MICROSOFT COPILOTS
OVERVIEW

- **Copilots for Web –** available (ex Bing Chat)

- **Copilot for M365 –** available (in some apps in preview mode)

- **Windows Copilot –** due to Europe's privacy protection laws, it is only available in US, UK, and selected countries in Asia and South America

- **Dynamics Copilot** – partially available (US only, announcement for Sweden, Australia, and UK)

- **Fabric Copilot** – in private preview

- **Security Copilot** – in private preview

- **GitHub Copilot** – available

- **Power Platform Copilot** - partially available (US only, announcement for Sweden, Australia, and UK)

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GET YOUR ORGANIZATION **READY FOR COPILOT**

Copilot for Microsoft 365 searches for **information from your organization's tenant** and can only surface organizational data to which individual users have **at least view permissions**.

Ungoverned data

- Data within organizations is often **unclassified or unlabeled**, indicating that organizations have **limited or no visibility** over vast volumes of potentially business-critical data

- Organizations own data that is **redundant, obsolete, or trivial** (ROT), and have **no data retention governance** in place

- Employees often don't use their organization's **sanctioned cloud storage and file-sharing tools**

No formal data processes

- Organizations often don't have in place **formal process for creating and managing SharePoint sites**

- **Shared files are visible to the entire organization**, especially if there are no implemented file sharing processes and security policies

- Employees still use **email to share documents copies** with colleagues or with **'anyone can access'** option.
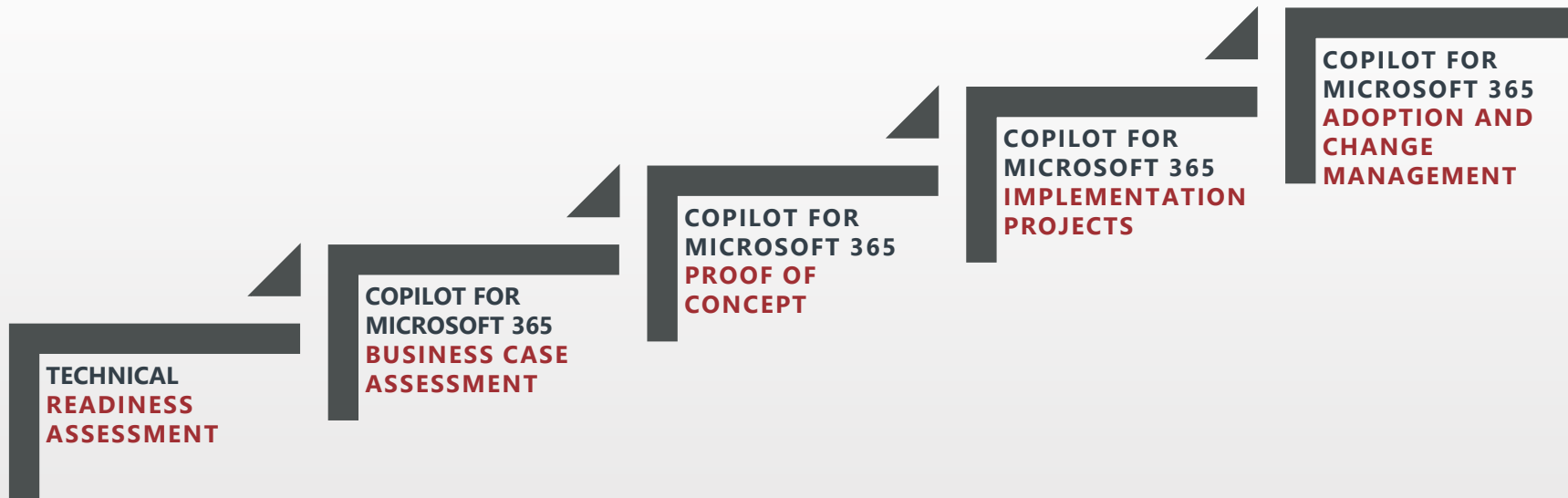
Low adoption

- Employees often don't use their organization's official content management system to **store and manage documents**

- When using existing organization's tools, users are **not well-informed and trained** in governance and processes and are **leaning back** to 'old' ways of working

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SPAN OFFERING
COPILOT FOR MICROSOFT 365

SPAN END TO END APPROACH

TECHNICAL READINESS ASSESSMENT

COPILOT FOR MICROSOFT 365 BUSINESS CASE ASSESSMENT

COPILOT FOR MICROSOFT 365 PROOF OF CONCEPT

COPILOT FOR MICROSOFT 365 IMPLEMENTATION PROJECTS

COPILOT FOR MICROSOFT 365 ADOPTION AND CHANGE MANAGEMENT

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TECHNICAL READINESS
ASSESSMENT

TECHNICAL READINESS **ASSESSMENT**

Documenting **current tenant configuration** and **identifying any gaps** or issues that may affect Copilot implementation

Generating multiple **permission reports** that will give insight into **who has access and where** (SharePoint, Teams, OneDrive, Exchange)

Assessing the **compliance of the tenant** configuration with the **Zero trust principles** and providing a scorecard that shows the level of alignment

Providing **recommendations for improvement** in the form of **quick wins and long-term projects** that can help achieve a higher level of **security, performance and compliance** with Copilot

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SERVICES IN SCOPE OF TECHNICAL ASSESSMENT

Microsoft Entra ID
- Users
- Roles
- Security groups

Exchange Online
- Mailbox size
- Activity
- User access

SharePoint and OneDrive for Business
- Standalone SharePoint sites
- Personal and group-connected sites

Microsoft Teams

Viva Engage

Microsoft 365

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TECHNICAL **ASSESSMENT ACTIVITIES**

- **Permission analysis**
  - User permissions
  - Role-based access control

- **Governance policies review**
  - SharePoint and OneDrive sharing policies
  - Retention and archiving policies

- **Usage and activity analysis**
  - Review of total number of files stored in SharePoint sites and how many files are actively being used
  - Storage consumption analysis across all multiple services

- **Sites and M365 group memberships review**
  - Detailed permission matrix report, cross-referencing site members and departments
  - Review of group privacy restrictions
  - Identification of 'orphaned' sites and groups. i.e., missing or not having owners

- **Content consumption across the organization**
  - Identification of on-premise content that is viable for migration to Microsoft 365, to utilize all the additional features and benefits it provides

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TECHNICAL ASSESSMENT OUTPUT

RECOMMENDATIONS FOR SHORT TERM ACTIONS (QUICK WINS)

- **Implement governance policies best practices**
  - Manage users access to your organization's resources
  - Establish compliance with your business standards
  - Ensure security of your data

- **Implement retention and archiving policies**
  - Efficiently manage, retain, and preserve organizational data in compliance with regulatory requirements
  - Facilitate easy accessibility and safeguarding against data loss
  - Ensure the quality of search results for efficient information retrieval

- **Provide a roadmap to increase security posture**
  - Establish a plan outlining measures, priorities, and actions to fortify and enhance organization's overall security framework

- **Validate user access using Search in the context of different roles and departments**
  - Improve your overall information access and protection

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TECHNICAL ASSESSMENT OUTPUT

RECOMMENDATIONS FOR LONG TERM ACTIONS

- **Just Enough Access**
  - Ensure users have the precise level of permissions necessary to perform their roles or tasks without excess access, thereby reducing potential security risks

- **Microsoft Syntex - Advanced management capabilities**
  - Implement advanced access policies for secure content collaboration:
    - Site access restriction for SharePoint sites
    - Restrict OneDrive access to a security group
    - Data access governance reports for SharePoint sites, used to discover sites that contain potentially overshared or sensitive content
    - Enforce more stringent access conditions using access policy for SharePoint sites and OneDrive
    - Secure SharePoint document libraries using sensitivity labels

- **Microsoft Purview Information Protection**
  - Identify files in SharePoint sites and OneDrive locations (including Microsoft Teams files) containing sensitive information or classified content
  - Auto-apply controls to limit and/or block access

- **Identity governance and Entitlement Management**
  - Manage and control user access rights and permissions across Entra ID and related M365 services, ensuring security, compliance, and streamlined access management.

- **Privileged Identity Management and Conditional Access**
  - Govern and regulate access to sensitive resources.
  - Define policies that adapt access based on specific conditions and user scenarios, collectively enhancing security and minimizing risks.

- **Migrate on-premise content to Microsoft 365**

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COPILOT FOR MICROSOFT 365
BUSINESS CASE ASSESSMENT

COPILOT FOR MICROSOFT 365 BUSINESS CASE ASSESSMENT

Conducting an informative **Art of the Possible** workshop to showcase the **capabilities of Copilot for Microsoft 365** through a comprehensive demonstration

Identifying **role-based scenarios** for utilizing **Copilot for Microsoft 365** and customizing them to meet the specific needs of the customer

Prioritizing identified scenarios and providing high-level **roadmap for the implementation** of Copilot for Microsoft 365

Providing **recommendations for adoption and change management activities** to ensure the effective implementation of Copilot for Microsoft 365

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COPILOT FOR MICROSOFT 365 BUSINESS CASE ASSESSMENT ACTIVITIES

● Kick-off

- Introduction to the workshop scope, technical requirements for Copilot for M365, and preparation for Art of the possible
  - Identification of the key stakeholders
  - Business case assessment activities overview
  - Readiness questionnaire review
  - Next steps

● Art of the Possible

- Deep dive into Copilot for Microsoft 365 capabilities
  - Copilot for Microsoft 365 overview
  - Copilot for Microsoft 365 demo
  - Copilot Lab – "The Art of Prompting"
  - Copilot for Microsoft 365 personas and business scenarios overview
  - Teams Premium and Copilot in Teams
  - Copilot for Microsoft 365 extensibility

> Art of the Possible activities are not presented on customer's data.

● Build the plan

- Defining and prioritizing top scenarios for using Copilot for Microsoft 365 in the organization
  - Identification and mapping of the role-based scenarios
  - Scenarios prioritization
  - Recommendations for the plan to pilot Copilot for Microsoft 365, next steps and identified risks

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COPILOT FOR MICROSOFT 365
PROOF OF CONCEPT

COPILOT FOR MICROSOFT 365 **PROOF OF CONCEPT**

Supporting PoC stakeholders in using the new solution before the full-scale implementation to build support for Copilot for Microsoft 365 adoption

Analysing and evaluating feedback on solution's usage to assess its impacts and value to the organisation

Identifying potential challenges and risks associated with the implementation and mapping them for mitigation in development of the roll-out strategy

Reporting the **PoC findings with recommendations** for the next steps in implementation of the solution

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COPILOT FOR MICROSOFT 365 PROOF OF CONCEPT ACTIVITIES

● PoC Workshops

- Analysis of the PoC users' workflows and pain points and how Copilot for Microsoft 365 can address them

- Hands-on training and support during PoC period

- Follow-up meetings for feedback, sharing experiences and challenges

● PoC Analysis and Report

- Analysis of the usage data and feedback from the PoC group

- Identification of the areas for improvement and optimization in the implementation of Copilot for 365

- Presentation of the results and recommendation for the next steps

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COPILOT FOR MICROSOFT 365 PROOF OF CONCEPT ACTIVITIES

● Planning

- Initial sessions to define the PoC scope, technical requirements for Copilot for M365, and preparation for the pilot phase
  - Identification of the key stakeholders
  - PoC activities overview
  - Identification of possible challenges
  - Next steps

● PoC Workshops

- Testing the capabilities of Copilot for Micorosft
  - Analysis of the PoC users' workflows and pain points and how Copilot for Microsoft 365 can address them
  - Hands-on training and support during PoC period
  - Follow-up meetings for feedback, sharing experiences and challenges

● Build the plan

- Defining and prioritizing top scenarios for using Copilot for Microsoft 365 in the organization
  - Identification and mapping of the role-based scenarios
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  - Recommendations for the plan to pilot Copilot for Microsoft 365, next steps and identified risks

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COPILOT FOR MICROSOFT 365
IMPLEMENTATION PROJECTS

COPILOT FOR MICROSOFT 365 IMPLEMENTATION PROJECTS

Configuration of Microsoft 365 tenant based on technical readiness assessment **findings with recommendations** for the next steps in implementation of the Copilot for Microsoft 365

Defining role-based policies for utilizing Copilot for Microsoft 365 and configuring tenant to meet the specific security requirements

Preparing your data for successful Copilot for Microsoft 365 searches

Assigning Copilot for Microsoft 365 licenses to your users

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COPILOT FOR MICROSOFT 365 IMPLEMENTATION PROJECT ACTIVITIES

- **Microsoft 365 Tenant Security Hardening**

  - Projects based on Technical Readiness Assessment outputs

  - Configuring: Exchange Online, SharePoint, Teams, Viva Engage

  - Configuring security policies and identity and access with Entra

  - Creating and implementing custom policies

  - Configuring Defender for Office protection policies

- **Copilot for Microsoft 365 Implementation**

  - Identifying the prerequisites for Copilot for Microsoft 365

  - Preparing your data for Copilot for Microsoft 365 searches

  - Assigning Copilot for Microsoft 365 licenses

  - Identifying Microsoft 365 security features that control oversharing of data in Copilot for Microsoft 365

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COPILOT FOR MICROSOFT 365
ADOPTION AND CHANGE MANAGEMENT (ACM)

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COPILOT FOR MICROSOFT 365 ACM

Defining the **key stakeholders, goals and objectives** to ensure the **clear vision and understanding** of the new solution implementation

Developing and executing **employee engagement plan** to drive **successful user adoption** with targeted communications and user training

Providing continuous **training and support to users** to facilitate the **adoption of Copilot for Microsoft 365** and maximize its benefits

Measuring the adoption rate and analysing the data to **implement the results** in the wide organisation roll-out strategy

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COPILOT FOR MICROSOFT 365 ACM ACTIVITIES

HIGH-LEVEL OVERVIEW OF THE ADOPTION AND CHANGE MANAGEMENT APPROACH

Prepare

- Identify the **project team**: key stakeholders, business sponsors, and early adopters (champions) community

- Define the **scope, objectives and benefits** of using Copilot for Microsoft 365

- Develop and prepare a **roll-out strategy** (scaled approach recommended)

- Develop **employee engagement approach** (communication and training plan)

Equip

- Ensure the organization's data **security and compliance**

- Set up necessary **permissions and policies**

- Assign the appropriate **licenses to early adopters**

- Identify **use cases** to pilot with the early adopters' group (workshops)

- Establish **usage and adoption metrics**

Engage

- Drive wide communications to **raise awareness and interest** in your organization

- **Drive early adopters' community** via targeted communications, workshops, and training

- **Gather and analyze information and insights** both from early adopters' community and other interest groups that may emerge during "early adopters'" phase

Adopt

- **Measure** adoption, plan and execute corrective adoption activities

- Reward successful use cases and **promote best practices**

- Establish **Centre of Excellence** to support your employees in their learning curve and improvement

- Review, adapt and **execute wide roll-out strategy** and drive employee engagement and adoption activities

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MICROSOFT WORKSHOP **COPILOT FOR M365**

Introduction

- Introduction to the workshop scope, technical requirements for Copilot for M365, and preparation for Art of the possible
    - Confirm the key stakeholders
    - Overview of the upcoming activities
    - Copilot for Microsoft 365 Workshop overview
    - Readiness questionnaire review
    - Next steps

Art of the Possible

- Combination of presentations and demonstration of Copilot for M365 capabilities and identification of possible use cases in the organization
    - Copilot for Microsoft 365 overview
    - Copilot for Microsoft 365 demo
    - Teams Premium and Copilot in Teams
    - Copilot for Microsoft 365 extensibility
    - Copilot for Microsoft 365 personas and business scenarios

Build the plan

- Summary of the findings and recommendations for the next steps
    - Prioritization of the role-based scenarios
    - Recommendations for the plan to pilot Copilot for Microsoft 365, next steps and identified risks

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THANK YOU!

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