse using the Power Apps developer plan: [Power Apps developer plan](#)

## Maximize developer productivity, app reach, and app discovery

Reach hundreds of millions of Microsoft 365 users, using your existing expertise, code, and tools. Benefit from tooling, distribution, management, commerce, and enterprise readiness while grounding your apps within the Teams and Microsoft 365 platforms and programs.

### Learn how to configure, publish, and manage your plugins in the Developer Portal for Teams:

- Take advantage of the [App Compliance Automation Tool](#)
- Speed up IT approvals with the [Microsoft 365 App Compliance Program](#)
- Increase user discoverability with [link unfurling](#) and contextual app exposure in surfaces such as chat, channels, and meetings in Teams

# Microsoft Dev Box

Generally available July 2023

The screenshot shows the Microsoft Developer Portal interface. The main content area displays a message: "No dev boxes created. Add your first dev box to begin developing in the cloud!" with a "Get started" button. A sidebar on the left contains navigation options: "Overview" and "Projects". The "Projects" section is expanded to show "Halo Team Developer". A modal dialog titled "Add a dev box" is open on the right side. This dialog includes a "Name" text input field, a "Dev box pool" dropdown menu currently set to "Standard dev box - Halo (West US)" with specifications "32 vCPU 128GB RAM 1TB Storage", and a "See all pools" link. At the bottom of the dialog are "Add" and "Cancel" buttons. The Windows taskbar at the bottom shows the time as 11:11 AM on 05/23/2023.





## New and existing plugin developers



# Most frequently asked questions



## When will my customers and my company have access to Microsoft 365 Copilot? And how much will it cost?

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- On 5/9 we announced we were bringing Copilot to 600 customers (including select partners) worldwide with the Microsoft 365 Copilot Early Access Program.
- EAP is an invite-only, paid preview program.

## What are the requirements to access Microsoft 365 Copilot?

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- Microsoft 365 is the foundation to being AI ready. Microsoft 365 E3/E5 (and Microsoft 365 Business Standard / Business Premium) will be a licensing requirements for Semantic index and Graph to work.
- Hybrid scenarios (O365/M365) will not be enabled fully by Copilot (only tenants in the cloud will work).
- There is no requirement for an underlying Azure tenant to enable Microsoft 365 Copilot.
- Microsoft 365 Copilot falls under the same [Microsoft 365 Product Terms](#).
- Microsoft Teams Premium is not a requirement to access Copilot, but customers will maximize their experience by having both.
- Microsoft Copilot for Viva is a separate product.

## Will Copilot work if the tenant has Okta or another 3rd party used for identity management?

- Azure Active Directory is a requirement (whether using the free version or premium). Currently there is no obstacle for hybrid solution.

# FAQ | Is the model learning from my data? Is Microsoft learning from my data? Which data does Copilot use?

## Microsoft Cloud Runs on trust

Your data is **your data**

Your data from any fine-tuning is **not used to train** the foundation AI models

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

# Designed for the needs of the enterprise



Grounded in  
**your customer's business data**

Microsoft 365 Copilot has real-time access to both your customer's *content and context* in Microsoft Graph.



Comprehensive  
**security, compliance, and privacy**

Copilot inherits your customer's security, compliance, and privacy policies set up in Microsoft 365.



Architected to protect  
**Your customer's data**

Data never leaves its secure partition, and it is never used for training purposes.



Integrated into the  
**apps your customer uses every day**

Word, Excel, PowerPoint, Outlook, Teams, and more.



Individual user and admin  
**always in control**

The user decides what to use, modify, or discard.



Designed to  
**learn new skills**

As Copilot learns about processes, it can perform more sophisticated tasks and queries.

# FAQ | What's the cost of hybrid work?



**148%+**

Meeting times

Weekly meeting time has more than doubled for Teams users and is still rising

**40.6B**

Email

Increase in number of emails delivered in February 2021 vs. February 2020

**45%+**

Chats

Weekly Teams chats per-person are up 45% and still rising

**66%+**

Docs

Number of people working on Office documents is up 66% year over year

Source: [The Next Great Disruption Is Hybrid Work—Are We Ready?](#) (microsoft.com)

# Copilot and Teams Premium... what's the difference?

Better together: [Teams Premium](#) and [Copilot](#) in Teams

## Teams Premium is best for...

- **Automatically provided**, intelligent summaries and action items of meetings for Teams Premium users
- Tools to save time by **quickly navigating meeting recordings**
- **Consistency across users** who see the same experience, except for personalized points of interest in the recording (like when your name was mentioned)

## Copilot in Teams is best for...

- **On-demand insights** provided only when you ask for them and tailored to your unique prompts
- Going beyond summarization by asking Copilot to **execute actions** and **proactively make suggestions**
- **Contextual insights** into why and how decisions were made, and even the rationalization behind them

# Microsoft Teams Premium

## Intelligent meeting recap

The screenshot shows the Microsoft Teams Premium interface for a meeting titled "Sales Analysis Review". The meeting recap section displays the date and time (Oct 10, 2022 1:00 PM - 2:00 PM) and provides options for "Recording" (6 chapters), "Transcript", and "Attendance". A "Chapters" section is open, showing a table of auto-generated chapters with their respective durations. A mouse cursor is hovering over the "MAU presentation by tenant stage" chapter. A callout box points to the "..." menu icon next to the "MAU presentation by tenant stage" chapter, indicating that users can click on these chapters to navigate to the corresponding content in the meeting recording.

Chapter	Duration
Sales analysis	3:01
MAU presentation by tenant stage	5:32
MAU growth	19:08
Fabrikam Partners	39:08
Adoption journey	44:33
Q&A	48:42

**Intelligent meeting recap**  
Easy navigation with autogenerated chapters

# Microsoft Teams Premium

Intelligent meeting recap from recording

The screenshot displays a Microsoft Teams meeting recording interface. At the top, a gallery shows six participants in a meeting. The main video player shows a presentation slide titled "Sales Analysis" with a sub-heading "Performance". A callout box highlights a transcript snippet: "Adele Vance: ...worked with Daniela on the feature to disable the...". Below the video player, the title "Sales Analysis Review" is visible, along with metadata: "Oct 10, 2022 • 36 views • Daniela Mandera". To the right, a "Chapters" list shows auto-generated segments: "Sales Analysis (3:01)", "MAU presentation by tenant stage (5:32)", "MAU growth (19:08)", "Fabrikam partners (39:08)", "Adoption Journey (44:33)", and "Conclusion".

Meeting recordings will automatically **call out** key moments, such as when your name was mentioned, a **screen was shared**, and when you left the meeting.



We have an exciting future ahead



Microsoft 365 Copilot  
**Partner  
Community**

Nominate yourself

Starting August 1, 2023

<https://aka.ms/CopilotPartnerCommunity>

# Next steps

1. Walk customers through the [M365 Copilot Assessment](#).
2. Review the [Road to M365 Copilot partner guide](#).
3. Review the [partner FAQ document](#).
4. Public [M365 Copilot Blog](#)

## Resources

- <https://aka.ms/M365CopilotPartner> - updated page with the most recent information and documents.
- Become familiar with [technical readiness materials](#)
- IT admin <http://aka.ms/M365AdminAI>

Microsoft 365 Copilot Preview falls under the [Microsoft 365 Product Terms](#). Review [Microsoft's privacy policy and service documentation](#).



<https://aka.ms/M365CopilotPartner>

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria  
Děkuji **Tak** Dank u Tānan Kiitos **Merci** Danke Ευχαριστώ A dank  
Mahalo הודת. **Dhanyavād** Köszönöm **Takk** Terima kasih **Grazie** Grazzi



# Thank You!

감사합니다 Paldies Choukrane Ačiū **Благодарам** ありがとうございます  
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga  
Ďakujem Tack Nandri Kop khun **Teşekkür ederim** Дякую Хвала Diolch