

Organisational readiness guide for Microsoft Copilot

Everything You Want and Need to Know

With the upcoming availability, which will begin with gradual availability from 1st November 2023, organisations are starting to realise the benefits that Generative AI powered tools will have on productivity and efficiency.

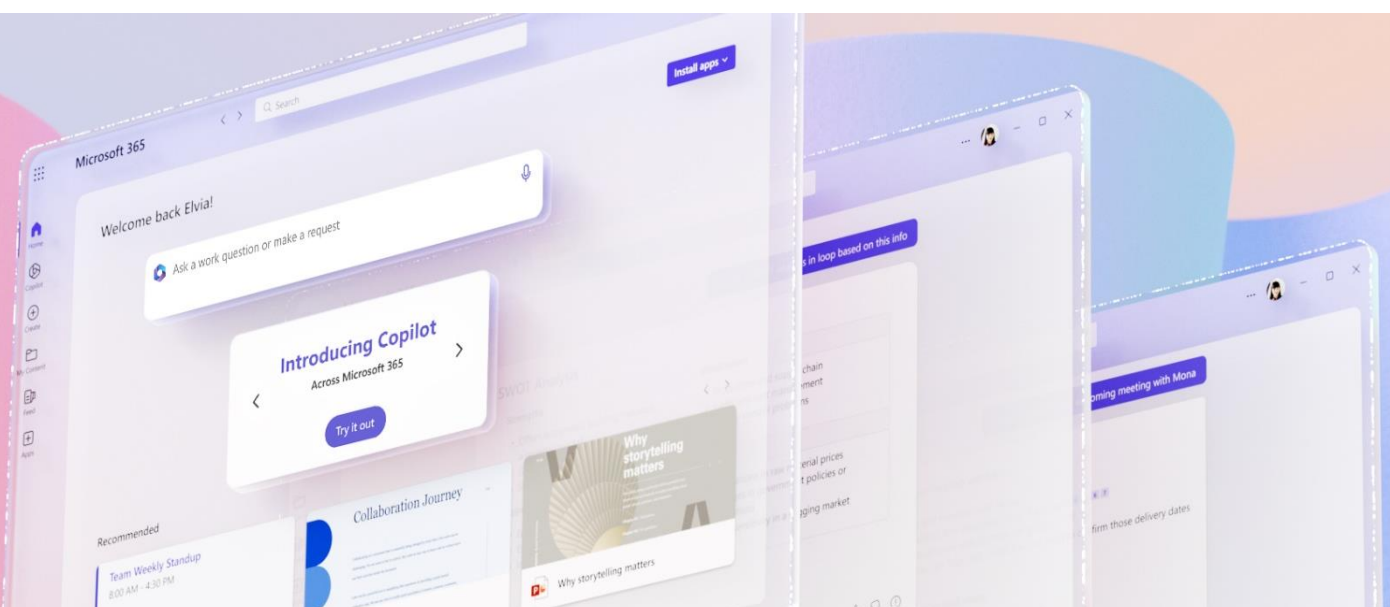
This new age of generative AI is defined by the combination of natural language and a new reasoning engine. Microsoft have created a new category of computing they call 'Copilot'.

Copilot empowers people to be smarter, more productive, more creative, and connected to the people and things around them. Copilot will be a consistent experience across devices, available as a side pane in Microsoft applications and as an icon in the Windows 11 taskbar. Copilot is unique in that it can understand the web, business data, and local context informed by the user's preferences and permissions. It's one simple, consistent experience people and organisations have learnt to trust from Microsoft.



This eBook aims to guide your leaders and managers on best practices and steps required to prepare and ready themselves for what will be transformational shift to the way we work and interface with technology from Windows to how we search and to how work gets done.

This follows guidance from our lead consultants, change practitioners, Microsoft Most Valued Professionals and directly from Microsoft.



Availability and Pricing

Microsoft announced in September that Microsoft 365 Copilot will be available to Enterprise organisation from **November 1st 2023**.

It will cost \$30 per user per month.

Who can get it on the 1st of November?

There are some limitations to this availability and organisations are advised to speak to their Microsoft account representative about availability.

This is because, whilst availability has been announced, it will be limited (at first) to Enterprise Customers – those managed by Microsoft and organisations that have been part of the Early Access Programme. There is also limitation in the number of licenses that can be purchased, and Microsoft will be working with organisations to make sure they meet the technical readiness recommendations before allowing purchase.

You need to ensure you organisation is ready for Copilot.

Since Copilot leverages your Microsoft 365 data in order do most of its work, many organisations will need to review their data lifecycle, governance, security and general Microsoft 365 health and adoption before they look to deploy and adopt Microsoft Copilot if they are to get the best out of it and demonstrate a good ROI.

This guide provides our tips and advice or getting Copilot Ready.



Get Your Data into Shape

Microsoft Copilot will put chat based conversational AI at the front and centre of every Microsoft 365 application and service that your employees know and use.

Unlike ChatGPT, Copilot experiences will not use OpenAI's publicly available services. Instead, all processing is achieved using Azure OpenAI services. Copilot LLM calls are routed to your Microsoft 365 datacentre region as well as other regions where capacity is more widely available during periods of high utilisation. Microsoft commit to customer data never being written outside the user's home region.

The way in which Copilot responds, what it creates or deduces is based on, and highly dependent on your organisational data - how it is **structured, governed, and secured**.

For example: You have 25 different documents stored in 10 different Teams or SharePoint locations which all talk about your company strategy, yet only one of them is the correct version - In this case, how will Copilot know which is correct when it needs to extract information based on employee request?

Microsoft 365 Copilot will use your existing permissions and policies to deliver the most relevant information, building on top of Microsoft's commitments to data security and data privacy. This means it is important to have **good content management practices** in place. For many organisations, content oversharing, and data governance can be a challenge, where content is shared beyond the needed audience either intentionally or accidentally.

Cisilion's Recommended Actions:

- **Ensure you understand, and use, the data controls** available across Microsoft 365.
- **Consolidate data** and migrate from on-premises data stores to Microsoft 365.
- **Leverage data retention and data lifecycle management** to help clean up old and stale data, based on your organisational and regulatory requirements.
- **Ensure you can identify, label, and protect sensitive information** such as personal and financial data across all your apps and services.
- **Leverage Data Loss Prevention (DLP)** across apps, data, and devices to detect and prevent and mitigate against potential security risks and leakage of data.
- **Leverage, use, and learn from the data and insights** that **Microsoft Semantic Index** for Copilot will provide to your organisation.

[Find out more about our Microsoft Copilot Readiness Workshop](#)

Identity and Access Management

Hackers don't hack in, they log in, and industry reports show that a hacker can be in your system for an average of 240 days without detection.

Microsoft Copilot respects your existing data and application security permissions and policies to deliver the most relevant information to users - building on top of their existing commitments to data security and data privacy already in place within your organisation. It is also backed by Microsoft's commitment to Responsible AI.

Whilst security should always be top of mind, it's worth using your Copilot as a reason to review your environment. Since Copilot will always run under the context of the user, ensuring you do all you can to mitigate identity breach is vital.

- Is MFA deployed and enabled for everyone?
- Do you use risk based conditional access?
- Are privileged accounts protected?
- Is sensitive information labelled and protected?

Like the rest of Microsoft 365, Copilot will adhere to the security, privacy, data governance, and data sensitivity policies that are in place across your organisation. Since Copilot will run under the user's context, it will not surface or provide access to insights or information that the user doesn't explicitly have permissions to. It may suggest for, example, *"you don't have access to that, you may need to request this from your administrator"*.

Cisilion's Recommended Actions:

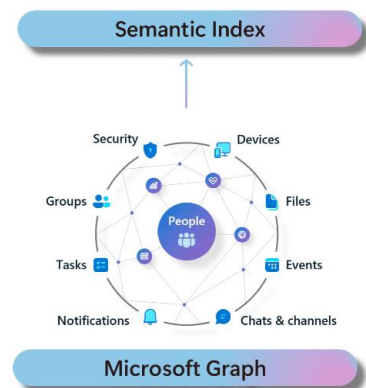
- **Ensure user accounts are protected with MFA and Conditional Access.** Use Privileged Account Protection and Defender for Identity for exec and senior management or those with access to employee information or personal data.
- **Review and define permissions,** roles, and access to all your apps and data to ensure that data is only accessible to authorised individuals or groups. Just enough access is key. Also use this a reason to audit data access and sharing.
- **Protect users against phishing attacks,** harmful URLs, and spoofing attacks with tools like Defender for Office 365.

[Find out more about our Identity and Access Workshop](#)

Drive Adoption of Microsoft 365

The real value and efficiency of AI will only be as good as its inputs, and in the case of Microsoft Copilot, that is the use and adoption of Microsoft 365.

Put simply, if your data is not in Microsoft 365 apps and services, Microsoft 365 Copilot will not have access to it, meaning the results you get will be limited. Microsoft say that "**the richness of the Copilot experience depends on the data sources indexed by Microsoft 365**", meaning that organisations with the most abundant data in Microsoft 365 (Exchange, OneDrive, SharePoint, Teams) will get the best experience from Microsoft 365 Copilot.



Microsoft pulls this data, relationship and people and external data (connected through the Microsoft Graph) and maps it into what they call the Semantic Index.

In Microsoft 365, there is often more than one way and one tool to do a task, this can lead to alternative collaboration habits including the use of email and static files. While Copilot will offer ways to help employees draft or tidy up emails, summarise meetings, jazz up a presentation or even compile reports or take actions from a meeting, it is still important to ensure your people:

- Are comfortable using and storing files on core Microsoft applications and services including Teams, OneDrive, and SharePoint.
- Collaborate on documents through sharing rather than sending multiple versions back and forth via email.
- Have experience, confidence, and training on how to interact with chat tools - just like searching the Internet - there are ways to maximise the ask on first attempt.

Cisilion's Recommended Actions:

- **Consolidate your data** by bringing data from any legacy on-premises environments into Microsoft 365 and Azure
- **Migrate third-party collaboration** and document sharing services to Microsoft 365, helping to reduce spend on third-party applications.
- **Ensure users are aware of the richness of tools** available to them and that they are confident in using them, through training or formal adoption services.
- **Leverage Microsoft 365's search capabilities** across applications and services including SharePoint, Teams, OneDrive, Edge for Business, and Outlook

[Find out more about our Microsoft 365 Adoption and TCO Review](#)

Review and Optimise Your Licensing

If you have multiple applications or services that do the same thing from different vendors, with data not being consistently stored, secured, and accessed, then just like your users ability to know where to look, the Copilot experience will likely also be compromised. It makes sense to use this time to think about application, storage, and service consolidation.

Copilot will perform best if it has access to the data in which you need it to act. Whilst there will be plugins and connectors, Microsoft, and the third-party are likely to charge a fee to do so, therefore the more you have in the Microsoft Cloud, the more likely success with Copilot will be.

Organisations may find that departments are spot purchasing different SaaS applications. Unless there is a strong business case for paying for and using multiple apps/services that do the same thing - you are probably wasting money and adding management overhead.

Through licensing optimisation assessments, you can reduce your licensing spend by reviewing your Microsoft and third-party licensing agreements, looking at what is allocated to users and what is needed and being used. This will help ensure you are paying for what you need and help you plan for future consolidation of duplicate apps and services.

Cisilion's Recommended Actions:

- **Undertake a Microsoft 365 Usage report and persona analysis** to see what services you are using and what tools your users either need or should have.
- **Map cloud or on-premises services** you are using which "conflict" with your Microsoft 365 licencing - including Zoom, Dropbox, and Trello.
- **Review your security, compliance, and governance applications.** According to Gartner, the average organisation has over 70 security products from 35 different vendors, meaning significant cost savings and simplification can be achieved.

[Find out more about our Free M365 Licensing Optimisation Assessment](#)

Prepare Your Organisation for Change

This new age of generative AI, defined by the combination of natural language and a new reasoning engine and the way it will be embedded, intertwined and brought to life through Microsoft apps and services **will fundamentally change how people and teams work**.

Adoption and Change Management will be crucial for organisations. Copilot is not just another application or product since it will fundamentally change how we work and interface with technology. Copilot will help employees stay in the focus of work, helping with complex and time-consuming tasks freeing up time to unleash creativity, unlock productivity, and level up skills and ability around the tools your users already use. Your people, will need to be kept in the loop, made aware of what is coming, learn and be confident in using it and know what it will and will be able to do. Training, technical and user success will be vital.

Rather than a one-off project this should be seen as continuous programme, facilitating continuous improvement, refining training content, and enhancing the user experience for ongoing success.

It will be essential to drive awareness, interest, and excitement within your users on how they can leverage these productivity tools, pre-empting how AI powered versions of these tools can help them do their job more efficiently.

Cisilion's Recommended Actions:

- **Ensure Copilot is part of your change management** strategy programme. If you don't have one, consider building one or hiring a lead change practitioner, or get support from a partner and Microsoft if you need to. As with any project or change, you need to drive awareness and interest around and help people understand what is coming and use it, rather than being afraid of it.
- **Build a Copilot Task Force** to help drive awareness, gather questions, feedback, or concerns across the organisation and up to management and leadership. They will own the comms, create champion groups, run Q&As, and host forums on platforms such as Viva Engage.
- Use the **Microsoft 365 Adoption Hub**. Microsoft will be providing tools including an onboarding guide to help to you and your users to get started and adopt Copilot once it is available for your organisation.
- Keep your **Client Success Team** in the loop by asking IT to add your client success team to the Microsoft 365 message centre emails.
- **Ensure AI and Copilot is at the leadership table**. Your employees will expect to know your plans for it, how it will affect their roles and how it will benefit them.

[Find out more about our Adoption and Change Management Services](#)

Frequently Asked Questions

1. **What is Microsoft 365 Copilot?** Microsoft 365 Copilot is an AI-powered digital assistant designed to help users with a range of tasks and activities on their devices. It can create drafts, suggest different wording, suggest, and insert images, create PowerPoint presentations from your Word documents and many other helpful things.
2. **When will I be able to get it?** Availability for Microsoft Copilot for 365 is confirmed as November 1st, 2023, with availability limited at first. Rollout will be in phases and organisations are advised to speak to their Microsoft account.
3. **How much will Microsoft 365 Copilot cost?** Microsoft have announced that Copilot for Microsoft 365 will cost \$30 per user per month.
4. **Will we need to do any prep before we use it?** Yes. Unlike adopting a new product or service, Copilot is not a box product – it's a fundamental shift in the way we will work and interface with technology. The way users' interface with it, the amount of data it needs to act upon, and what it can do, is vast and as such you will need to test it and tune your data, security, and training to ensure it works as expected. You'll need to work with your change management teams or a partner who can help you.
5. **Who owns the responses Copilot creates?** Microsoft does not claim ownership of the content created by Copilot capabilities. As copyright and other laws regarding ownership vary by jurisdiction, Microsoft does not decide on whether the content created by Copilot experiences is copyright-protected.
6. **Is content Copilot produces original content?** Copilot generates content based on language patterns using its' Large Language Model which is hosted privately in the Microsoft Cloud. The results it generates will be very similar to existing content, but Copilot might generate the same or very similar content for multiple people who are prompting Copilot in the same way. Microsoft also have a commitment to copyright and will "pay" any legal cases raised as a result of copyright infringements.
7. **Does Copilot learn from our corporate data?** No. Neither your data nor the content written by employees are used for machine learning. Likewise, when you send feedback or report content, Microsoft uses your input to make feature improvements; your feedback does not directly impact the foundational AI models that Copilot is based on.
8. **Does Microsoft plan to offer Copilot in other products?** Yes. Microsoft Copilot has also been announced for Windows 11 (coming Sept 26th, 2023), Dynamics, Power Platform, Microsoft Security, Teams, and Viva.
9. **What licences do I need?** Copilot is an add-on license. Organisations will need Microsoft E3, E5 or Microsoft 365 Business (premium or standard) as a minimum base license for Copilot.

Get business ready:

Register for our 90-minute Briefing Workshop

- **Format:** Virtual / Hybrid / In-Person
- **Recommended Audience:** Business Leaders, Head of Departments, HR, IT

During this virtual or in-person briefing, we provide your teams with the current updates, organisational readiness tips and tricks from the field - what to expect and how to prepare your people and organisation.

We will also walk you through guidance around data protection, governance, and compliance, and provide valuable insights and advice around the adoption of chat-based AI tools into your workplace. Finally, we aim to capture and answer questions your employees, managers and leadership team may have.

What to expect from the workshop

By the end of this workshop, our Microsoft solution consultants will provide you with:

- Overview and latest updates around Microsoft Copilot.
 - How Copilot works: Key features, how it works and the benefits for employees
 - Technical Readiness: Microsoft 365 adoption checklist
 - Security and Compliance readiness.
 - Business Enablement: Use cases, awareness, adoption, and employee comms.
 - Value Recognition
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- Support and guidance - next steps and actions.

[Click here to book a session.](#)

Disclaimer

Please note, the information in this eBook is based on our guidance, experience, and information available at time of creation. Microsoft Copilot is still in early stages and Microsoft are slowly releasing more information to both their partners and customers. As such there are lots of rumours, speculation, and fake media updates floating around the Internet. For the most accurate and up-to-date source of information, please check with your Microsoft account team. Cisilion will not be held liable for any information written, assumed, or interpreted within this eBook.