



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



Better Q&A and task completion

Edge



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

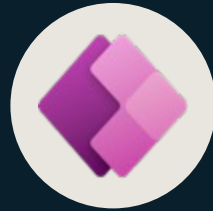
GitHub Copilot



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

+



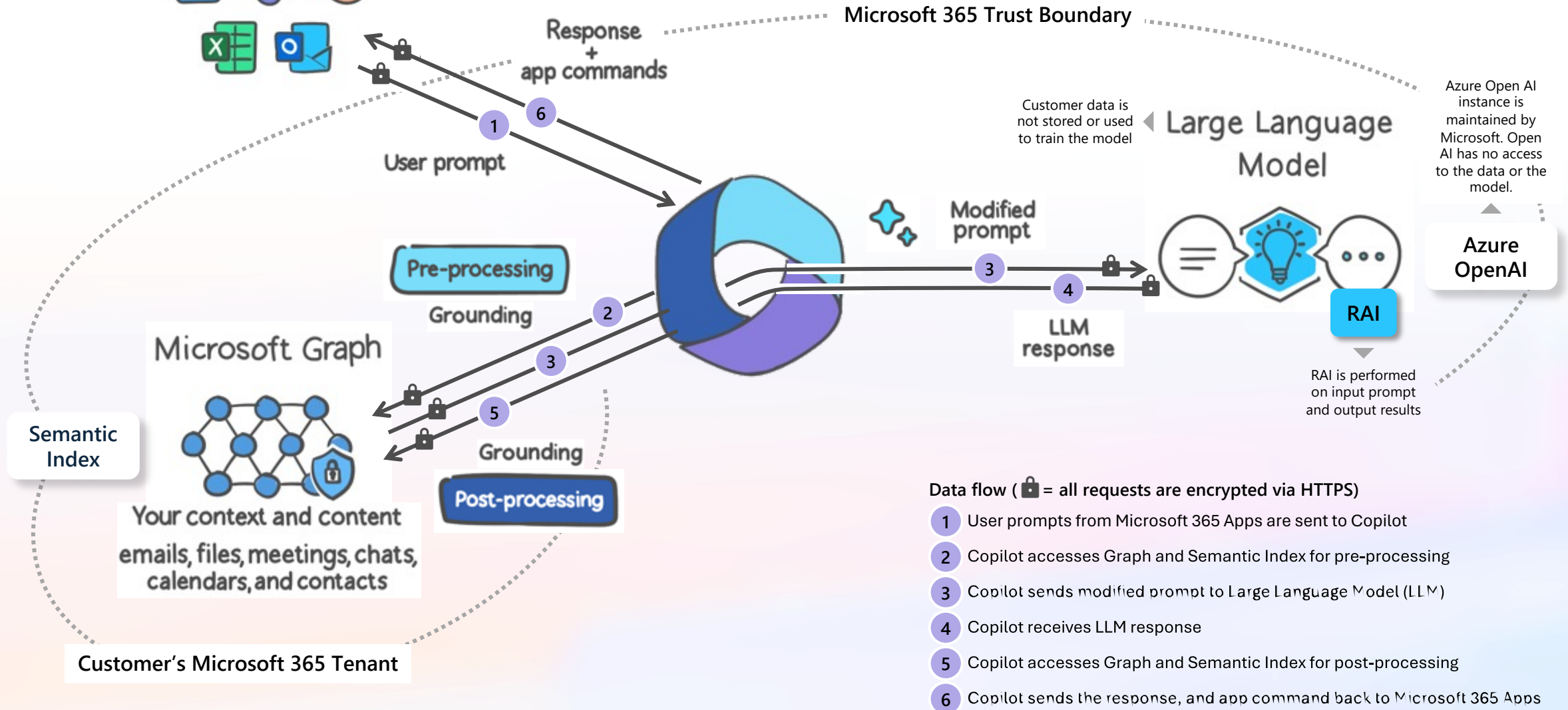
The
web

How Copilot works

Microsoft 365 Apps



Microsoft 365 Copilot



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]

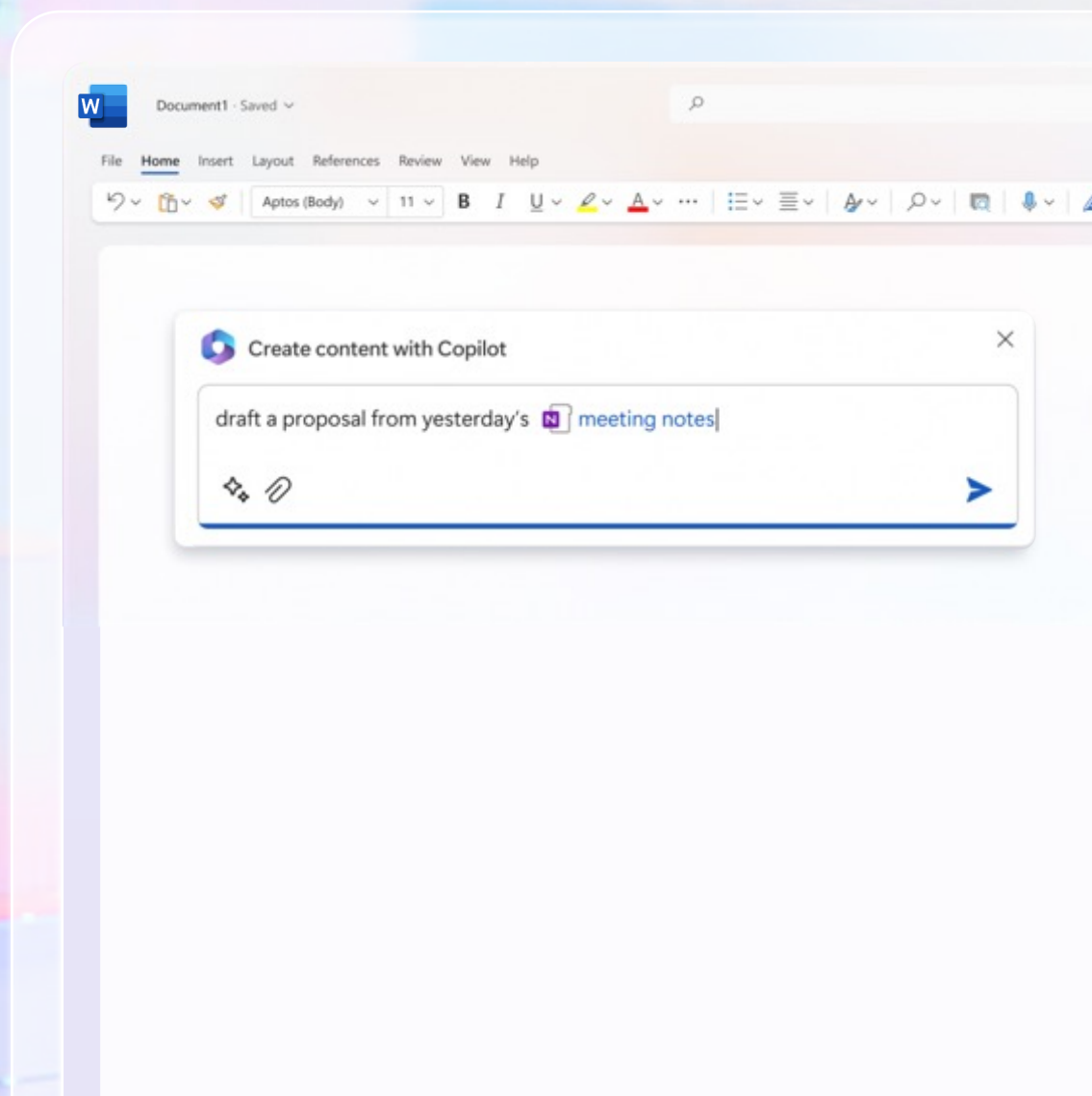


Cassandra is a sales lead at Contoso

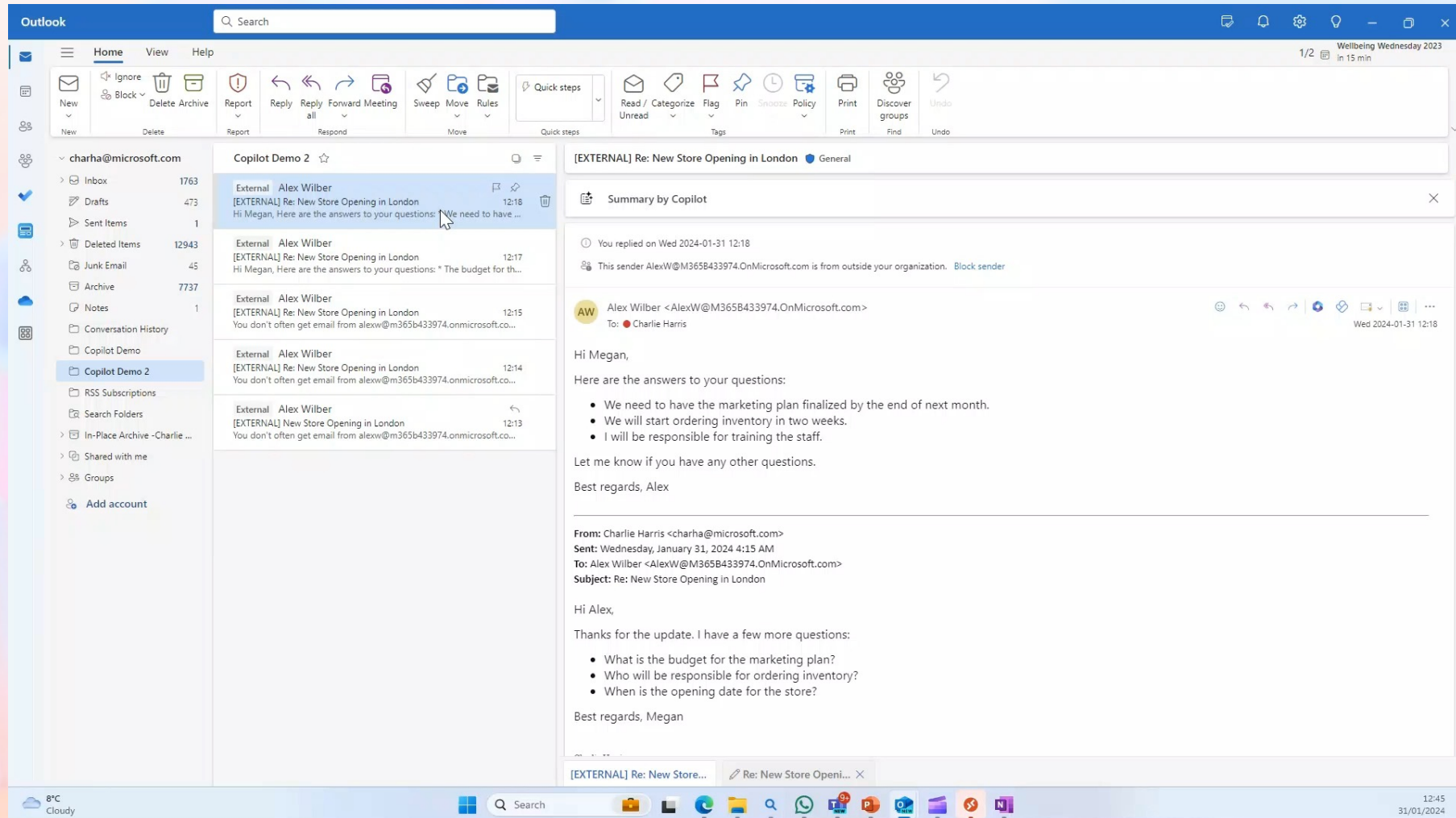


Copilot for Microsoft 365 Demo

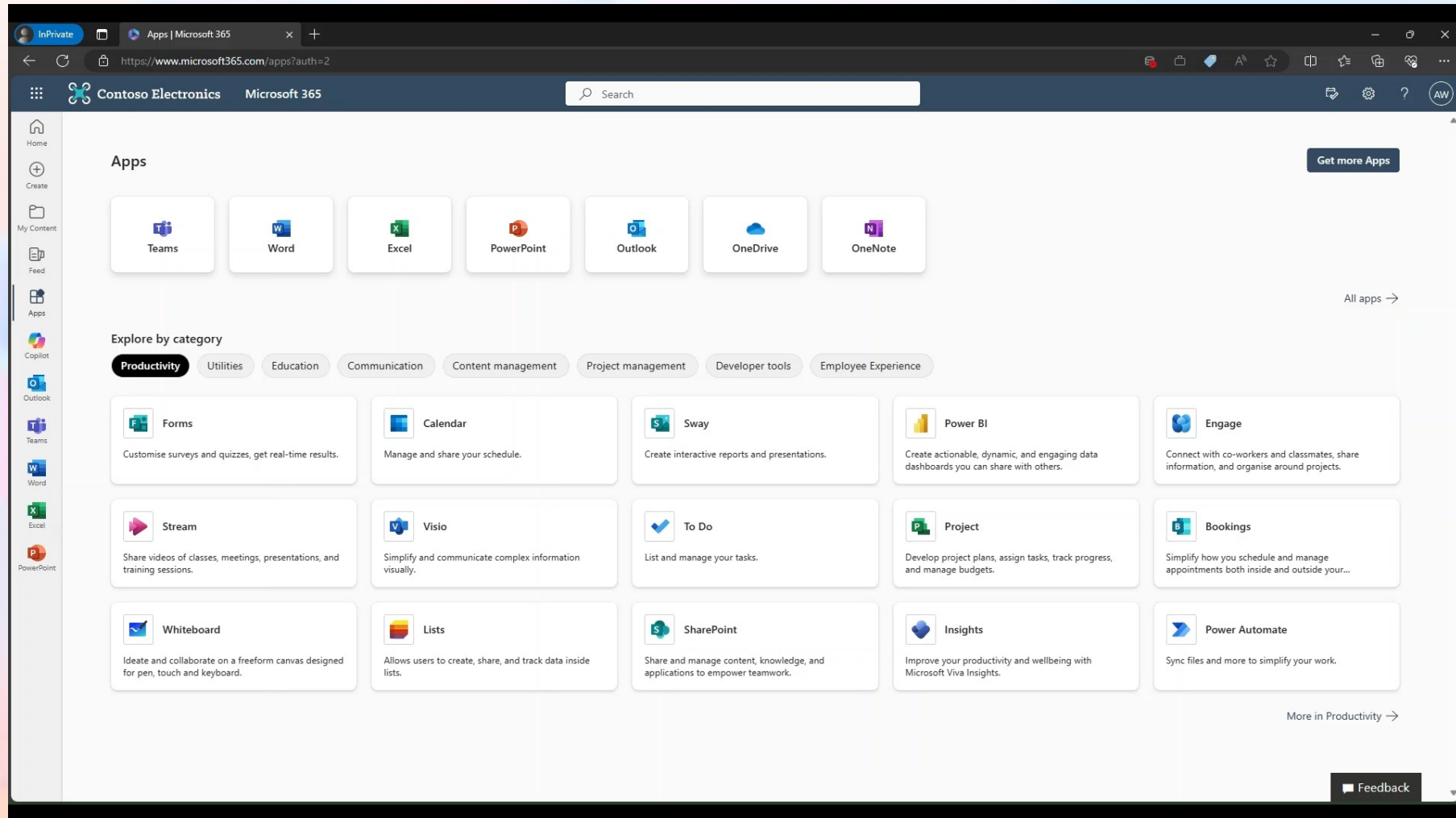
The assistant you've been waiting for



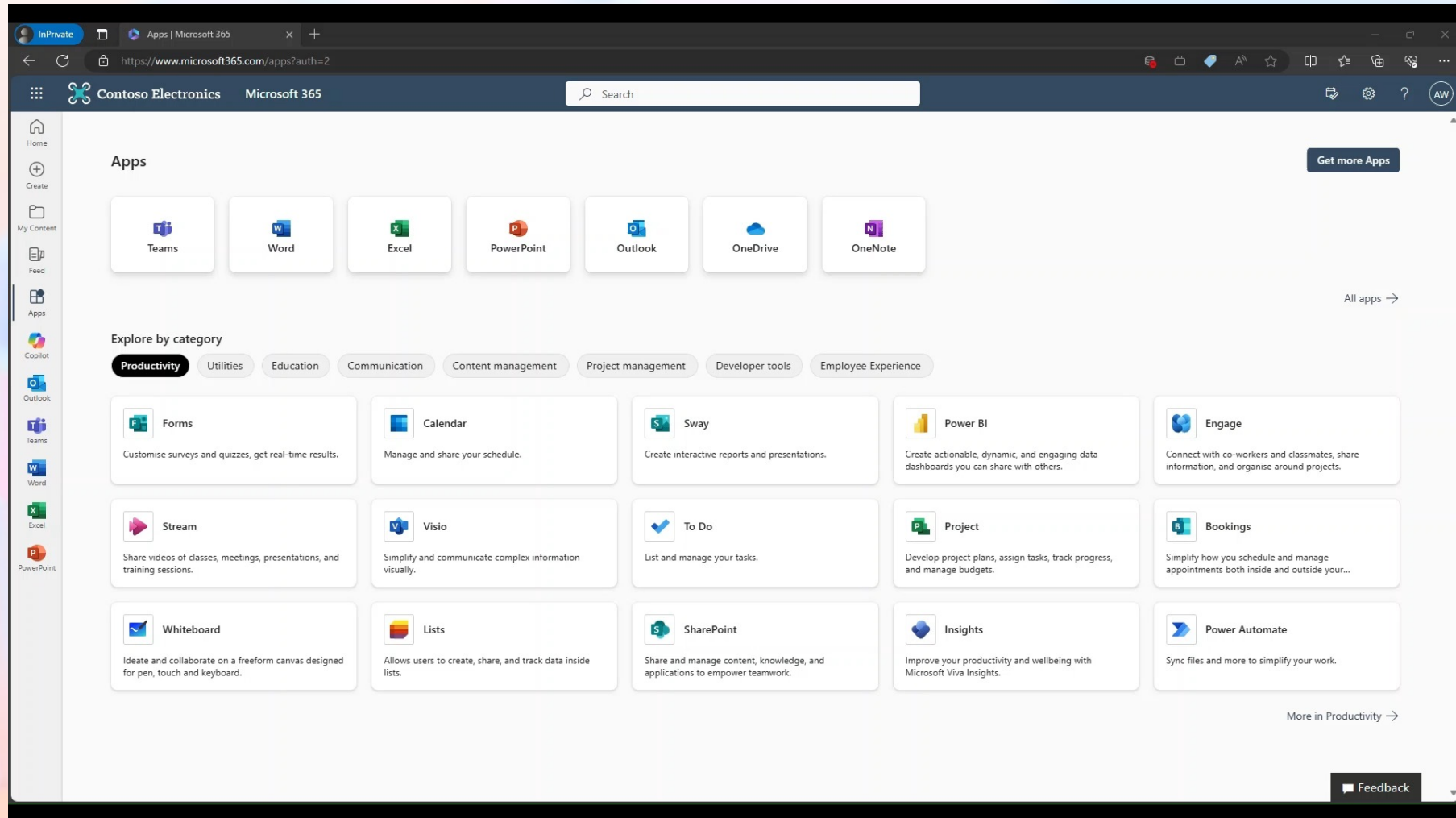
Microsoft 365 Copilot for Outlook



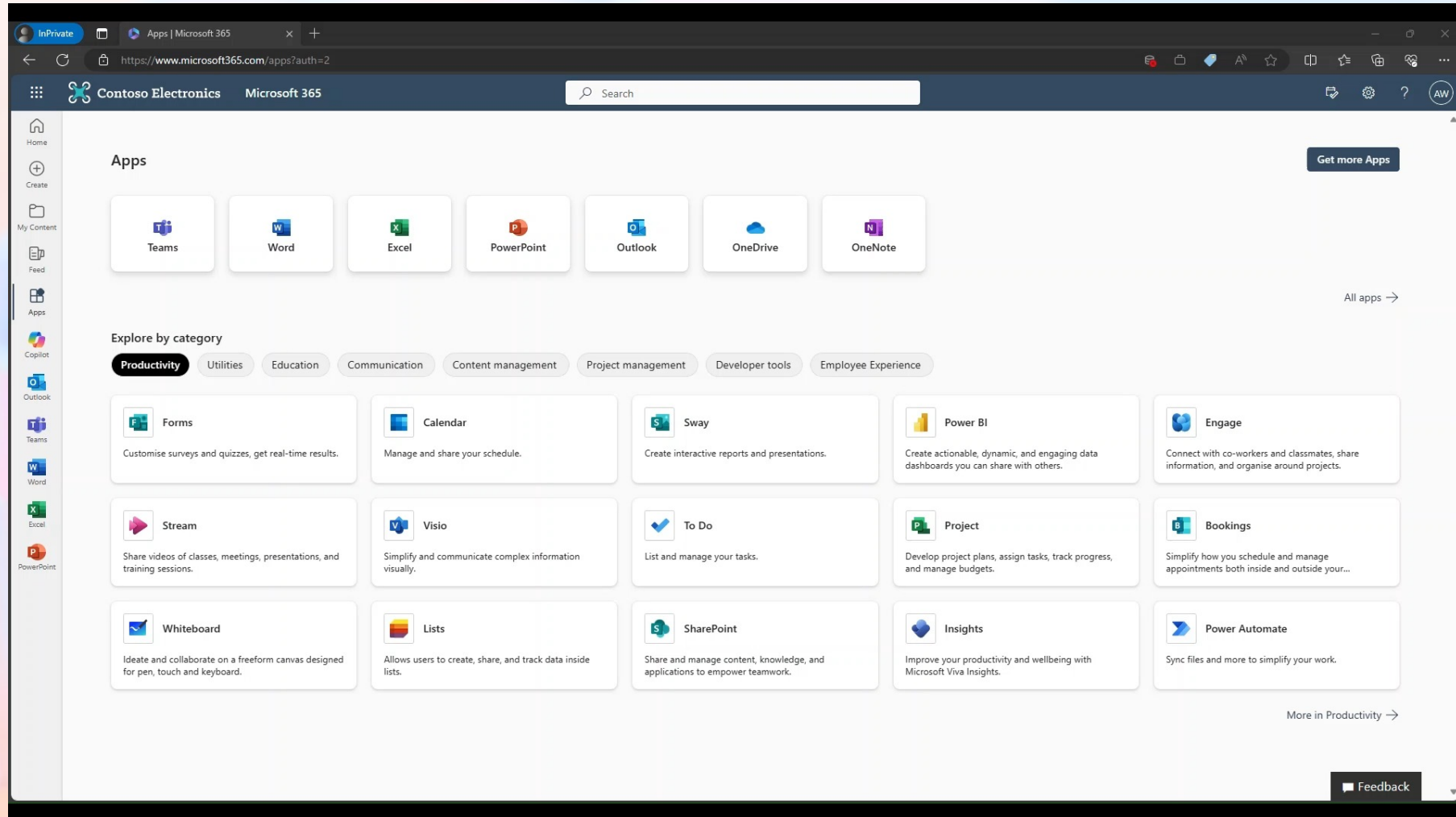
Microsoft 365 Copilot for Word



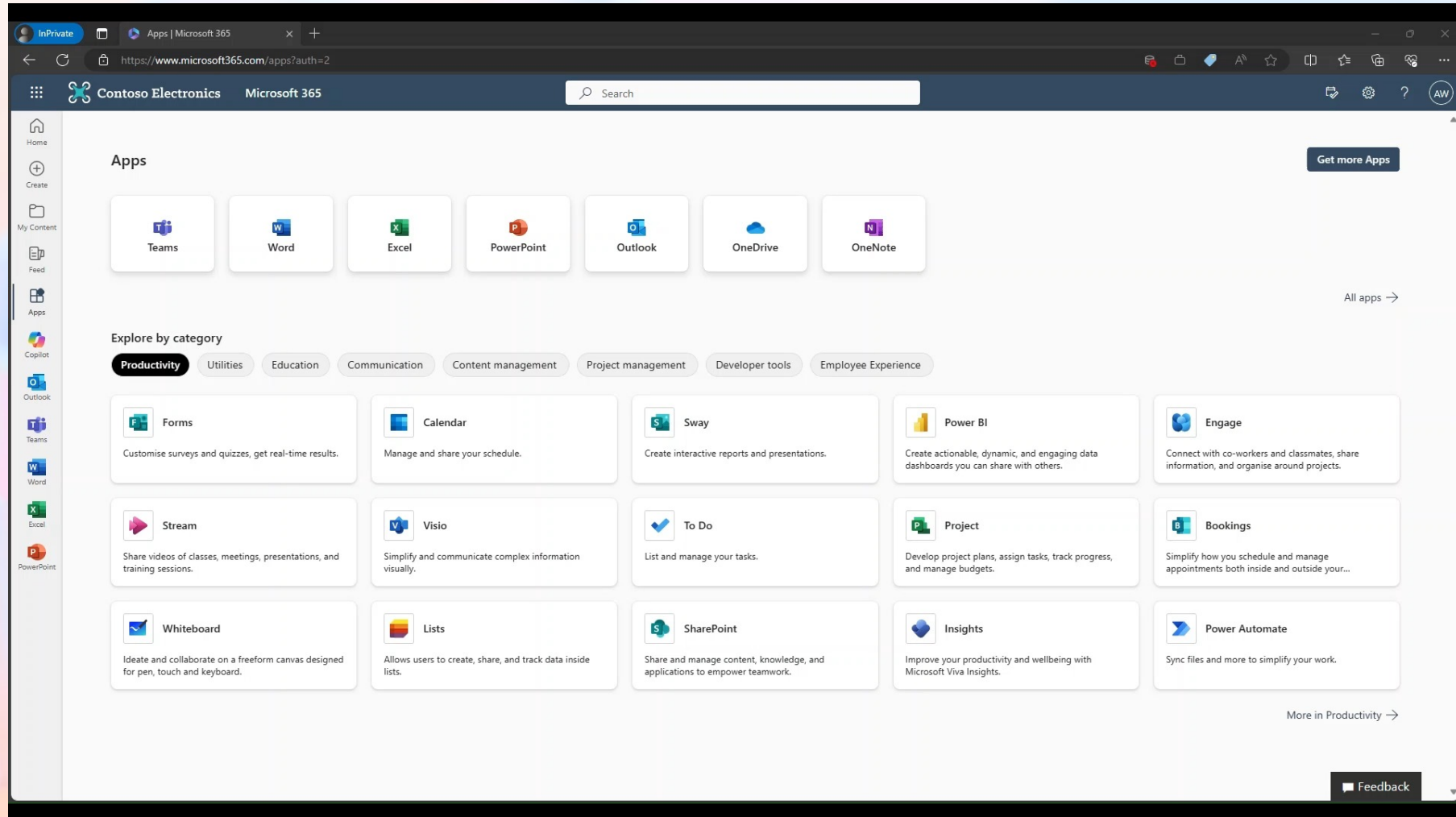
Microsoft 365 Copilot for Word



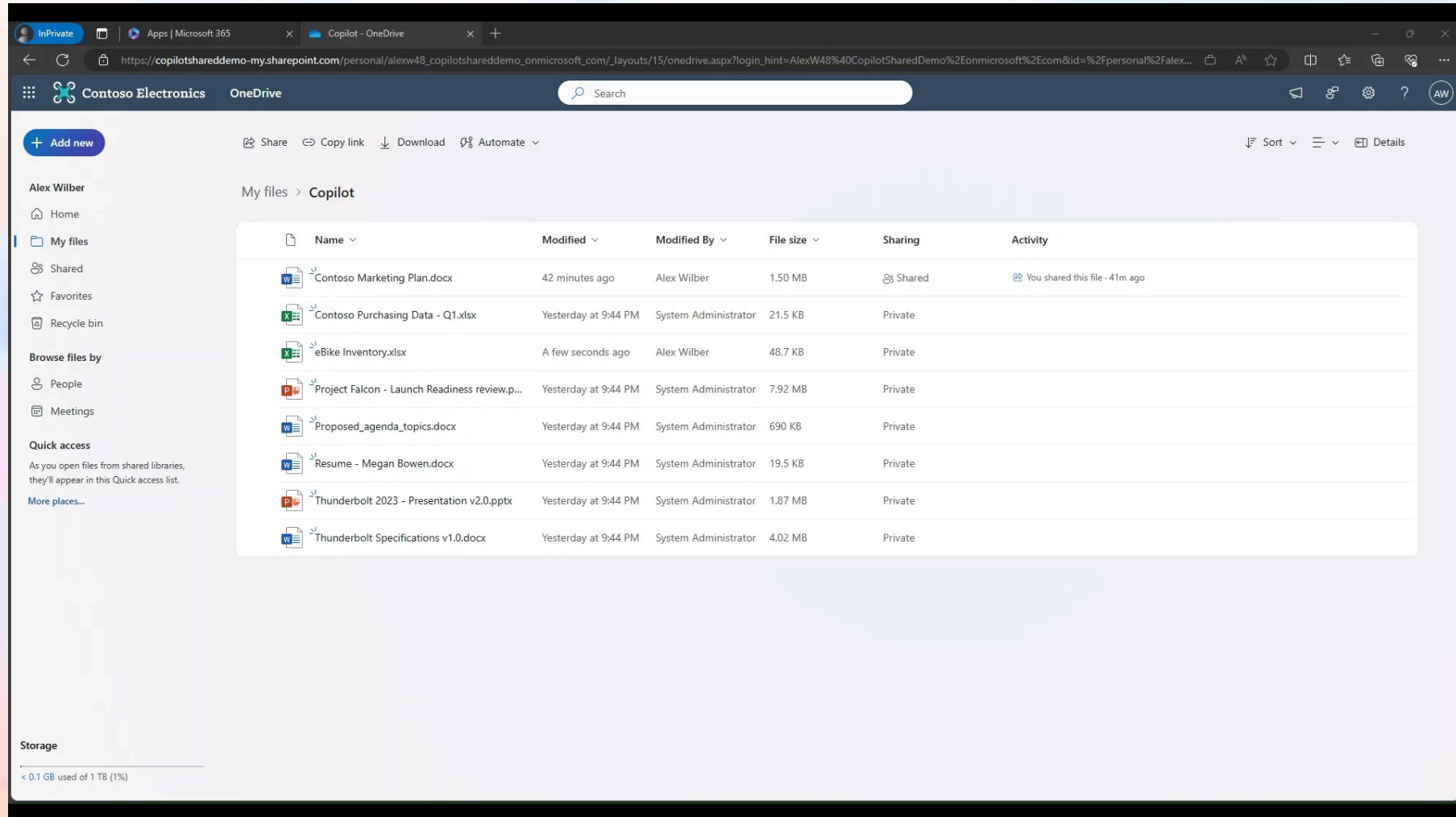
Microsoft 365 Copilot for PowerPoint



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

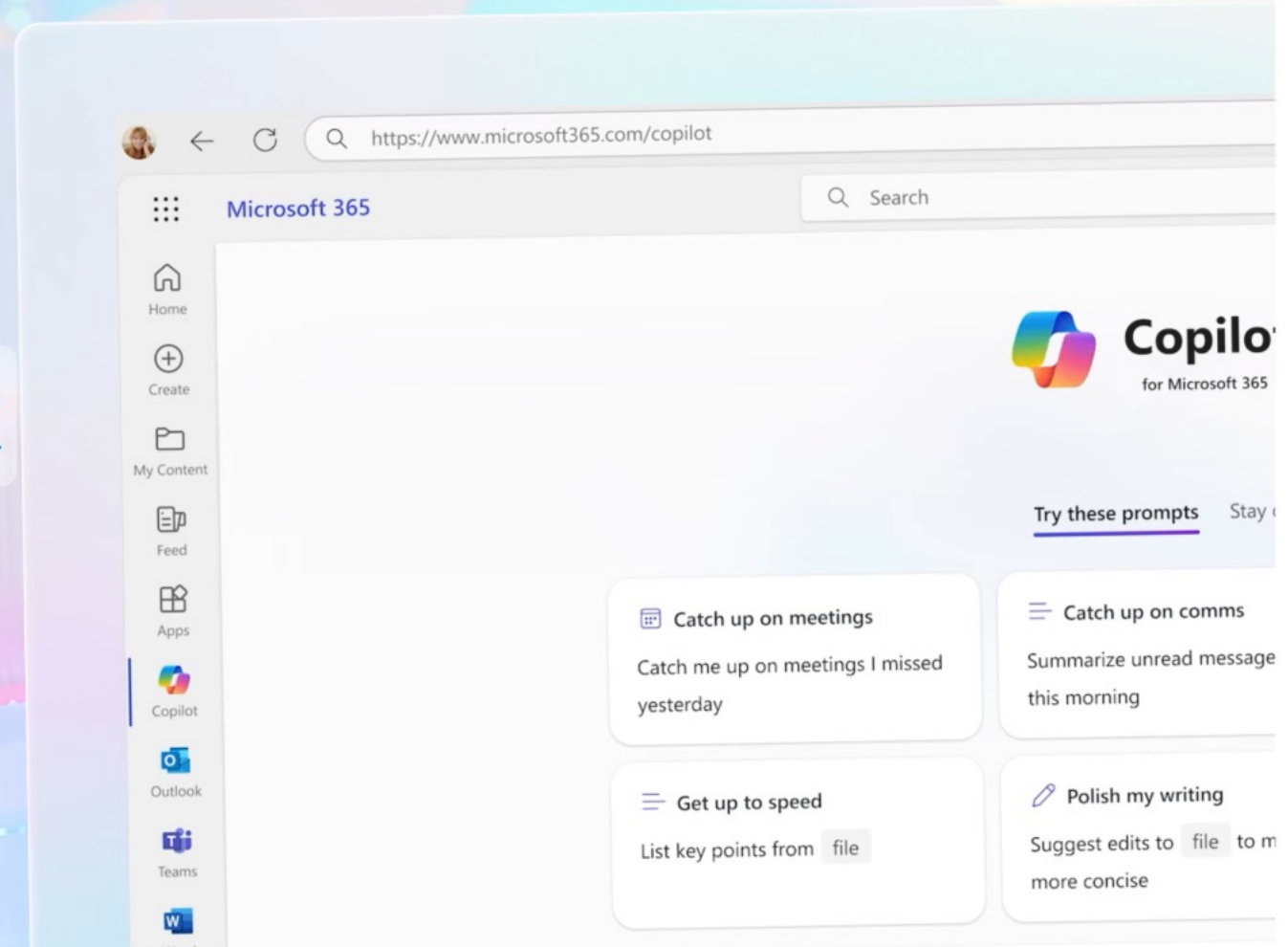
- Quantify impact with the Microsoft Copilot Dashboard
- Meet with your AI council biweekly
- Publicly celebrate successes

Thank you

Additional Demos

MICROSOFT 365

Microsoft Copilot



MICROSOFT 365

Copilot in Teams Meetings

The screenshot displays the Microsoft Teams interface during a meeting recap. The top navigation bar includes a search bar and navigation icons. The left sidebar shows standard Teams navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area is titled 'Core accounts business review' and includes tabs for Chat, Details, Files, and Recap. The meeting date and time are 'Mar 16, 10:00 AM', with an 'Open in Stream' link. Below this, the 'Shared content' section lists 'Proseware Proposal.pptx'. A video player shows a hand pointing at a screen with a play button and a duration of '48m 42s'. The 'Speakers' and 'Topics' sections are visible, with topics including 'Proseware negotiation strategy' and 'Core accounts round table'. On the right, the 'Notes' section shows a recap by 'Core accounts.loop' titled 'Quarterly results and forecasts for Core Account', including a summary of meeting points and a list of notes.

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

Notes

Core accounts.loop

Quarterly results and forecasts for Core Account

Summary

Based on what attendees said in the meeting

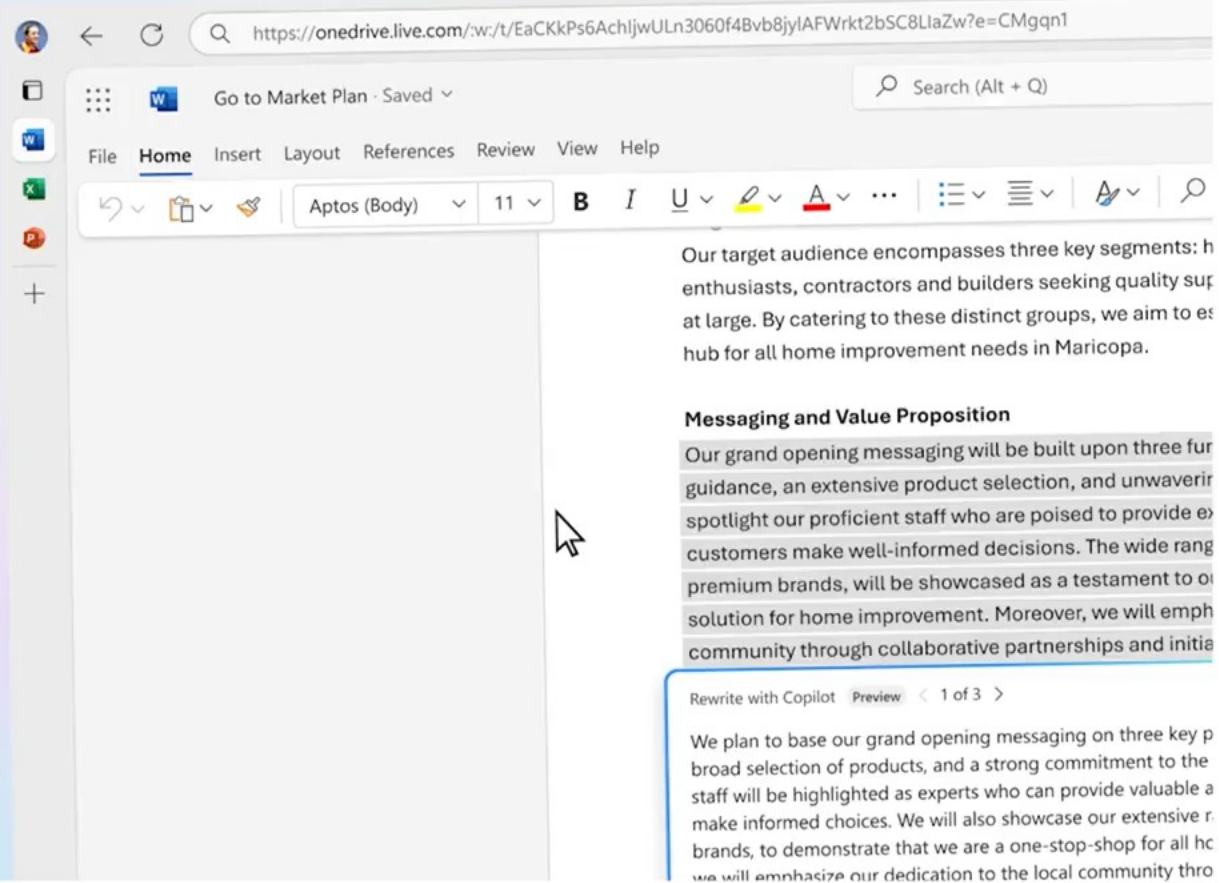
- \$230K revenue shortfall in this quarter
- Inventory 15% surplus (renewable products and recycled n
- Account leads to propose discounting scenarios to lower i
- Proseware was discussed as a leading opportunity

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 shows the Microsoft Word interface with a document titled "Go to Market Plan - Saved". The ribbon is set to "Home", and the font is "Aptos (Body)" in size 11. The document content includes a paragraph about the target audience and a section titled "Messaging and Value Proposition". A Copilot suggestion box is visible at the bottom right, offering to rewrite the text.

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

Messaging and Value Proposition

Our grand opening messaging will be built upon three fundamental pillars: expert guidance, an extensive product selection, and unwavering support. We will spotlight our proficient staff who are poised to provide expert advice, ensuring customers make well-informed decisions. The wide range of premium brands, will be showcased as a testament to our commitment to providing a comprehensive solution for home improvement. Moreover, we will emphasize our dedication to the local community through collaborative partnerships and initiatives.

Rewrite with Copilot Preview < 1 of 3 >

We plan to base our grand opening messaging on three key pillars: a broad selection of products, and a strong commitment to the staff who will be highlighted as experts who can provide valuable advice. We will also showcase our extensive range of brands, to demonstrate that we are a one-stop-shop for all home improvement needs. We will emphasize our dedication to the local community through

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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 feed shows six participants in a grid. To the right of the video, 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 by Daniela highlighting the effectiveness of before-and-after images, and another by Babak suggesting a prosperous home improvement project. At the bottom, there are buttons for 'Speakers', 'Topics', and 'Chapters', and a profile card for Serena Davis.

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

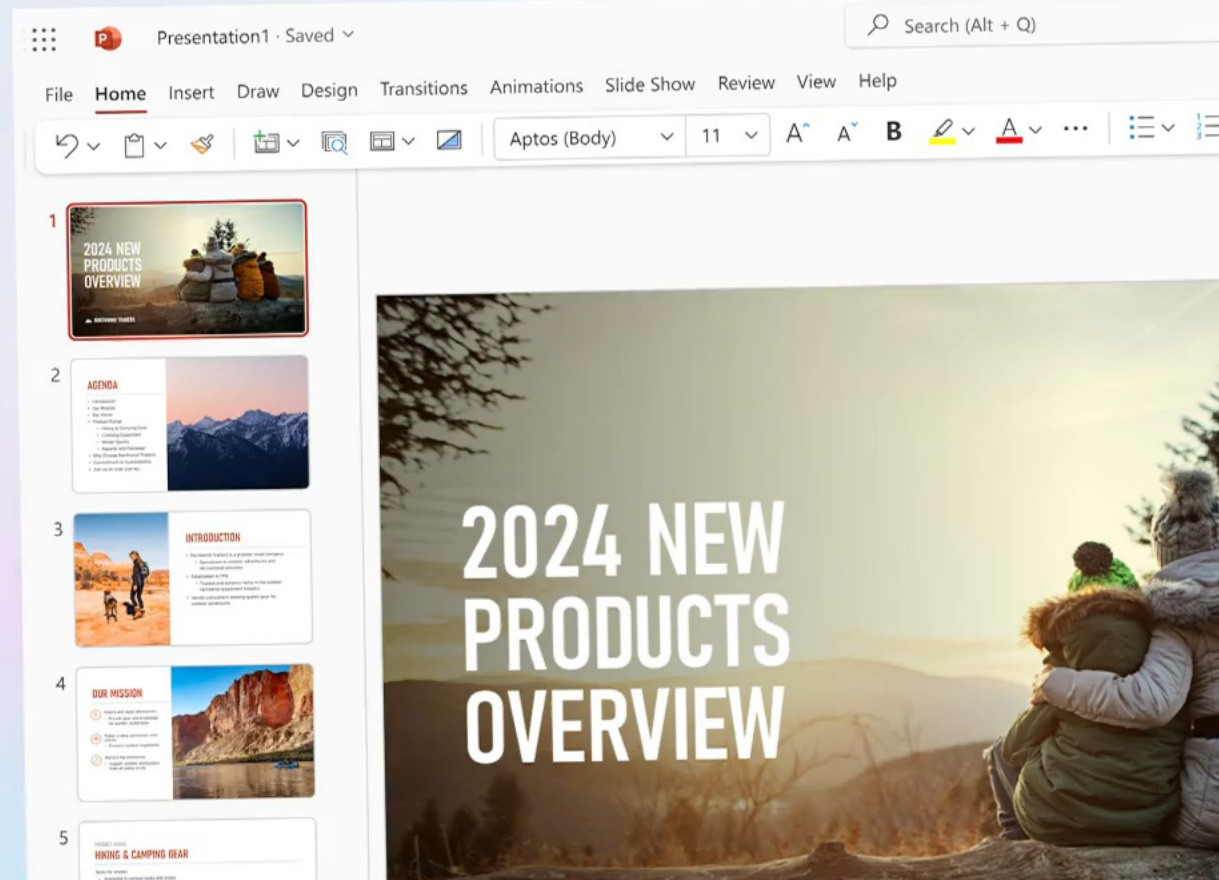
- > **Daniela** highlighted the s before-and-after images i their effectiveness. **Seren** suggestion into the team'
- > **Babak** suggested conduc prosperous home improv

Speakers Topics Chapters

Serena Davis

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Copilot in PowerPoint



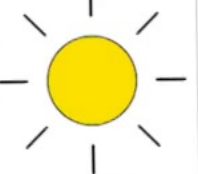
MICROSOFT 365

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_forecast))],
 'Weather Forecast': predicted_weather_conditions
})

	A	B	C	D	E
1	5 Day Weather Forecast				
2	<i>Generates a forecast (sunny, rainy, cloudy), based on historical data for temperature, humidity and wind speed.</i>				
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