



Microsoft Copilot

Econocom Sales Bootcamp – 25 March 2024

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Agenda

Preparing for AI

Microsoft AI

Copilot

Demo

Preparing for the era of AI



Goals



Pain points



**Current
capabilities**



Data strategy



**Resource and
adoption readiness**

How to prepare for AI

"Security and risk management leaders must implement verifiable controls for AI data protection, privacy, application security and filtering of large language model content inputs and outputs."

- Gartner

Gartner, Quick Answer: How to Make Microsoft 365 Copilot Enterprise-Ready From a Security and Risk Perspective,, Avivah Litan, Matt Cain, Jeremy D'Hoinne, Nader Henein, Dennis Xu, 15 September 2023

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Microsoft's AI Principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

Microsoft Cloud — AI you can trust

Your data is **your** data.

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

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

Microsoft's approach to privacy



**You control
your data**



**You know
where your
data is located**



**We secure your
data at rest and
in transit**



**We defend
your data**

Start your data security and compliance journey today!



Understand your data



Visit **data classification** and leverage built-in and custom Sensitive Information Types (SITs), trainable classifiers, and labeled content



Label your data



Define **label taxonomy** and label content by enabling default labels, configuring manual labeling, or scaling with auto-labeling



Create a DLP policy



Create DLP policies and **prevent content oversharing** through M365 apps, devices, and in browsers

Build a foundation for data security and compliance

Copilot

An experience using generative AI
to assist humans with complex cognitive tasks

- Copilots are often driven by natural language (and optionally other data modalities)
- Copilots are often embodied by a chatbot
- Humans determine, guide, and approve the output
- The value of the Copilot depends on value of the tasks it assists with and the cognitive load and time saved

Microsoft Copilots

Bing



Edge



Better Q&A and task completion

Better interaction with web content

Copilots for Web

Word



Better reading and writing assistance

Outlook



Better e-mail management

M365 Copilot

Excel



Better data analysis

PowerPoint



Better presentations

Teams



Better Meetings

Business Chat



Better knowledge management

Copilots for Productivity

Designer



Better digital creations

Copilot for Creativity

Windows Copilot



Better interaction with OS, apps, and files

Copilot for Everyday

Dynamics Copilot



Better sales and customer support

Copilots for Business

Fabric Copilot



Better data analytics and business intelligence

Copilots for Analytics

Security Copilot



Better threat detection, identification, and mitigation

Copilot for Security

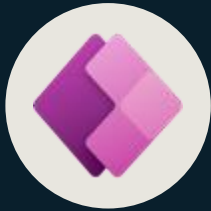
GitHub Copilot



Better code development

Copilot for Development

Power Platform Copilot



Better creation of apps, workflows, and agents

Copilot for Low/No Code Development



Copilot for Microsoft 365

Natural language



Large Language
Models

+



Microsoft Graph
- your data -

+



Microsoft
365 Apps

+



The
web

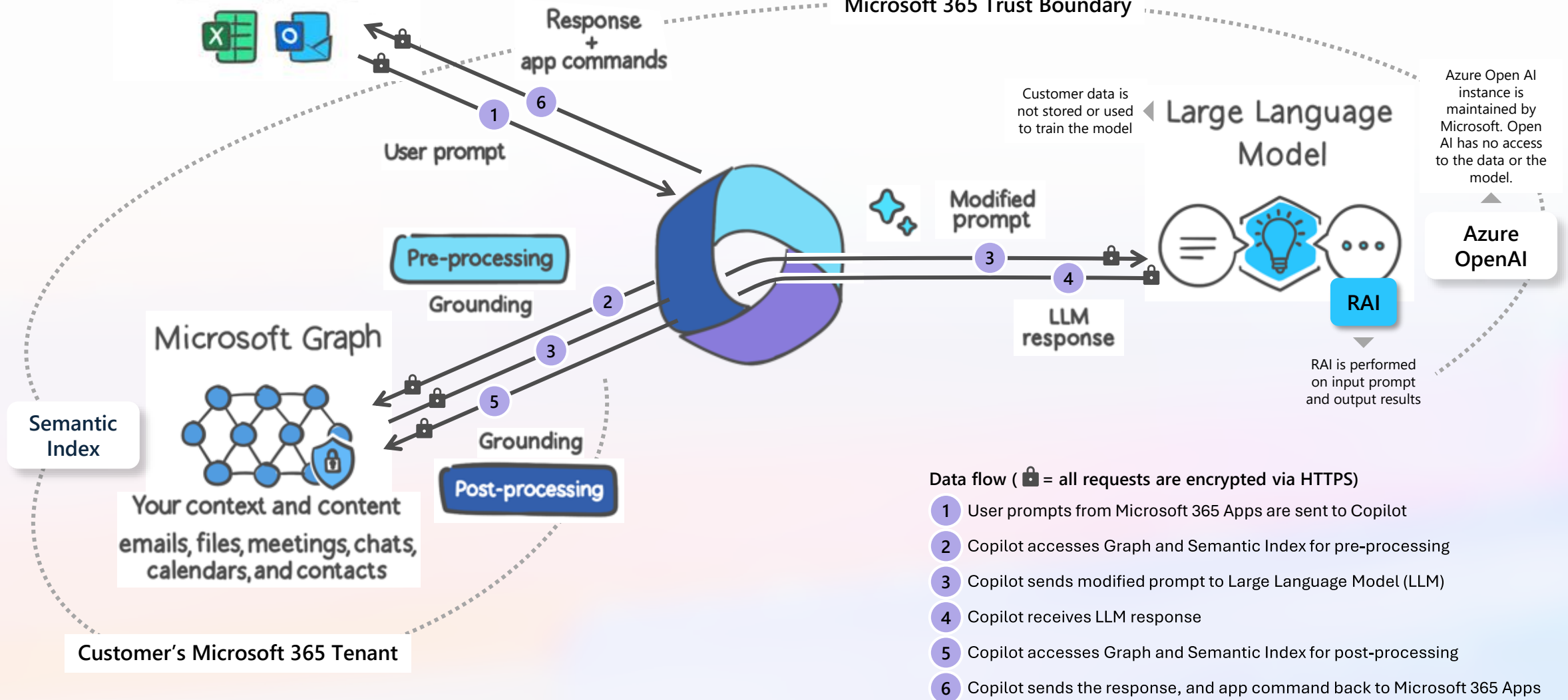
How Copilot works

Microsoft 365 Apps



Microsoft 365 Copilot

Microsoft 365 Trust Boundary



RAI is performed on input prompt and output results

Some main capabilities per app

PowerPoint

Writing

- Create first drafts
- Add more content
- Edit content and format

Reading

- Summarize deck content
- Extract next steps

Word

Writing

- Create first drafts
- Add more content

Reading

- Summarize long documents
- Ask questions about document content

Teams

In-meeting

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

Post-meeting

- Create notes and actions
- Recap and querying

Chat

- Summarize and ask questions about content in a group, mtg, or 1-1 chat
- Rewrite/improve chats

Excel

- Add new columns with formulas
- Apply lay-out and conditional formatting
- Analyze data: charts and tables

Loop

Writing

- Brainstorm
- Collaborative authoring
- Collaborative planning

Some main capabilities per app

Outlook

Writing

- Draft with Copilot
- E-mail coaching

Reading

- Summarize e-mails

Whiteboard

Writing

- Brainstorming

Summarize

- Categorize

Forms

Writing

- Create first survey drafts
- Add more content or regenerate

Copilot (M365 chat)

Content retrieval

- Collect all information about a topic
- Collect the latest from person X

Receive assistance

- Summarize documents
- Ask open ended questions (give me tips on how to improve this communication, ...)
- Combine information from multiple sources into a draft email
- ...



A day in the life of a Sales Lead

8:00 AM

Cassandra needs to prepare for her big pitch to Contoso so she summarizes the emails and chats from her main client.



Microsoft Copilot with Graph-grounded chat

Summarize all of the emails and Teams chats in the past month from Contoso highlighting the primary asks and open items.

8:15 AM

Cassandra commands Copilot to create a message to confirm the meeting.



Copilot in Outlook

Draft an email to confirm the meeting this afternoon. Highlight how excited we are to present the latest product updates and new pricing. Use a formal tone and keep the email concise.

9:00 AM

Cassandra received the latest financial numbers from her business planning lead. She uses Copilot to create some amazing charts to showcase the value of the offer.



Copilot in Excel

Show all data insights.

4:00 PM

Cassandra has missed a few chats during the day. She sees that her team has been discussing a new product launch and commands Copilot to summarize the conversation to quickly catch up.



Copilot in Teams

Summarize this chat and make sure to include the key points and who made them.

2:00 PM

It's time for the pitch. Cassandra can focus on her presentation knowing Copilot is taking notes. She commands Copilot to list the questions asked so she can be sure everything gets answered during the call.



Copilot in Teams

What questions were asked during the meeting that have not been answered?

11:00 AM

Cassandra puts the final touches on the pitch presentation by adding a slide based on the summary of the annual report she had Copilot draft.



Copilot in PowerPoint

Add a slide based on [copy in annual report summary]

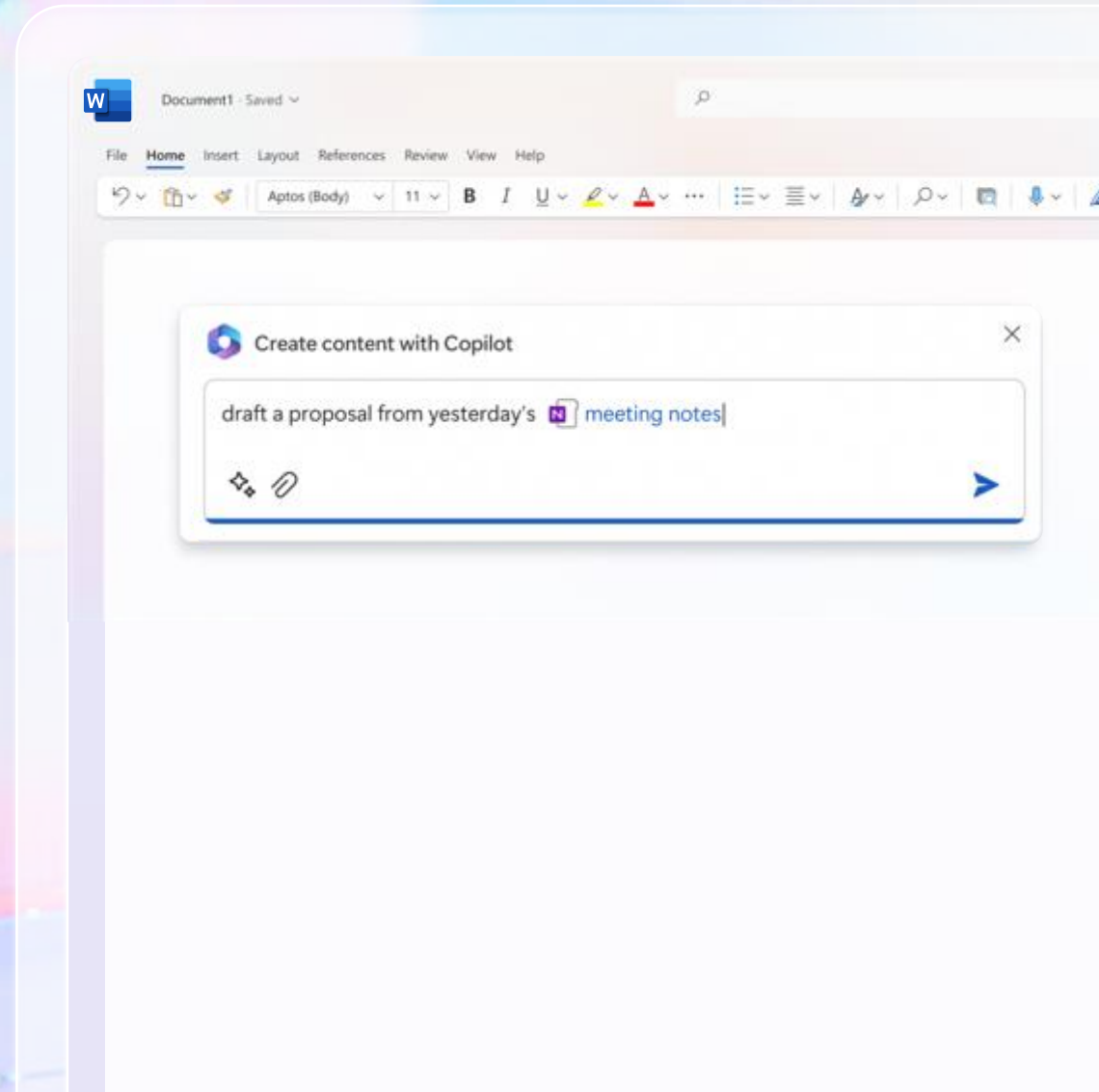


Cassandra is a sales lead at Contoso

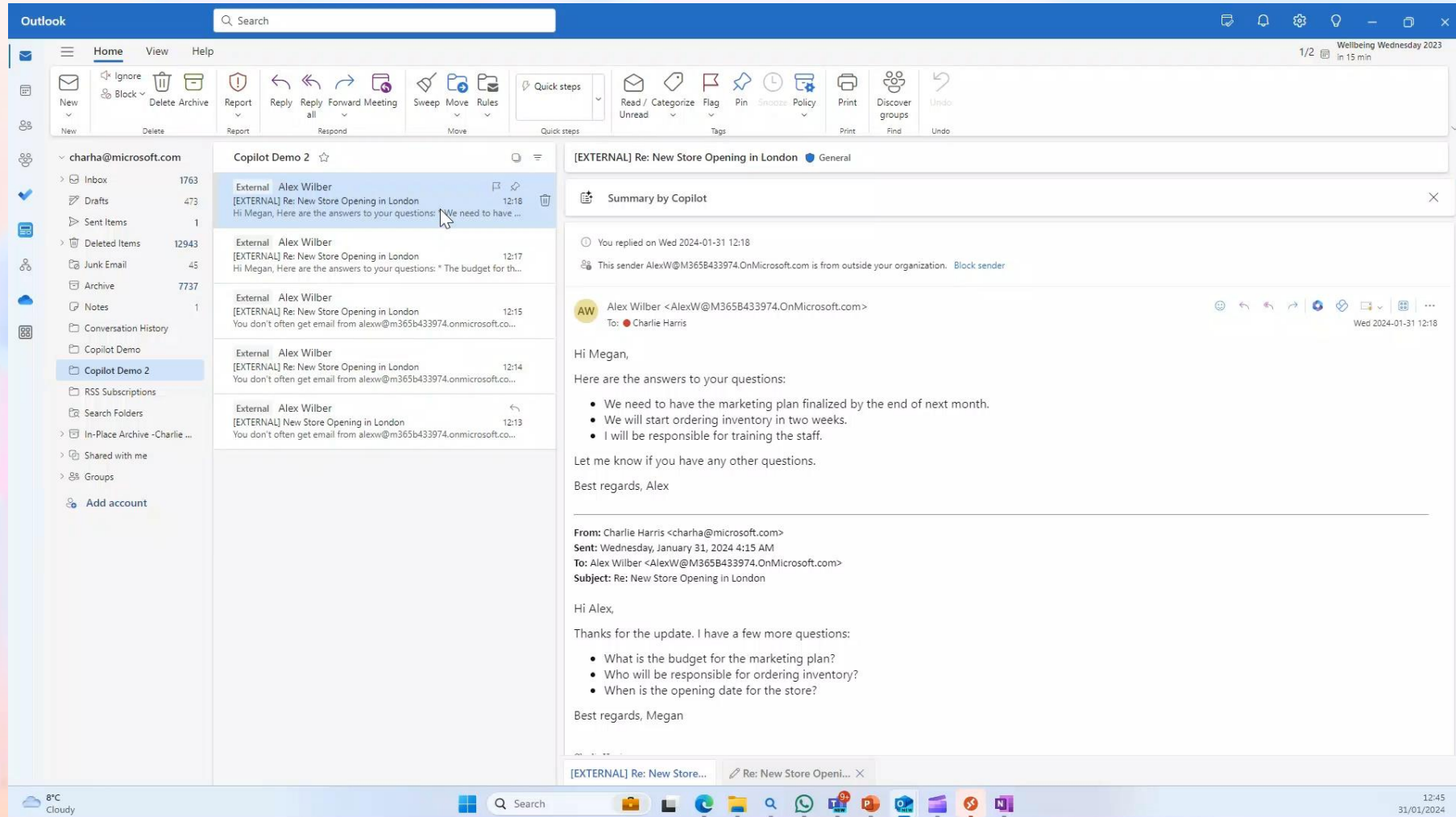


Copilot for Microsoft 365 Demo

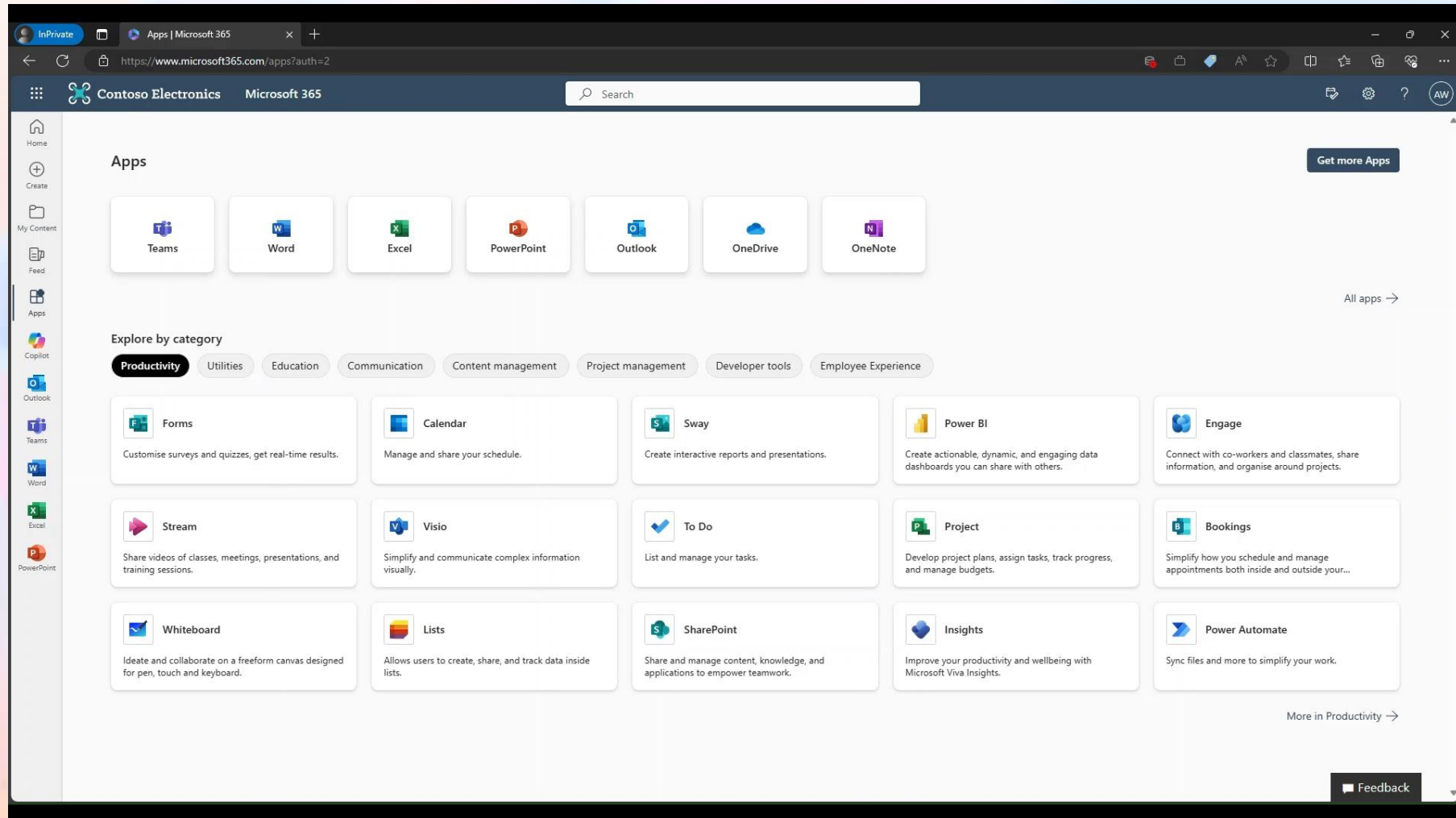
The assistant you've been waiting for



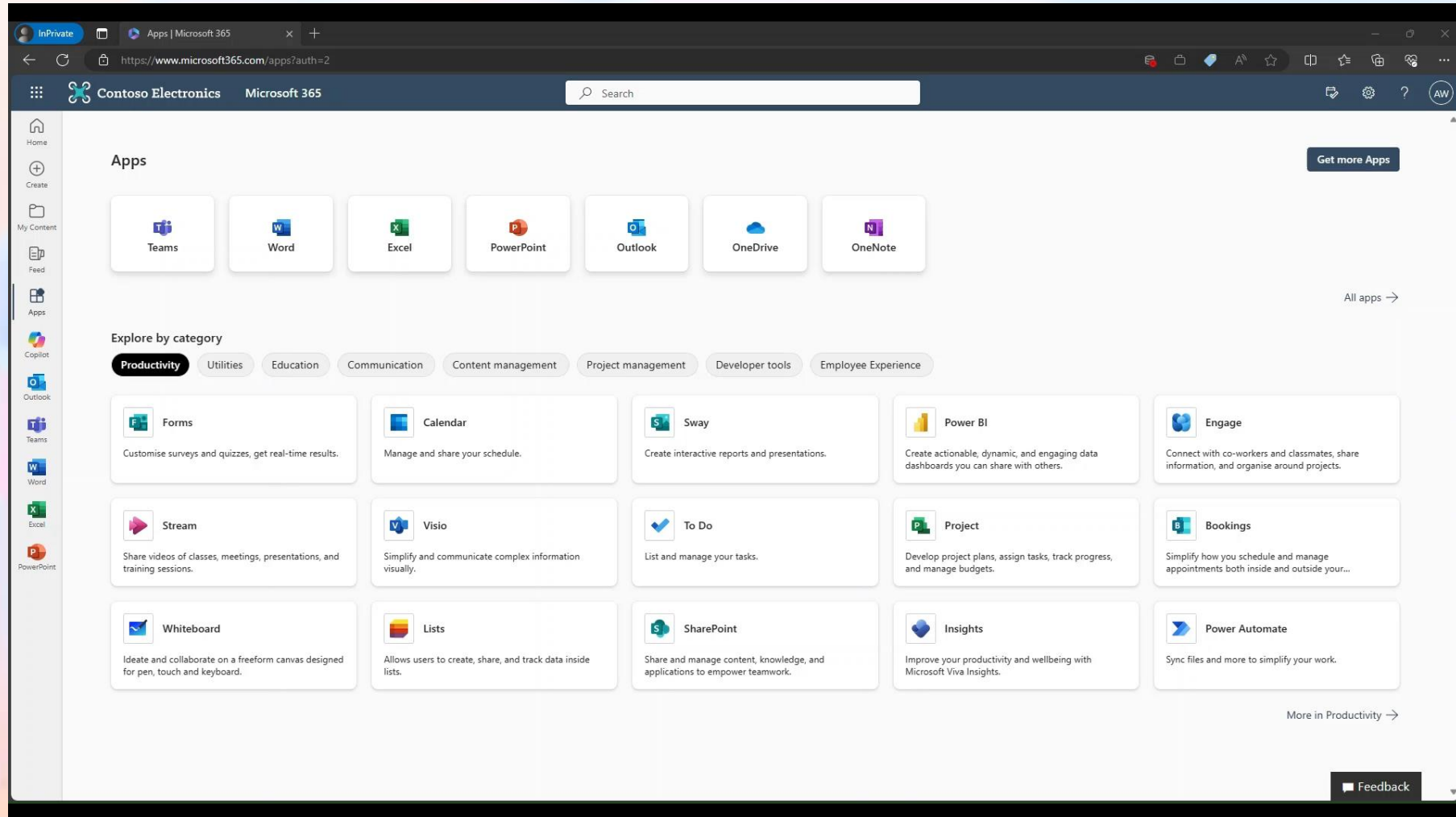
Microsoft 365 Copilot for Outlook



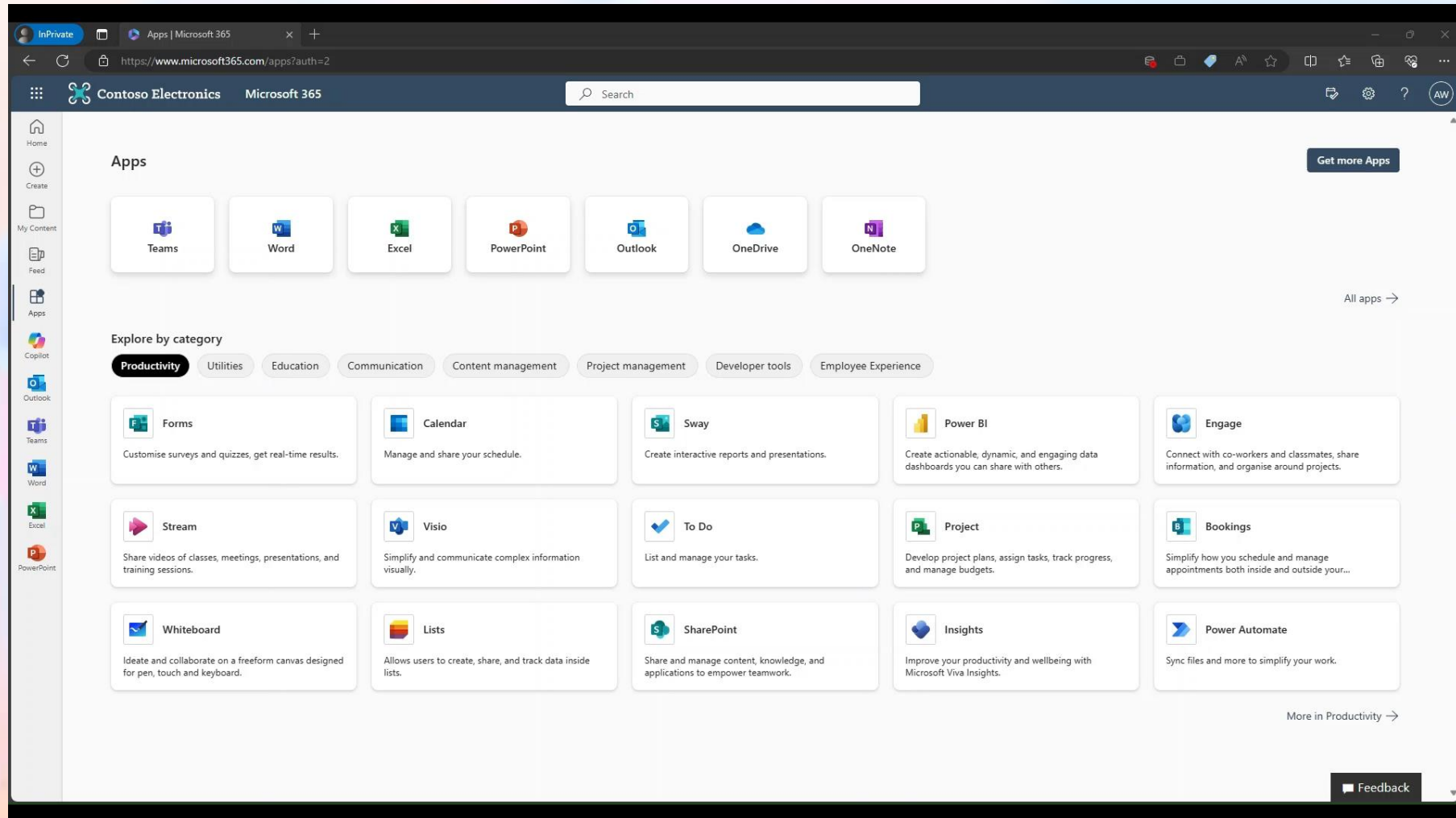
Microsoft 365 Copilot for Word



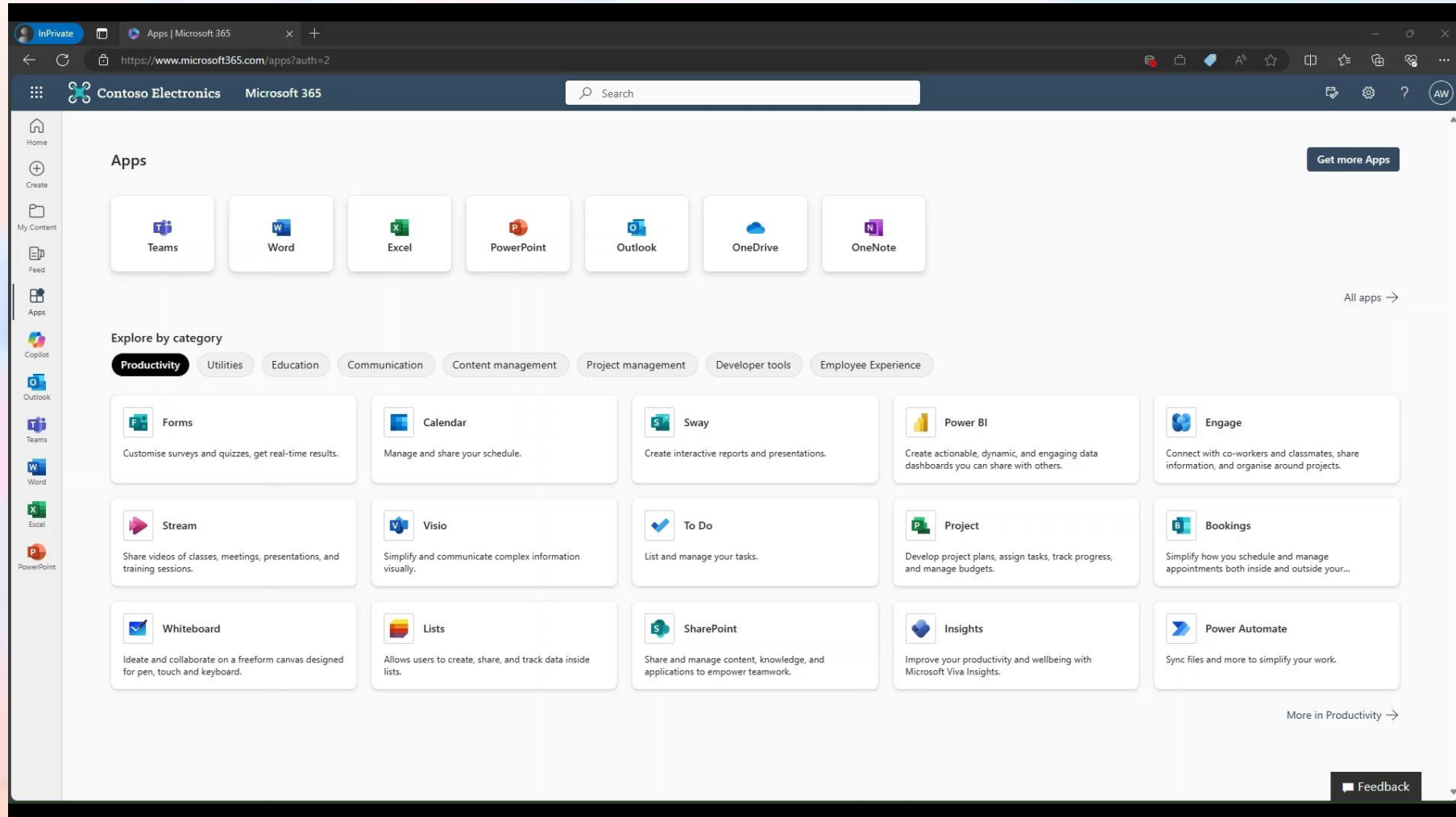
Microsoft 365 Copilot for Word



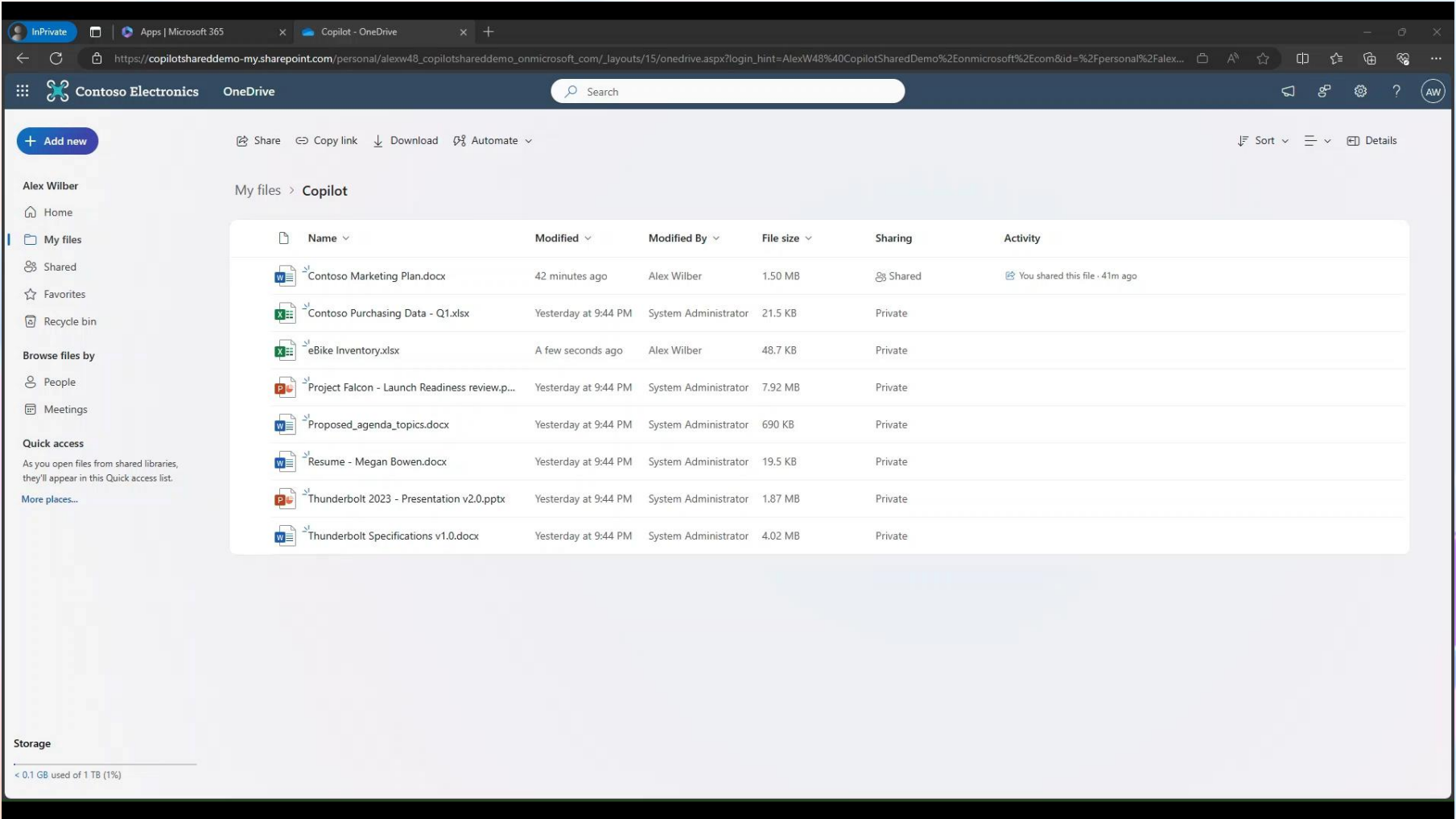
Microsoft 365 Copilot for PowerPoint



Microsoft 365 Copilot for Teams



Microsoft 365 Copilot for Excel



Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

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

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

	For Individuals		For Organizations
	Copilot	Copilot Pro	Copilot for Microsoft 365
	Free	\$20	\$30
Foundational Capabilities	●	●	●
Web Grounding	●	●	●
Commercial Data Protection	●	●	●
Priority Model Access		●	●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		●	●
Copilot in Teams			●
Microsoft Graph Grounding			●
Enterprise-Grade Data Protection			●
Customization		Copilot GPT Builder	Copilot Studio

For Copilot Pro, a Microsoft 365 Personal or Family subscription is required to access Copilot in Word, Excel, PowerPoint, Outlook, and OneNote on PC, Mac, and iPad. Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.

How fast you can recover the cost of Copilot

Executive
\$200,000

Saving 1 hour at a pay rate of \$200,000/year saves \$100.

3.3 minutes/day breakeven

Manager
\$100,000

Saving 1 hour at a pay rate of \$100,000/year saves \$50.

6.5 minutes/day breakeven

Individual Contributor
\$60,000

Saving 1 hour at a pay rate of \$60,000/year saves \$30.

11 minutes/day breakeven

How long to break even

Assumes 2,000 hours per year and 22 days/month worked and a cost of \$30/month for the Copilot license and only converting 25% of time savings to value benefits

Common questions we hear from customers



● **Who** do I give the first Copilot seats to?



● **How** do I get employees up and running quickly?



● **What** are the ways to measure impact?



Copilot for Microsoft 365

Three-phase approach to business progress

01 Phase



Readiness

- Concentrate licenses in a few key teams
- Start with quick wins
- Create an AI council.

02 Phase



Adoption

- Create a Copilot user community
- Identify Copilot champions and early adopters
- Manage expectations
- Communicate best practices early and often

03 Phase



Measurement

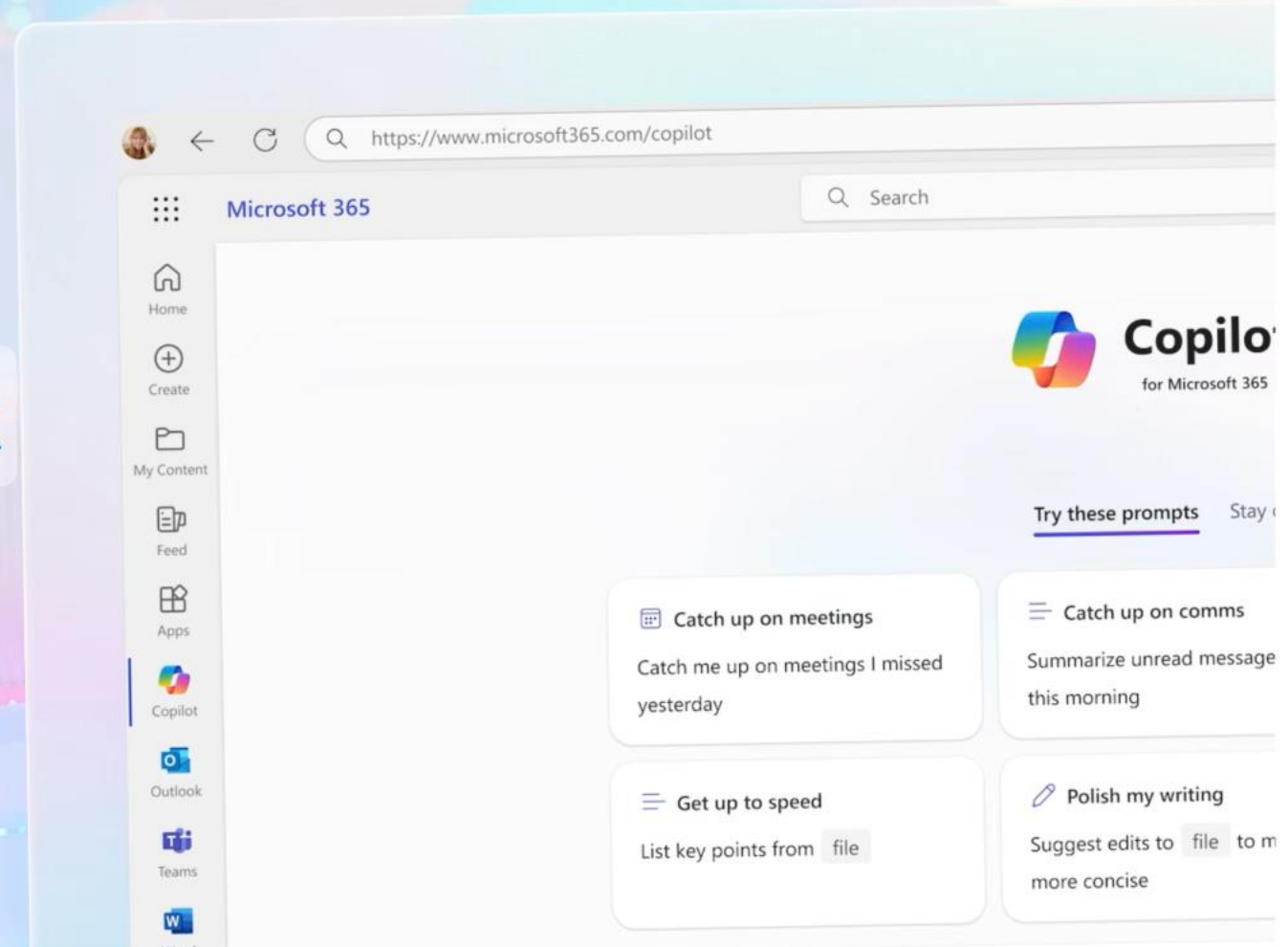
- Quantify impact with the Microsoft Copilot Dashboard
- Meet with your AI council biweekly
- Publicly celebrate successes

Thank you

Additional Demos

MICROSOFT 365

Microsoft Copilot



MICROSOFT 365

Copilot in Teams Meetings

The screenshot displays a Microsoft Teams meeting interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main area shows a meeting titled "Core accounts business review" with tabs for Chat, Details, Files, and Recap. The meeting date and time are "Mar 16, 10:00 AM". Below this, there's a "Shared content" section showing a file named "Proseware Proposal.pptx". A video player shows a hand pointing at a screen with a play button and a duration of "48m 42s". Below the video are tabs for "Speakers" and "Topics". The "Topics" tab is active, showing a list of topics: "Proseware negotiation strategy" and "Core accounts round table". On the right side, there are tabs for "Notes", "@ Mentions", and "Transcript". The "Notes" tab is active, showing a summary of the meeting by "Core accounts.loop".

Core accounts business review Chat Details Files Recap +

Mar 16, 10:00 AM Open in Stream

Shared content

Proseware Proposal.pptx

48m 42s

Speakers Topics

Proseware negotiation strategy

Core accounts round table

Core accounts.loop

Quarterly results and forecasts for Core Account

Summary

Based on what attendees said in the meeting

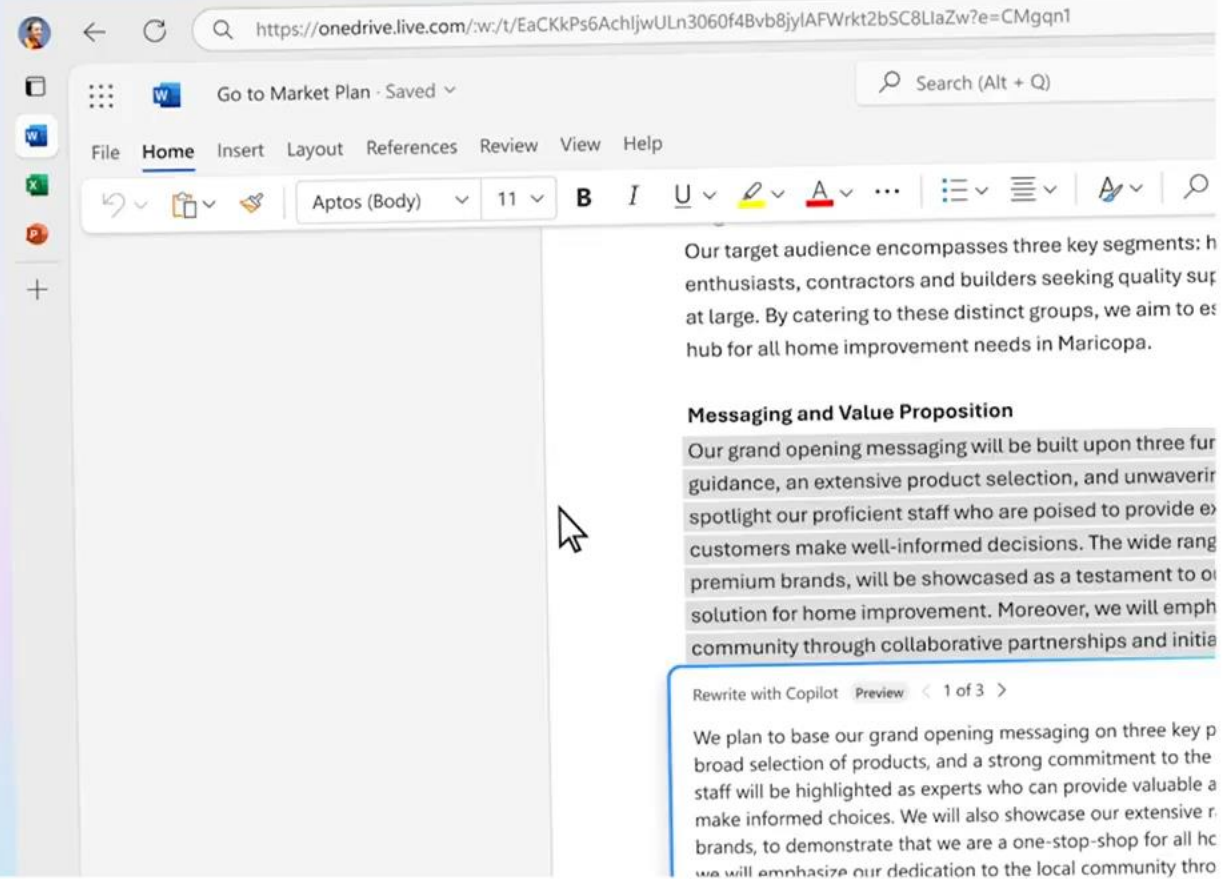
- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled n
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

Notes

- Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal.
- The team identified a new opportunity with Proseware th

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Copilot in Word



The screenshot displays the Microsoft Word application window. The title bar shows the URL <https://onedrive.live.com/?w:/t/EaCKkPs6AchIjwULn3060f4Bvb8jylAFWrkt2bSC8LiaZw?e=CMgqn1>. The ribbon is set to the 'Home' tab, with the font 'Aptos (Body)' and size '11' selected. The document content includes a paragraph: 'Our target audience encompasses three key segments: h enthusiasts, contractors and builders seeking quality sup at large. By catering to these distinct groups, we aim to es hub for all home improvement needs in Maricopa.' Below this is a section header 'Messaging and Value Proposition' followed by a paragraph: 'Our grand opening messaging will be built upon three fur guidance, an extensive product selection, and unwaverir spotlight our proficient staff who are poised to provide ex customers make well-informed decisions. The wide rang premium brands, will be showcased as a testament to oi solution for home improvement. Moreover, we will emph community through collaborative partnerships and initia'. At the bottom, a Copilot suggestion box is visible, titled 'Rewrite with Copilot' and 'Preview', showing a rewritten version of the text: 'We plan to base our grand opening messaging on three key p broad selection of products, and a strong commitment to the staff will be highlighted as experts who can provide valuable r make informed choices. We will also showcase our extensive r brands, to demonstrate that we are a one-stop-shop for all hc we will emphasize our dedication to the local community thro'.

Go to Market Plan - Saved

File Home Insert Layout References Review View Help

Aptos (Body) 11 B I U

Our target audience encompasses three key segments: h enthusiasts, contractors and builders seeking quality sup at large. By catering to these distinct groups, we aim to es hub for all home improvement needs in Maricopa.

Messaging and Value Proposition

Our grand opening messaging will be built upon three fur guidance, an extensive product selection, and unwaverir spotlight our proficient staff who are poised to provide ex customers make well-informed decisions. The wide rang premium brands, will be showcased as a testament to oi solution for home improvement. Moreover, we will emph community through collaborative partnerships and initia

Rewrite with Copilot Preview < 1 of 3 >

We plan to base our grand opening messaging on three key p broad selection of products, and a strong commitment to the staff will be highlighted as experts who can provide valuable r make informed choices. We will also showcase our extensive r brands, to demonstrate that we are a one-stop-shop for all hc we will emphasize our dedication to the local community thro'

MICROSOFT 365

Copilot in Outlook

The screenshot displays the Outlook application interface. At the top, the 'Outlook' logo and a search bar are visible. Below the navigation pane, the email header for 'Marketing Sync - meganb@contoso.com' is shown. The main content area displays a meeting recap for the event 'Profitable Projects Pitch & Plan', which took place on Wednesday 9/8/2023, from 11:00 AM to 12:00 PM. The meeting video player shows six participants in a grid view. Below the video, there are tabs for 'Speakers', 'Topics', and 'Chapters'. To the right of the video player, the 'Content' section lists 'Product Roadmap...'. Below this, there are buttons for 'Notes' and 'AI notes'. A warning message states 'AI-generated content may be incorrect'. The 'Meeting notes' section contains two entries: one mentioning 'Daniela' highlighting the effectiveness of before-and-after images, and another mentioning 'Babak' suggesting a prosperous home improvement project.

Outlook

Search

Marketing Sync - meganb@contoso.com

Event [Meeting recap](#)

Profitable Projects Pitch & Plan | Wednesday 9/8/2023, from 11:00 AM to 12:00 PM

Content

Product Roadmap...

Notes AI notes

AI-generated content may be incorrect

Meeting notes

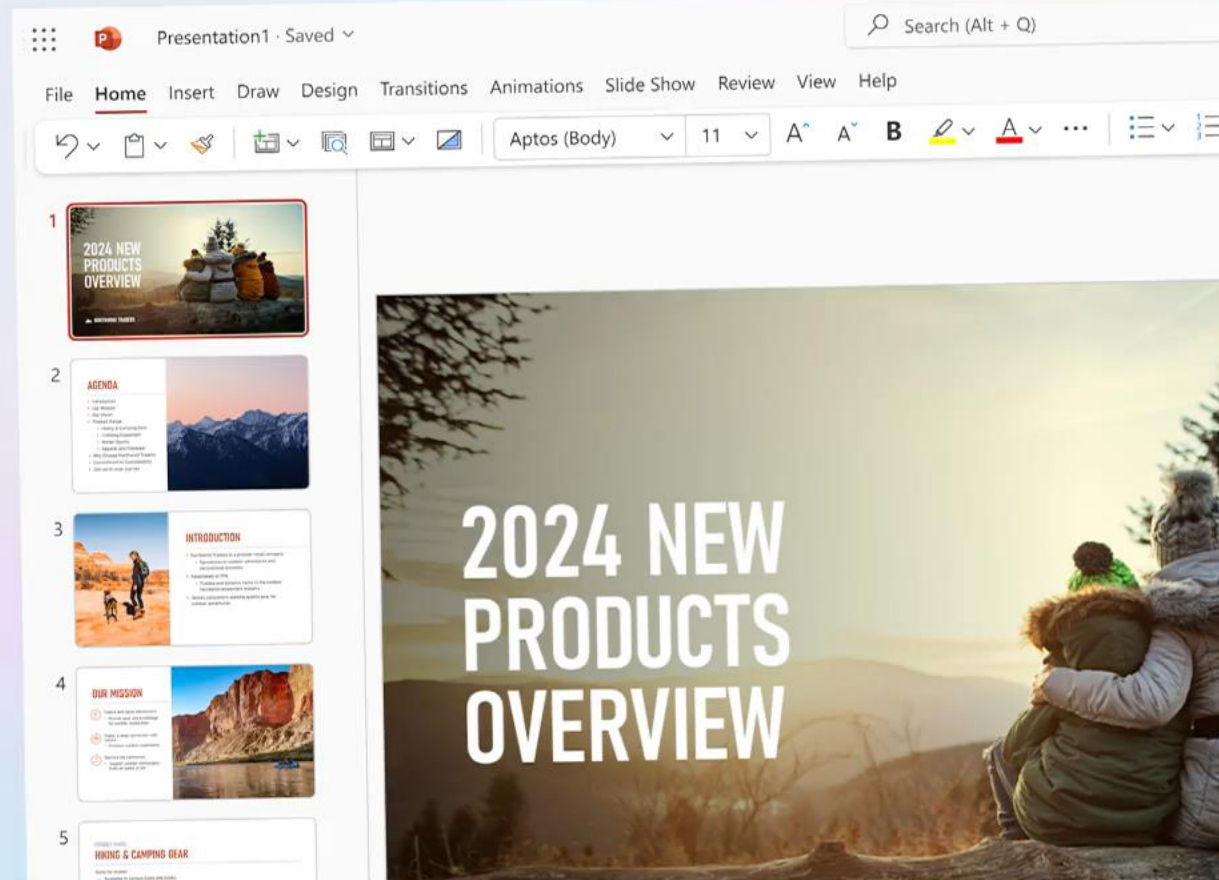
- > **Daniela** highlighted the effectiveness of before-and-after images in their effectiveness. **Sereni** suggestion into the team
- > **Babak** suggested conducting a prosperous home improvement project for the team

Speakers Topics Chapters

Serena Davis

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Copilot in PowerPoint



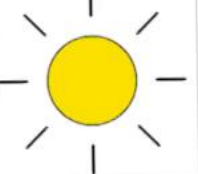
MICROSOFT 365

Copilot in Excel

AutoSave On WeatherForecast.xlsx Confidential Saved

File Home Insert Formulas Data Review View

B7 PY # Create a DataFrame of the weather forecast results
forecast_df = pd.DataFrame({
 'Weekday': [(datetime.now() + timedelta(days=day)).strftime('%A') for day in range(len(predicted_weather_conditions))],
 'Weather Forecast': predicted_weather_conditions
})

	A	B	C	D	E
1	5 Day Weather Forecast				
2	Generates a forecast (sunny, rainy, cloudy), based on historical data for temperature, humidity and wind speed.				
3					
4	Historical Data	DataFrame			
5	Weather Labels	DataFrame			
6	Model	DecisionTreeClassifier			
7	Full Forecast	DataFrame			
8					
9					
10	Weekday	Wednesday	Thursday	Friday	Saturday
11	Weather Forecast	cloudy	cloudy	rainy	sunny