



Copilot for Microsoft 365

Your AI assistant at work

The age of Copilots
has arrived.

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

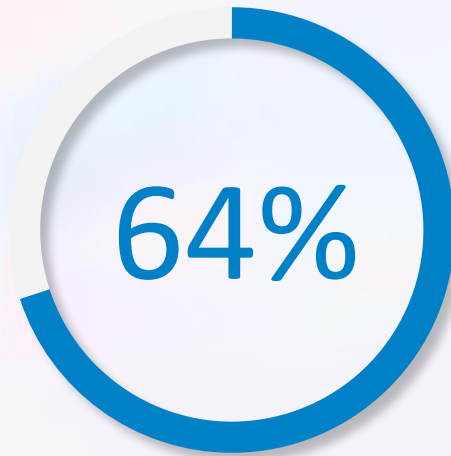
70%

said Copilot made
them more productive

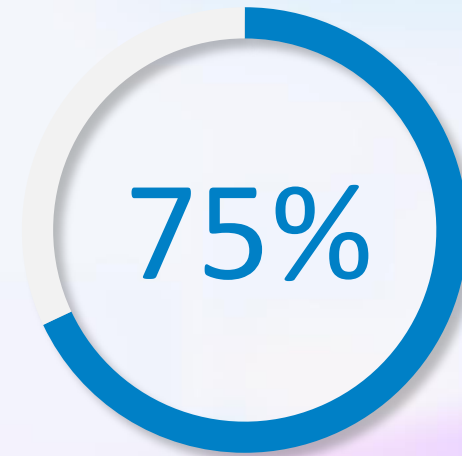
77%

said they didn't
want to give Copilot up

Copilot productivity gains



said they spent less time
processing email



said they spent less time searching for
information in their files

Copilot's impact on meetings, searching, writing, and summarizing



getting caught up on
a missed meeting



in a series of tasks (searching,
writing, and summarizing)



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models



Microsoft Graph
- Your Data -



Microsoft 365
Apps



The
Internet

Copilot for Microsoft 365

1



Empowers
AI at work

2



Provides
secure foundation

Copilot for Microsoft 365

1



Empowers
AI at work

2



Provides
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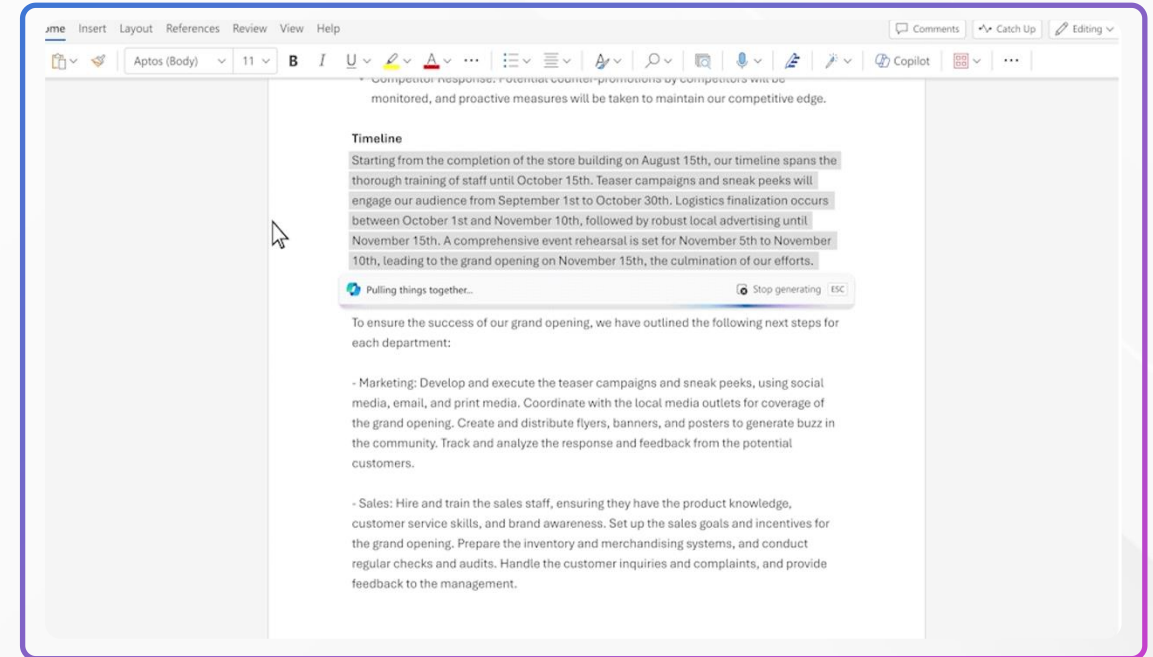


Marketing

Jumpstart the creative process and generate ideas while writing

With **Copilot in Word**, transform writing with efficiency and creativity.

- Create first draft by referencing up to three documents
- Rewrite sections or an entire document, or change the tone to refine existing documents
- Receive suggestions to strengthen arguments, smooth inconsistencies
- Save time and summarize text in lengthy documents
- Discover information—for example, ask if there is a call to action





Sales

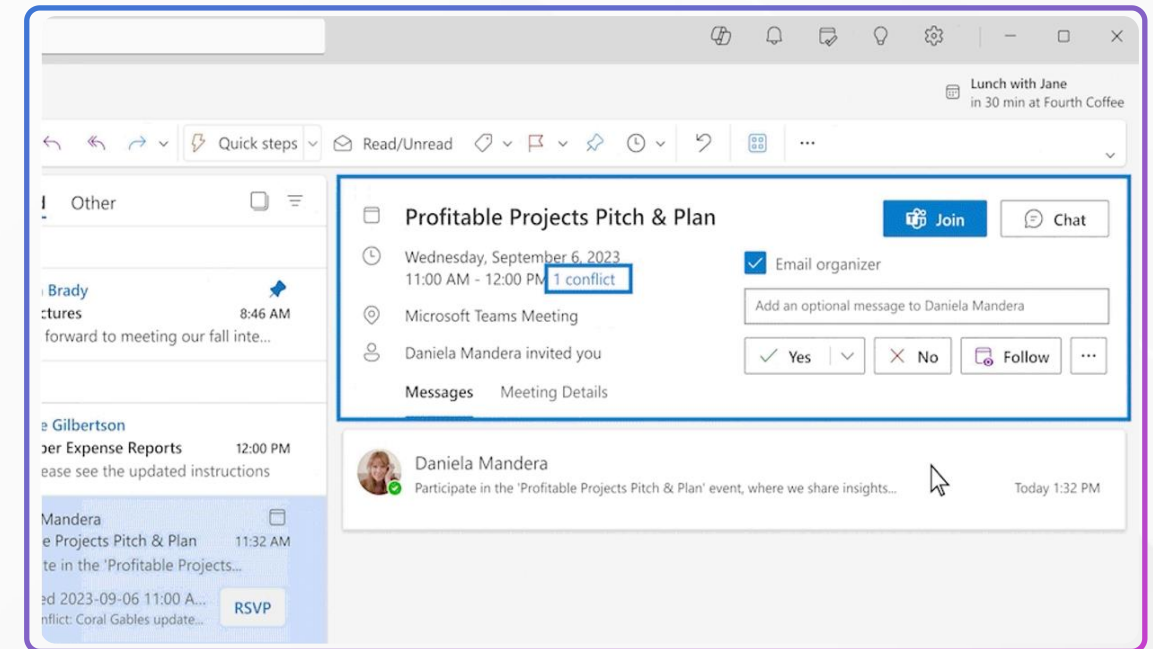
Stay focused on closing deals with an AI assistant for email

With **Copilot in Outlook**, stay on top of your inbox, manage meeting follow-ups, and create impactful communication in a fraction of the time.

- Customize an email prompt with options for length and tone
- Include people's viewpoints in conversation summaries
- Prepare for meetings with a meeting prep summary

Copilot for Sales

- + Advance customer relationships with seamless connection to your CRM platform for real-time sales insights and customer-specific content creation





Customer Service

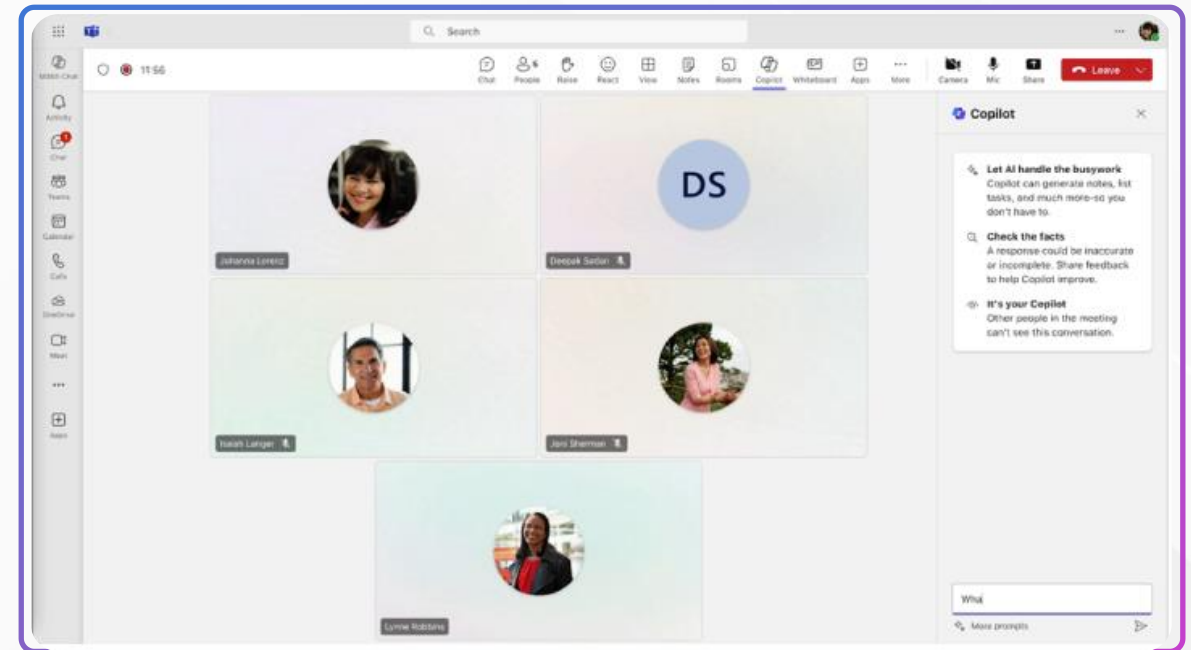
Stay coordinated as a team to resolve more customer issues

With **Copilot in Teams**, stay organized and on top of all your chats, meetings, and calls.

- Create new messages, meeting notes, table of ideas
- Build agendas based on chat history transcripts from other meetings or calls
- Discover answers to specific questions—such as what decisions were made—from chats or meetings

Copilot for Service

- + Modernize existing service solutions with generative AI to enhance customer experiences and boost productivity in the tools agents use every day



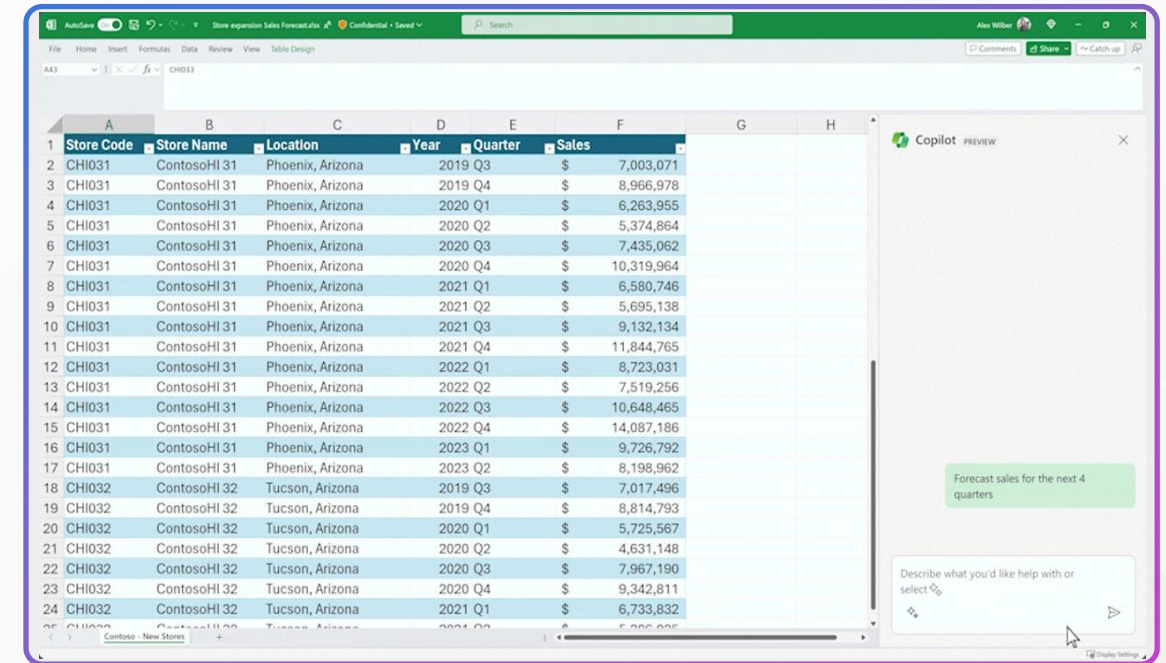


Finance

Simplify financial reporting and validating data quality

With **Copilot in Excel**, analyze, comprehend, and visualize data with ease.

- Create new formula columns or insert charts
- Insert pivot tables into new a sheet
- Refine data by providing simple commands
- Identify trends, create visualizations, or ask for recommendations with natural language queries



The screenshot shows an Excel spreadsheet with a table of sales data. The table has columns for Store Code, Store Name, Location, Year, Quarter, and Sales. The data spans from 2019 Q3 to 2023 Q1 for two store locations: Phoenix, Arizona and Tucson, Arizona. To the right of the table, the Copilot interface is visible, showing a preview of the data and a chat window with a prompt: "Describe what you'd like help with or select".

	Store Code	Store Name	Location	Year	Quarter	Sales
1	CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q3	\$ 7,003,071
2	CHI031	ContosoHI 31	Phoenix, Arizona	2019	Q4	\$ 8,966,978
3	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q1	\$ 6,263,955
4	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q2	\$ 5,374,864
5	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q3	\$ 7,435,062
6	CHI031	ContosoHI 31	Phoenix, Arizona	2020	Q4	\$ 10,319,964
7	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q1	\$ 6,580,746
8	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q2	\$ 5,695,138
9	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q3	\$ 9,132,134
10	CHI031	ContosoHI 31	Phoenix, Arizona	2021	Q4	\$ 11,844,765
11	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q1	\$ 8,723,031
12	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q2	\$ 7,519,256
13	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q3	\$ 10,648,465
14	CHI031	ContosoHI 31	Phoenix, Arizona	2022	Q4	\$ 14,087,186
15	CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q1	\$ 9,726,792
16	CHI031	ContosoHI 31	Phoenix, Arizona	2023	Q2	\$ 8,198,962
17	CHI032	ContosoHI 32	Tucson, Arizona	2019	Q3	\$ 7,017,496
18	CHI032	ContosoHI 32	Tucson, Arizona	2019	Q4	\$ 8,814,793
19	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q1	\$ 5,725,567
20	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q2	\$ 4,631,148
21	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q3	\$ 7,967,190
22	CHI032	ContosoHI 32	Tucson, Arizona	2020	Q4	\$ 9,342,811
23	CHI032	ContosoHI 32	Tucson, Arizona	2021	Q1	\$ 6,733,832
24	CHI032	ContosoHI 32	Tucson, Arizona	2021	Q2	\$ 5,000,000

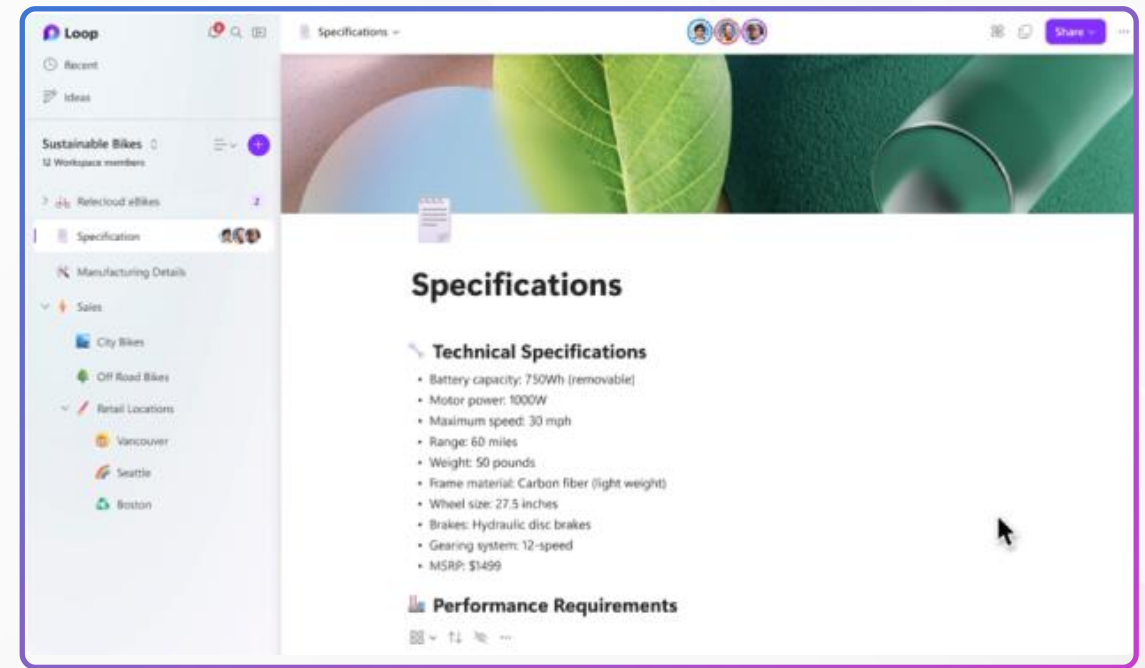


Data and IT Pros

Effectively manage shared projects and track project progress

With **Copilot in Loop**, unlock the power of shared thinking—co-create, get up-to-speed, and stay in sync with your teammates.

- Create a new workspace or use one already created for you
- Summarize a page to easily understand content in the workspace to start collaborating immediately
- Produce new ideas or refine plans



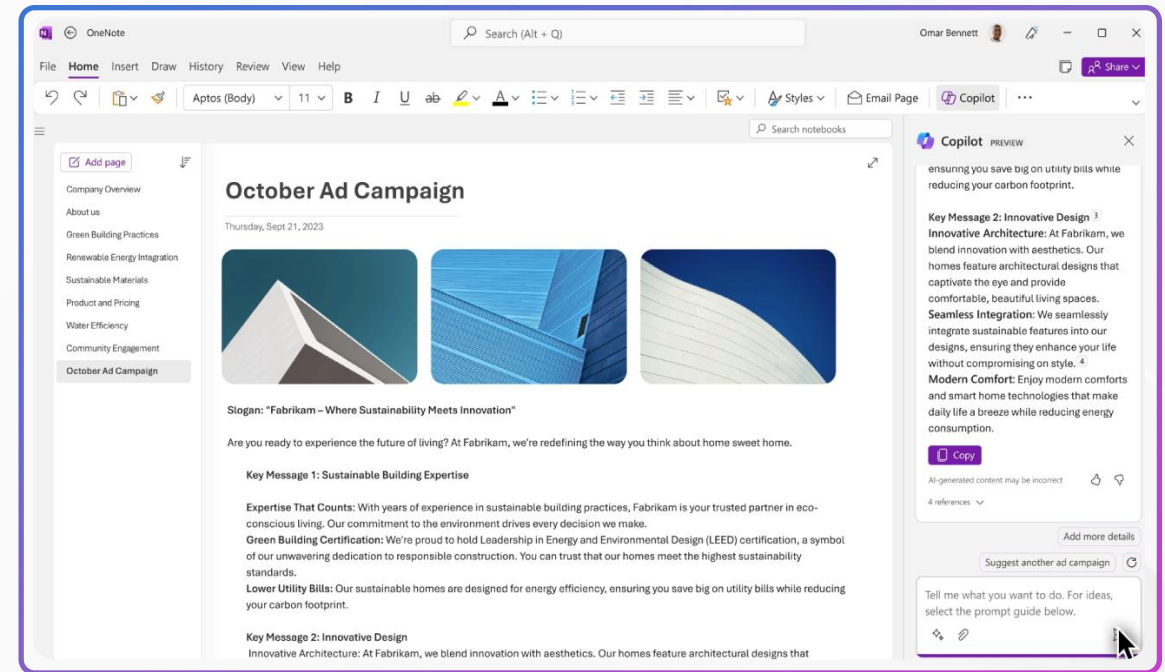


HR

Store, access, and prioritize notes in a fraction of the time

With Copilot in OneNote, revolutionize the way you plan and organize staying better prepared and proactively take action.

- Discover deeper insights about your notes
- Summarize your OneNote content, so you can make better sense of longer page notes you've taken
- Get a Copilot-generated paragraph, bulleted list, or organized section



Let's look at a day in the life of a seller using **Copilot for Microsoft 365**

A day in the life of a seller using Copilot for M365

Summarize messages from customer

 Microsoft Chat

Summarize emails and Teams chats from Contoso.



Prepare offer value document for customer

 Microsoft Excel

Show all data insights from *FinancialForecast2024.xls*



Take call with customer

 Microsoft Teams

Show all questions asked during the call



Propose a meeting

 Outlook

Draft an email to Contoso proposing a meeting



Prepare for meeting

 PowerPoint

Create pitch deck for meeting using *Fabrikam meeting brief.doc*



Review meeting and conduct follow-ups

 Microsoft Teams

Summarize meeting and show follow-up actions



Copilot for Microsoft 365

1



Empowers
AI at work

2



Provides
secure foundation

Common questions we hear from customers

-  ● **How** do we know our data is secure?
-  ● **When** will we be able to audit Copilot usage?
-  ● **What** can I do to avoid overexposing our data?
-  ● **Where** is my data processed?



Copilot for Microsoft 365

Built on Microsoft's comprehensive approach



Security



Compliance



Privacy



Responsible AI

Microsoft
protects your data
and enables you to
control it

Protecting your data
through the LLMs



Security and
Compliance



Data Usage
and Privacy



Committed to
responsible AI



Inheriting
Microsoft 365 policies
and controls



Data access &
permissions



User-tenant
focus



Customer data
protection



Data processing and
residency

Microsoft 365 Security and Compliance controls for Copilot

Baseline security



Copilot +
Office 365 E3

Multi-factor Authentication
with security defaults

Manual sensitivity labels
for Copilot generated content
(Office only)

Core security controls



Copilot +
Microsoft 365 E3

Conditional Access
policies based on identity, device,
location, & network

Manual sensitivity labels
for non-Microsoft documents
(e.g., pdf)

Endpoint management
capabilities

Best in class security controls



Copilot +
Microsoft 365 E5

User/session risk
and access control

Automatic sensitivity labels
for non-Microsoft documents
(e.g., pdf)

Discover and evaluate the
risk of 400+ AI apps & implement
controls to for their use at work

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.

How should an organization embark on
a journey of **Copilot** adoption?

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



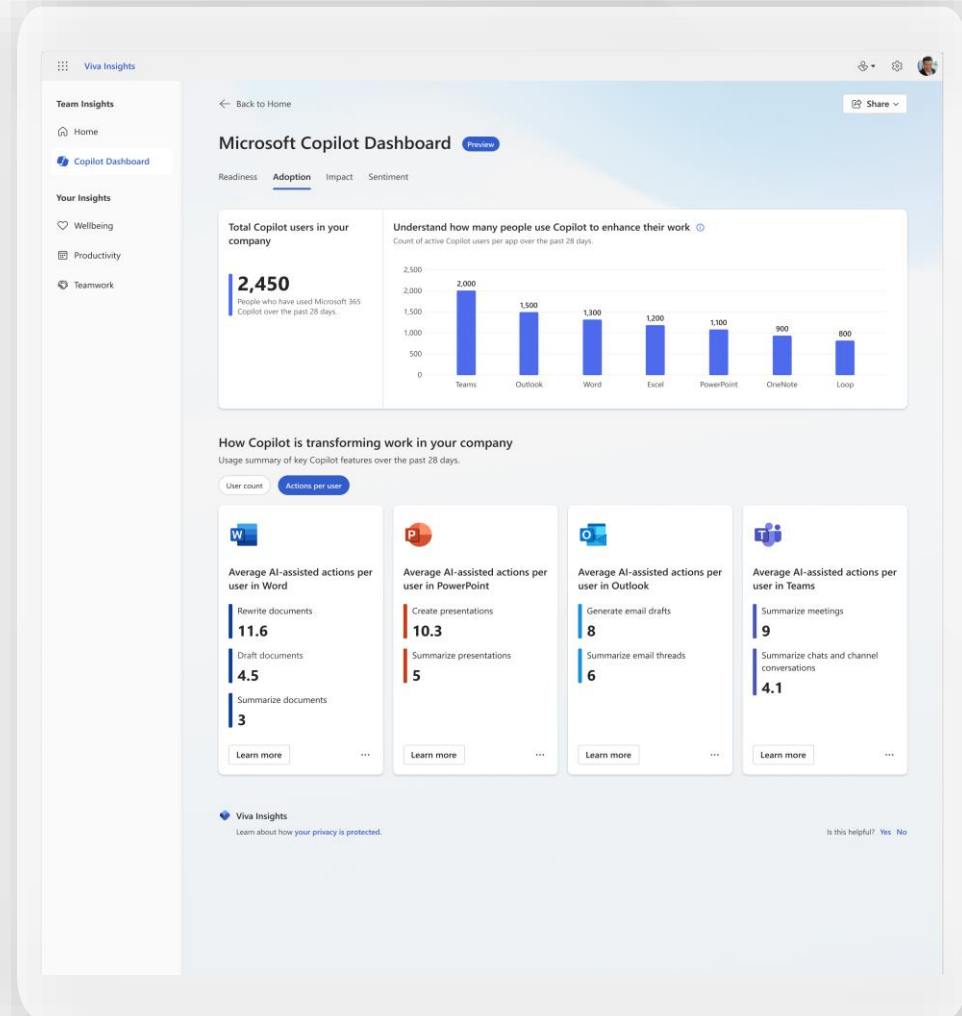
Measurement

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

Microsoft Copilot Dashboard

Enable IT and business leaders to plan their AI readiness, drive adoption, and measure the impact of their Microsoft Copilot investment

Public preview



FAQs

1

What is Copilot for Microsoft 365?

Copilot for Microsoft 365 is an AI-powered assistant designed to help users streamline their work processes within the Microsoft 365 ecosystem. It leverages machine learning to provide intelligent suggestions, automate repetitive tasks, and enhance productivity.

2

How does Copilot integrate with Microsoft 365?

Copilot seamlessly integrates with Microsoft 365 applications such as Outlook, Word, Excel, PowerPoint, and Teams. It operates as an extension or add-on within these applications, providing contextual assistance and suggestions based on user actions.

3

What are the system requirements for using copilot for Microsoft 365?

To use copilot for Microsoft 365, you need a Windows 10 device with an internet connection and a Microsoft 365 subscription of the following SKU, Microsoft 365 Business Standard, Microsoft 365 Business Premium, Office 365 E3, Office 365 E5, Microsoft 365 E3, or Microsoft 365 E5.

4

Is Copilot included in all Microsoft 365 business licenses?

Availability depends on the specific Microsoft 365 business license. While it may be included in some plans, others may require additional subscription or licensing fees. Businesses should check their license agreement or consult with their Microsoft representative for clarification.

FAQs

5

Can I purchase Copilot as an add-on to my existing Microsoft 365 business license?

Depending on your license agreement and Microsoft's offerings, Copilot may be available as an add-on for certain Microsoft 365 business licenses. Contact Microsoft or your IT provider for information on purchasing Copilot as an add-on.

6

Can I transfer Copilot licenses between users within my organization?

Copilot licenses are generally assigned to individual users within an organization and may not be transferable between users. However, businesses should review their licensing agreement and consult with Microsoft or their IT provider for guidance on license management and transferability.

7

Is Copilot subject to additional terms or usage restrictions under my Microsoft 365 business license?

Copilot usage may be subject to additional terms, usage restrictions, or licensing agreements outlined in your Microsoft 365 subscription agreement. Review your licensing terms and conditions or consult with Microsoft or your IT Provider for clarification on any specific requirements or restrictions related to Copilot.

8

Are there any specific requirements or prerequisites for using Copilot with my Microsoft 365 business license?

Copilot typically requires compatible versions of Microsoft 365 applications and may have specific system requirements for optimal performance. Ensure that your organization's devices meet these requirements and that users have appropriate permissions to enable Copilot functionality.

Thank You!

#TimeToDoBig

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