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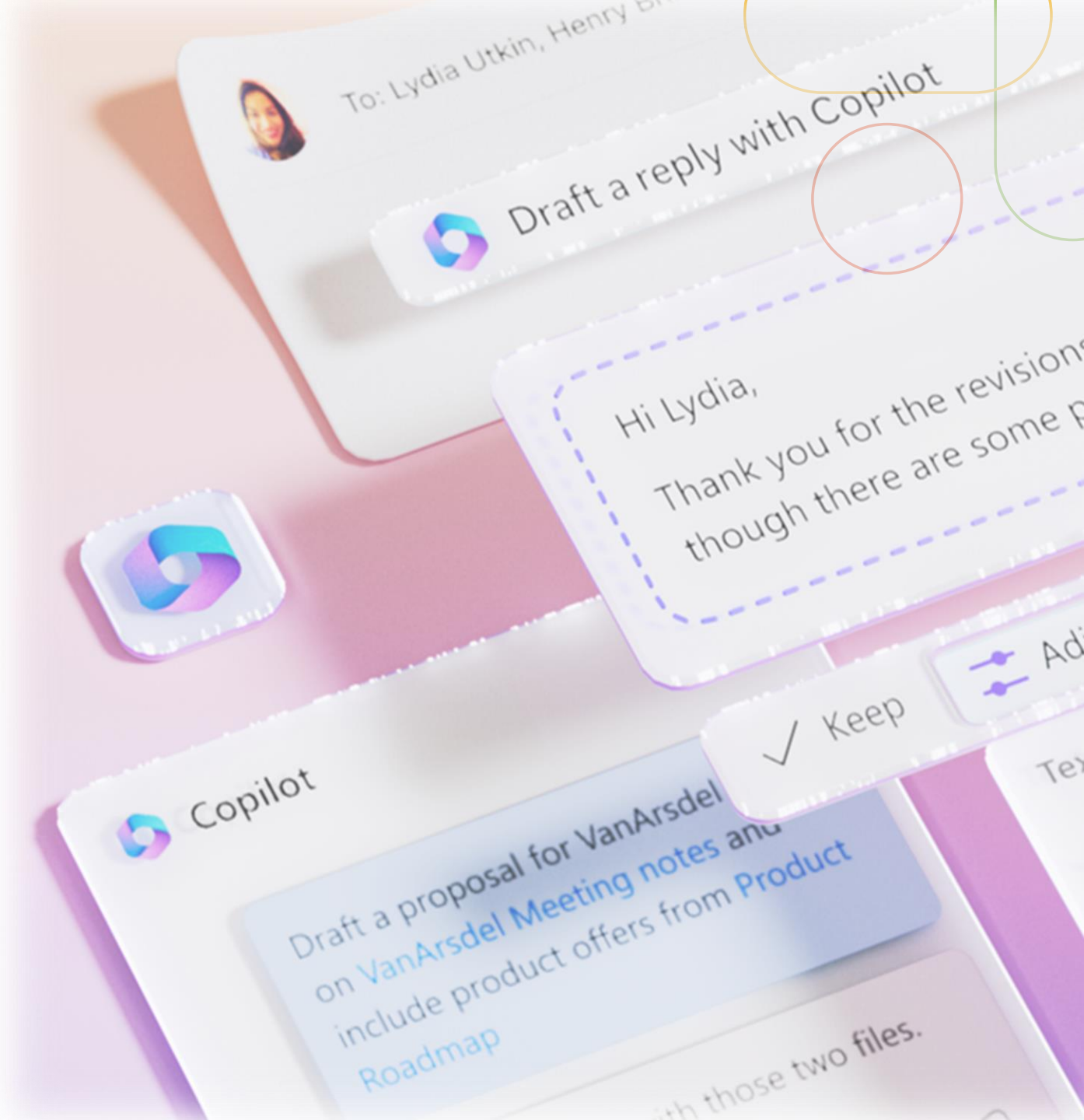
Copilot for  
Microsoft 365

Overview Webinar



# Agenda:

- Family of Copilots
- Copilot for Microsoft 365
  - Overview
  - Licensing & Availability
  - Use Cases
- Copilot with Commercial Data Protection
- Copilot for Sales
- Copilot for Service
- Copilot Studio
- Copilot Readiness
- Partner Opportunity
- Demo



# AI transformation opportunities



**Enrich** employee experiences



**Reinvent** customer engagement



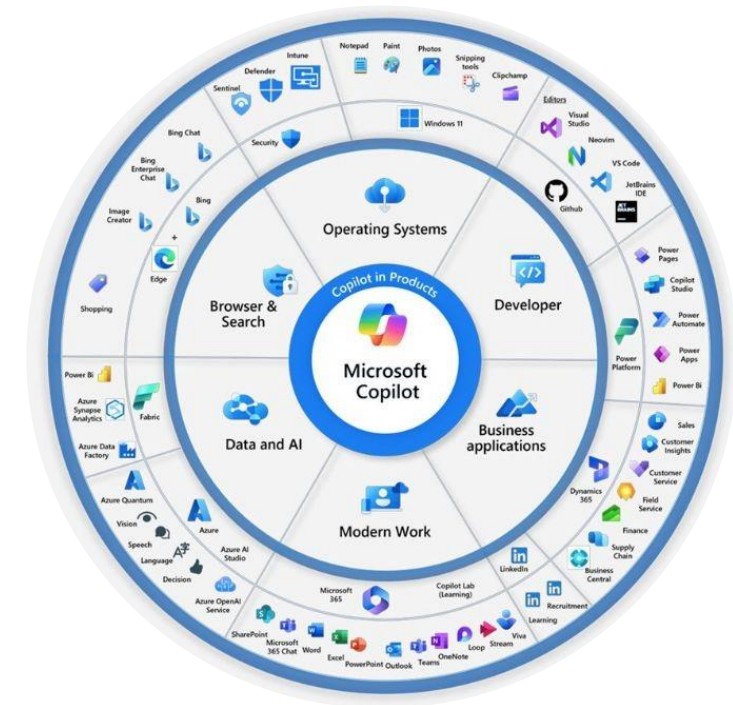
**Reshape** business processes



**Bend the curve** on innovation

# Family of Copilots

- 1 Copilot for Microsoft 365
- 2 Copilot
- 3 Windows Copilot
- 4 Copilot for Sales
- 5 Copilot for Service
- 6 Copilot in Dynamics 365
- 7 Security Copilot
- 8 GitHub Copilot
- 9 Power Platform Copilots
- 10 Copilot for Microsoft Fabric
- 11 Copilot in Microsoft Viva
- 12 Copilot Studio





# Copilot for Microsoft 365

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# Overview



Transforms the way users work by helping them generate content and complete tasks that consume time, creativity and energy, so that they can focus on more meaningful work



It leverages Large Language Models (LLMs) and your data in the Microsoft Graph and the Microsoft 365 Apps



Integrated into the Microsoft 365 Apps - Teams, Word, Outlook, PowerPoint, Excel, Whiteboard, Loop and OneNote



# Use cases



Create first drafts, add more content, summarise long documents, ask questions about the content with **Copilot in Word**



Analyse data and produce insights, sort and filter data, and generate formulas with **Copilot in Excel**



Transform word documents into a PowerPoint deck, summarise content, edit and format content, generate images with **Copilot in PowerPoint**

A screenshot of the Microsoft PowerPoint application interface. The title bar shows 'Presentation1 • Saved'. The ribbon includes 'File', 'Home', 'Insert', 'Design', 'Transitions', 'Animations', 'Slide Show', 'Review', 'View', and 'Help'. The 'Home' ribbon is active, showing options for undo, redo, copy, paste, and font settings (Aptos (Body), size 11, bold, italic, underline). The main slide area displays a presentation deck with three slides. The first slide is titled 'VanArsdel • WideWorld' and 'Proposal to supply sustainable building material'. The second slide is titled 'Our purpose at WideWorld Imports is to reduce our carbon footprint by making sustainability the norm.' The third slide is blank. A Copilot chat window is open on the right side of the screen. It contains the following text: 'Hi Daichi, how can I help you get started?'. Below this is a button that says 'Create a short presentation based on VanArsdel\_Proposal'. A larger text box contains: 'I've made the VanArsdel\_Proposal into 5 slides that should take about 10 minutes to present.' Below this text are 'Undo' and 'Like' buttons, and a '1 reference' dropdown. At the bottom of the chat window, there are buttons for 'Add animations to this slide' and 'Apply a modern style to the presentation'. A text input field at the very bottom says 'Describe what you'd like to create, or type / for suggestions'.

# Intelligent recap in Copilot

The screenshot displays a Microsoft Teams meeting interface. The main window shows a meeting titled "Product roadmap discussion" with a video player and a list of speakers: Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, and Bruno Zhao. A "Recap" tab is active, showing AI-generated meeting notes and follow-up tasks. A Copilot chat window is open on the right, displaying a prompt to create a table of pros and cons for a campaign option, with a table of results and a follow-up prompt to elaborate on the options.

**Intelligent recap**

**Copilot in Teams**

**Built-in and automated**

**Standardized**

**Video, speaker, and chapter markers**

**Available after meeting only**

**On-demand**

**Based on unique prompts**

**Conversational interaction, with citations**

**Available real-time (during & after meeting)**

Use **built-in meeting summaries** and **ask any question** about the meeting

\*Intelligent recap is also available in Teams Premium



# Licensing & Availability

## Pricing

- \$582NZD/per user/per year (RRP)
- Annual commit, pay annually ONLY
- No charity or education SKUs currently via CSP

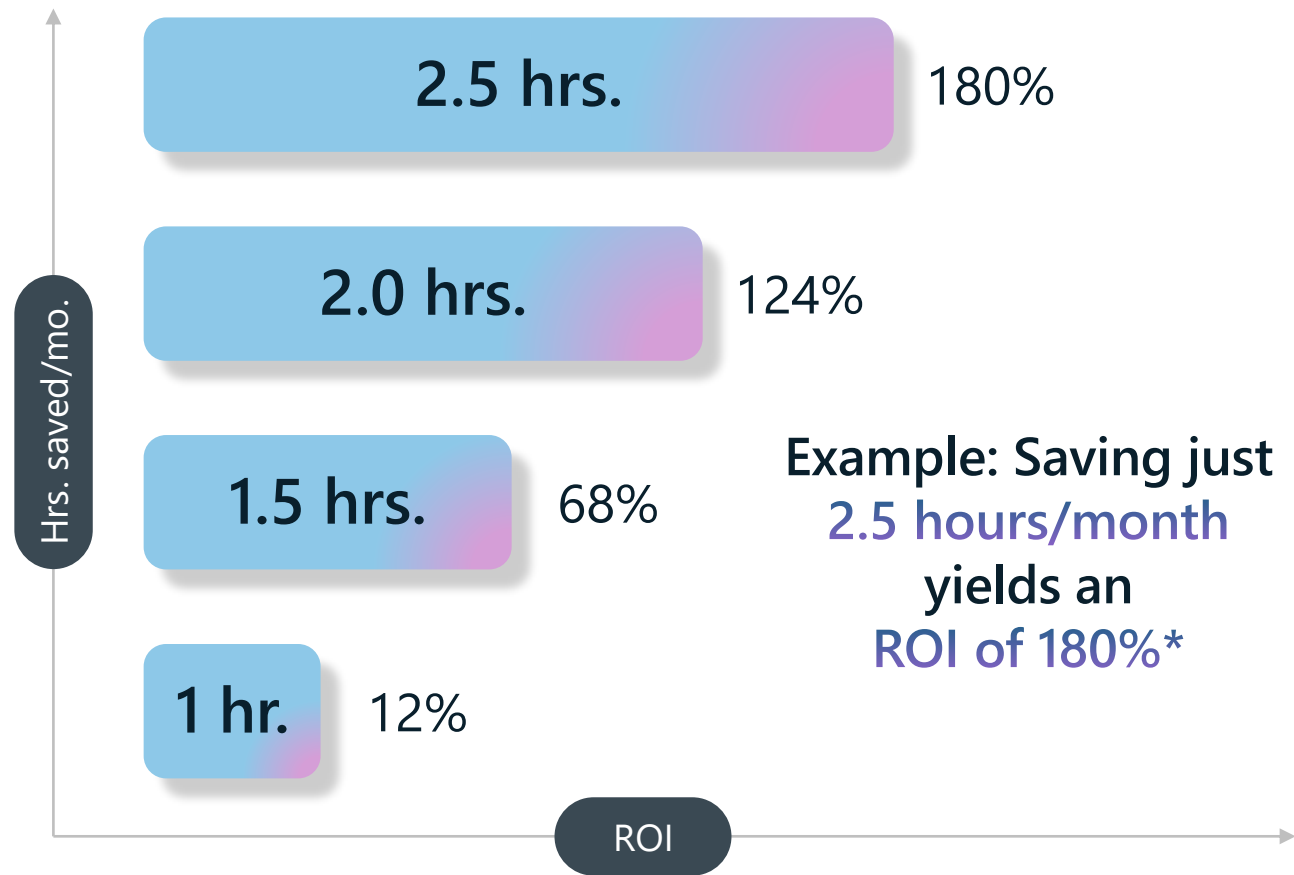
## Eligible Base Licenses

- Microsoft 365 E3/E5
- Office 365 E3/E5
- Microsoft 365 A3/A5 for faculty
- Office 365 A3/A5 for faculty
- Microsoft 365 Business Standard
- Microsoft 365 Business Premium

## Availability

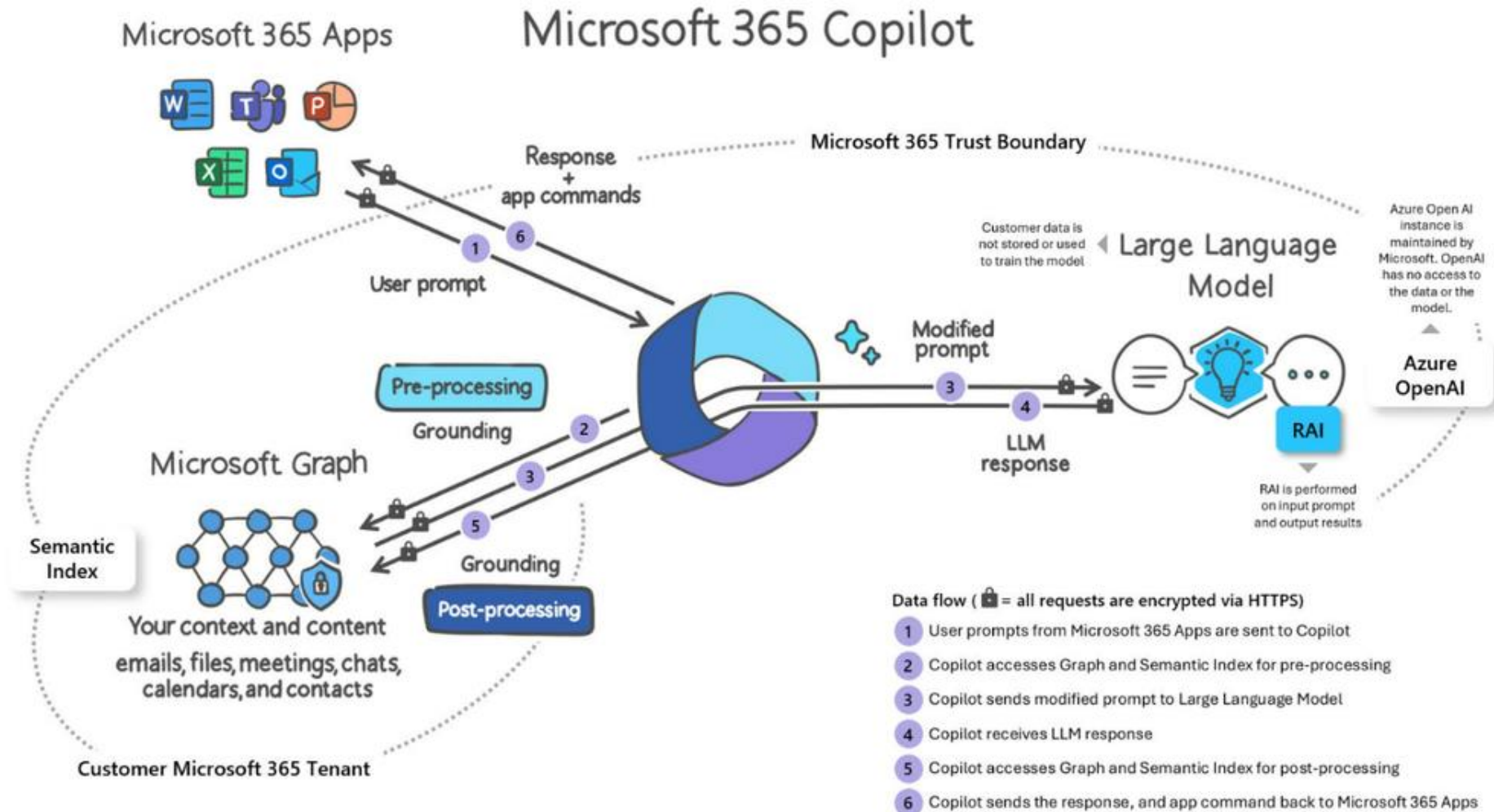
- All channels – no minimum seat purchase requirement
- No trial licenses
- No IUR licenses
- No demo tenants

# How much time can people save with Copilot for Microsoft 365?



\*At \$70,000 employee cost per year, 54 minutes per month = \$30 of employee's time  
See appendix for detailed calculations

# Data, Security & Privacy



# Semantic Indexing

Enablement Index-triggering logic	Bootstrap Create the index the first time	Steady state Updates are continuously being indexed
<p><u>Tenant-level</u>: <b>Automatically triggered from Copilot purchase</b> signal from commerce.</p> <p><u>User-level</u>: <b>Automatically triggered</b> based on <b>Copilot license</b> assignment.</p>	<p><u>Tenant-level</u>: Reaches <b>95% coverage</b> of SPO text-based documents in <b>1 week</b> and full coverage in up to 28 days. Can start query index after 1 week.</p> <p>User-level: User's mailboxes are semantic index-enabled in <b>2 days on average for 99% of users</b> and up to 2 weeks for outliers. Can start query the index as soon as the mailbox is enabled.</p>	<p><u>Tenant-level</u>: <b>Word semantic search</b> (e.g., dog -&gt; pet): Processed in <b>near-real-time</b>. <b>Sentence semantic search</b> (e.g., "FY25 Project A Budget forecast"): Can take <b>up to 48 hours</b> to be indexed.</p> <p><u>User-level</u>: <b>Updates and new content</b> is processed in <b>near-real-time</b>.</p>

# Copilot with Commercial Data Protection

## Overview

Previously Bing Chat Enterprise

AI-powered chat for the web

Accessed via:

<https://copilot.microsoft.com/> or <https://www.bing.com/chat> or Copilot in Edge or Copilot in Windows

## Use Cases

Summarise long articles/PDFs

Research, find answers, analyse data

Generate content or images

## Licensing

M365 E3/E5

M365 F3

M365 Business Standard

M365 Business Premium

M365 A3/A5 for faculty and students (18+)

O365 A1/A3/A5 for faculty and students (18+)

## Security

Doesn't retain chat prompts or responses

Data is not used to train underlying AI models

Chat data encrypted in transit & at rest

Must be signed in & licensed



# Microsoft Copilot for Sales

Your everyday AI assistant for sales teams

## Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



### CRM platform

Salesforce Sales Cloud  
Microsoft Dynamics 365 Sales  
Sales insights, content, and recommendations



Commercial data protection



The Internet



Microsoft 365 Apps



Copilot Studio



# Microsoft Copilot for **Service**

Your everyday AI **assistant** for **service teams**

## Natural Language



Large Language Models (LLMs)



Web grounding



Microsoft Graph grounding



Enterprise-grade data protection



**Contact center systems**

Surface knowledge, summarize cases and conversations, draft contextual responses, and more



Commercial data protection



The Internet





Microsoft 365 Apps



Copilot Studio

# Copilot feature comparison

	 <b>For Individuals</b>	 <b>For Organisations</b>		
	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$20	Free	\$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

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.



# Copilot feature comparison



	Copilot	Copilot for Microsoft 365	Copilot for Sales	Copilot for Service
	Free	\$30	\$50	\$50
Foundational Capabilities	●	●	●	●
Web grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Enterprise-Grade Data Protection		●	●	●
Graph Grounding		●	●	●
Microsoft 365 Apps		●	●	●
Copilot Studio		●	●	●
Role Specific capabilities			●	●

Introducing



# Copilot Studio

Connect to data

Create and orchestrate  
sophisticated logic

IT manageability  
& control

# Licensing



It's licensed on a per-tenant basis with the 'Copilot Studio' standalone subscription



The customer is charged based on billed messages



Each user authoring a bot needs the Copilot Studio User License (\$0)



Limited features included in Copilot for M365 – creating plugins for M365 apps





# Copilot Readiness

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# The AI-powered Organisation

01



Foundational  
productivity



02



Copilot for  
Microsoft 365

# Considerations



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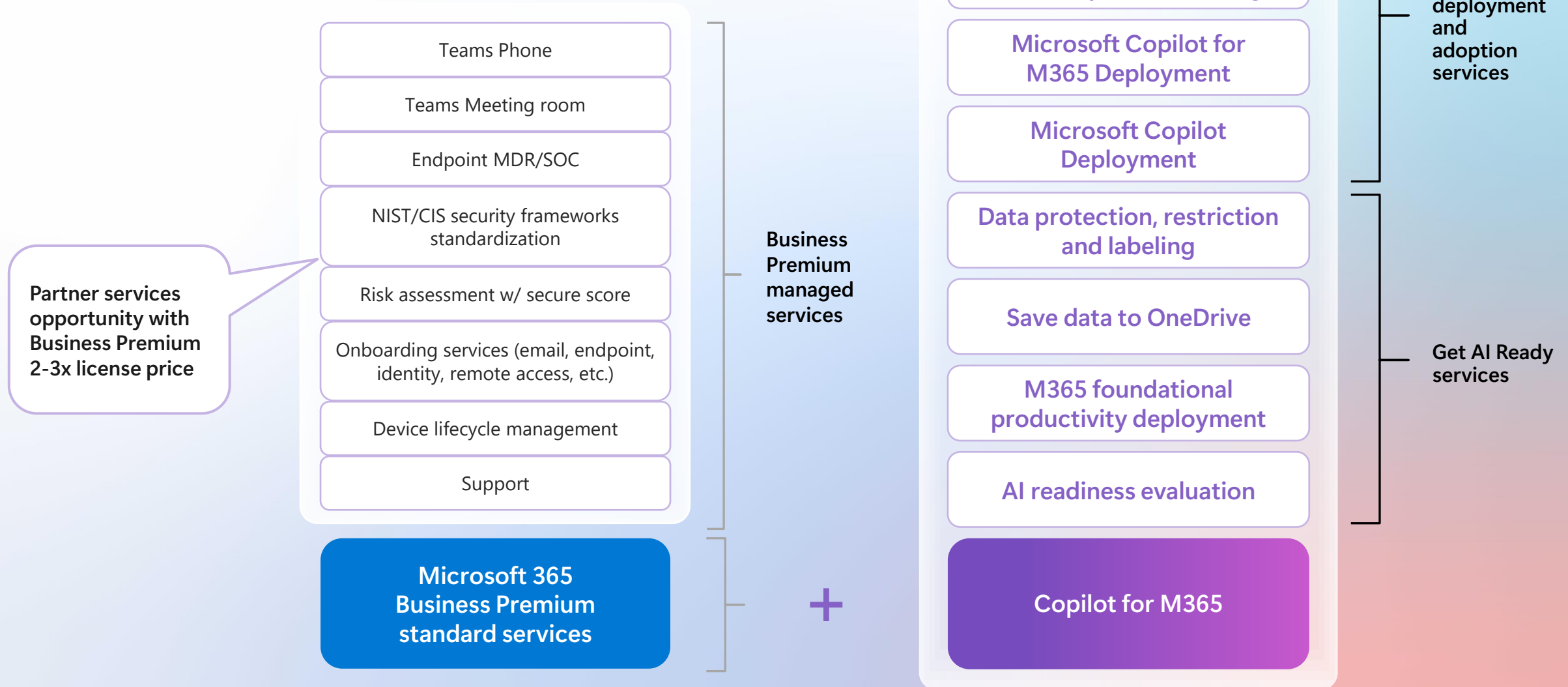
- On-prem customers – begin discussions around migrating to the cloud
- Does the customer have the appropriate licenses – review licenses & renewals
- Does the customer have specific use cases/scenarios that they believe can be enhanced by AI?
- How will you identify/define user profiles who will benefit most from Copilot?
- Does the customer have a central location for data storage?
- Does the customer have a clear permission model for their data?
- Do you have an end user adoption plan for Copilot?
- How do you see your business changing with AI?
- Is AI going to be a focus for your business?
- Do you have resource to support your customers with adopting AI?
- Do you feel prepared to have conversations with your customers about AI?
- Do your customers understand what AI is?
- Will you develop an AI practise or partner with another MS partner to deliver AI support and services?
- How can you prepare and train your employees to be ready for AI?



# Partner Opportunity

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# Copilot brings additional CSP revenue and profitability opportunities







## Security and Compliance controls for Copilot for Microsoft 365

### Essential security controls



#### Copilot + M365 Business Standard

**Multi-factor Authentication**  
with security defaults

**Device-based access & security controls**  
for M365 resources

**Basic content and keyword search**  
for Copilot generated data

### Comprehensive security controls



#### Copilot + Microsoft 365 Business Premium

Everything in M365 Business Standard, plus:

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

**Terms of use policies** to accept before getting access

**Restrict saving business data and files** to approved applications only

**Protect sensitive M365 data from exfiltration** and improper use (files & emails only)

**eDiscovery, litigation hold and retention policies**



## Security and Compliance controls for Copilot for Microsoft 365

### 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



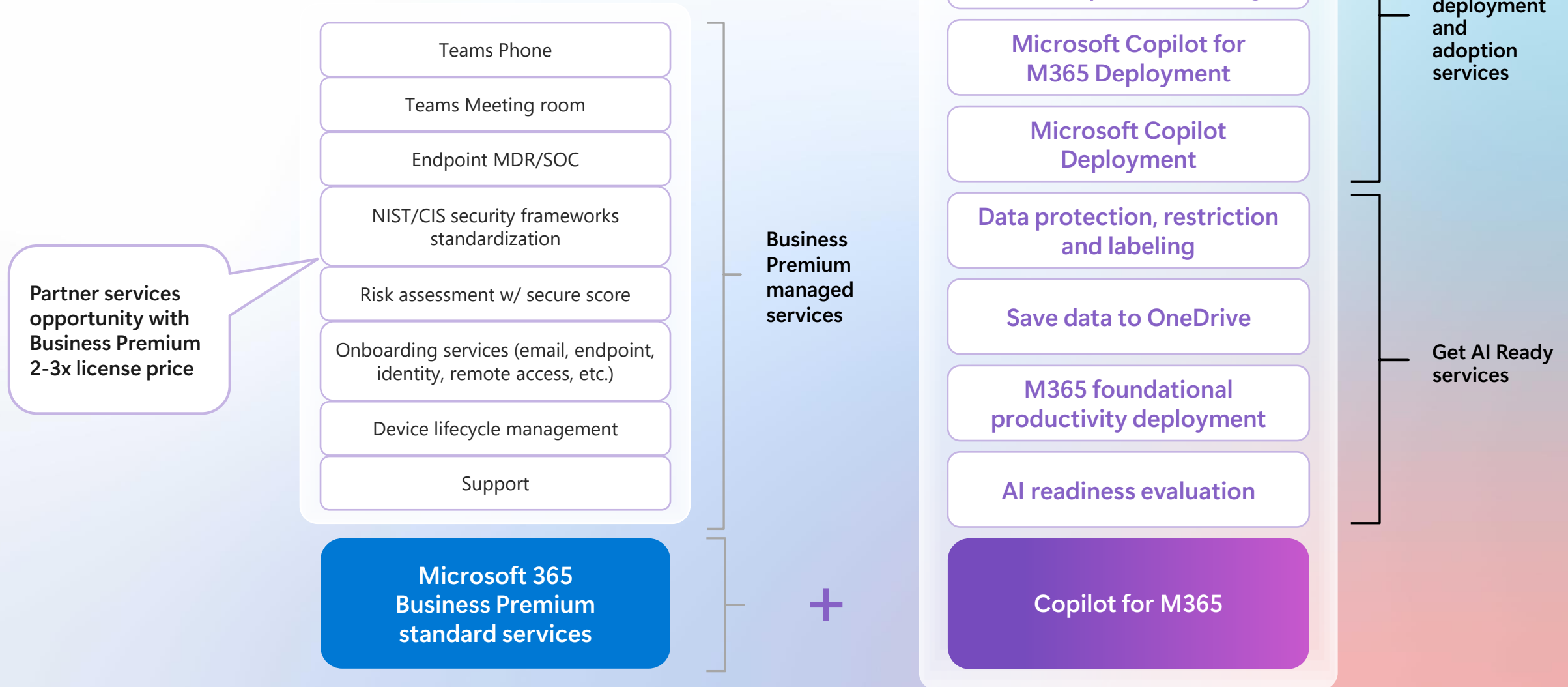
Copilot +  
Microsoft 365 E5

**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**


# Copilot brings additional CSP revenue and profitability opportunities





# Copilot for Microsoft 365 Demo

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**Q&A**