

# Are You Ready for Microsoft 365 Copilot?

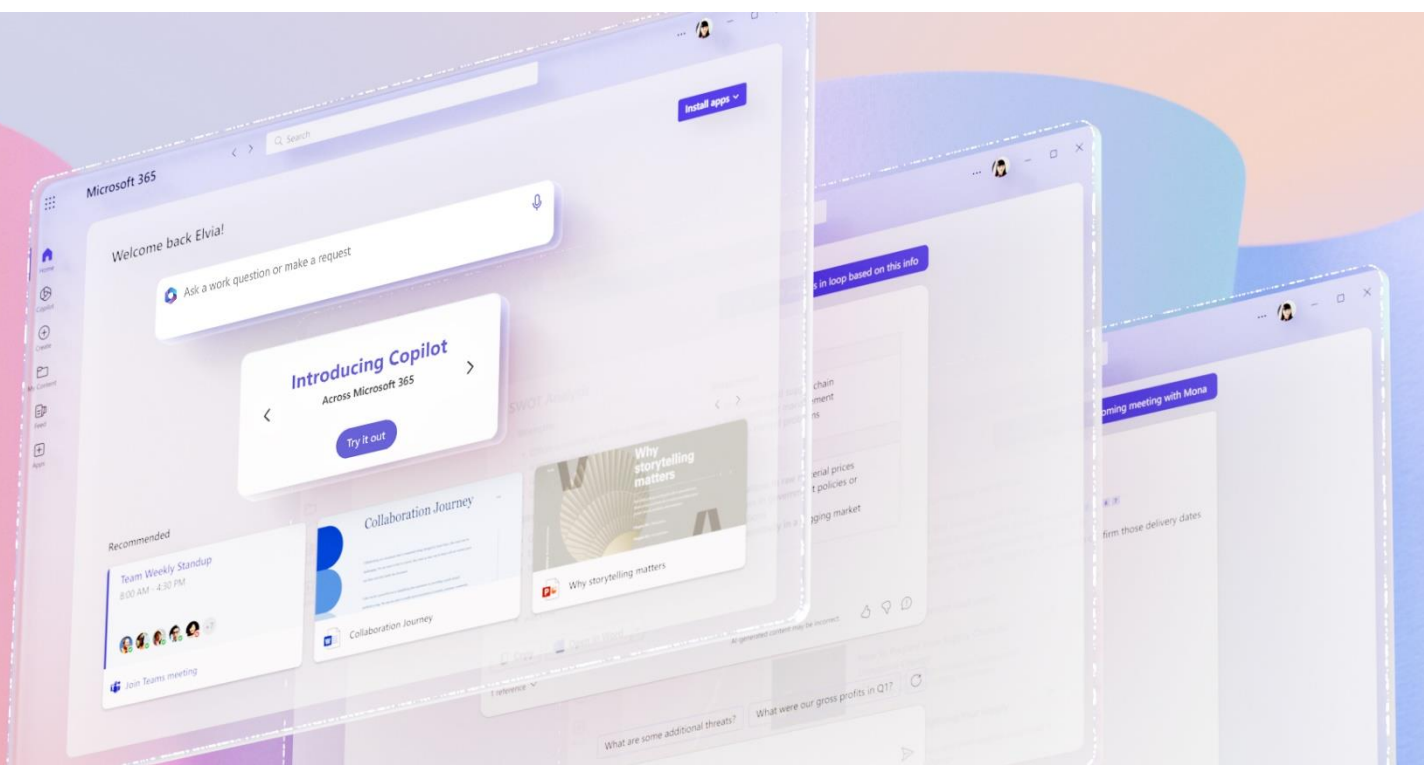
## Copilot: Here's What You Need to Know

Artificial Intelligence (AI) has been around for a long time, but it has never found itself more in the conversations in the workplace than now. The launch of OpenAI's ChatGPT tool at the end of last year launched generative AI onto the radar of many people who had not considered using it until now - or simply did not see the ways in which it could be relevant to their lives or work.

In March 2023, Microsoft announced Microsoft 365 Copilot, followed shortly after by a "Copilot" for almost every other platform, including Viva, Dynamics, GitHub and Security - all of which are set to change the way we work and interface with applications and data for ever.

As Microsoft 365 Copilot enters the next stage of its closed and limited private preview, organisations are now having to think about the impact AI will have on the way their users' interface and use corporate applications and data, how their roles will change as they work alongside AI, and the new opportunities it will create.

Whilst Copilot is still in early testing phase, this guide aims to guide your business on how to prepare your people, tools, and processes for what will be transformational shift to the way we all work, interface with technology, and even the way in which people think about work.



# Get Your Data into Shape

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

Unlike ChatGPT, Copilot will use Microsoft's privately hosted Large Language Models (LLMs) for its context. Copilot will leverage Microsoft Search, Graph API, and your data to make its own deductions on what you ask, the context, and with who and how you work. Microsoft say that it will not use your organisational data to train the Copilot LLM. Microsoft continues to respect and adhere to your data governance and controls.

As such, 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?

Remember, this is not just limited to your structured and unstructured data. If employee information is not up to date in your HR system and connected Azure AD, then Copilot's decisions and advice around connecting you to the right people will also likely be incorrect. Also, if permissions on your data, SharePoint sites and Teams sites is not correct, users may not get access to the insights and data they need, or worse case, may have access to information that they were not supposed to have access to.

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## Cisilion's Recommended Actions:

- **Make sure you understand, and use, the data controls** available across Microsoft 365.
- **Consolidate data** and migrate as much as you can from on-premises 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 identify and protect sensitive information** such as personal and financial, across your Microsoft 365- and third-party connected applications and data.
- **Leverage Data Loss Prevention (DLP)** across all your apps, data, and devices to detect and mitigate 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

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.

Whilst security should always be top of mind, it's worth using your Copilot readiness as a reason to review your estate. 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"*.

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## Cisilion's Recommended Actions:

- **Ensure user accounts are protected with MFA and Conditional Access.** Consider using Privileged Account Protection and Microsoft 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.
- **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](#)

# Maximise 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 365 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.

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.

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## 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.

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## Cisilion's Recommended Actions:

- **Undertake a Microsoft 365 Usage report and persona analysis** to see what Microsoft 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

Copilot is still in a closed Private Preview, and there are no dates on the roadmap for a public preview mainstream release, or any information on pricing. What we do know is – **it is coming, and it will fundamentally impact and change how your people and teams will work.**

**Adoption and Change Management** will be crucial for organisations, it provides much-needed awareness, training, support, and resources to help your employees understand and leverage Copilot effectively. Rather than a one-off task, it should be seen as continuous programme, facilitating continuous improvement, refining training content, and enhancing the user experience for ongoing success.

To avoid inconsistent data, it is 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. Above, all - whilst AI might change the way people work, the role of Copilot is to help people work more efficiently and focus on skilled tasks rather than replace them.

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## Cisilion's Recommended Actions:

- **Build an AI Task Force** to help drive awareness, gather questions, feedback or concerns across the organisation and up to management and leadership. As a major shift of how we work, this is a key part of the change preparation phase.
- **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.
- **Create a Copilot Success Team** with sponsors from across the business to paint a picture of what you know about Copilot and how it will help your people be more productive. Own the communication around Copilot, champion user groups, employee Q&A and other forums on platforms such as Viva Engage.
- **Ensure this is part of your change management** strategy programme. If you don't have one, consider using the Success Team and get support from a partner or build a change team. As with any project or change, you need to drive awareness and interest around this so that people can leverage workstream-integrated AI to make their work more optimal and meaningful, rather than being afraid of it.

[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? "Soon".** Copilot in Microsoft 365 apps like Word or PowerPoint is currently available only in a limited private preview. It is expected to be more widely available later in 2023.
3. **Will there be a preview region outside of the UK? Yes** - Microsoft have confirmed that the preview will be opened up to organisations outside the US. As AI requires a huge amount of compute power, Microsoft will be continually reviewing these requirements and ensuring they have enough computing resource within each Azure region. There may also be different regulatory guidelines and locale adjustments needed in country.
4. **Will we need to do any prep before we use it? Yes.** Unlike an update to Teams, Word or PowerPoint, Copilot is not a box product. The way users' interface with it, the amount of data it needs to act upon, generate, summarise or create is vast and as such you will need to test it and tune your data, security and training to ensure it works as expected. The pilot programme Microsoft are running are designed to not only help Microsoft learn from this, but also to help them best guide others as availability becomes more widespread.
5. **Is the 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. Depending on what data is stored in Microsoft 365 this data will be based on the content available to it and to the user.
6. **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.
7. **Does Microsoft plan to offer Copilot in other products? Yes,** many Microsoft products have AI built in, including Microsoft 365, Microsoft Azure, Windows, Dynamics 365, and Microsoft Cognitive Services. Microsoft Copilot has been announced for Windows 11, Dynamics 365, Power Platform, Microsoft Security, Viva, Loop, and Microsoft Designer.
8. **How much will Microsoft Copilot Cost?** Microsoft are evaluating use cases; licensing costs and data ingestion needs as part of their closed private preview. More information on pricing will be available in coming months along with availability timescales.

# Your Next Steps: Register for Cisilion's Copilot Awareness and Readiness Workshop

- **Duration:** 2 hours
- **Format:** Virtual / Hybrid / In-Person
- **Recommended Audience:** Business Leaders, Head of Departments, HR, IT

During this virtual or in-person briefing, we will provide current updates, organizational readiness planning, and what to expect when Microsoft Copilot becomes generally available. 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:

- Comprehensive overview and demo of Microsoft 365 Copilot
- An overview of how Copilot works, its key features, and benefits
- Organisational readiness - Microsoft 365 adoption
- Organisational readiness - Security and data readiness
- Organisational readiness - Use cases, training, and employee communication
- Organisational readiness - Semantic Index for Copilot
- Next steps and how Cisilion can help

[Click here to register your interest](#)

### 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.