

September 23, 2024

PERSPECTIVE

CHANGES EVERYTHING.

Microsoft Copilot as your AI Assistant
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WIPFLI

Agenda

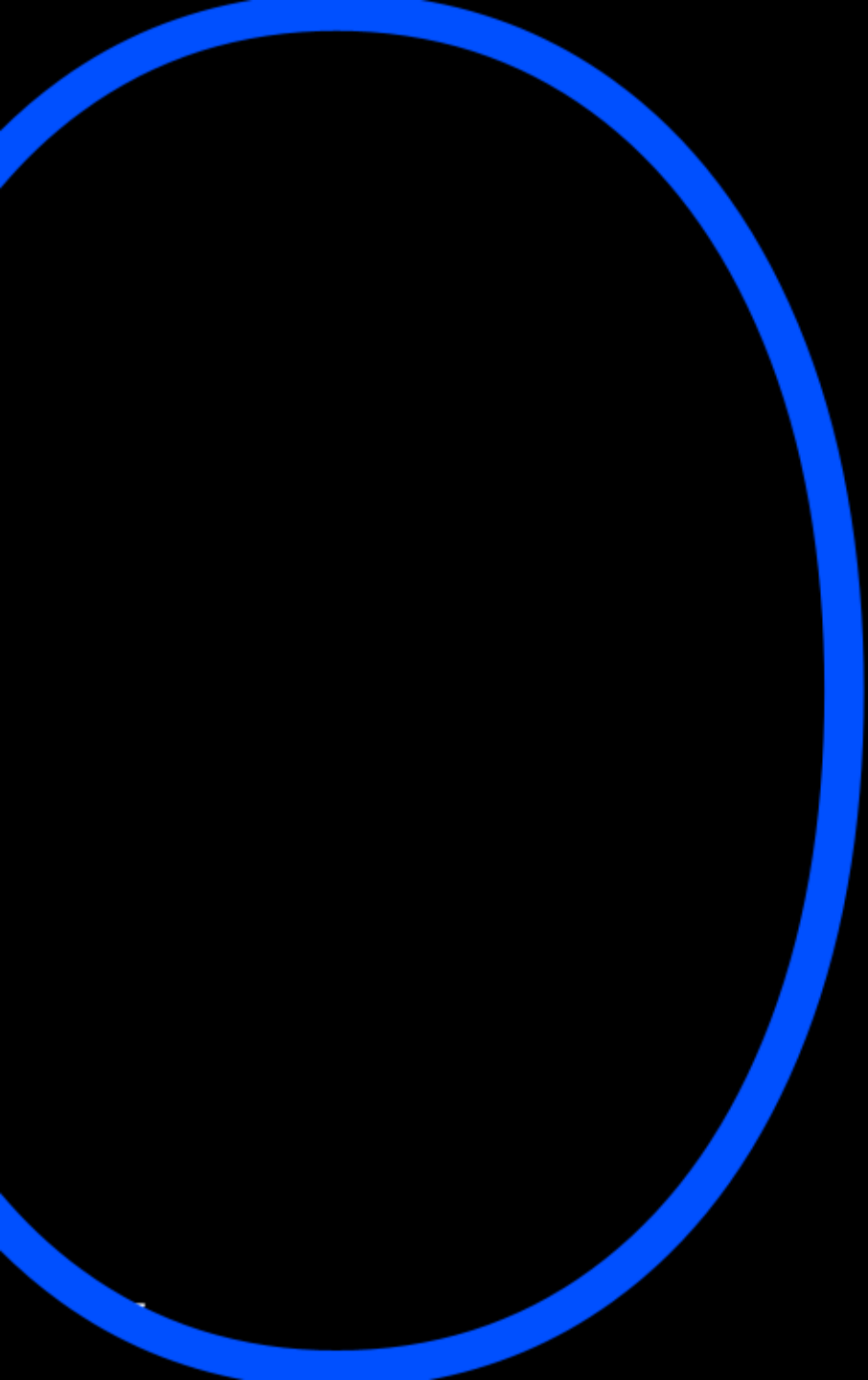
Microsoft's AI-powered assistant

Copilot for Microsoft 365 in action

Trust / risk / security considerations

Success management and adoption

Gartner benchmarking data



Microsoft's AI-powered assistant

Impact by workflow



Effective meetings

- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting



Data analysis

- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations



Content creation

- Jump-start creativity, and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts and tables



Email processing

- Draft email replies instantly
- Personalize the tone and length, even on the go
- Quickly summarize a long email thread

Impact by Function



HR

- Communicate policies and draft job descriptions
- Create stunning training materials
- Easily respond to job applicants' or employees' emails



Marketing

- Identify relevant market trends and segments
- Create the first draft for a project
- Summarize campaign results with powerful visuals



Sales

- Have better sales conversations and close more deals
- Create sales presentations and proposals
- Analyze sales data from previous quarters



IT

- Create a project plan for a product rollout
- Stay up to date on various project calls and chats
- Identify patterns in data and solve issues faster



Finance

- Simplify financial reporting and planning
- Identify performance improvements
- Report metrics using professional charts

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



Copilot feature comparison

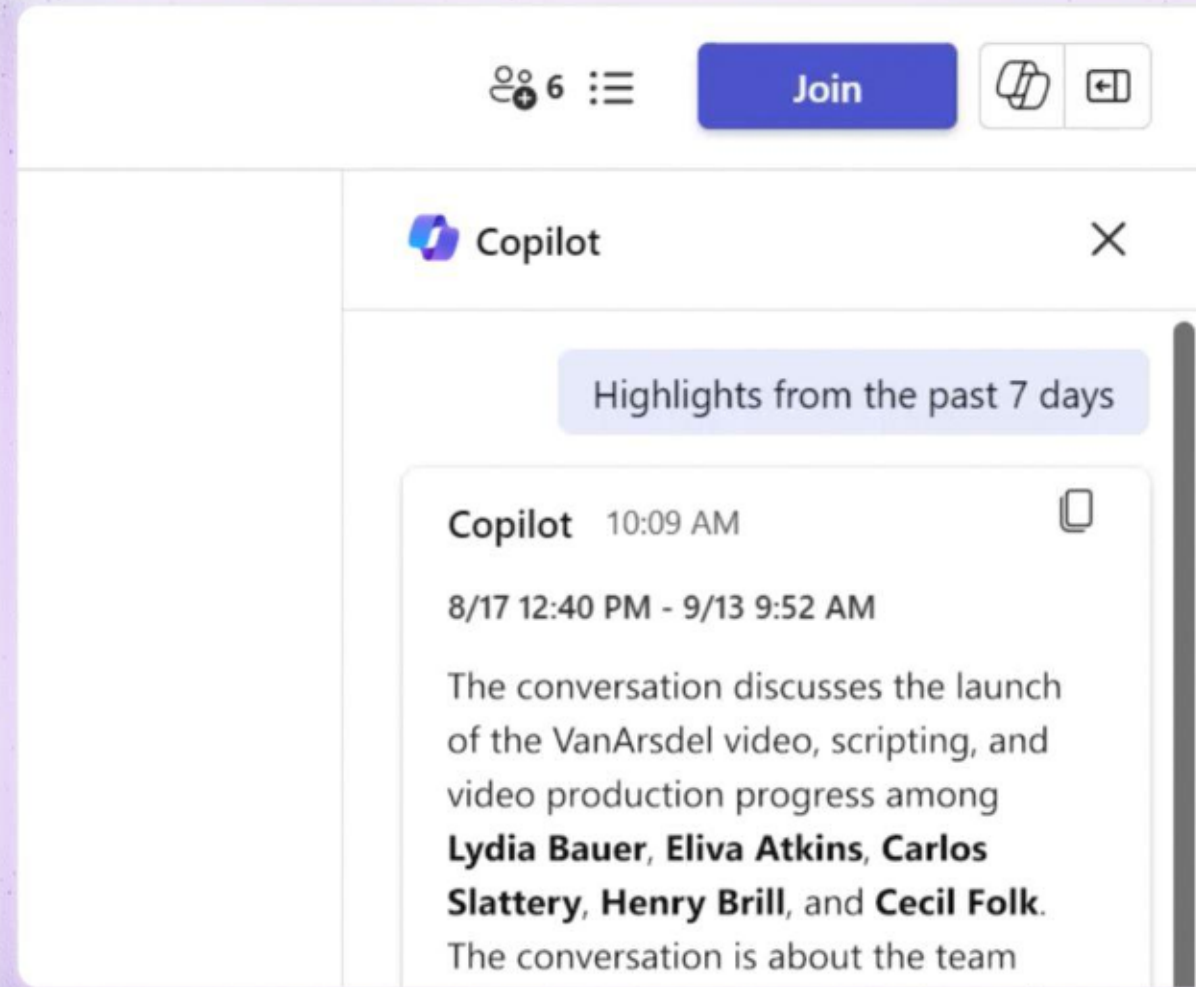
	Copilot	Copilot for Microsoft 365
	Free	\$30
Foundational capabilities	●	●
Web grounding	●	●
Commercial data protection	●	●
Enterprise-grade data protection		●
Microsoft graph grounding		●
Microsoft 365 apps		●
Copilot Studio		●



**Copilot for Microsoft
365 in action**

Copilot in Teams

Catch up on meetings



The screenshot shows the Microsoft Teams Copilot interface. At the top right, there is a 'Join' button and icons for a meeting (6 participants), a list, and a share icon. Below this, the Copilot logo is visible. A section titled 'Highlights from the past 7 days' contains a message from Copilot at 10:09 AM. The message provides a summary of a meeting held from 8/17 12:40 PM to 9/13 9:52 AM, discussing the launch of the VanArsdel video, scripting, and video production progress among Lydia Bauer, Eliva Atkins, Carlos Slattery, Henry Brill, and Cecil Folk. The message concludes with 'The conversation is about the team'.

6 :≡ Join

Copilot

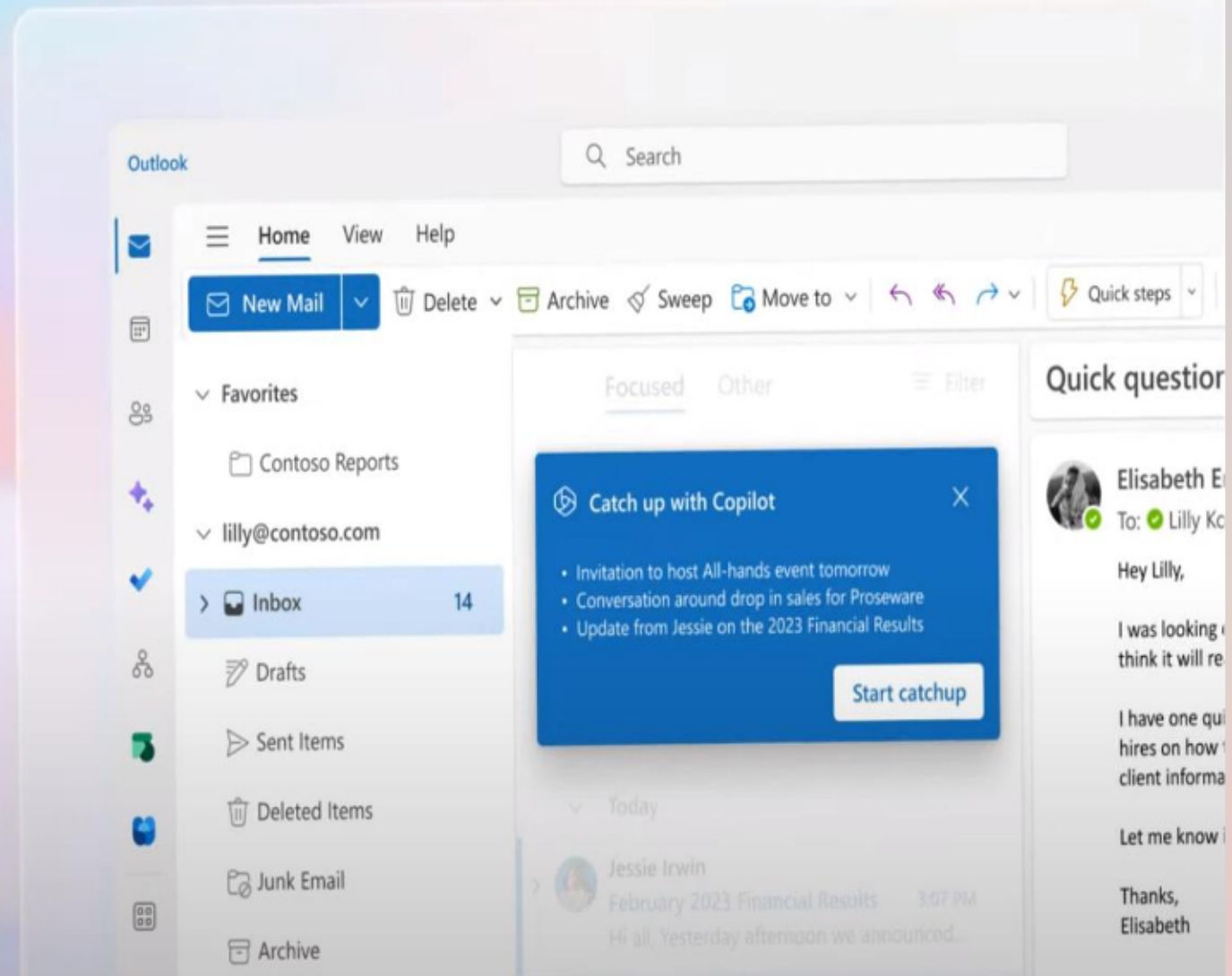
Highlights from the past 7 days

Copilot 10:09 AM

8/17 12:40 PM - 9/13 9:52 AM

The conversation discusses the launch of the VanArsdel video, scripting, and video production progress among **Lydia Bauer, Eliva Atkins, Carlos Slattery, Henry Brill, and Cecil Folk.** The conversation is about the team

Copilot in Outlook



MICROSOFT 365

Copilot in Word



Document - saved

File Home Insert Draw Design Layout References Mailings Review View Help

Paragraph (Body) 11 B I U

assistance to file, members, and posts. Our recycled steel from reputable suppliers and meets all quality standards.

Flax-based polyurethane rigid foam	This is an innovative insulation material that is made from such as cotton or wool. It has excellent thermal and a properties, as well as the environmental impact. It is also and maintain.
Cork	Cork is another fast-growing renewable material that can flooring, wall panels, insulation, and furniture. It has a soft and appearance that can create a warm and cozy at home has good sound absorption and thermal insulation quality.
Recycled plastic	Recycled plastic can be used to make various products & items, panels, beams, or furniture. It helps reduce plastic use energy and resources. It also has high durability, and and low maintenance requirements.

Design Timeline

Our team of experts is available to work with Verastat, to ensure it delivering the best possible solution.

Next Steps

We would be honored to further discuss this opportunity with Verastat information about our products, services, and pricing. To proceed, [contact us through our website.](#)

MICROSOFT 365

Copilot in PowerPoint



A screenshot of a Microsoft PowerPoint presentation. The slide displays a search result for a document titled "Proposal to supply sustainable building material". The search interface includes a search bar at the top with the text "Proposal to supply sustainable building material" and a magnifying glass icon. Below the search bar, there are several search results. The first result is a document titled "Proposal to supply sustainable building material" with a green background and white text. The second result is a document titled "VanArman & YardsWorld" with a green background and white text. The third result is a document titled "Building" with a brown background and white text. The background of the slide is a blurred image of a city skyline.



**Trust / Risk / Security
Considerations**

Trust / Risk / Security Concerns with M365 Copilot

- **Sensitive data exposure**
Copilot inherits the security rules in your M365 tenant. Excessive sharing can expose sensitive data.
- **Inaccurate results**
Copilot gets things wrong. Answers may be based on redundant, outdated, and trivial content.
- **Information life cycle**
Prompts and completions may be subject to discovery requests. Meeting transcripts may contravene internal and external policies

Microsoft's AI principles

Microsoft Cloud — AI you can trust

- Your data is **your** data.
- Your data **is not** used to train OpenAI foundation models without permission.
- Your data is **protected** by the most comprehensive enterprise compliance and security controls.



Fairness



Reliability
and
safety



Privacy
and
security



Inclusiveness



Transparency



Accountability

4 Key Risks for Copilot for M365

1. Overpermissioned Files to Unauthorized or Unintended Users

- Acceptable Use Policy and Awareness Training
- Data Access Governance Tool to report and clean up excessive permissions
- Insider Risk Management Tools to detect abnormal file and download activities

4 Key Risks for Copilot for M365

2. Sensitive data could potentially leave M365 tenant through Copilot's integration with 3rd party applications (e.g. Bing Search)

- Administrators have full control to enable and disable plug-ins as well as web content plug-in

4 Key Risks for Copilot for M365

3. Copilot output could include hallucination, toxic output, or copyright protected content

- Grounding to clean data
- AUP and awareness training
- Azure AI content safety
- Examine Microsoft's Copilot's copyright commitment

4 Key Risks for Copilot for M365

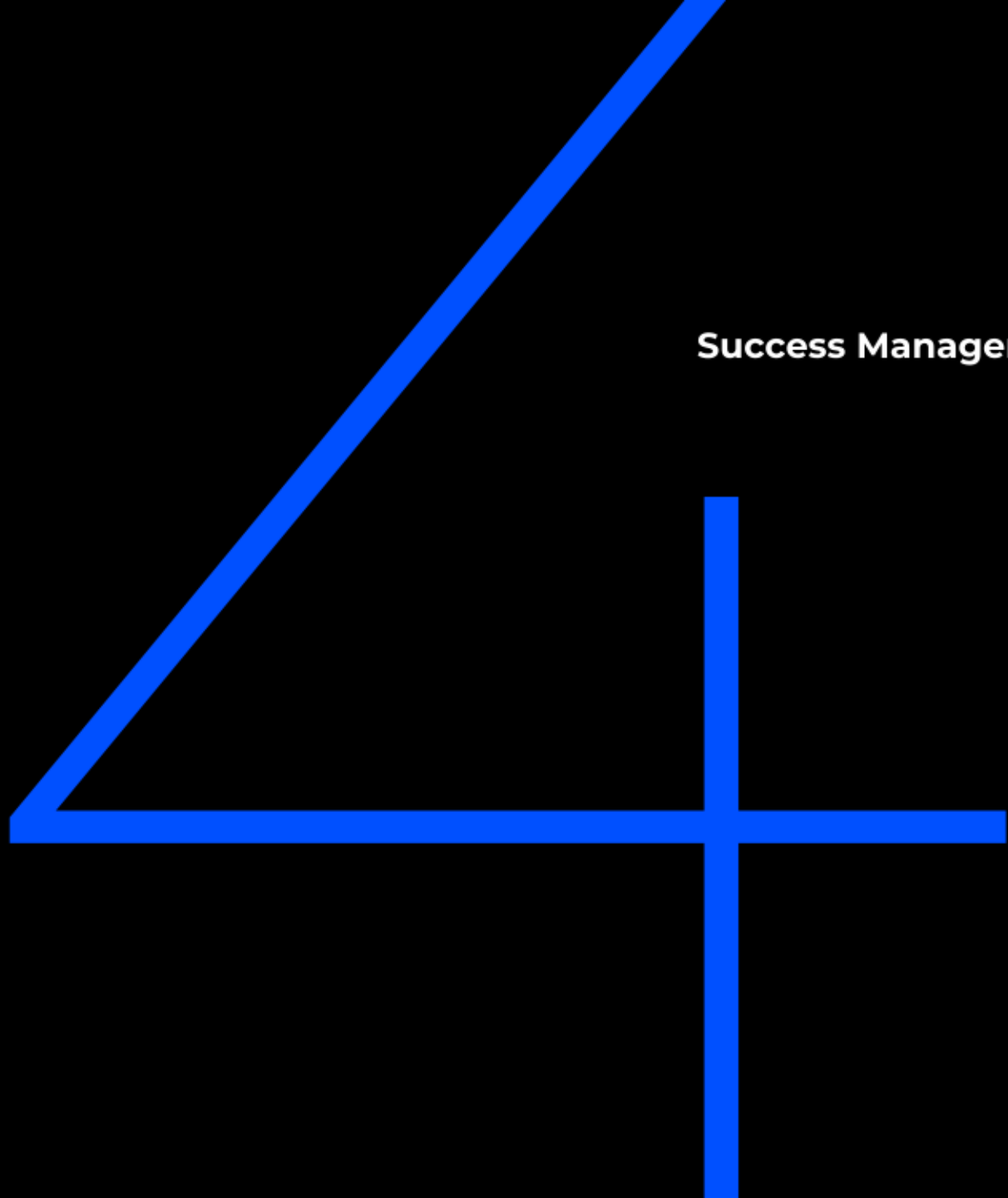
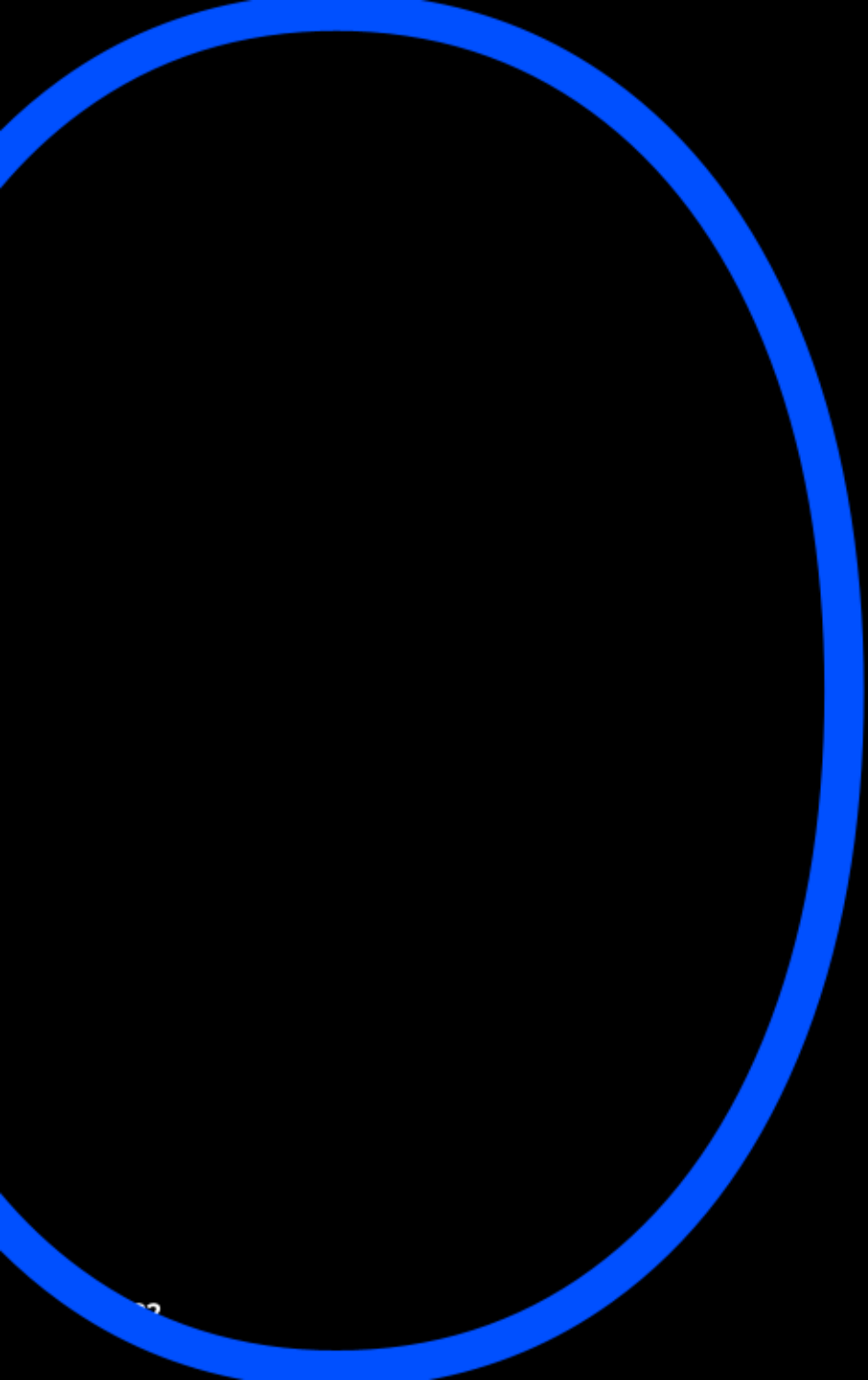
4. Copilot for M365 is susceptible to prompt injection

- AUP and Awareness Training
- Azure AI Content Safety
- Proactive monitoring and governance

Other considerations

Questions to ask

- Has your AU policy been updated to include AI?
- Has a risk assessment been completed?
- Have M365 permissions been audited?
- How will we monitor for anomalies?
- How do we ensure LLM's aren't poisoned or that they introduce bias?
- What are our retention requirements for transcribed Teams meetings?
- Has our vendor management program been updated to identify risk associated with vendors' utilization of AI?

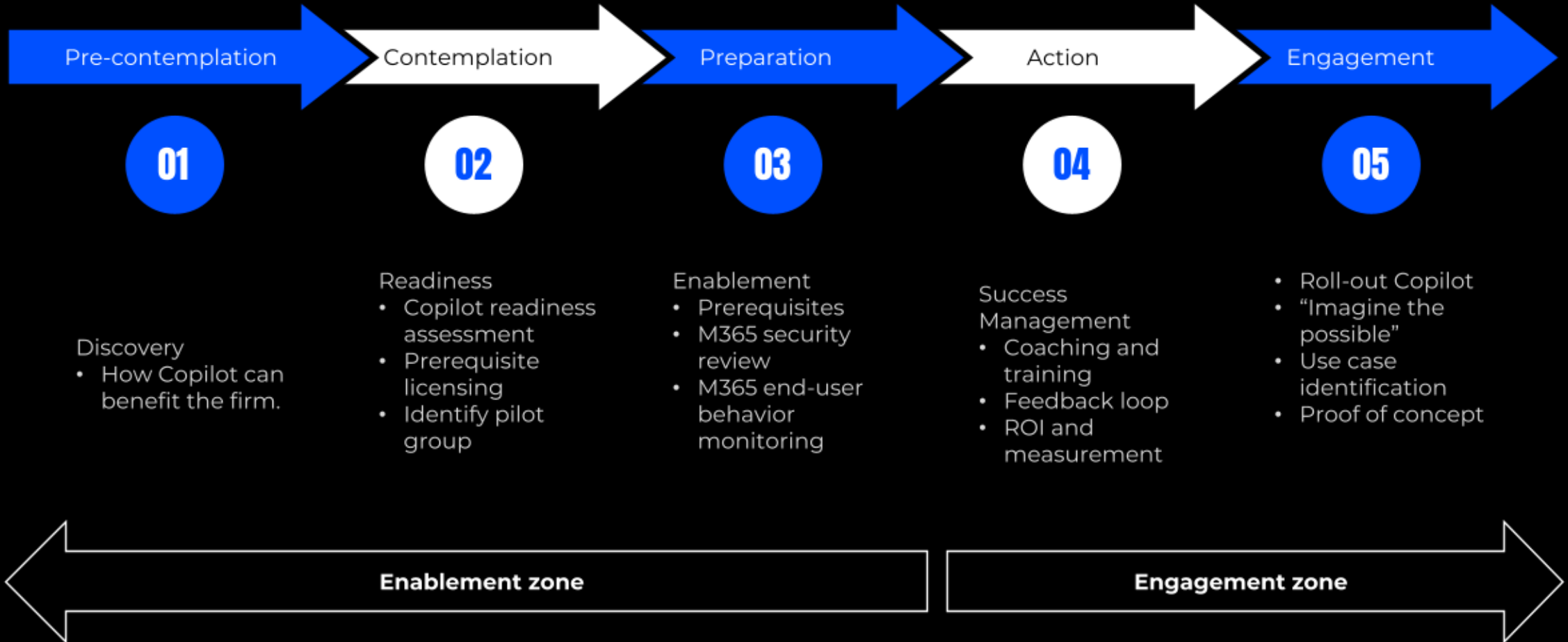


**Success Management and
Adoption**

Ready to get started?



Copilot Client Journey

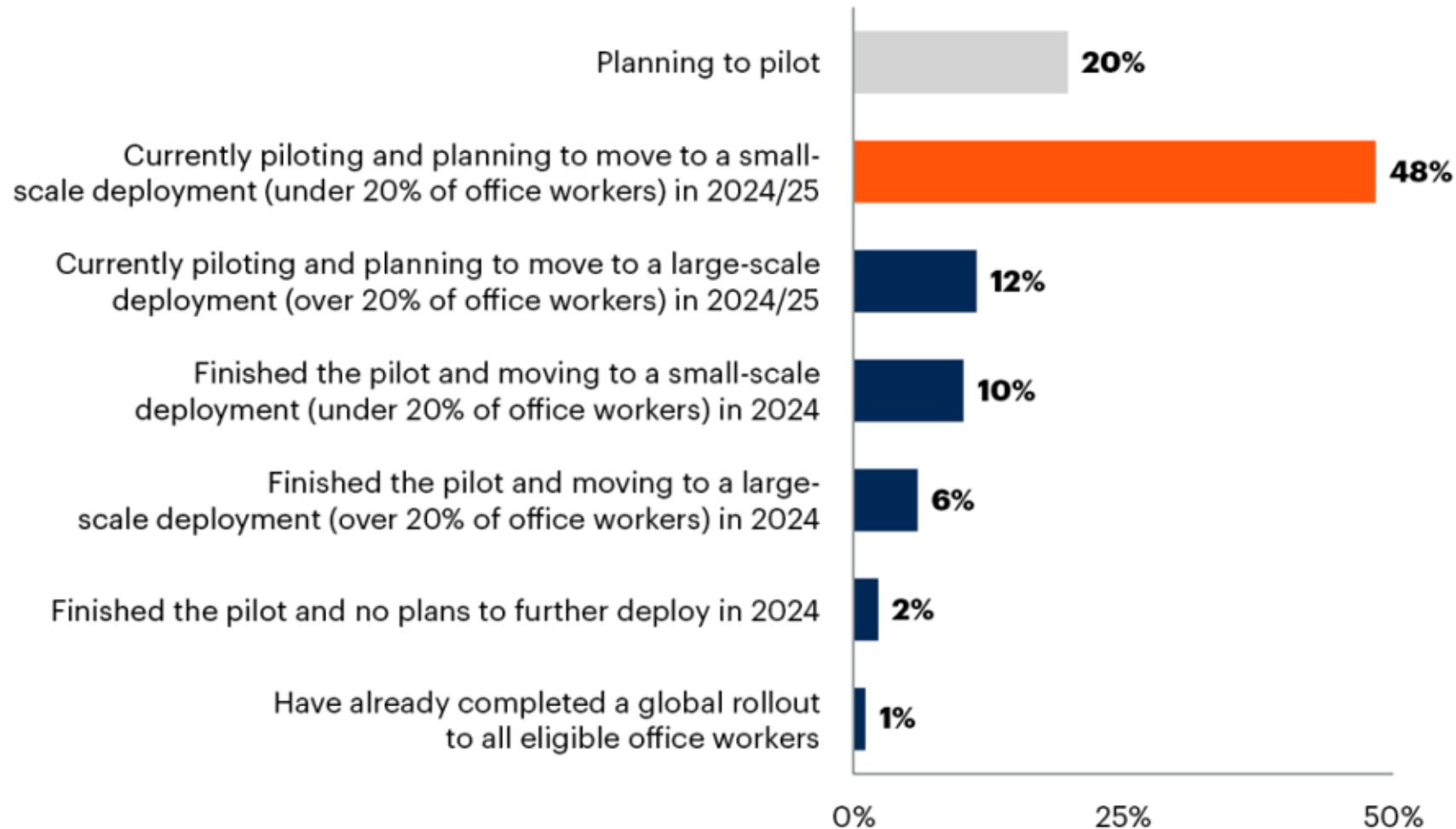


Q5

Gartner Benchmarking

Status of Implementing Copilot for Microsoft 365

Percentage of respondents



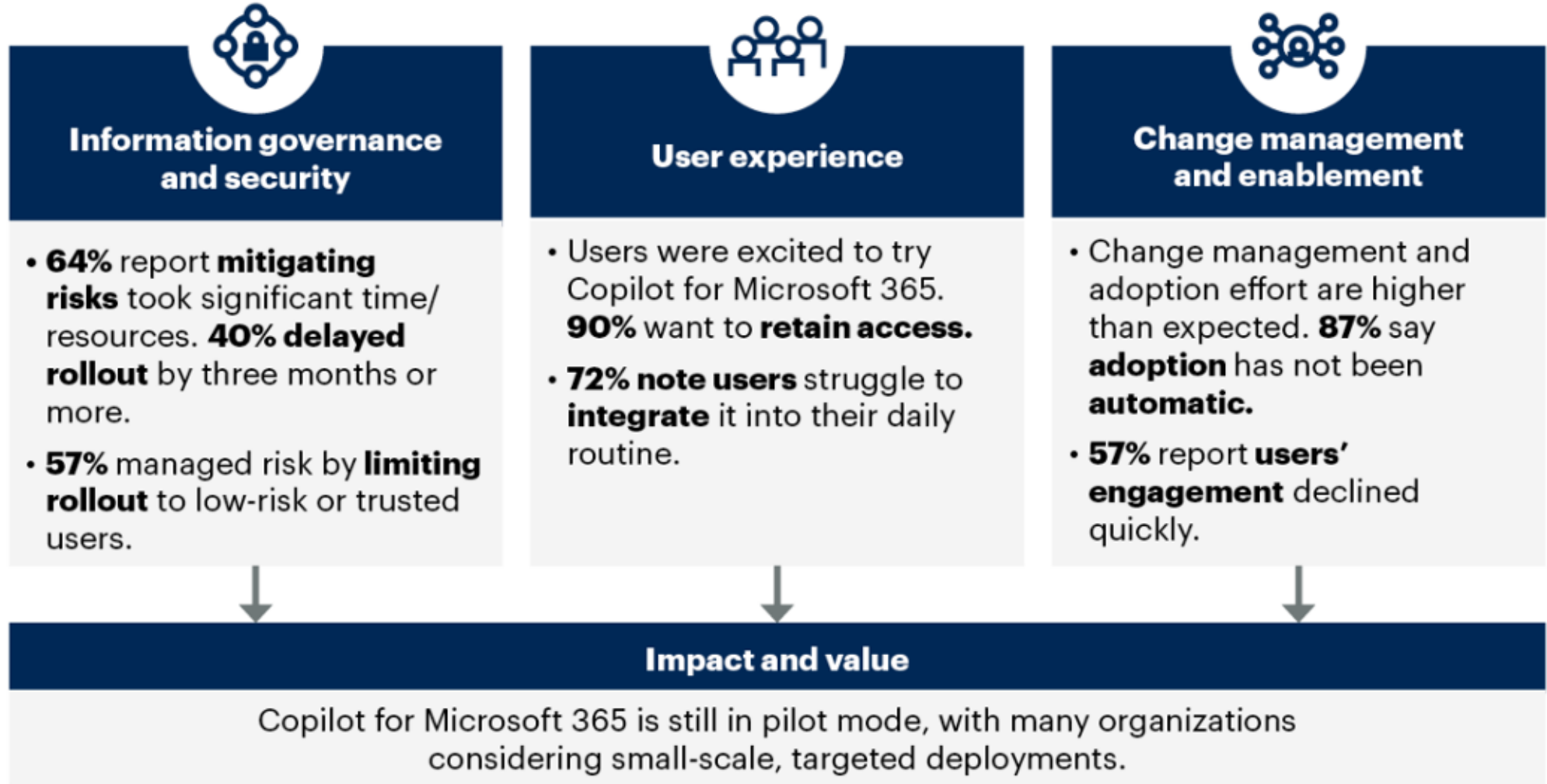
n = 165; IT leaders primarily responsible for Copilot for Microsoft 365, excluding "don't know"

Q: Which best describes the status of implementing Copilot for Microsoft 365 in your organization?

Source: 2024 Gartner Impact of GenAI in the Digital Workplace Survey

Note: Respondents who selected "planning to pilot" were excluded from the rest of the survey. Percentages may not add up to 100% because of rounding.

Copilot for Microsoft 365: Key Survey Findings



Source: Gartner
818800_C

Thank you!

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