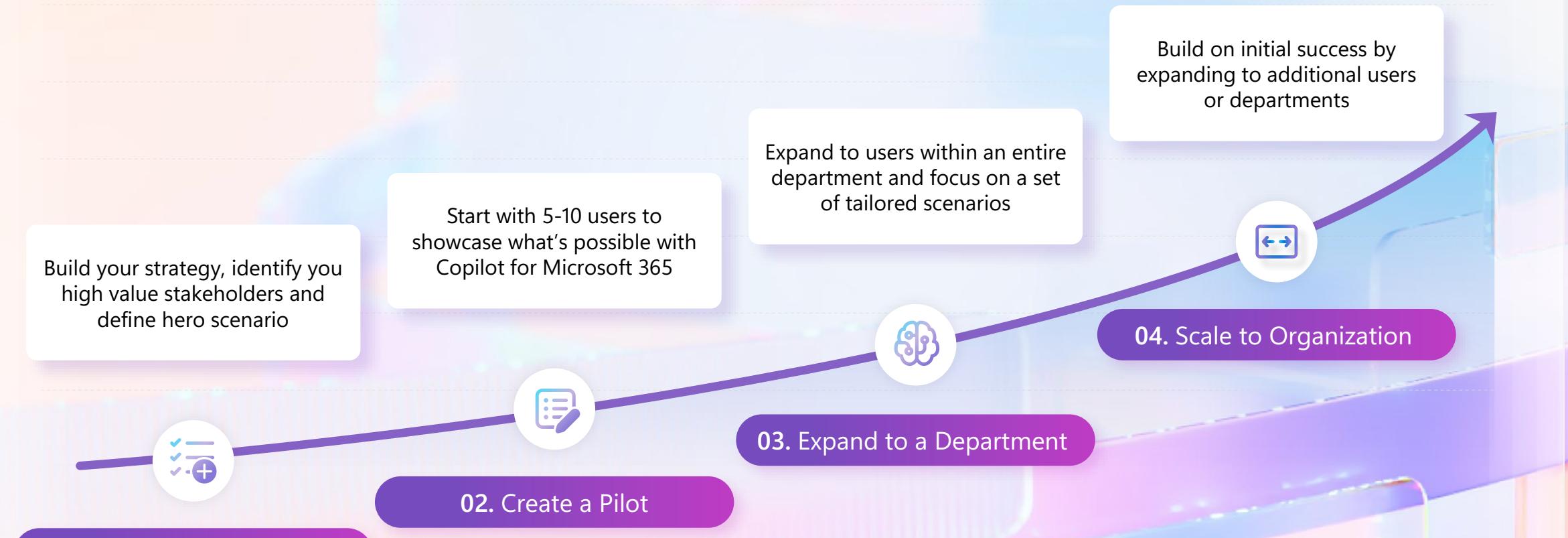




CSP Level Up In-Person Technical Training



Four steps to drive Copilot success with customers



Steps to drive Copilot success with customers



Get Ready

1

Secure LT sponsorship and identify single line of business to pilot

2

Identify success owners and detail high value personas

3

Define success criteria, KPIs, and success measurement plan

Steps to drive Copilot success with customers



Create a
Pilot

1

Launch a pilot for 5+ users and help them get started

2

Prepare and deploy Copilot for M365

- Discover, label, and protect data
- Migrate data to Microsoft 365
- Implement Identity and Access Management
- Configure Copilot and assign licenses

3

Drive Adoption

- Identify Copilot Champions (decision makers)
- Build and execute adoption plan
- Deliver adoption training and materials on Copilot for Microsoft 365

Steps to drive Copilot success with customers



Expand to
a Department

- 1 Review success measures and gather and amplify success stories
- 2 Create deployment and adoption plan jointly with customer
- 3 Rollout Copilot licenses to the rest of the department
- 4 Tailor Copilot for the specific department leveraging Copilot Studio

Steps to drive Copilot success with customers



Scale to
Organization

1

Build an org-wide Copilot adoption plan

2

Establish the business case and ROI with Copilot Dashboard

3

Support customer with adoption & change management services

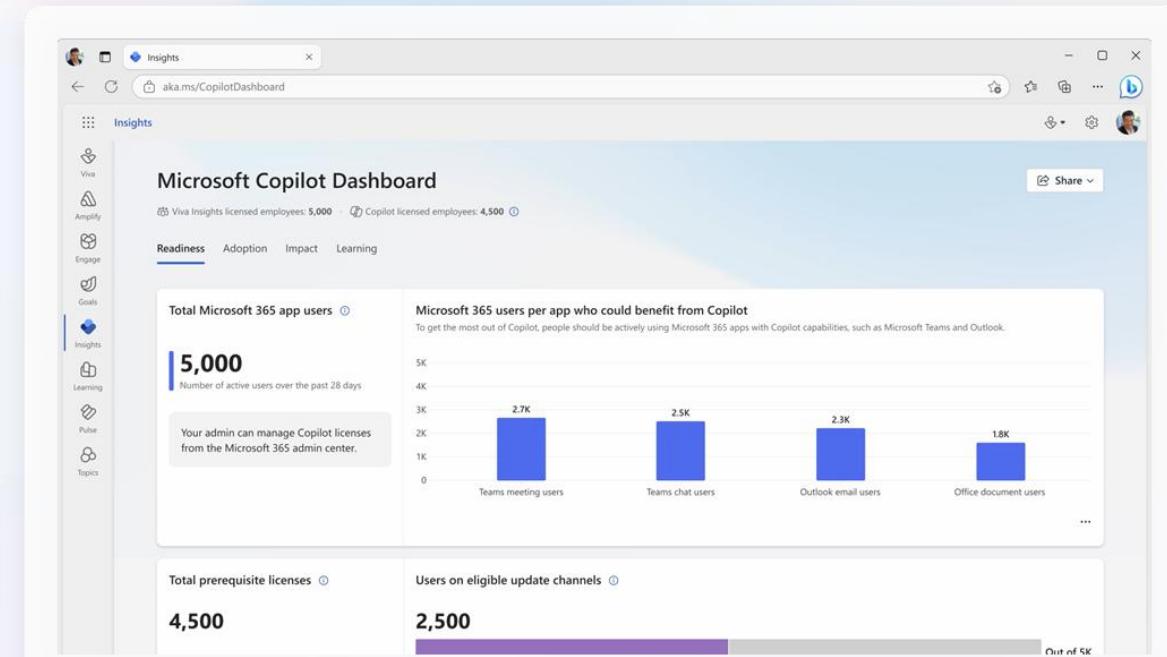
4

Pilot role-based Copilots (Copilot for Sales / Service)

Measure the impact of your Copilot investment

With the Microsoft Copilot Dashboard powered by Viva, business decision makers and IT leaders can plan their AI readiness, drive adoption and measure the impact of their Copilot investment.

- Plan for Copilot readiness across Microsoft 365 and track by app
- Evaluate Copilot adoption across apps and by feature
- Analyze the potential impact of Copilot across meetings, email, chat, and documents
- View employee sentiment about the value and benefits of Copilot
- Learn about the latest research and findings about AI



Viva for Measurement

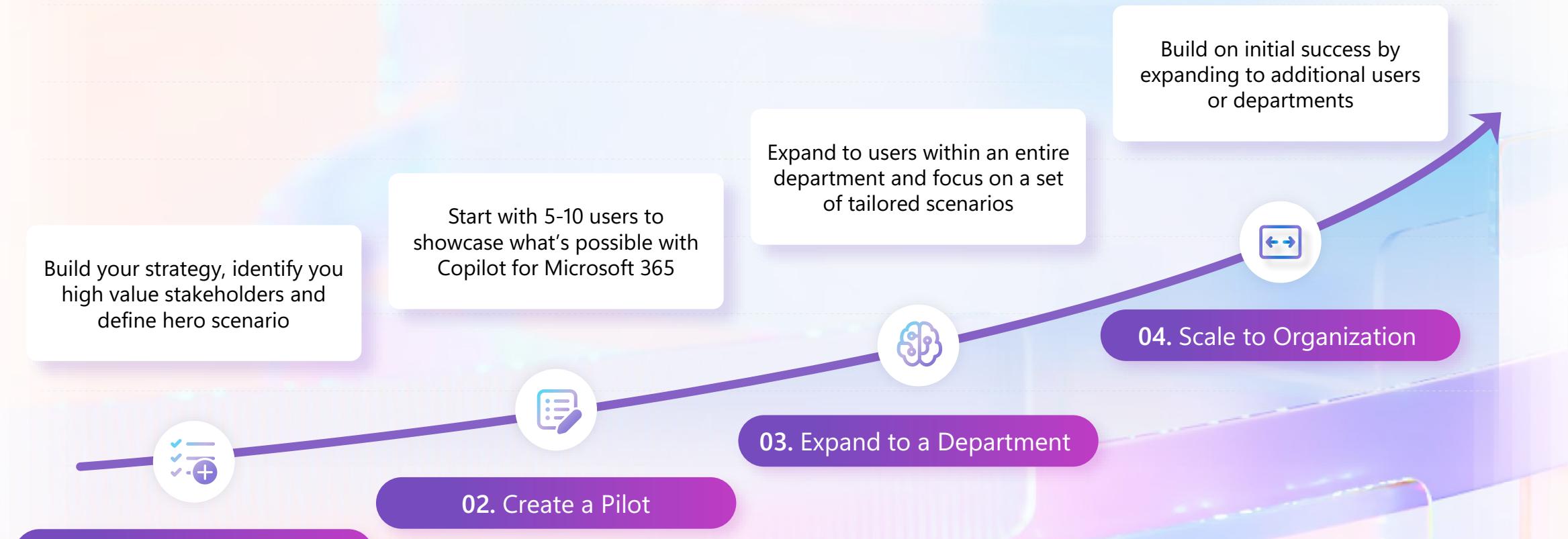
- + With a Microsoft Viva license (*available as add-on*), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns



Microsoft Copilot Dashboard

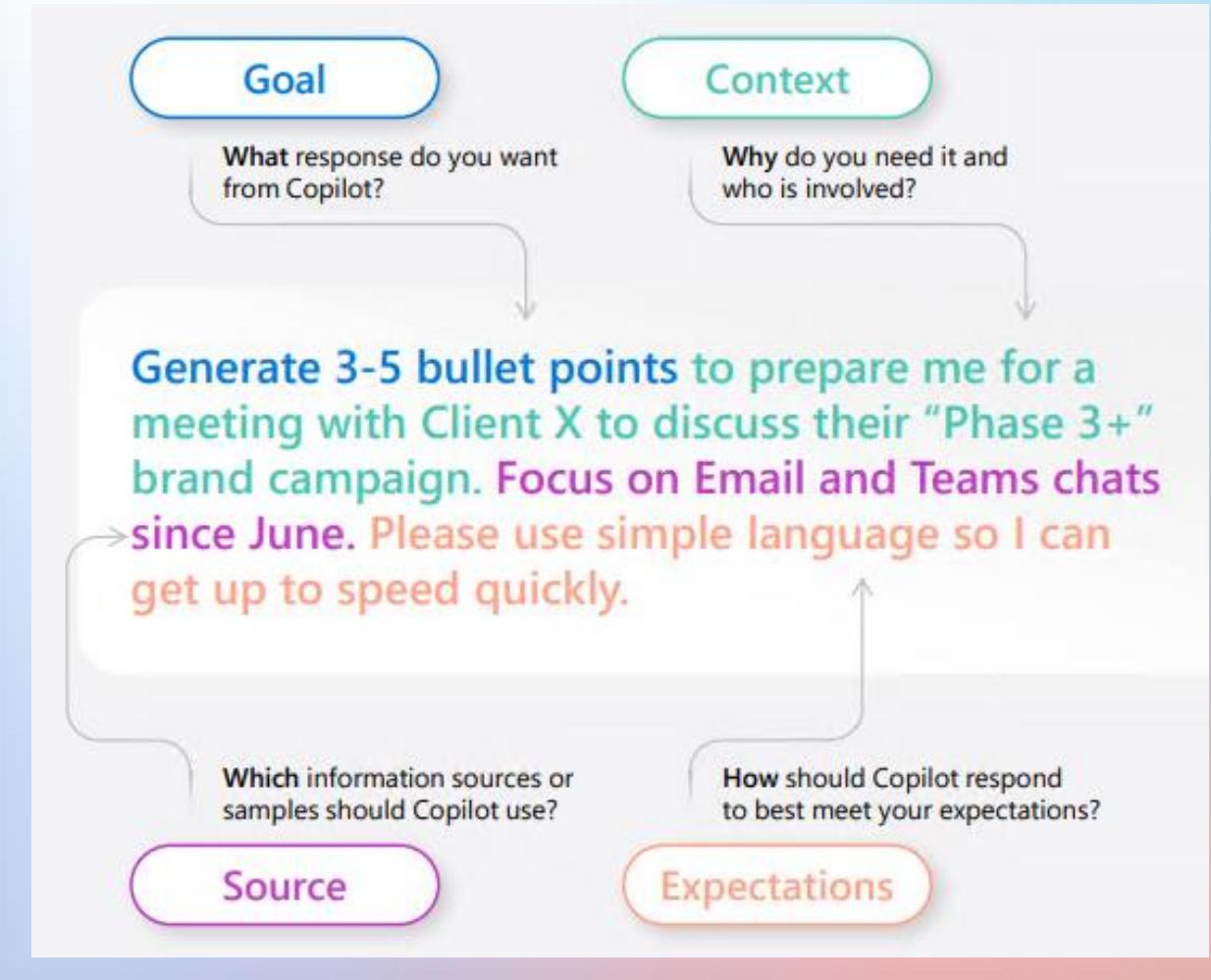
aka.ms/CopilotDashboard

Four steps to drive Copilot success with customers



Teach users how to use prompts with Copilot for Microsoft 365

Use prompts to create, summarize, edit or transform.
It's like having a conversation with Copilot.



Copilot Lab

- A collection of prompts that can be used to explore and experiment with Copilot
- Learn the art and science of prompt Engineering in an easy way
- Provides latest information and resources
- Evolves and adapts as AI becomes more advanced

The screenshot shows a user interface titled "More prompts to try". At the top, there are tabs for "Work" and "Personal", with "Work" being the active tab. Below the tabs are dropdown menus for "Apps" and "Categories". The main area is a grid of 16 cards, each representing a different prompt. The cards are arranged in four rows and four columns. Each card has a small icon on the left, a title, and a brief description.

Category	Prompt Title	Description
Work	Share meeting notes	Draft an email with notes and action items from <code>meeting</code>
Work	Write a status update	Write a status report to my manager based on <code>file</code> . Include any upcoming deliverables, due dates, and key decisions
Work	Catch up on messages	Summarize Teams messages from this week about...
Work	How to	How do I write a request for proposal?
Work	Help me write	Write an email to my team about our top priorities for next quarter from <code>file</code>
Work	Discover a company topic	I need to explain [concept] to a [role/target audience]. I need to include an explainer of what it is, how it works, and a
Work	Draft an FAQ	Create an FAQ based on <code>file</code>
Work	Describe something concisely	Summarize this doc into a high-level overview of the benefits of [topic]
Work	Get calendar info	When's my next meeting with <code>person</code> ?
Work	Create a quiz	Write a practice quiz about [Topic]. Include at least 20 questions, and group questions by category. Provide a detailed
Work	Create based on a topic	Create 5 hypothetical courses about [Topic]. Include a brief summary for each course and a catchy title.
Work	Prep for a meeting	I've got an upcoming meeting with <code>person</code> . Based on my recent communication and recent news items, create a...
Personal	Add images	Add a relevant image to this
Personal	Get key info	List key points from <code>file</code>
Personal	Brainstorm	Suggest 10 compelling taglines
Personal	Draft an email template	Draft a personal email I can send

➤ Find more Copilot prompts to try in [Copilot Lab](#)

How to get started

1	Skill your people on delivering the best Copilot demo	https://aka.ms/CopilotClickThroughDemoGuide
2	Build your Copilot for Microsoft 365 Pilot Offering	https://aka.ms/CSPCopilotAdoption
3	Leverage the H2 renewal opportunity to get customers AI-ready	https://aka.ms/CSPCopilot
4	Start using Microsoft 365 Lighthouse to: a. Manage your upcoming renewals and optimize growth b. Identify high propensity customers to engage with	https://lighthouse.microsoft.com

The background of the slide features a dynamic, abstract design composed of several overlapping, translucent bands. These bands are primarily colored in shades of blue, orange, and pink, creating a sense of depth and motion. The bands curve and overlap, with some appearing to be in sharp focus while others recede into the background.

*D*eliver impact

Deliver Managed Services

Deliver impact: Managed services

Establish process for continuous service improvement

Delivering a managed service around Copilot empowers partners and customers to organize service health reviews to:

1. Periodically review health and business value of the AI transformation journey
2. Conduct periodic assessments of governance, security, and user enablement practices
3. Identify opportunities for expansion and further optimization of key Microsoft Copilot for Microsoft 365 user experiences

- Access the [admin documentation](#) for the latest technical requirements, policies and reporting
- Join [the Copilot community](#) to connect with experts and community members
- Participate in Copilot Ask Microsoft Anything [events](#)



Managed Service components



Shared deliverable: Service Health Review



Performance



Feedback analysis



Incident review



Success stories



Roadmap planning



Risk mitigation

A Service Health Review (SHR) is a systematic process of evaluating the current state and future needs of IT services in an organization.

The purpose of an SHR is to identify the strengths and weaknesses of IT services (in this case Copilot implementation), as well as the opportunities and threats that may affect their delivery and value.

An SHR provides recommendations for improving IT service management, governance, user enablement, and alignment with business goals.

SHRs foster a transparent and collaborative partnership between the partner and business leaders, user enablement specialists, and IT professionals.

Recommended practices include:

- SHR Chair is the Copilot Success Owner (partner or customer)
- Conducted monthly, moving to quarterly, once onboarding cohorts are complete
- Includes service feedback and top issues from User Enablement staff
- Core focus on data-driven fact finding, scenario identification, learning, and improvement in a blame-free environment



Deliver impact

Analyze usage reports

Deliver impact: Access usage reports

Interpret the Microsoft Copilot Dashboard data

The Copilot for Microsoft 365 usage report includes two sections: Readiness and Usage.

In the [Readiness section](#), you can review technical eligibility, license assignment, and users who are in a strong position to get value from Copilot for Microsoft 365.

In the [Usage section](#), you can view a summary of Copilot for Microsoft 365 adoption with visibility into users' last Copilot for Microsoft 365 activity.

- Interpret the Readiness section by analyzing assigned and available Copilot licenses, how many users are technically eligible, and how many are in a strong position to get value from Copilot for Microsoft 365.
- If needed, you can export the report data into an Excel .csv file by selecting the Export link. This exports the Copilot for Microsoft 365 last activity data of all users and enables your identified report readers to do simple sorting, filtering, and searching for further analysis.



Deliver impact: Analyze usage reports

Interpret the Microsoft Copilot Dashboard data

In the Readiness tab, you assess your organization's overall readiness for Copilot rollout based on technical eligibility requirements and overall Microsoft 365 app usage.

In the Adoption tab, you track user adoption trends per Microsoft 365 app and Copilot feature.

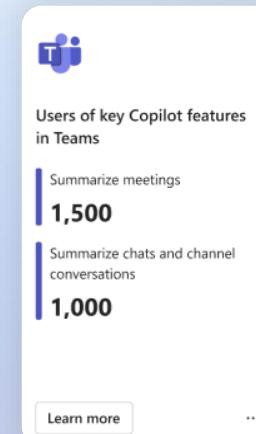
In the Impact tab, you assess Copilot impact by layering the results of Microsoft's quantitative and qualitative research on top of your organization's Copilot and Microsoft 365 usage patterns.

The Sentiment tab provides information that helps you assess Copilot impact from users' perspective.

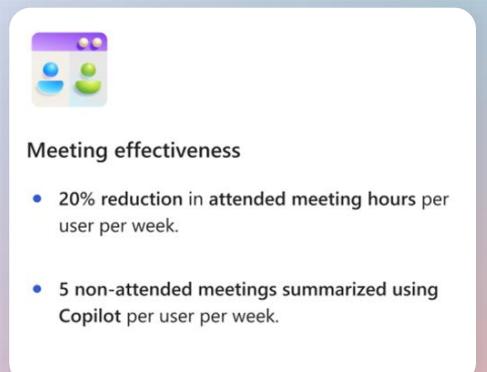
- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Sentiment tab to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them displayed in the Microsoft Copilot Dashboard
- Analyze insights on how users feel about the AI assistance they receive from Copilot



Readiness



Adoption



Impact



Deliver impact
Investigations

Audit: Types of events for forensic investigations



Copilot Interactions

Helps determine scope of prompt and response messages sent



Teams

Provides insight into Teams activities, including users, channels, connectors or apps that have been added or removed



User Search

Provides insight into searches in Exchange Online or SharePoint Online for breach assessment

Investigations: How Audit can help

For your regulatory and legal obligations

- Assess scope of data breach
- Access audit logs to support length of investigation



Forensic investigations



Responding to legal requests

Audit > Audit search

X

Monday, Nov 6, 2023 12:00:00 AM to Wednesday, Nov 8, 2023 12:00:00 AM

Export ▾

Date ↓	IP Address	User
<input type="checkbox"/> Nov 7, 2023 12:41 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:40 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:36 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:25 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:24 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:20 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:16 PM	2001:4898:80e8:37:f985:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input type="checkbox"/> Nov 7, 2023 12:11 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
<input checked="" type="checkbox"/> Nov 7, 2023 10:20 AM	24.17.224.43	AlexW@MODERNCOMMS382604.OnMicrosoft.com

Users

AlexW@MODERNCOMMS382604.OnMicrosoft.com

Activity

Interacted with Copilot

Item**Details****CreationTime**

2023-11-07T18:20:46

Id

8a2bfba6-c241-47fd-a6e5-6995b57590b0

Operation

CopilotInteraction

OrganizationId

b9ba404e-37f1-4363-bb0b-fc387ddfabe6

RecordType

261

UserKey

23f35b20-f05f-42f6-9ce8-d53c9edd3ce0

UserType

0

Version

1

Workload

Copilot

Close

Audit > Audit search

**Monday, Nov 6, 2023 12:00:00 AM to Wednesday, Nov 8, 2023 12:00:00 AM**[Export](#)

Date	IP Address	User
Nov 7, 2023 12:41 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:40 PM	2001:4898:80e8:36:f986:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:36 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:25 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:24 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:20 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:19 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:16 PM	2001:4898:80e8:37:f985:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 12:11 PM	2001:4898:80e8:1:f9bb:fb39:1a3e:5fad	AlexW@MODERNCOMMS382604.OnMicrosoft.com
Nov 7, 2023 10:20 AM	24.17.224.43	AlexW@MODERNCOMMS382604.OnMicrosoft.com

1

Workload

Copilot

ClientIP

24.17.224.43

UserId

AlexW@MODERNCOMMS382604.OnMicrosoft.com

CopilotEventData

```
{ "AccessedResources": [ { "Id": "https://moderncomms382604.sharepoint.com/sites/0f334ff3-40e6-aab6-2802e7fc43d4", "Name": "kickoff.pptx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc43d4", "Type": "pptx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f334ff3-40e6-aab6-2802e7fc43d4", "Name": "Design update.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc43d4", "Type": "docx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f334ff3-40e6-aab6-2802e7fc43d4", "Name": "Next generation chip.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc43d4", "Type": "docx" } ], "AppHost": "bizchat", "Contexts": [], "MessageIds": [], "ThreadId": "19:qt0mIM5vzHCDQ1PGzya5KFTJfuhVOpYJcNbi1LDvqx81@thread" }
```

[Close](#)

- Home
- Users
- Teams & groups
- Roles
- Resources
- Billing
- Copilot
- Support
- Settings
- Domains
- Search & intelligence
- Org settings
- Microsoft 365 Backup
- Integrated apps
- Viva
- Partner relationships
- Microsoft Edge
- Setup
- Reports

Copilot

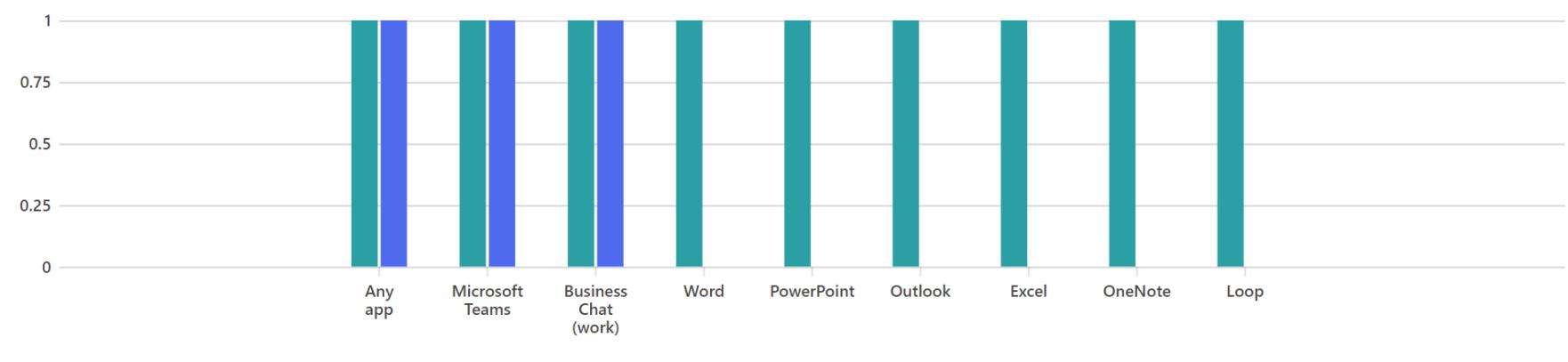
Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.

[Overview](#) [Discover](#) [Settings](#)

Reports

Adoption by app

Adoption status of Microsoft 365 Copilot over the past 30 days. See [metric definitions](#)



Enabled Users Active Users

[Learn more in Usage](#)



Microsoft Copilot Dashboard

Readiness Adoption Impact Learning

Activate Microsoft 365 Copilot for your organisation

Any user with a prerequisite Office 365 or Microsoft 365 licence can be assigned a Copilot licence.

 Time period: 4 weeks (21 Sept – 18 Oct)

Copilot adoption rate i



- Active Copilot users
- Copilot licensed employees

Copilot activation steps

Total Microsoft 365 licences i



Total Copilot licences i



Copilot licences assigned i



Active Copilot users i



[Explore adoption](#)

...

DSPM for AI (preview)

- Overview
- Recommendations
- Reports
- Policies
- Activity explorer
- Data assessments (preview)

Data assessments (preview)

Identify oversharing risks

Use data assessments to identify potential oversharing risks in your organization. They also provide fixes to limit access to sensitive data.

Assess and prevent oversharing

① Create an assessment

Choose the sources and users you want to assess.

② Evaluate data

Review the assessment for potential oversharing risks within the sources and users.

③ Apply remediations

Limit Microsoft Copilot access to sensitive data, apply label and retention policies to sites and data. Conduct site and access review to evaluate site permissions and user access.

Assessment status

[+ Create assessment](#)

Assessment name

Status

Scan started

Default assessments (1)

Oversharing Assessment for the week of November 4, 2024

Scan completed

Nov 8, 2024 1

Custom assessments (4)

Oversharing Assessment for the week of Nov 4, 2024

Scan completed

Nov 6, 2024 1

Oversharing Assessment for Obsidian Merger

Scan completed

Nov 6, 2024 8

Data assessments (preview) > Oversharing Assessment for the week of November 4, 2024

Oversharing Assessment for the week of November 4, 2024

Assessment info

Description
Default assessment created by Purview

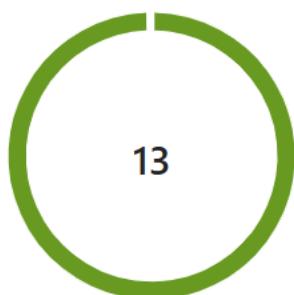
Total items

13

Sources included

7

Total items



Scanned For Sensitive Info Types:

Not Scanned

Sensitivity labels on data

Labeled



8

Not labeled



5

No Sensitive Information Types Detected

Sensitive Information Types Detected

Data Not Scanned

Data with sharing links

Shared with anyone

0

Shared organization wide



1

Shared with specific people



2

Shared externally



1

SharePoint

7 items Group

Data source ID	Source type	Total items ↓	Total items accessed	Times users accessed	Unique users accessed	Total sensitive items	Total scanned items
/sites/obsidianmerger/	SharePoint	8	Coming soon	Coming soon	Coming soon	7	8
/sites/marketanalysis/	SharePoint	2	Coming soon	Coming soon	Coming soon	0	2
/sites/projectblue/	SharePoint	1	Coming soon	Coming soon	Coming soon	0	1

Data assessments (preview) > Oversharing Assessment for the week of November 4, 2023

Oversharing Assessment for the week of November 4, 2023

Assessment info

Description
Default assessment created by Purview

Total items
13

Sources included
7

Total items

Scanned For Sensitive Info Type:

Not Scanned

Sensitivity label

Labeled	
Not labeled	
No Sensitive	
Sensitive Info	
Data Not Scanned	

Data source ID	Source type	Total items ↓	Actions
/sites/obsidianmerger/	SharePoint	8	
/sites/marketanalysis/	SharePoint	2	
/sites/projectblue/	SharePoint	1	

/sites/obsidianmerger/

Overview Protect Monitor

Limit Microsoft 365 Copilot access to this site

Choose how you would like Copilot to access data in this SharePoint site.

Restrict access by label

Microsoft Purview Data Loss Prevention

Restrict all items

SharePoint Restricted Content Discovery

SharePoint Administrators or Global Administrators can enable Restricted Content Discoverability in SharePoint Online in your organization.

Steps at a glance

1. Download and install SharePoint Online Management Shell. Download the latest version of [SharePoint Online Management Shell](#)
2. Connect to SharePoint Online as a [Global Administrator](#) or [SharePoint Administrator](#) in Microsoft 365. To learn how, see [Getting started with SharePoint Online Management Shell](#)
3. Apply Restricted Content Discoverability on a SharePoint site. Run the following command in SharePoint Online Management Shell:

```
Set-SPOSite -identity <site-url>  
-RestrictContentOrgWideSearch $true
```

4. View the Restricted Content Discoverability configuration for a given site. Run the following command in SharePoint Online Management Shell:

```
Get-SPOSite -identity <site-url> | Select  
RestrictContentOrgWideSearch
```

Other labeling policies

Default sensitivity label for SharePoint document library

When a default sensitivity label is added to a SharePoint document library, the label

- Home
- Solutions
- Learn
- Settings
- AI Hub (preview)
- Data assessments (preview)

Data assessments (preview) > Oversharing Assessment for the week of November 4, 2023

Oversharing Assessment for the week of November 4, 2023

Assessment info

Description
Default assessment created by Purview

Total items
13

Sources included
7

Total items

Scanned For Sensitive Info Types

Not Scanned

Sensitivity labels

Label Type	Count
Labeled	13
Not labeled	0
No Sensitive	13
Sensitive Info	0
Data Not Scanned	0

Data source ID	Source type	Total items ↓	Actions
/sites/obsidianmerger/	SharePoint	8	View details
/sites/marketanalysis/	SharePoint	2	View details
/sites/projectblue/	SharePoint	1	View details

/sites/obsidianmerger/

Overview Protect Monitor

Limit Microsoft 365 Copilot access to this site

Choose how you would like Copilot to access data in this SharePoint site.

Restrict access by label

Microsoft Purview Data Loss Prevention

Restrict all items

SharePoint Restricted Content Discovery

Use a Microsoft Purview Data Loss Prevention policy to limit access to any files in your organization with sensitivity labels.

Steps at a glance

1. Go to the Data Loss Prevention in Microsoft Purview portal
2. Create new policy. Select "Policies" to create a new policy
3. Choose a custom policy. Select Custom policy in the Custom category
4. Customize your policy. Name your policy, and then select "Microsoft 365 Copilot" in the location
5. Create a new advanced DLP rule.
6. Add labels you want to exclude. In the fields for the new rule, select "Content contains sensitivity labels" and add the labels
7. Select an action. Choose "Exclude Copilot from processing"
8. Save the rule and the policy.

Other labeling policies

Default sensitivity label for SharePoint document library

When a default sensitivity label is added to a SharePoint document library, the label will only apply to new items added to the site. Navigate to library settings on the SharePoint site and select a sensitivity label.



Create default sensitivity label for SharePoint document library

Microsoft SharePoint location

Data assessments (preview) > Oversharing Assessment for the week of November 4, 2023

Oversharing Assessment for the week of November 4, 2023

Data source ID	Source type	Total items	Last updated
/sites/obsidianmerger/	SharePoint	8	Nov 10, 2023
/sites/marketanalysis/	SharePoint	2	Nov 10, 2023
/sites/projectblue/	SharePoint	1	Nov 10, 2023

Assessment info

Description
Default assessment created by Purview

Total items
13

Sources included
7

Total items

Scanned For Sensitive Info Types

Not Scanned

Sensitivity label distribution

Sensitivity Label	Count
No Sensitive	10
Sensitive Info	2
Data Not Scanned	1

/sites/obsidianmerger/

Other labeling policies

Default sensitivity label for SharePoint document library

When a default sensitivity label is added to a SharePoint document library, the label will only apply to new items added to the site. Navigate to library settings on the SharePoint site and select a sensitivity label.

Create default sensitivity label for SharePoint document library
Microsoft SharePoint location

Default labels

Label all new items by default using sensitivity labels. Labels can have no protection or protection defined by the admin.

Create default sensitivity label
Microsoft Purview Information Protection

Sensitive information auto-labeling policy

Use auto-labeling policies based on sensitive content or keywords.

Files with sensitive info types

7

[View items](#)

Create auto-labeling policy for sensitive information
Microsoft Purview Information Protection

SharePoint site sensitivity label

Apply a sensitivity container label at the site level. Warning: this label will only apply to the site and not the contents of the site, including all files on the site. To protect the files on the site, add sensitivity labels to the files.

Edit SharePoint site sensitivity container label

Oversharing Assessment for the week of November 4, 2024

Assessment info

Description
Default assessment created by Purview

Total items
13

Sources included
7

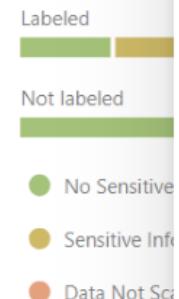
Total items



Scanned For Sensitive Info Type:

Not Scanned

Sensitivity label

[Overview](#)[Protect](#)[Monitor](#)

Run a site access review

SharePoint site access review lets IT administrators delegate the process of reviewing data access to site owners of overshared sites.

Shared with anyone

0

[View items](#)

Shared organization wide

0

[View items](#)

Shared with specific people

2

[View items](#)

Shared externally

1

[View items](#)

Start a SharePoint site access review

SharePoint Admin Portal

Run an identity access review

Manage group memberships, access to enterprise applications, and role assignments. User access can be reviewed regularly to make sure only the right people have continued access.



Run a Microsoft Entra ID user access review

Microsoft Entra

Data source ID	Source type	Total items ↓	Actions
/sites/obsidianmerger/	SharePoint	8	
/sites/marketanalysis/	SharePoint	2	
/sites/projectblue/	SharePoint	1	

Template or custom policy Name Admin units**Locations** Policy settings Policy mode Finish

We'll apply the policy to data that's stored in the locations you choose.

i Protecting sensitive info in on-premises repositories (SharePoint sites and file shares) is now in preview. Note that there are prerequisite steps needed to support this new capability. [Learn more about the prerequisites](#)

Location	Scope	Actions
Exchange email	Turn on location to scope	
SharePoint sites	Turn on location to scope	
OneDrive accounts	Turn on location to scope	
Teams chat and channel messages	Turn on location to scope	
Devices	Turn on location to scope	
Instances	Turn on location to scope	
On-premises repositories	Turn on location to scope	
Fabric and Power BI workspaces	Turn on location to scope	
<input checked="" type="checkbox"/> Microsoft 365 Copilot (preview)	All users & groups	Edit

Back

Next

Cancel

Template or custom policy Name Admin units Locations

Policy settings

 Advanced DLP rules Policy mode Finish

Create rule

Use rules to define the type of sensitive information you data protect. If content matches many rules, the most restrictive one will be enforced. [Learn more about rules.](#)

Name *

Restrict Copilot from processing Obsidian Merger

Description

Exclude sensitivity label Obsidian Merger

Conditions

We'll apply this policy to content that matches these conditions.

Content contains

Group name *

Default

Group operator

Any of these

Add ▾

Create group

+ Add condition ▾

Actions

Use actions to protect content when the conditions are met.

Save**Cancel**

- Template or custom policy
- Name
- Admin units
- Locations
- Policy settings
- Advanced DLP rules
- Policy mode
- Finish

Create rule

Use rules to define the type of sensitive information you data protect. If content

Name *

Restrict Copilot from processing Obsidian Merger

Description

Exclude sensitivity label Obsidian Merger

Conditions

We'll apply this policy to content that matches these conditions.

Content contains

Group name *

Default

Add ▾

Sensitivity labels

+ Add condition ▾

Actions

Use actions to protect content when the conditions are met.

Save

Cancel

Sensitivity labels

Search for Sensitive info types

1 selected

<input type="checkbox"/>	Name	Publisher
<input type="checkbox"/>	All Employees (unrestricted)	General/All Employees (unrestricted)
<input type="checkbox"/>	Confidential	Confidential
<input type="checkbox"/>	Anyone (unrestricted)	Confidential/Anyone (unrestricted)
<input type="checkbox"/>	All Employees	Confidential/All Employees
<input type="checkbox"/>	Trusted People	Confidential/Trusted People
<input type="checkbox"/>	Confidential business	Confidential business
<input type="checkbox"/>	Confidential internal transaction	Confidential internal transaction
<input type="checkbox"/>	Confidential user defined	Confidential user defined
<input type="checkbox"/>	Highly Confidential	Highly Confidential
<input type="checkbox"/>	All Employees	Highly Confidential/All Employees
<input type="checkbox"/>	Specified People	Highly Confidential/Specified People
<input checked="" type="checkbox"/>	Obsidian Merger	Obsidian Merger

Add

Cancel

Template or custom policy Name Admin units Locations

Policy settings

 Advanced DLP rules Policy mode Finish

Create rule

Use rules to define the type of sensitive information you data protect. If content matches many rules, the most restrictive one will be enforced. [Learn more about rules.](#)

Name *

Restrict Copilot from processing Obsidian Merger

Description

Exclude sensitivity label Obsidian Merger

Conditions

We'll apply this policy to content that matches these conditions.

Content contains

Group name *

Default

Group operator

Any of these

Sensitivity labels

Obsidian Merger

Add ▾

Create group

+ Add condition ▾

SaveCancel

Template or custom policy Name Admin units Locations**Policy settings** Advanced DLP rules Policy mode Finish

Create rule

Content contains

Group name *

Default

Group operator

Any of these

Sensitivity labels

Obsidian Merger

Add ▾

Create group

+ Add condition ▾

Actions

Use actions to protect content when the conditions are met.

Prevent Copilot from processing content

Content that matches your conditions won't be used by Copilot to generate responses.

[Learn more about this action](#)

ⓘ Currently, this action is supported only for labeled files in SharePoint and OneDrive that are processed in Microsoft 365 Chat experiences.

 Exclude content from processing in Copilot**Save****Cancel**

Template or custom policy Name Admin units Locations**Policy settings** Advanced DLP rules Policy mode Finish

Customize advanced DLP rules

The rules here are made up of conditions and actions that define the protection requirements for this policy. You can edit existing rules or create new ones.

[+ Create rule](#)

1 item

Name	Status	
Restrict Copilot from processing Obsidian Merger	<input checked="" type="checkbox"/> On	  

Conditions
Content contains any of these sensitive info types:
Obsidian Merger

Actions
Restrictions on files in transit

[Back](#)[Next](#)[Cancel](#)

Template or custom policy Name Admin units Locations Policy settings **Policy mode** Finish

Policy mode

You can test this policy before turning it on to verify if it needs improvement or if it meets all your objectives. If you turn the policy on right away, you can edit it later and safely test those changes in simulation mode.

At this time, simulation mode isn't supported for these locations you selected: Microsoft 365 Copilot (preview).

Run the policy in simulation mode

We'll show you items that match the policy's conditions to help you evaluate its impact. Your data won't be affected; the policy stays off while in simulation mode. [Learn more about simulation mode](#)

Show policy tips while in simulation mode.

Turn the policy on if it's not edited within fifteen days of simulation

Turn the policy on immediately

After the policy is created, it'll take up to an hour before any changes are enforced.

Leave the policy turned off

Decide to test or activate the policy later.

- Template or custom policy
- Name
- Admin units
- Locations
- Policy settings
- Policy mode
- Finish

New policy created

Data loss prevention policy has been created.

Next steps

Monitor alerts to review policy matches. [Learn about reviewing alerts](#)

RECOMMENDATION

You're protecting this sensitive data, now make sure it's deleted when no longer relevant to your organization.

Removing unnecessary or obsolete data can reduce your risk during a security incident. Use auto-labeling policies in Data Lifecycle Management to help minimize your attack surface.

[Secure Now](#)

Related tasks

Create an insider risk policy to investigate and take action on insider risks and threats.

[Get started](#)

Create a records management policy to automatically retain or

[Done](#)

Data Loss Prevention

[Overview](#)[Policies](#)[Alerts](#)[Activity explorer](#)[Classifiers](#)[Explorers](#)

Related solutions

[Information Protection](#)[Insider Risk Management](#)

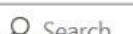
Policies

Use data loss prevention (DLP) policies to help identify and protect your organization's sensitive info. For example you can set up policies to help make sure information in email and docs isn't shared with the wrong people. [Learn more about DLP](#)

If your role group permissions are restricted to a specific set of users or groups, you'll only be able to manage policies for those users or groups. [Learn more about role group permissions.](#)

[View role groups](#)[+ Create policy](#) Export

4 items



Search

[Customize columns](#)

<input type="checkbox"/>	Name	Priority	Last modified	Status
<input type="checkbox"/>	Microsoft AI hub - Discover sensitive prompts in AI assistants	0	Oct 29, 2024 1:45 PM	On
<input type="checkbox"/>	Microsoft AI hub - Adaptive Protection in AI assistants	1	Oct 29, 2024 1:56 PM	On
<input type="checkbox"/>	Default policy for Teams	2	Oct 29, 2024 6:50 PM	On
<input type="checkbox"/>	Obsidian Merger	3	Nov 7, 2024 1:01 PM	On



Search



BB



Copilot

Tell me the key points from ht...

Work

Web

New chat



...



Copilot

Visual Creator

Get Copilot agents

Chats

Tell me the key points fr... 10:04 PM

Tell me about project obsidian 11/8

What is this https://fabrikamp... 11/6

Sure, here are the key points from the document [Project Obsidian M&A](#):

Executive Summary: Project Obsidian is a strategic merger between Company A and Company B aimed at creating a more competitive and innovative entity in the market. The merger will combine the strengths of both companies to enhance market share, improve operational efficiencies, and drive long-term growth^①.

Objectives:

- **Market Expansion:** Leverage the combined market presence to enter new markets and increase market share.
- **Operational Efficiency:** Streamline operations by integrating processes, reducing redundancies, and optimizing resources.
- **Innovation:** Foster a culture of innovation by combining the R&D capabilities of both companies to develop new products and services.
- **Financial Performance:** Improve financial performance through cost synergies, increased revenue, and enhanced profitability^①.

Key Terms:

- **Transaction Structure:** The merger will be executed as a stock-for-stock transaction, with shareholders of Company A receiving shares of Company B.
- **Valuation:** The combined entity will be valued at \$22 billion, with Company A valued at \$15 billion and

Can you provide more details on the financial projections?

What are the specific cost synergies expected?

How will the cultural integration be managed?

View prompts

Message Copilot

Add people, files, and more for better results

0 / 16000

@ ⌂ ⌁ ⌂

User not in DLP Policy



Search



Copilot

Summarize https://fabrikampurv...

Work Web

New chat



November 11, 2024 at 10:10 PM

Summarize [Project Obsidian M&A.docx](#)

The document titled [Project Obsidian M&A](#) is authored by you and was last modified this afternoon [1](#). Unfortunately, I can't provide more detailed information as the content is protected [1](#).

Is there anything specific you would like to know or any other document you need help with?

[Project Obsidian M&A](#)

SharePoint: ObsidianMerger > Shared Documents

Adele Vance modified 9 hours ago

Ask

1 Project Obsidian M&A

[Edit in Pages](#)

[Copy](#)

1 of 30 responses AI-generated content may be incorrect

Can you list the sections or headings in the document?

Can you provide a summary of the document's purpose?

Is there a way to access the content of the document?

[View prompts](#)

Message Copilot

Add people, files, and more for better results

0 / 16000

@

User in DLP Policy



Visual Creator

Get Copilot agents

Chats

[Show more](#)

Summarize https://fabri... 10:10 PM

Summarize Project Obsidi... 10:09 PM

give me examples of work ... 7:17 PM

Project obsidian 11/7

Can you summarize https://fa... 11/7

Microsoft deployment blueprint to address internal oversharing in Microsoft 365 Copilot

Customers with E5 Foundational

Address internal oversharing concerns in Microsoft 365 Copilot

Realize value quickly with Copilot by reviewing potential content sharing risks and optionally enabling Restricted SharePoint Search to address risk to enable full Copilot deployment

Select services are included in your FastTrack benefit. Other critical services are available thru Microsoft Unified or our Partner Ecosystem

Phase	Pilot	Deploy	Operate
Effort	2-4 days	2-4 weeks	1+ months
Deployment steps	<ul style="list-style-type: none"> Identify the most popular sites & assess oversharing <ul style="list-style-type: none"> Export the top 100 most used sites from SPO admin center Run SAM permission state report¹ Use Purview Content Explorer to view which sites contain sensitive information types (SITs)² Grant Copilot access to popular, low risk sites <ul style="list-style-type: none"> Cross reference the report results from SAM and Content Explorer with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery³ Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified⁴ Turn on proactive audit and protection <ul style="list-style-type: none"> Turn Off EEEU (everyone except external users) at the tenant level⁵ Turn on Audit and view Copilot interaction activity reports and charts⁶ Turn on audit-mode oversharing SPO DLP policy to restrict access to sensitive data exposure & start remediating them⁷ Disable RSS (if enabled) to allow full Copilot experience⁸ 	<ul style="list-style-type: none"> Discover oversharing risks <ul style="list-style-type: none"> Use permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)⁹ Identify Copilot agent insights & take actions¹⁰ Further reduce risk and simplify oversight <ul style="list-style-type: none"> Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners¹¹ Automate SAM permission state report to maintain permissions hygiene¹² Automate permission reports and actions to maintain permissions hygiene¹³ Restrict sensitive info from Copilot access and/or processing <ul style="list-style-type: none"> Initiate Access Review for all sites that are overshared¹⁴ Apply restricted access control (RAC) on business-critical sites¹⁵ Exclude critical sites from Copilot reasoning over them¹⁶ Increase site privacy <ul style="list-style-type: none"> Publish labels to Office apps, Container/Sites, Outlook for manual data protection by user¹⁷ Use site labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members¹⁸ Periodically review inactive sites and take necessary action¹⁹ Control site provisioning by allowing creation for users that complete training²⁰ Use change history to identify site changes that may cause oversharing²¹ Continuously manage all your oversharing DLP alerts via the Microsoft Purview Portal²² Further secure sensitive data <ul style="list-style-type: none"> Reduce risk by remediating alerts for overshared documents from the SPO DLP policy and applying sensitive labels²³ Improve Copilot responses <ul style="list-style-type: none"> Setup retention/deletion policies for SharePoint to reduce data surface²⁴ Identify inactive sites, then restrict access, archive or delete²⁵ 	

Guidance assumes Copilot technical prerequisites in place: Technical enablement of core services (Teams, SharePoint, Exchange), Office Applications deployed (modern Outlook recommended) and on current or monthly update channel

Learn how to use the features in the blueprint and how these features impact Microsoft 365 Copilot: <https://aka.ms/E3PrepareYourDataForCopilot>

Customers with E5 Foundational

Address internal oversharing concerns in Microsoft 365 Copilot

Realize value quickly with Copilot by reviewing potential content sharing risks and optionally enabling Restricted SharePoint Search to address risk to enable full Copilot deployment

Select services are included in your FastTrack benefit. Other critical services are available thru Microsoft Unified or our Partner Ecosystem

Phase	Pilot	Deploy	Operate
Effort	2-4 days	2-4 weeks	1+ months
Deployment steps	<ul style="list-style-type: none"> Identify the most popular sites & assess oversharing <ul style="list-style-type: none"> Export the top 100 most used sites from SPO admin center Run SAM permission state report¹ Identify Copilot agent insights & take actions¹⁰ Discover oversharing risks <ul style="list-style-type: none"> Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners¹¹ Automate SAM permission state report to maintain permissions hygiene¹² Automate permission reports and actions to maintain permissions hygiene¹³ Further reduce risk and simplify oversight <ul style="list-style-type: none"> Proactively review oversharing reports and restrict access as needed¹⁴ Proactively avoid oversharing by applying RAC at site provisioning¹⁵ Periodically review inactive sites and take necessary action¹⁹ Control site provisioning by allowing creation for users that complete training²⁰ Use change history to identify site changes that may cause oversharing²¹ Continuously manage all your oversharing DLP alerts via the Microsoft Purview Portal²² Restrict sensitive info from Copilot access and/or processing <ul style="list-style-type: none"> Initiate SAM Access Review for all sites that are overshared¹⁴ Apply restricted access control (RAC) on business-critical sites¹⁵ Exclude critical sites from Copilot reasoning over them with SAM Restricted Content Discovery (RCD)¹⁶ Publish sensitivity labels with Purview Information Protection to Office apps, Container/Sites, Outlook for manual data protection by user¹⁷ Grant Copilot access to popular, low risk sites <ul style="list-style-type: none"> Cross reference the report results from SAM and Purview DSPM for AI with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery³ Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified⁴ Turn on proactive audit and protection <ul style="list-style-type: none"> Turn Off EEEU (everyone except external users) at the tenant level⁵ Turn on Purview Audit and view Copilot interaction activity reports and charts⁶ Turn on proactive analysis for sensitive data handling with prompts and responses with Purview Communications Compliance²⁶ Turn on audit-mode oversharing SPO Purview DLP policy to restrict access to sensitive data exposure & start remediating them⁷ Disable RSS (if enabled) to allow full Copilot experience⁸ Increase site privacy <ul style="list-style-type: none"> Use site sensitivity labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members¹⁸ Apply default site library sensitivity labels to protect new and modified unlabeled documents²⁷ Reduce risk by remediating alerts for overshared documents from the SPO Purview DLP policy by applying sensitive labels and disabling anyone access²⁸ Further secure sensitive data <ul style="list-style-type: none"> Automatically label new documents and prevent them from oversharing with run time labeling policy, starting with client-side policies and extend to server-side policies²⁹ Identify inactive sites with SAM, then restrict access or delete³⁰ Improve Copilot responses <ul style="list-style-type: none"> Setup Purview retention/deletion policies for SharePoint to reduce data surface²⁴ Identify inactive sites with SAM, then restrict access or delete³⁰ 	<ul style="list-style-type: none"> Discover oversharing risks <ul style="list-style-type: none"> Use DAG permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)⁹ Identify Copilot agent insights & take actions¹⁰ Further reduce risk and simplify oversight <ul style="list-style-type: none"> Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners¹¹ Automate SAM permission state report to maintain permissions hygiene¹² Automate permission reports and actions to maintain permissions hygiene¹³ Restrict sensitive info from Copilot access and/or processing <ul style="list-style-type: none"> Proactively review oversharing reports and restrict access as needed¹⁴ Proactively avoid oversharing by applying RAC at site provisioning¹⁵ Periodically review ownerless sites and take necessary action¹⁹ Control site provisioning by allowing creation for users that complete training²⁰ Use change history to identify site changes that may cause oversharing²¹ Continuously manage all your oversharing DLP alerts via the Microsoft Purview Portal²² Grant Copilot access to popular, low risk sites <ul style="list-style-type: none"> Cross reference the report results from SAM and Purview DSPM for AI with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery³ Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified⁴ Turn on proactive audit and protection <ul style="list-style-type: none"> Turn Off EEEU (everyone except external users) at the tenant level⁵ Turn on Purview Audit and view Copilot interaction activity reports and charts⁶ Turn on proactive analysis for sensitive data handling with prompts and responses with Purview Communications Compliance²⁶ Turn on audit-mode oversharing SPO Purview DLP policy to restrict access to sensitive data exposure & start remediating them⁷ Disable RSS (if enabled) to allow full Copilot experience⁸ Increase site privacy <ul style="list-style-type: none"> Use site sensitivity labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members¹⁸ Apply default site library sensitivity labels to protect new and modified unlabeled documents²⁷ Reduce risk by remediating alerts for overshared documents from the SPO Purview DLP policy by applying sensitive labels and disabling anyone access²⁸ Further secure sensitive data <ul style="list-style-type: none"> Automatically label new documents and prevent them from oversharing with run time labeling policy, starting with client-side policies and extend to server-side policies²⁹ Identify inactive sites with SAM, then restrict access or delete³⁰ Improve Copilot responses <ul style="list-style-type: none"> Setup Purview retention/deletion policies for SharePoint to reduce data surface²⁴ Identify inactive sites with SAM, then restrict access or delete³⁰ 	

Guidance assumes Copilot technical prerequisites in place: Technical enablement of core services (Teams, SharePoint, Exchange), Office Applications deployed (modern Outlook recommended) and on current or monthly update channel

Learn how to use the features in the blueprint and how these features impact Microsoft 365 Copilot: <https://aka.ms/E3PrepareYourDataForCopilot>

Get the blueprint:

<https://aka.ms/Copilot/OversharingBlueprintLearn>

Secure, Govern and Manage Copilot Agents





**IT control and management
for agents**

Copilot Control System

Equipping IT to lead AI transformation

The **Copilot Control System** is designed to enable IT confidently adopt and accelerate the business value of Copilot and agents. This includes



Data Protection

Identify and mitigate oversharing

Intelligent grounding respects your permissions and security controls

RAI checks for every prompt protect from AI risks



Management Controls

Control which agents are available and who can access agents

Review agent permissions and actions before making available in your tenant

Track and manage agent lifecycle, access usage and operational insights



Measurement & Reporting

View core usage telemetry and track license utilization

Track improvements in user productivity and compare impact across groups

Analyze Copilot & agents impact to business outcomes

Copilot Control System product capabilities

	Data Protection	Management Controls	Measurement & Reporting
<p>Previously announced and generally available</p> 	<p>Set permissions and labels [SharePoint and Microsoft 365]</p> <p>Set policies: DLP, Labels, Retention and more [Purview]</p> <p>Add grounding data with connectors [Microsoft 365 Admin Center (MAC)]</p> <p>RAI & policy checks at runtime</p> <p>Monitor & reporting with Audit logs, eDiscovery [Microsoft Purview]</p>	<p>Control user and agent access permissions in tenant [MAC]</p> <p>Control permissions to create agents using Copilot Studio [Power Platform Admin Center (PPAC)]</p> <p>Review agent actions before approval in MAC and control allowed actions for agent creators [PPAC]</p> <p>Manage agent lifecycle [PPAC]</p>	<p>Analyze license allocation and Copilot usage telemetry [MAC & Viva]</p> <p>Understand how Copilot usage is correlating to time savings and changes in collaboration & behavioral outcomes [Viva/Copilot Dashboard]</p>
<p>Announcing at Ignite</p> 	<p>NEW: SharePoint Advanced Management now included in Microsoft 365 Copilot to monitor content oversharing</p> <p>NEW: Copilot Activity APIs to export prompts and responses [Graph APIs]</p> <p>NEW: DLP for Microsoft 365 Copilot prevents processing and summarizing of protected content [Microsoft Purview]</p> <p>NEW: Gen-AI risk detection capabilities [Microsoft Purview]</p>	<p>NEW: IT admins can now use Copilot in admin centers to streamline tasks and get AI-powered insights [Microsoft 365 admin center, Teams Admin Center and SharePoint Admin Center].</p> <p>NEW: No extra cost for indexing your data into Copilot with connectors [MAC]</p>	<p>NEW: Introducing Copilot Analytics</p> <ul style="list-style-type: none">NEW: Viva Insights included in M365 Copilot; conduct deeper Copilot impact and ROI analysis by filters and 3P data with pre-built reportsNEW: Copilot Business Impact Report (VI) analyze M365 Copilot usage across business KPIs (sales, finance)

IT can directly customize Copilot's knowledge

Index data with Graph connectors and ground Copilot's responses in your work content



Improve Microsoft 365 Copilot relevance and context by indexing data from external sources into Microsoft Graph



Indexed data respects security and privacy policies to enforce access rights so you only get access to what you have access to



Updated entitlement for Microsoft 365 licensing to allow 50 million items indexed per tenant (Fall 2024)

Graph connectors

What are Graph connectors?

Microsoft Graph APIs to index items from other systems



IT management controls for agents

Power Platform Admin Center

Developer and resource access

Agent & connector catalog

- Admins control whether developers can publish from Copilot Studio when AI features are enabled

Management and monitoring

- Admins control which connectors and API endpoints are allowed in Power Platform environments

Developer access

- Admins control who has developer permissions in a Power Platform environment

Resources

- ✓ Developer access via [Security roles](#)
- ✓ Management of [PP Data policies](#)

Microsoft 365 Admin Center

Copilot agent access and deployment

Agent & connector catalog

- Admins can review agents and publish to tenant catalog
- Admins are notified about new agents awaiting review via Teams notifications
- Admins can review API endpoint of any Copilot agent
- Developers are notified about admin decision on approval of requested apps

Management and monitoring

- Admins can apply tenant postures for 1P/3P/LOB apps with agents
- Admins can manage agents at an app level for user access and pre-installation

User access

- Admins can manage who can upload a package with agents for personal use (planned) Available now in Teams Admin Center
- Admins can review and consent to AAD SSO permission for actions via API endpoints

Resources

- ✓ [Demo video](#): Review and approve an unpublished app
- ✓ Agent catalog: [App Approval Requests](#)

Teams Admin Center (TAC)

User access

- Admin can manage who can upload and use custom apps

Resources

- ✓ Secure and trust who can upload and use apps: [Upload of custom apps](#)

Governing and Administering Copilot Studio



Copilot Studio-specific Gov/Admin

Copilot Studio has some governance and administration features that are unique to the tool



Gov/Admin through Power Platform

Because Copilot Studio is a tool within Power Platform, many governance and administration features exist within the platform

Manage

[+ New](#)  Recently deleted environments

Search

Environments

Environment groups

Resources

Tenant settings

Data (Preview)

Products

Power Apps

Power Automate

Power Pages

Copilot Studio

Environments

An [environment](#) is a space to store, manage, and share your organization's business data, apps, chatbots, and flows. When an environment is [managed](#), it allows you greater visibility and control.

	Environment	Type	State	Dataverse	Managed	Region	Release Cycle	Created on
Sid Gundavarapu	Developer	Ready	Yes	Yes	Canada	Standard	10/15/2024 9:56	
Isaiah Langer	Developer	Ready	Yes	Yes	Canada	Standard	09/25/2024 6:31	
Mik NOT sysadmin	Production	Ready	Yes	Yes	Canada	Standard	09/24/2024 10:3	
Mik sysadmin	Production	Ready	Yes	Yes	Canada	Standard	09/24/2024 10:3	
Mona Kane	Developer	Ready	Yes	Yes	Canada	Standard	09/20/2024 10:5	
Alex Darrow (no ME)	Sandbox	Ready	Yes	Yes	Canada	Standard	09/20/2024 8:59	
Ryan Jensen	Developer	Ready	Yes	Yes	Canada	Standard	09/19/2024 1:35	
Nestor Wilke	Developer	Ready	Yes	Yes	Canada	Standard	09/19/2024 11:5	
Casey Dev2	Sandbox	Ready	Yes	No	United States	Early	09/18/2024 11:4	
Casey Dev1	Sandbox	Ready	Yes	No	United States	Early	09/18/2024 11:4	
David Blyth	Sandbox	Ready	Yes	Yes	Canada	Early	09/17/2024 5:05	
David Blyth	Developer	Ready	Yes	Yes	Canada	Standard	09/16/2024 3:02	
Lee Gu	Developer	Ready	Yes	Yes	Canada	Standard	09/15/2024 3:39	
Woodgrove Bank - Copilot Stu...	Production	Ready	Yes	Yes	Canada	Early	09/14/2024 7:46	
Mona Kane Demo 1	Developer	Ready	Yes	Yes	Canada	Early	09/13/2024 2:40	

Governing and Administering Copilot Studio



Copilot Studio-specific Gov/Admin

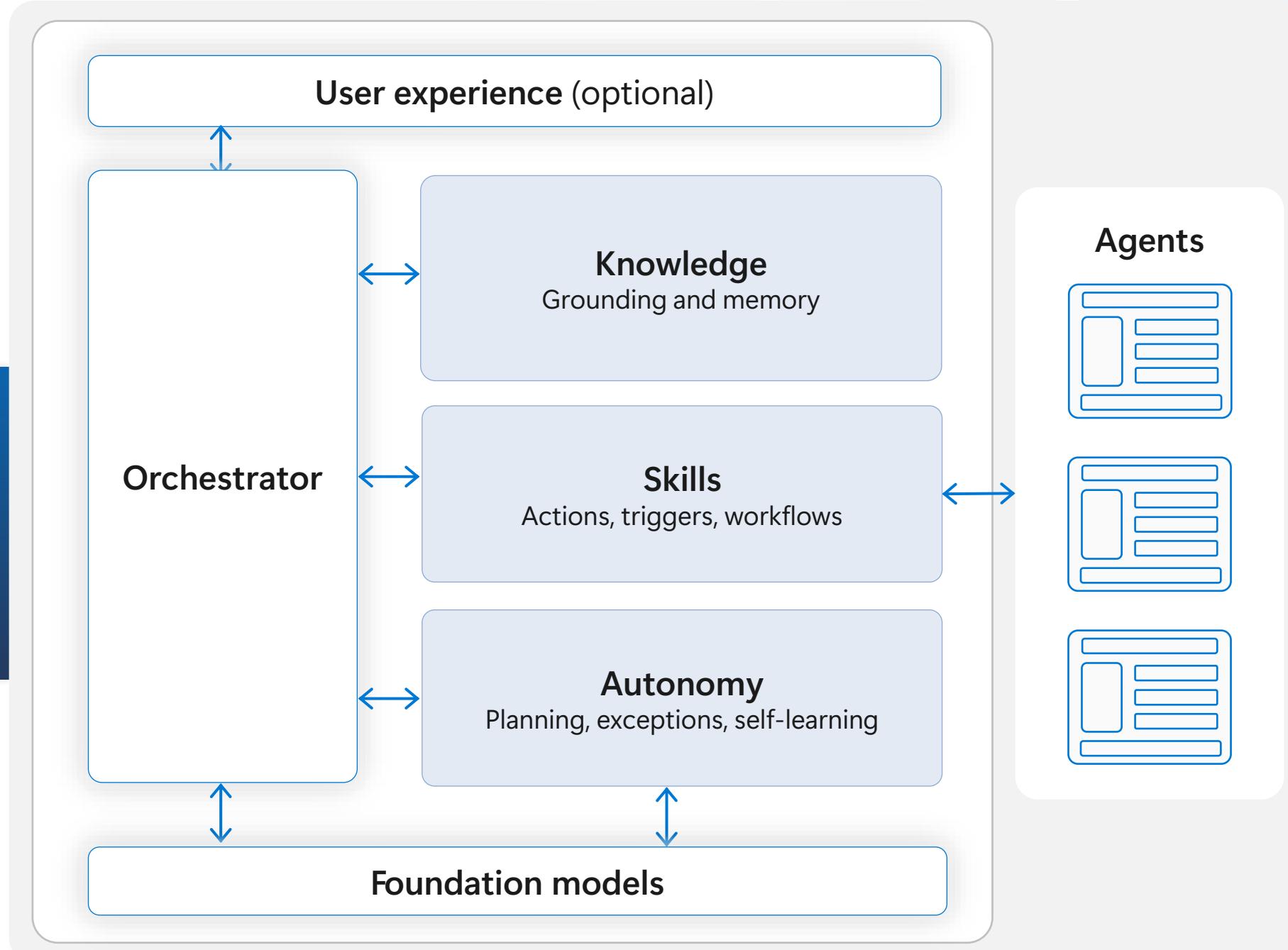
Copilot Studio has some governance and administration features that are unique to the tool



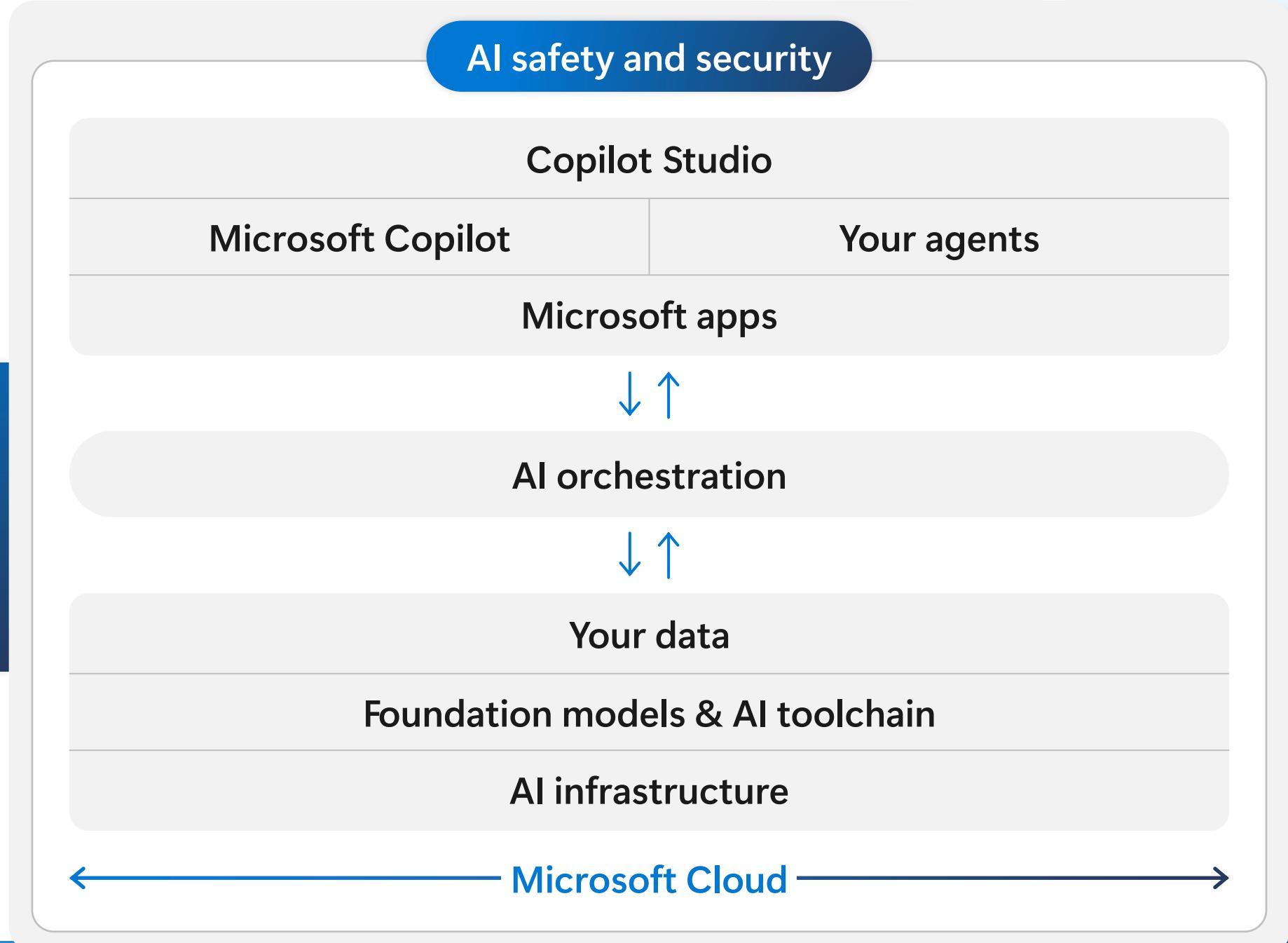
Gov/Admin through Power Platform

Because Copilot Studio is a tool within Power Platform, many governance and administration features exist within the platform

Anatomy of an agent



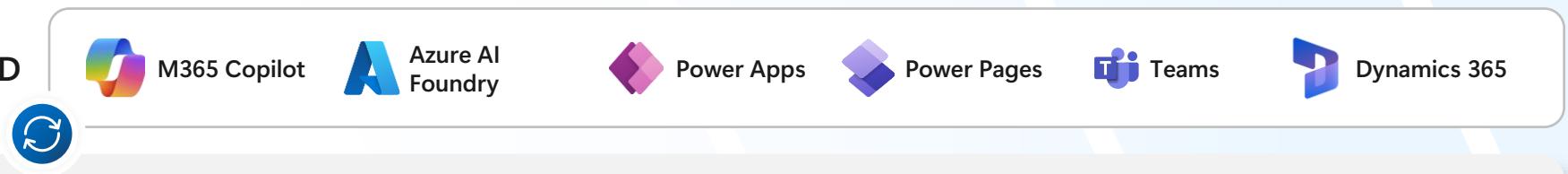
Copilot stack



Generative AI in Copilot Studio

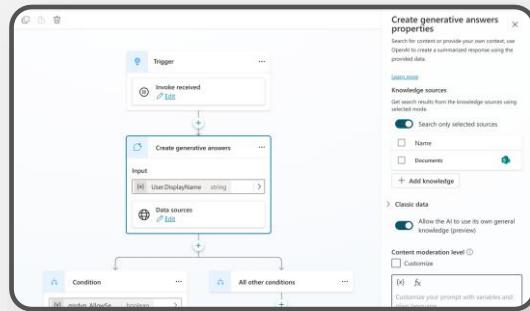
Powered by Azure

CONNECT AND EXTEND



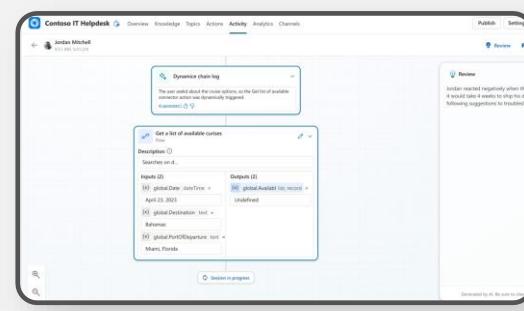
Generative Conversations

Generative Answers



Copilot Studio boosts conversational coverage by dynamically generating multi-turn answers based off an organization's content in real-time in response to unanticipated questions

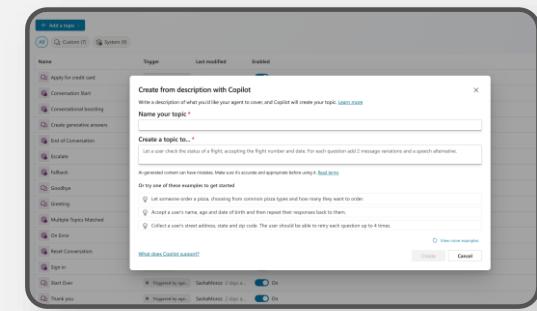
Generative Actions



Copilot Studio generates dialog and takes action through dynamically chaining existing building blocks which can handle queries that were not anticipated or previously built

Generative Assistance

Generative building



Assisted authoring to build, design and modify agents through natural language

External

3P Search APIs

External URL

Internal

OneDrive URL

Documents

SharePoint URL

Tools

Power Platform Connectors

Topics

Skills

Power Automate Flows

Edit & Refine

Topics

Trigger Phrases

Entities

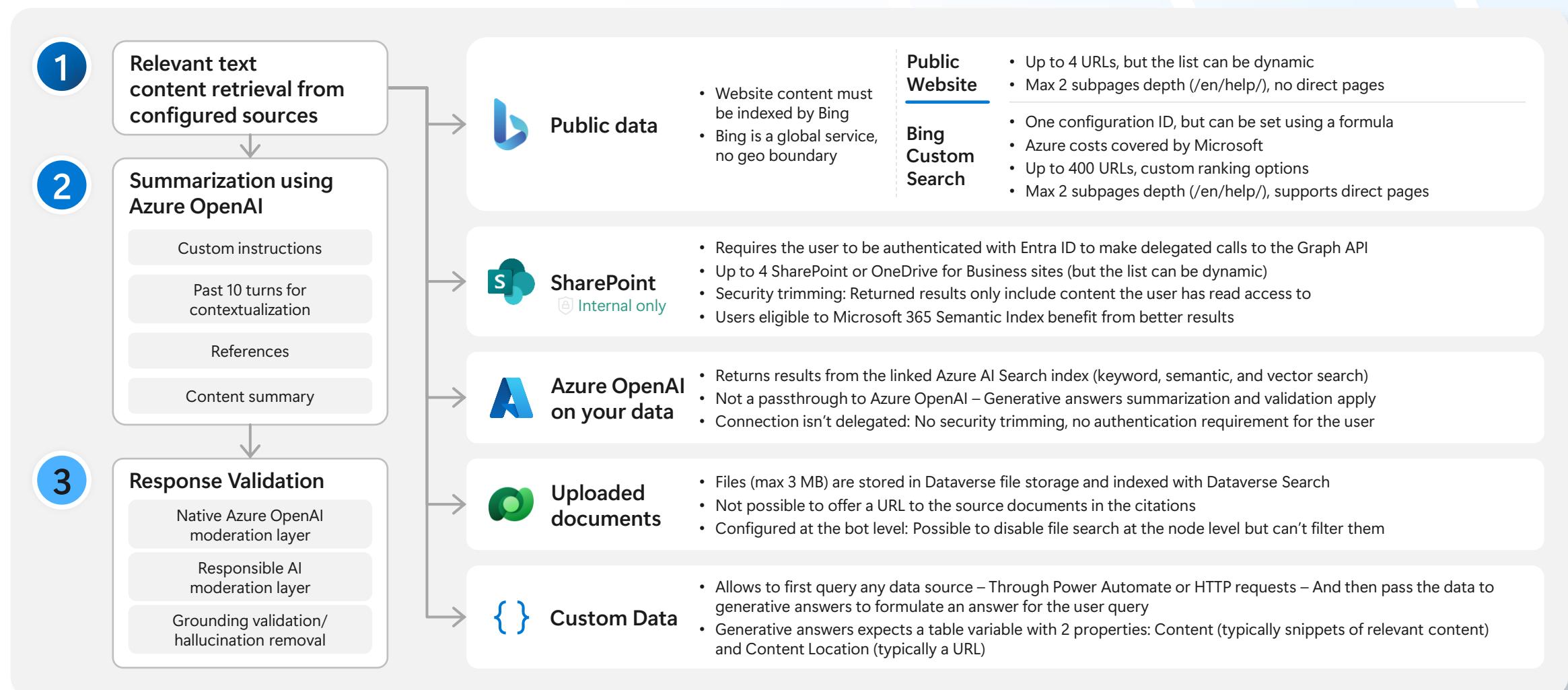
Variables

Adaptive Cards

Branching

Generative answers considerations

Generative answers processes and data sources



Generative AI security and compliance considerations

-  The large language models (LLM) Copilot Studio depends upon are the foundation models trained by OpenAI.
-  Generative answers uses GPT4o, but as new models outperform previous ones, they can be updated.
-  Models are hosted on internal Azure OpenAI services, honoring the Microsoft Services Trust boundary.
-  Models are accessed and used following [Microsoft Responsible AI](#) principles and policies.
-  [Custom instructions](#) can be added to generative answers to influence format and filters.
-  [Data storage and processing](#) for Copilot Studio generative AI capabilities may result in data movement across regional boundaries. When local data storage and processing aren't available in the region, environment settings are available to disable features requiring Azure OpenAI or Bing Search, preventing data movement.
-  Copilot Studio does not collect, nor provide any customer data, for use in the training of LLMs.
-  For operations purposes only, conversations are stored temporarily in a service-operated and secured store so that authorized Microsoft employees via Secure Access Workstations (SAWs) with Just-In-Time (JIT) access requests may respond to support requests. Access can be controlled through [Customer Lockbox](#).
-  Generative AI capabilities log additional troubleshooting data, but only when the thumbs up or down reactions are used by the copilot author in the Copilot Studio test pane.
-  Given the existing control layers and to avoid further logging of customer data, [Azure OpenAI abuse monitoring](#) is disabled for Copilot Studio generative AI features.

How can I control generative AI capabilities in Copilot Studio?

Copilot Studio provides granular and tenant-level governance controls for custom copilots in your organization. Use the Power Platform admin center to



[Make publishing of custom copilots available or unavailable](#), at the tenant level.



[Control whether custom copilots can use public URLs as knowledge sources](#), at the environment level.



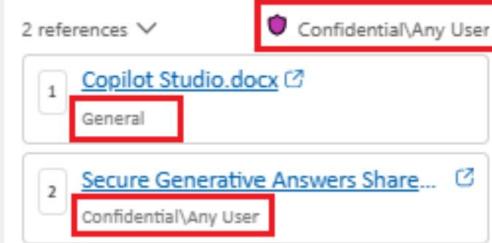
[Allow data movement across geographic locations for generative AI features](#), at the environment level.

Copilot Studio sensitivity labels (Preview)

Microsoft Copilot Studio supports the sensitivity labels for SharePoint and OneDrive data sources for knowledge or generative answers classic. This capability from Microsoft Purview strengthens your data security and compliance for Microsoft Copilot Studio.

Copilot uses existing controls to ensure that data stored in your tenant is never returned to the user, or used by a large language model (LLM), if that user doesn't normally have access to that data. When the data has sensitivity labels from your organization applied to the content, there's an extra layer of protection.

Copilot Studio is available as both a standalone web app and as a discrete app within Teams. Most of the functionality between the two versions is the same, but there might be different reasons to choose one version over the other based on how you want to use Copilot Studio. To use Granular Controls, you need to ensure that Copilot Studio follows AI rules and adheres to the "Chain of Protection," such as Sensitivity label. When AI uses existing data specific to an individual user to deliver a new capability, it must maintain a sensitivity label and protection set of the highest labeled and protected source. Around 700+ customers have turned off generative AI copilot publish in their tenants [1] [2].



Governing and Administering Copilot Studio



Copilot Studio-specific Gov/Admin

Copilot Studio has some governance and administration features that are unique to the tool

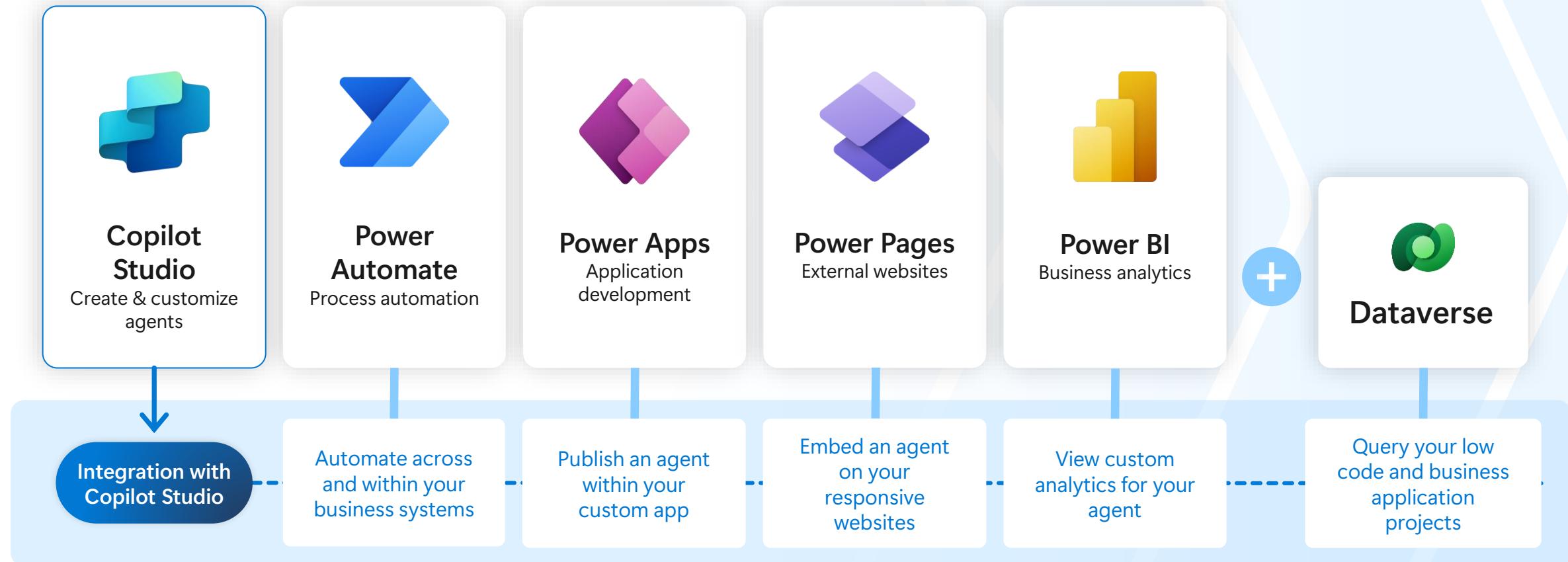


Gov/Admin through Power Platform

Because Copilot Studio is a tool within Power Platform, many governance and administration features exist within the platform

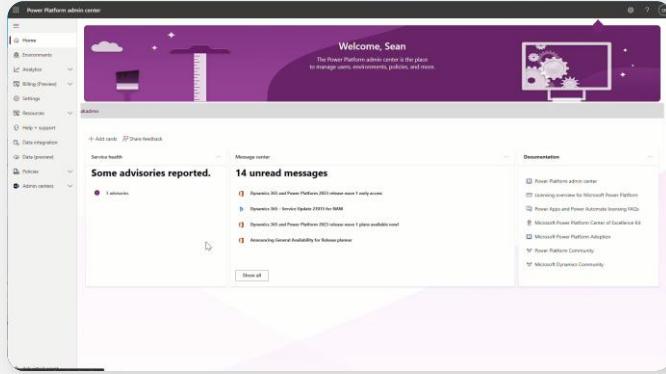
Copilot Studio is a member of the Power Platform

Many governance and administration capabilities for Copilot Studio exist in the Power Platform



The right tools for your governance requirements

Power Platform Admin Center

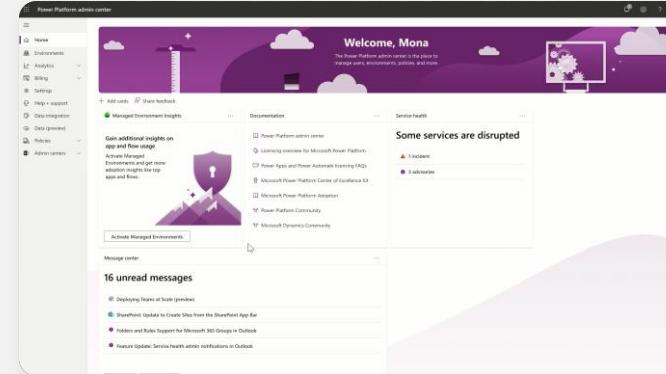


Standard governance offering

Build guardrails around data, agents, and environments

View analytics on low code assets across your organization

Managed Environments for Power Platform

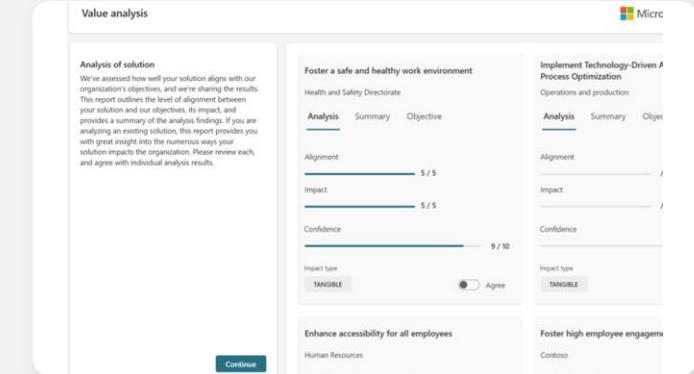


Premium governance offering

Enable governance-at-scale without additional IT resources

Proactively build and enforce best practices while gaining key insights and analytics

Center of Excellence Kit



Extensible governance add-on

Enhance your governance journey with powerful open-source tools

Drive innovation and improvement faster

Managed Service: Center of Excellence

As your customers use Microsoft Power Platform to enable citizen developers across their organizations, they also seek capabilities to **govern and monitor usage**

The Microsoft Power Platform CoE Starter Kit is a collection of components and tools that are designed to **help organizations develop a strategy** for adopting and supporting Power Platform

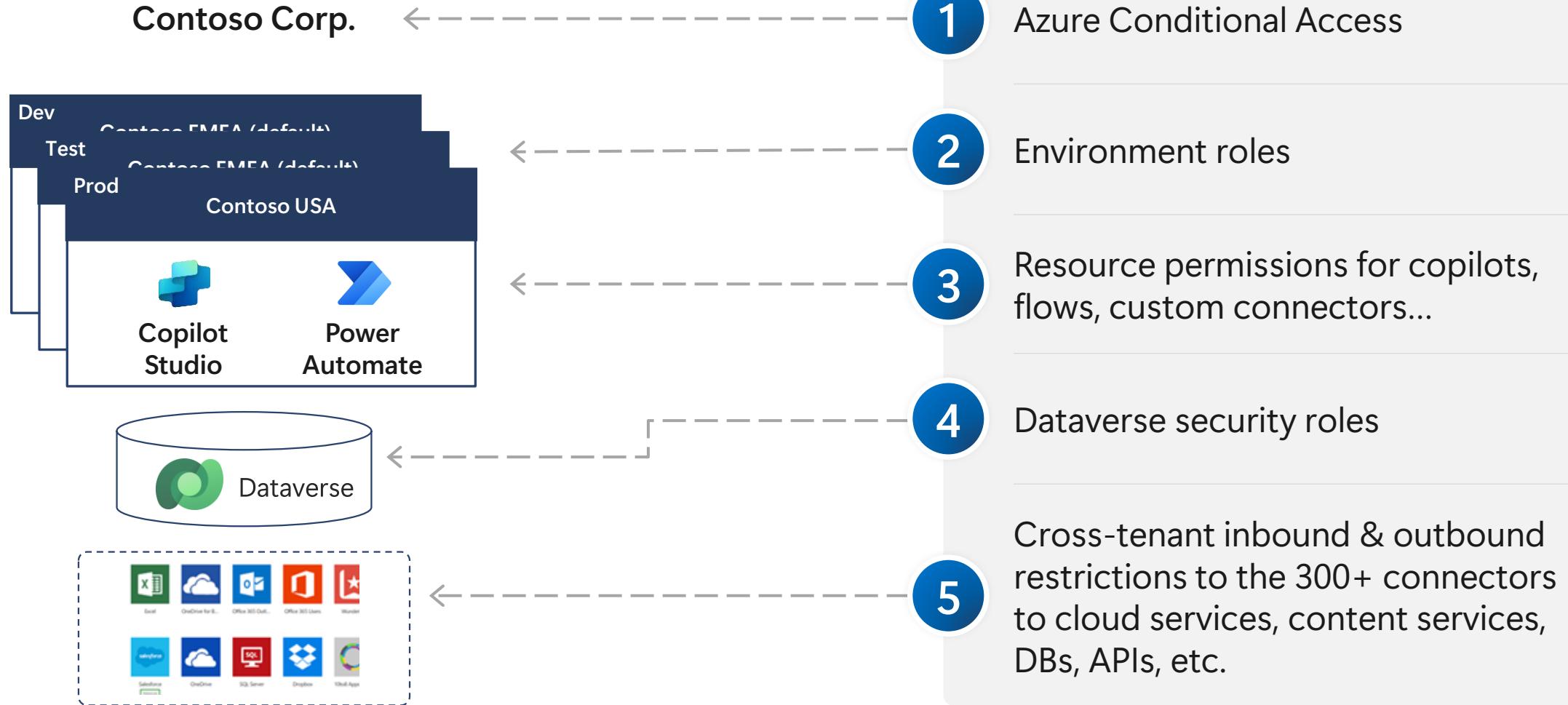
CoE Starter Kit features for Copilot Studio

- Keep track of the number of conversations per agent over time, with daily aggregates
- Allocate a number of conversations per environment
- Receive capacity email alerts when environment add-ons get near or over their allocated number of conversations
- Get an overview dashboard of Copilot Studio usage in a tenant over time as well as an all-up conversation consumption versus allocation

Questions to discuss

- Do you plan to use the Center of Excellence Starter Kit to delivered a managed service for the agents in your customer's tenant?
- Do your customers have specific governance requirements such as charge-back models?
- Do you allow your customer's users to create agents using Copilot Studio for Teams?
- Do you allow your customer's users to create Copilot Studio trials, or do you want them blocked?

Managing access for copilot developers



Environments

Create, manage, and monitor



Specify your region



Secure access to the environment by selecting which user groups can access the environment



Define Security roles for the environment



Makers can create and share apps, connectors, gateways etc. in the environment



Admins have complete ability to customize and administer the environment

Copilot Studio security roles

✓ Overview of standard Dataverse security roles and impact on Copilot Studio

Security Role/Table	Chatbot bot	Chatbot Subcomponent botcomponent	Conversation Transcript conversationtranscript
System administrator	 Org (CRUD)	 Org (CRUD)	 Org (CRUD)
System customizer	 Org (CRUD)	 Org (CRUD)	 Org (CRUD) Soon none
Environment maker	 User (CRUD)	 User (CRUD)	 None
Bot Transcript Viewer	 None	 None	 User (Read)
Bot Author <small>(deprecated)</small>	 User (CRUD)	 User (CRUD)	 User (CRU)
Bot Contributor <small>(deprecated)</small>	 User (Read)	 User (CRUD)	 None
Omnichannel administrator	 Org (Read)	 None	 None

How are Copilot Studio records secured in Dataverse?

- When a chatbot is created, a team gets also created and the chatbot is shared with that team.
- Chatbot subcomponents (e.g., topics, entities, files, etc.) are shared with the same team.
- Conversation Transcripts are implicitly shared with their parent Chatbot's team, but only users that have a read access on the Conversation Transcript table can access them.

- These security roles grant permissions to Copilot Studio configuration and data tables in Dataverse
- To start creating and working on copilots, users can be assigned the standard Environment Maker security role. With this role, users only see their own copilots or the copilots that have been shared with them. If too permissive, custom roles may also be used
- The Environment Maker role also lets users create other related Power Platform components (e.g., solutions, cloud flows, connection references, environment variables, etc.)
- To see transcripts, users must be granted at least one role giving read access to the Conversation Transcript table

Useful resources

- [Use group teams to assign security roles](#)
- [Security concepts in Dataverse](#)
- [Chatbot \(bot\) table/entity reference](#)
- [Chatbot subcomponent \(botcomponent\) table/entity reference](#)
- [conversationtranscript table/entity reference](#)

Application lifecycle management (ALM)



First and foremost, ensure your team is checking into source control



Copilot Studio ALM is like the rest of the Power Platform



Your agent is packaged together with dependencies (Power Automate Flows, connectors) into a solution



A solution file is a .zip, unzip it and check it in



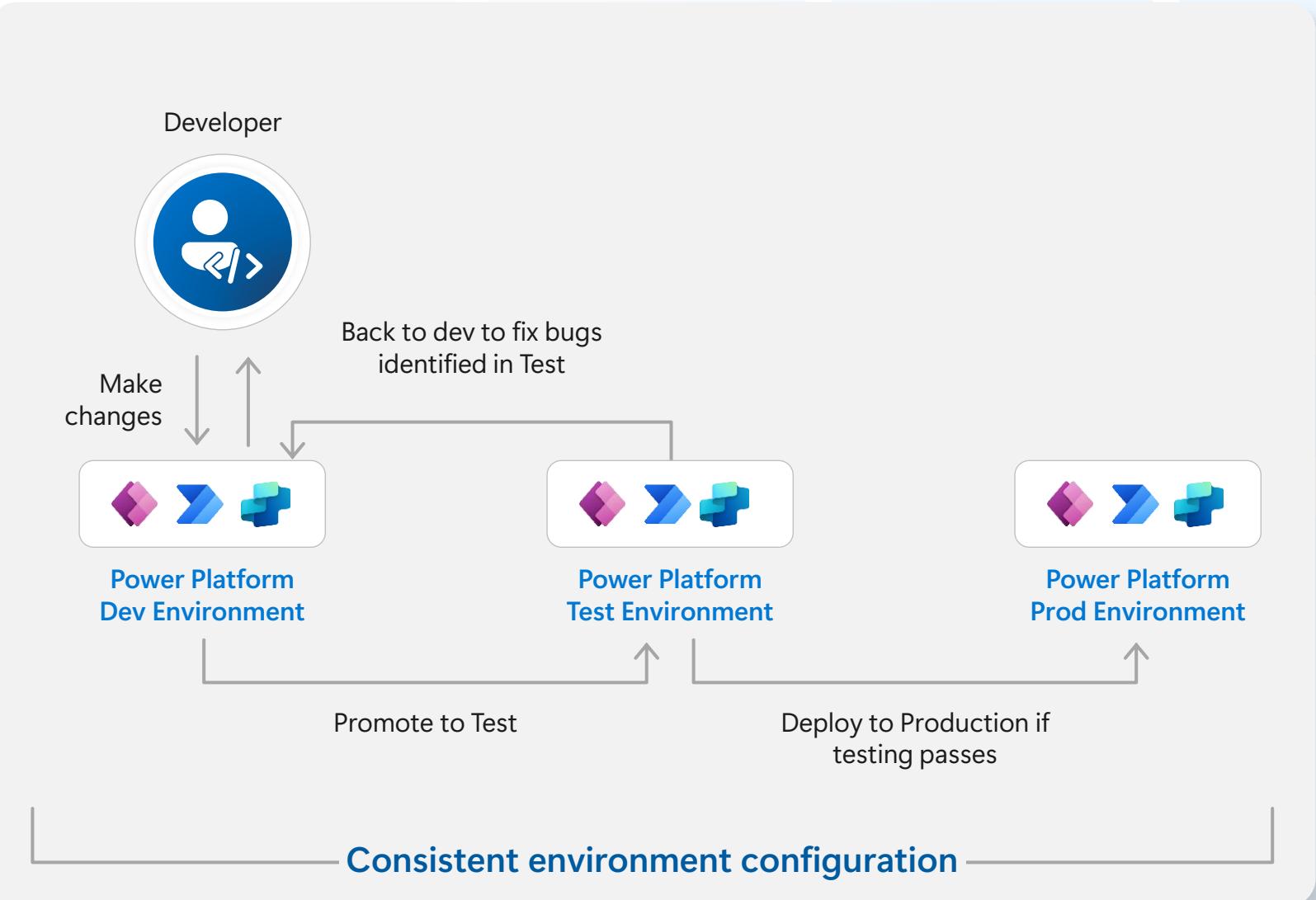
Lots of further reading:

[Application lifecycle management \(ALM\) with Microsoft Power Platform](#)

Power Platform ALM

Makers have agent lifecycle management requirements – Governance, development, and maintenance

Makers can export and import agents across multiple environments – Development, test and production



Solution configuration

Safely deploy customizations across environments and keep track of changes

ALM golden rules

- Work in the context of solutions
- Create separate solutions only if you need to deploy components independently
- Use a custom publisher and prefix
- Use environment variables for settings and secrets that change across those
- Export and deploy solutions as managed, unless setting up a dev environment
- Don't do customizations outside of dev
- Consider automating ALM for source control and automated deployments

Example solution configuration

Development	Test	Q.A.	Production
Agent • Contoso Agent • Agent Components 	Agent • Contoso Agent • Agent Components 	Agent • Contoso Agent • Agent Components 	Agent • Contoso Agent • Agent Components 
Cloud Flows • ServiceNow Flow • Internal API Flow 	Cloud Flows • ServiceNow Flow • Internal API Flow 	Cloud Flows • ServiceNow Flow • Internal API Flow 	Cloud Flows • ServiceNow Flow • Internal API Flow 
Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 

Learn from agent usage in production to make improvements in dev for future releases

What needs to be set manually?

- Azure Application Insights integration
- Deployed channels
- Some security settings

Evaluate options from simple to advanced continuous integration & delivery (CI/CD)

1. Manual deployment of solutions
2. Automated deployment with user-friendly pipelines in Power Platform (no source control)
3. Automated deployment + source control with Azure DevOps or GitHub Power Platform tools
4. Use of the ALM Accelerator for #2 + #3 and advanced deployment options for both no-code and pro developers
5. Automated testing of the agent as part of the deployment process





Advisor recommendations for copilots

Generally available

Enforce data loss prevention policy for Microsoft Copilot Studio copilots

The screenshot shows the Power Platform admin center interface. On the left is a navigation sidebar with various sections like Home, Environments, Advisor (which is expanded), Security, Analytics, Billing, Settings, Copilot (which is also expanded), Resources, Help + support, Data integration, Data (preview), Policies, Admin centers, and Dev tools. The main area has tabs for 'Recommendations' and 'Action history', with 'Recommendations' selected. It displays a list of 14 items, each with an impact level (High or Medium) and a description. A specific recommendation is highlighted: 'Enable data loss prevention policy enforcement for Copilot Studio'. A modal window titled 'Enable data loss prevention policy enforcement for Copilot Studio' provides details about why this is important (to secure and govern copilots) and what can be done (enable DLP enforcement). It also includes a 'Share in Teams' button.

Impact	Recommendations
High	Optimize Dataverse storage and improve performance of your apps
Medium	Review requests to turn on Managed Environments
High	Enable data loss prevention policy enforcement for Copilot Studio
High	Block connections with external tenants
High	Control Microsoft operator access to your content
Medium	Reduce risk exposure by revoking ownership of the apps owned by guest users
High	Protect high value apps with premium security and governance
High	Follow Application Lifecycle Management (ALM) best practices for high value apps
High	Assign licenses to pending Power Apps license requests
High	Review Power Apps license recommendations
High	Assign valid owners to mitigate business continuity risks
High	Enable Web Application Firewall (WAF) to protect websites



Authentications in copilot

Generally available

Copilot authentication is **secure** by default

Makers can select other **authentication options** – Microsoft or Manual

Admin can disable **no authentication** option for copilot

The screenshot shows the Copilot Studio interface with the 'Copilots' section open. Under 'Custom copilots', there are three entries: 'Security Health Copilot' (selected), 'Safe Travels Copilot', and 'Governance and Security Copilot...'. Under 'Microsoft', there are two entries: 'Copilot for Microsoft 365' and 'Copilot for Sales'. A 'Coming soon' section is also visible. On the right, the 'Settings' sidebar is open, and the 'Security' tab is selected. In the main content area, the 'Authentication' section is displayed. It includes a heading, a note about verifying user identity, and three options: 'No authentication' (radio button), 'Authenticate with Microsoft' (radio button), and 'Authenticate manually' (radio button, which is selected). Below these options are fields for 'Redirect URL' (set to 'https://token.botframework.com/auth/web/'), 'Service provider' (set to 'Azure Active Directory v2 with Certificates'), and dropdown menus for 'Azure Active Directory', 'Azure Active Directory v2', and 'Azure Active Directory v2 with Certificates'. At the bottom, there are fields for 'Token exchange URL (required for SSO)' and 'Login URL'.



Warn makers to Secure copilots

Generally available

Maker can monitor, protect, & manage security of copilots

Copilot warn makers when secure by defaults settings are changed and suggest steps to enhance copilot security

The screenshot shows the Copilot Studio interface with a modal dialog titled "Publish this copilot". The dialog contains several sections with warnings and suggestions:

- Your copilot does not require end user authentication.** Includes a link to "Authentication settings".
- Your copilot is shared with all users in the organization.** Includes a link to "Share settings".
- Your copilot runs actions using the author's authentication.** Includes a link to "View 24 actions".
- There are warnings that may affect the functionality of your draft copilot.** Includes a link to "Learn more".

At the bottom right of the dialog are "Publish" and "Cancel" buttons. The background shows the "Helpdesk Copilot" overview page with sections like "Test your copilot" and "Contoso Copilot".

DLP Policies and Copilot Studio

The Power Platform Data Loss Prevention Policies also apply to Copilot Studio

The regular connectors in the connector library can still be assigned to business, non-business, or blocked

In addition, there are some Copilot Studio-specific connectors we can block (see image)

Assign connectors ⓘ

Business (0) Non-business (1285) | Default Blocked (0)

Connectors for non-sensitive data. Connectors in this group can't share data with connectors in other groups. Unassigned connectors will show up here by default.

Name	Blockable	Endpoint configurable	Class
Skills with Copilot Studio	Yes	No	Built-In
Chat without Microsoft Entra ID authentication in Copilot Studio	Yes	No	Built-In
Microsoft Teams channel in Copilot Studio	Yes	No	Built-In
Direct Line channels in Copilot Studio	Yes	No	Built-In
Facebook channel in Copilot Studio	Yes	No	Built-In
Omnichannel in Copilot Studio	Yes	No	Built-In
Knowledge source with SharePoint and OneDrive in Copilot Studio	Yes	Yes	Built-In
Knowledge source with public websites and data in Copilot Studio	Yes	Yes	Built-In
Knowledge source with documents in Copilot Studio	Yes	No	Built-In
Application Insights in Copilot Studio	Yes	No	Built-In

Example: Require end-user authentication

When you create a new copilot, the **Authenticate with Microsoft** authentication option is turned on by default. The copilot automatically uses Microsoft Entra ID authentication for Authenticate with Microsoft without requiring any manual setup and only lets you chat with your copilot on Teams. However, copilot makers in your organization can select the **No authentication** option to allow anyone with the link to chat with your copilot.

The screenshot displays two main windows from the Power Platform admin center:

- Authentication Dialog:** A modal window titled "Authentication" with the sub-section "Choose an option". It contains three options:
 - No authentication: Described as "Publicly available in any channel".
 - Authenticate with Microsoft: Described as "Entra ID authentication in Teams and Power Apps". A note states: "Only Teams and Power Apps channels are available; all other channels will be disabled." This option is highlighted with a red box.
 - Authenticate manually: Described as "Set up authentication for any channel". A note states: "Supports Microsoft Entra ID or any OAuth2 identity provider. Available in any channel." This option is also highlighted with a red box.
- DLP Policies - Edit Policy:** A list of connectors under the "Non-business (1153) | Default" tab. One connector, "Chat without Microsoft Entra ID authentication in Copilot Studio", is highlighted with a red box. A context menu is open for this connector, showing options: "Move to Business", "Block" (which is highlighted with a red box), and "Configure connector".

Security, copilot, & user management

✓ Best practices to secure your Copilot Studio project



Assign licenses to users through Entra ID groups

Grant the 'Microsoft Copilot Studio User' license to users through a group instead of individual assignment.



Manage user access to environments through Entra ID groups

Only bot authors and a just-in-time admins should have access to your environments and data stores.



Manage security role assignment through Entra ID group teams

Within each Dataverse environment, leverage group teams to assign security roles to users.



Apply restrictive Data Loss Prevention policies to your environment

DLP policies can be applied to your environments to block all connectors that are not required by the project as well as any bot channel or setting that isn't useful for the project (e.g., unauthenticated use, use skills, etc.).



Review and only enable tenant, environment and copilot settings that are relevant

Tenant admins can disable publishing of GenAI-powered bots. Environment admins can disable GenAI features that require data movement outside of their region. Bot authors can require secured access for Direct Line. Internal chatbots can be limited for use by specific groups instead of being available to all.



Review and tighten security of all integrations

Connections should require strong authentication. Secrets should be stored in a secure location (e.g., Azure Key Vault). Leverage delegation, impersonation or filtering for data access in the context of an end-user.



Have a gated release process to production

Deploying changes from dev to test and to prod should require reviews and be part of a gated process.



Explore additional Power Platform, Dataverse and Entra ID security features

E.g., audit logs, customer-managed keys, customer lockbox, IP firewall, network isolation, multi-factor authentication, continuous access evaluation, etc.

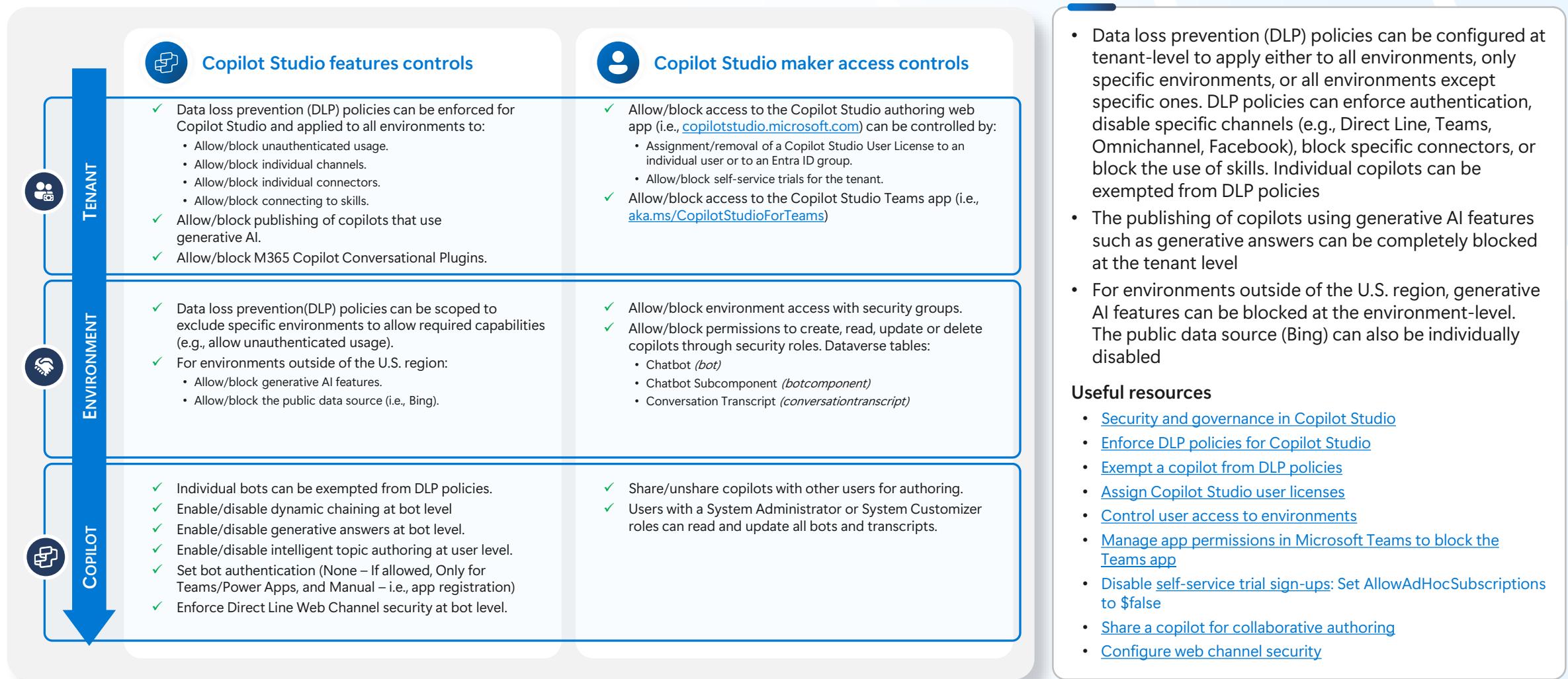
- Entra ID groups should be leveraged to fully drive user license assignment, environment access, and security roles assignment
- You should apply a most-restrictive approach by default and relax requirements on an exception basis

Useful resources

- [Assign licenses to a group](#)
- [Control user access to environments](#)
- [Use group teams to assign security roles](#)
- [Manage data loss prevention policies](#)
- [Disable the ability to publish copilots with generative answers and actions](#)
- [Configure data movement across geographic locations for generative AI](#)
- [Configure web channel security](#)
- [Share and collaborate on chatbots](#)
- [Connecting and authenticating to sources](#)
- [Use environment variables for secrets](#)
- [Authentication variables](#)
- [Pipelines in Power Platform](#)
- [Activity logging](#)
- [Customer-managed encryption](#)
- [Customer lockbox](#)
- [IP firewall](#)
- [Virtual networks](#)
- [Microsoft Entra ID security best practices](#)

Security and administration controls

Available security, governance and AI controls at the tenant, environment, or copilot level





Data Mask sensitive copilot data

Public Preview

Configure sensitive data to be masked when shown to users

Integrated with column level security and RBAC policies to secure user access

The screenshot shows a Microsoft Copilot Data Masking interface. At the top, there are navigation buttons: Back, New row, New column, Refresh, Create an app, and Edit table properties. Below this is a title bar with a grid icon and the word "Accounts". The main area displays a table with four columns: Account Name, Main Phone, Address 1: City, and Email (which is highlighted with a blue border). The table contains sample data from various companies. The "Email" column is specifically highlighted with a blue border, indicating it is being masked.

Account Name	Main Phone	Address 1: City	Email	Account Number
A. Datum Corporation (sample)	555-0158	Redmond	*****@*****.com	
Adventure Works (sample)	555-0152	Santa Cruz	*****@*****.com	ABC28UU7
Alpine Ski House (sample)	555-0157	Missoula	*****@*****.com	ABCO9M32
Blue Yonder Airlines (sample)	555-0154	Los Angeles	*****@*****.com	ACSHN2S4
City Power & Light (sample)	555-0155	Redmond	*****@*****.com	
Coho Winery (sample)	555-0159	Phoenix	*****@*****.com	BABCO88H
Contoso Pharmaceuticals (sample)	555-0156	Redmond	*****@*****.com	
Fabrikam, Inc. (sample)	555-0153	Lynnwood	*****@*****.com	AFFSE9IK
Fourth Coffee (sample)	555-0150	Renton	*****@*****.com	ABSS4G45
John	3452348756	451 Woodland Pl, Bothel, WA	*****@*****.com	
Litware, Inc. (sample)	555-0151	Dallas	*****@*****.com	ACTBBDC3
Tom	2662234534	1345 NE way, Redmond, WA	***@*****.com	

Getting access to build an agent



A license for each user, also known as a "**Per user license**" (or "Copilot Studio User License" as referred to on the [Microsoft 365 admin center](#)), should be assigned to individual users who need access to create and manage agents.



A license for your organization, also known as a "**Tenant license**" (or "Copilot Studio" as referred to on the [Microsoft 365 admin center](#)), should be acquired by the tenant admin. This license cannot be assigned to individual users.



End users of your agents don't need a license. After you publish your agent, the users you select via the authentication and channel availability will be able to access the agent.

Disable agent publishing



Your admin can disable the ability to publish agents with generative answers and actions for your tenant in the **Power Platform admin center**.

Your admin can disable an agent for your organization by creating a support request.

Demo

Audit Copilot for M365 prompts & responses

The background of the slide features a dynamic, abstract design composed of several overlapping, translucent, curved bands in shades of orange, yellow, pink, purple, and blue. These bands create a sense of depth and motion, resembling liquid or light rays. The overall aesthetic is modern and professional.

Extend & optimize

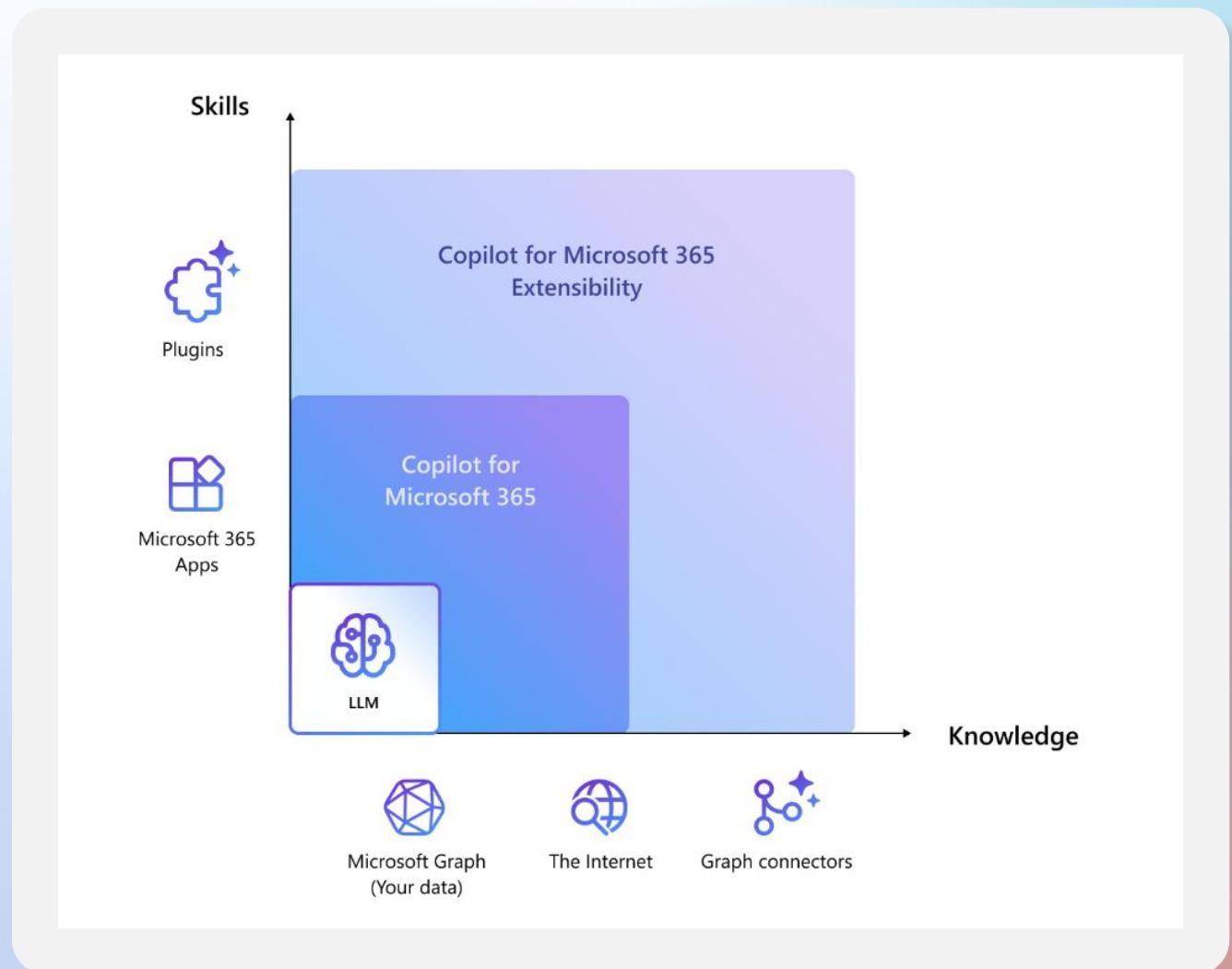
Enable and publish plugins

Extend Microsoft Copilot for Microsoft 365

Enrich the data estate of your enterprise with industry-leading AI

Keep your users in the flow of their work, start to finish

Inherit world-class security, compliance, and privacy policies



1 Plugins

Plugins expand your users' skills by interacting with your web service using natural language in Microsoft Copilot.

Plugin types

Use existing integrations or build new ones to extend your organization's AI-powered skills.

Teams

Message Extensions

Message extensions allow users to interact with a web service through buttons and forms in the Microsoft Teams, Outlook, and Microsoft 365 app clients.



Power Platform

Connectors

A proxy or a wrapper around an API that allows users to leverage a set of prebuilt actions and triggers to build their apps and workflows.



Open AI

Plugins

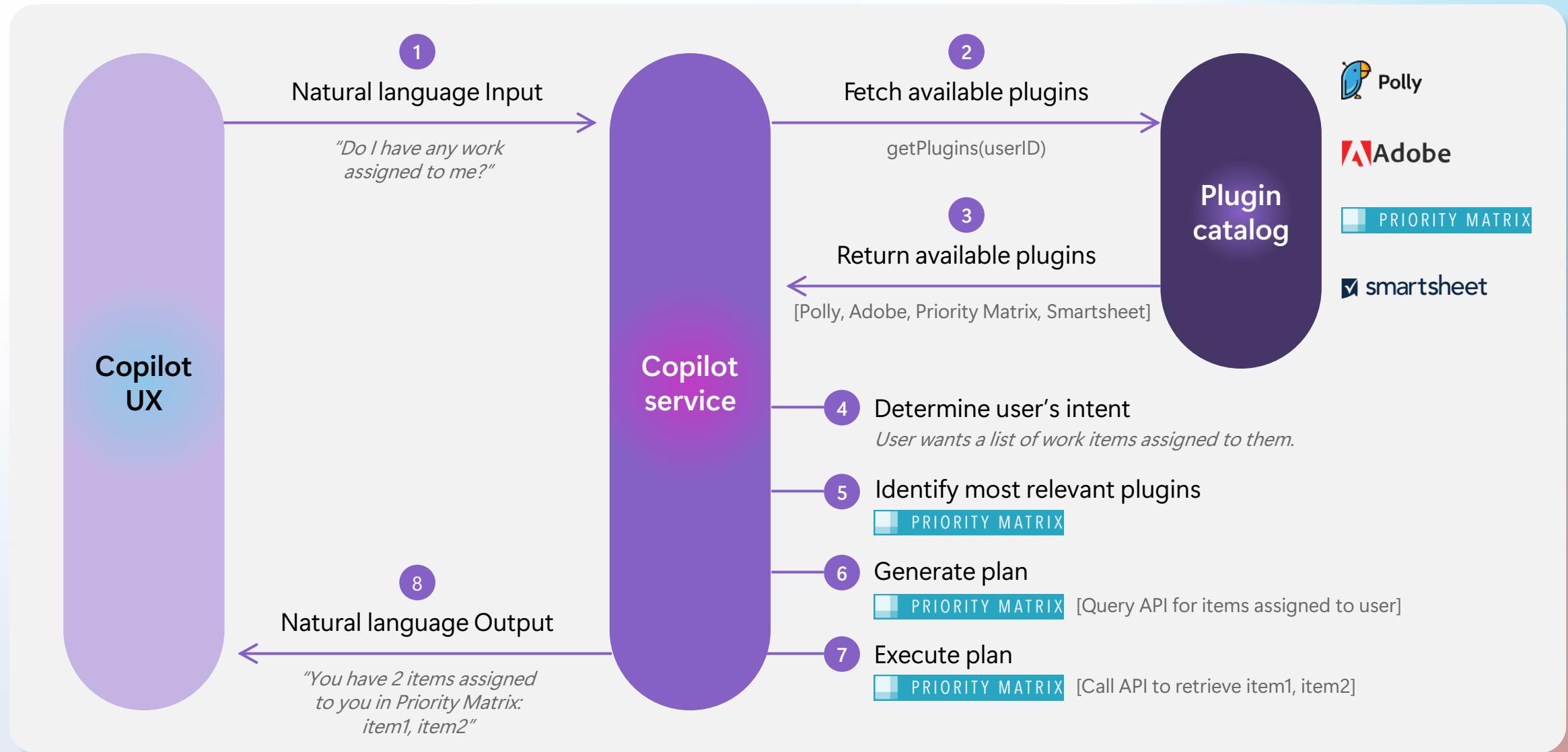
Open AI plugins connect ChatGPT to APIs, enabling it to perform actions like browsing and interacting with websites and games.



Existing Investments

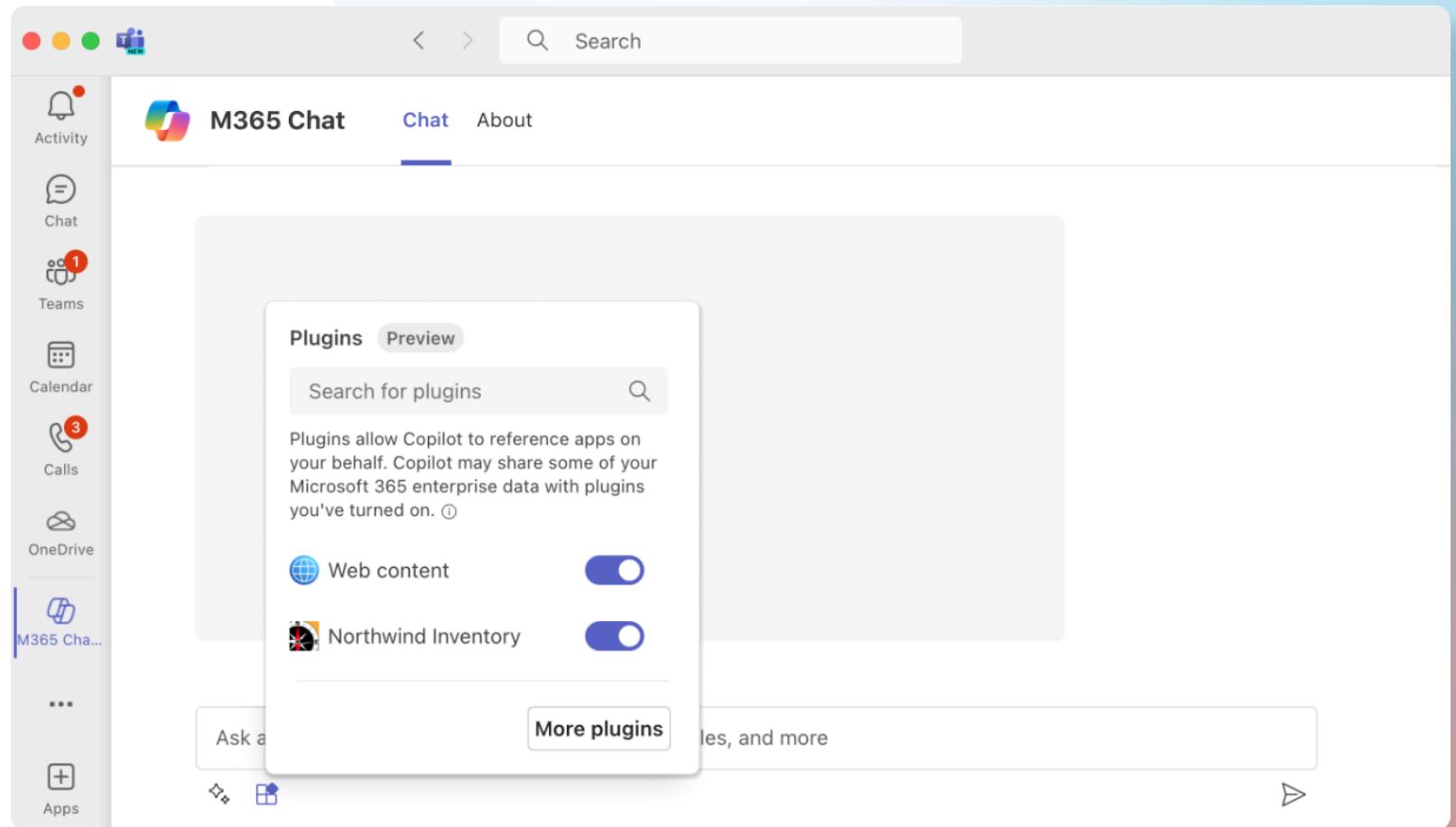
New

Plugin flow



Extensibility preview support

Support for plugins is in preview
and limited to [Microsoft 365 Chat for Teams](#).





Microsoft Graph connectors

Graph connectors increase the discoverability and engagement of your enterprise data by deeply integrating your data into the Copilot for Microsoft 365 experience.

Access citations to find summarized resources

The screenshot shows a Microsoft Copilot interface integrated into a Microsoft Teams chat window. The Teams sidebar on the left includes Activity, Chat (with 1 unread message), Teams, Calendar, Calls, Files, Contoso, and Apps. The main area displays a conversation with Copilot and several team members (Daniela, Cassandra Dunn, Aadi Kapoor, Eric Ishida, Cortex Framework, Will Little, Marie Beaudouin, Hillary Reyes, Charlotte and Babak, Reta Taylor, Joshua VanBuren, Daichi Fukuda, Kadji Bell). Copilot has provided a summary of Adatum's technical design, mentioning major updates to the database schema, implemented feedback for error handling, and proposed feature addition by Aadi. The summary includes three references:

- 1 Adatum's technical design
- 2 Group Chat with engineer team
- 3 Email with Aadi Kapoor

A "Copy" button is available to copy the summary text. A note at the bottom states "AI-generated content may be incorrect".

Hi Daniela, here are the major updates about Adatum's technical design [1](#)

- 1. Updated section 3.2:** The technical design document has been updated to optimize the database schema by introducing indexing and denormalizing certain tables. These changes are expected to significantly reduce query response times and enhance the overall efficiency of the system. [1](#)
- 2. Implemented feedback:** After receiving input from Babak, the development team addressed the identified areas of improvement in Module B. With the newly added error handling mechanisms, the system now gracefully handles potential exceptions and provides users with more informative error messages, contributing to a smoother user experience. [2](#)
- 3. Proposed feature addition by Aadi:** To enrich user interactions and foster real-time communication, the team put forth a proposal to integrate a live chat functionality within the application. Discussions regarding the technical implementation and potential impact on system performance are ongoing among the development team. [3](#)

[Copy](#)

3 references [...](#)

AI-generated content may be incorrect [Like](#) [Downvote](#)

1 Adatum's technical design [...](#)

2 Group Chat with engineer team [...](#)

3 Email with Aadi Kapoor [...](#)

Ask a work question, make a request, or type / for suggestions.

Microsoft Graph connectors



Make the most of your external data

by giving Copilot the ability to access and summarize your diverse datasets from different sources, enabling more comprehensive insights



Use Copilot as a research aid

letting Copilot find, summarize, and perform Q&A natively by leveraging the dataset of your choice



Surface the intelligence of Copilot

in Microsoft Search, ContextIQ, and more to enhance the ways your users are already searching for answers

Three main steps to set up a Graph connector

01. Create a connection

02. Register your schema

03. Ingest your content to the Microsoft Graph

Microsoft Graph connector pricing



Connectors Are Free

All of the connectors by Microsoft are free. However, you need to have sufficient index quota to ingest content from those connectors.



What is 1 item of index quota?

Each entity (or record) from the source system that you add to Microsoft Graph.

1 document in file share, 1 wiki page in Confluence or 1 ticket in Jira



Entitlement with Copilot

Copilot for Microsoft 365 includes entitlement to 500 items of index quota per licensed user.

For a 50-user SMB, you would have entitlements to 25000 items

Note: purchase additional index quota and SMB relevance

Additional Quota can be acquired with a minimal of USD \$1000/month for a million items.

For SMB's, you'd require special use cases to warrant this investment and therefore we recommend to first look at scenarios that can be met via license entitlement options.

Learn More: <https://learn.microsoft.com/en-us/microsoftsearch/licensing>

Sample response from Copilot, utilizing data from Graph connector

Show me GitHub issues ready for content review



Here are some GitHub issues that are ready for content review:

- "Testing fix to breadcrumb by adding Learn at first level" is ready for content review. 1
- "Patch 3" is ready for content review. 2
- "Update subscription-post-subscriptions.md" is ready for content review. 3
- "Update presence-setpresence.md" is ready for content review. 4
- "Update subscription-post-subscriptions.md" is ready for content review. 5
- "Update docs: Update profilePhoto" is ready for content review. 6
- "Update workinghours.md" is ready for content review. 7

Is there anything else you would like to know?

Copy

7 references ▾

Extend & optimize: Design, build, and deploy plugins

Design and build custom plugins

To enhance the Copilot for Microsoft 365 experience and cater to specific business requirements, you can create **AI plugins**. These plugins serve as extensions, allowing you to customize Copilot for Microsoft 365 for various scenarios. Here are the different types of AI plugins you can create:

1. **Prompt Plugins:** Utilize **AI Builder** and natural language understanding to target specific workflows within your business. These plugins generate content or extract insights based on user interactions with Copilot for Microsoft 365
2. **Flow Plugins:** Leverage **Power Automate flows** to perform actions and retrieve data. They enable seamless integration with external systems
3. **Connector Plugins:** Access data from other systems using **Power Platform connectors**. Popular enterprise products like Salesforce, Zendesk, MailChimp, and GitHub can be connected
4. **OpenAI Plugins:** Establish connections to custom **OpenAI models** that you create, enhancing Copilot for Microsoft 365 capabilities

- Determine the path forward for extensibility with our [decision guide](#)
- Design a plugin based on requirements to meet a user scenario
- Determine if the plugin needs to be built or if an existing plugin in the store can be utilized to meet your needs, and if an existing or new Teams apps message extension, Power Automate Flow, Data Connector is needed
- If needed, read our [documentation on message extensions for Copilot for Microsoft 365](#)
- If needed, read our [documentation on building plugins using Microsoft business applications](#)
- Publish plugins to your tenant

Reduce the build time for Copilot for Microsoft 365 extensibility:

- Decide if there is a need to build a new plugin or to leverage an existing plugin available in the Apps marketplace.
- Reduce the build time by determining if there is an existing Teams Message extension, Power Automate flow, and data connectors that can be leveraged for integration of Copilot for Microsoft 365 and Line of Business applications.
- Leverage Copilot Studio when possible.





Level-Up CSP Technical Training: Copilot for Microsoft 365

Create your own Copilot



Copilot Studio Overview

Public preview



Copilot Studio

In Copilot for Microsoft 365

Make Copilot work for you

Connect Copilot
to your data
everywhere

Customize copilot to
your business needs
and processes

Control & manage
customizations
centrally

Copilot Studio matched to your needs

When you **want to...**



Customize Copilot
for Microsoft 365
to work with data outside
Microsoft 365



...you need



**Copilot Studio in
Copilot for Microsoft 365**

Public
Preview

Built in customization
tool for Copilot for
Microsoft 365

Included in your Copilot for
Microsoft 365 subscription

When you **want to...**



Build your own Copilot



...you need

Generally
Available

**Microsoft Copilot
Studio (Standalone)**



End-to-end conversational
low-code SaaS-based Studio for
building custom standalone copilots

Licensed
separately

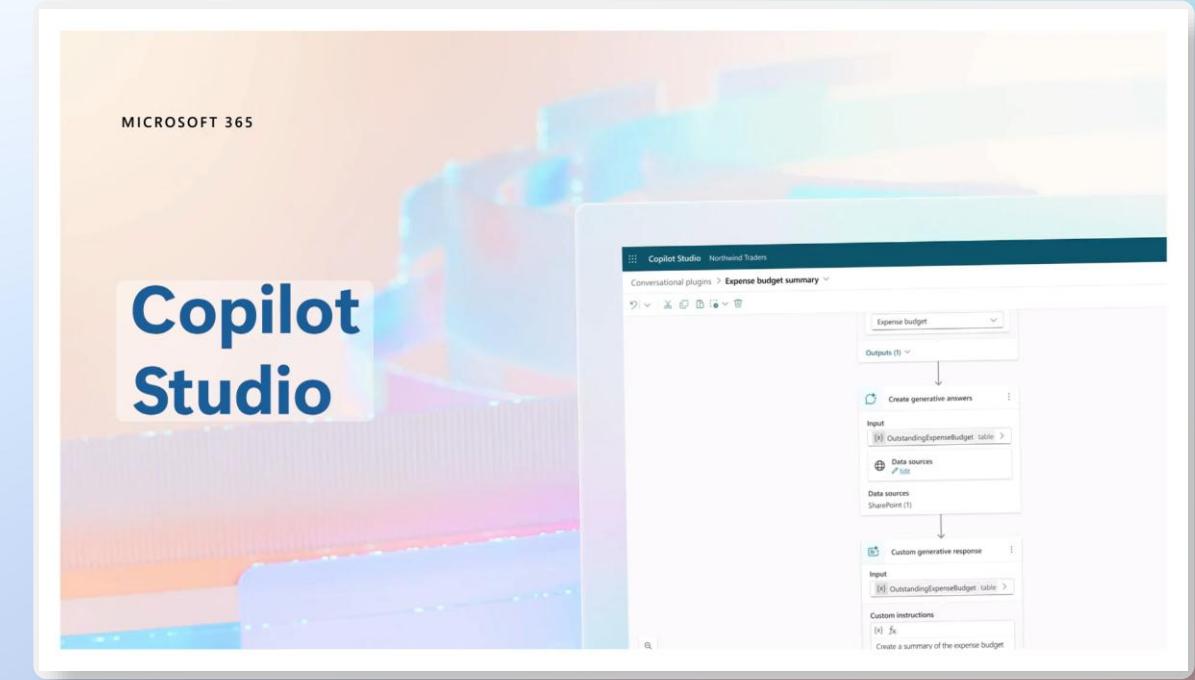
Customize Copilot for your unique business needs

With Copilot Studio in Copilot for Microsoft 365, you can extend and customize Copilot to work the way you need.

- **Connect Copilot to your data** in CRM, ERP, finance systems and more, using 1200+ standard and premium connectors.
- **Incorporate your business processes** into Copilot
- **Configure Copilot responses** to specific questions on topics like compliance, HR policies and more.
- **Publish and manage copilot customizations** in one central place

Build your own Copilot

- + With **Copilot Studio** (*available standalone*), quickly and easily create your own conversational copilots for customers or employees with an intuitive low-code tool.



Copilot Studio in Copilot for Microsoft 365

Examples of plugins you can design:

It's a platform for your needs.



Salesforce

Accelerate the speed you want information from your core CRM applications.

Ask Copilot:

What are my **open leads**?



Workday

Interact with your HRM systems for employee information or other.

Ask Copilot:

What's is my **current employee profile** information, address and contact information



SAP

Interface with your ERP systems to streamline your finance or resource planning processes

Ask Copilot:

Send a list of **pending invoices** from **this week**.



1200+

Extend with Plugins, but what are they?

Plugins are API definitions designed to **add skills** to **Microsoft Copilots**.

Reusable building blocks

Author with visual workflows to suit your needs

Publish and manage through IT

Traditional plugin development can be challenging

Budget &
time constraints

Infrastructure &
resource hosting

Developer and
technical expertise

Integration with
business systems

Security &
compliance risks

Maintaining
content

Transform plugin building with low code + AI



Build together
in low code



Optimize
business
processes



Accelerate
time to value



Unlock new
ideas with the
business



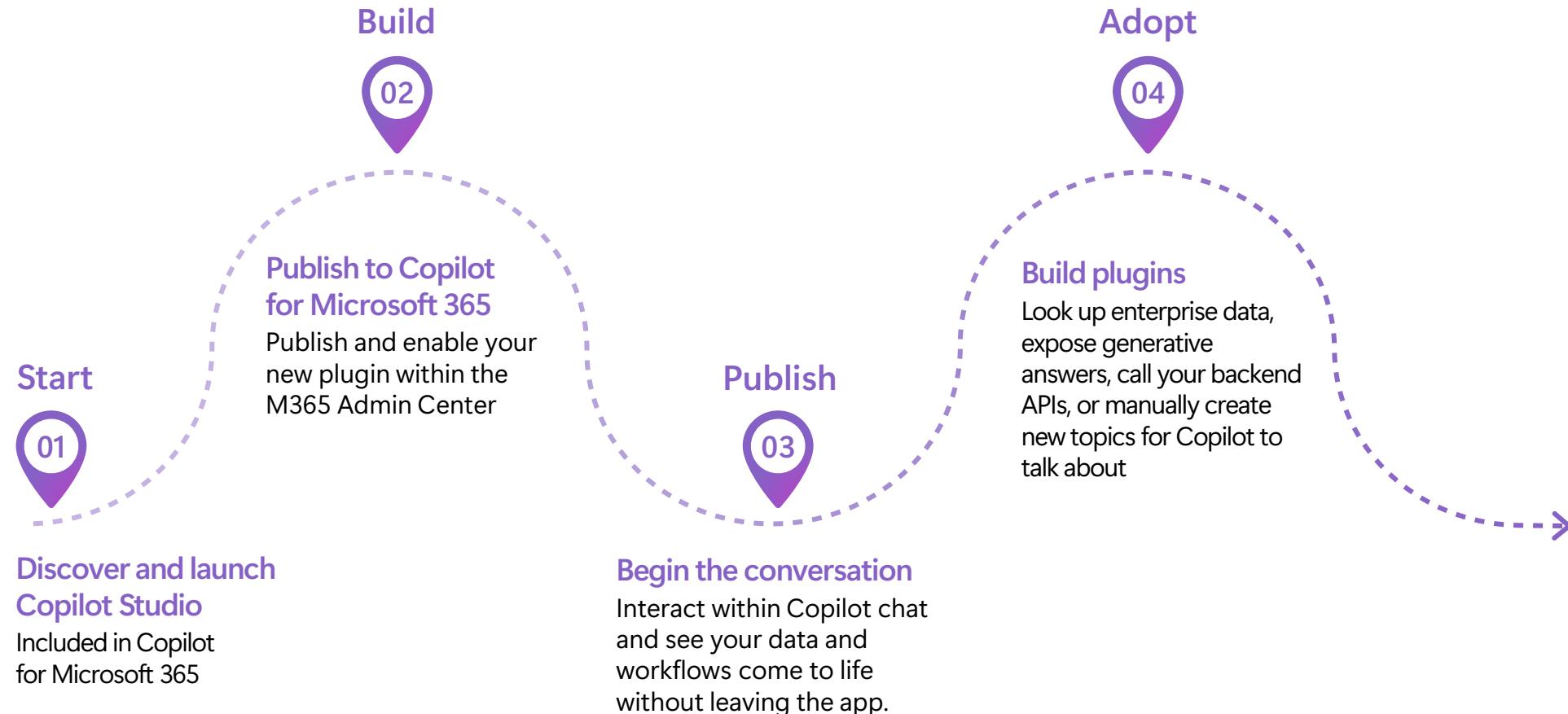
Reduce
development
costs



Monitored
and secure
through IT



How to build a plugin for Copilot for Microsoft 365



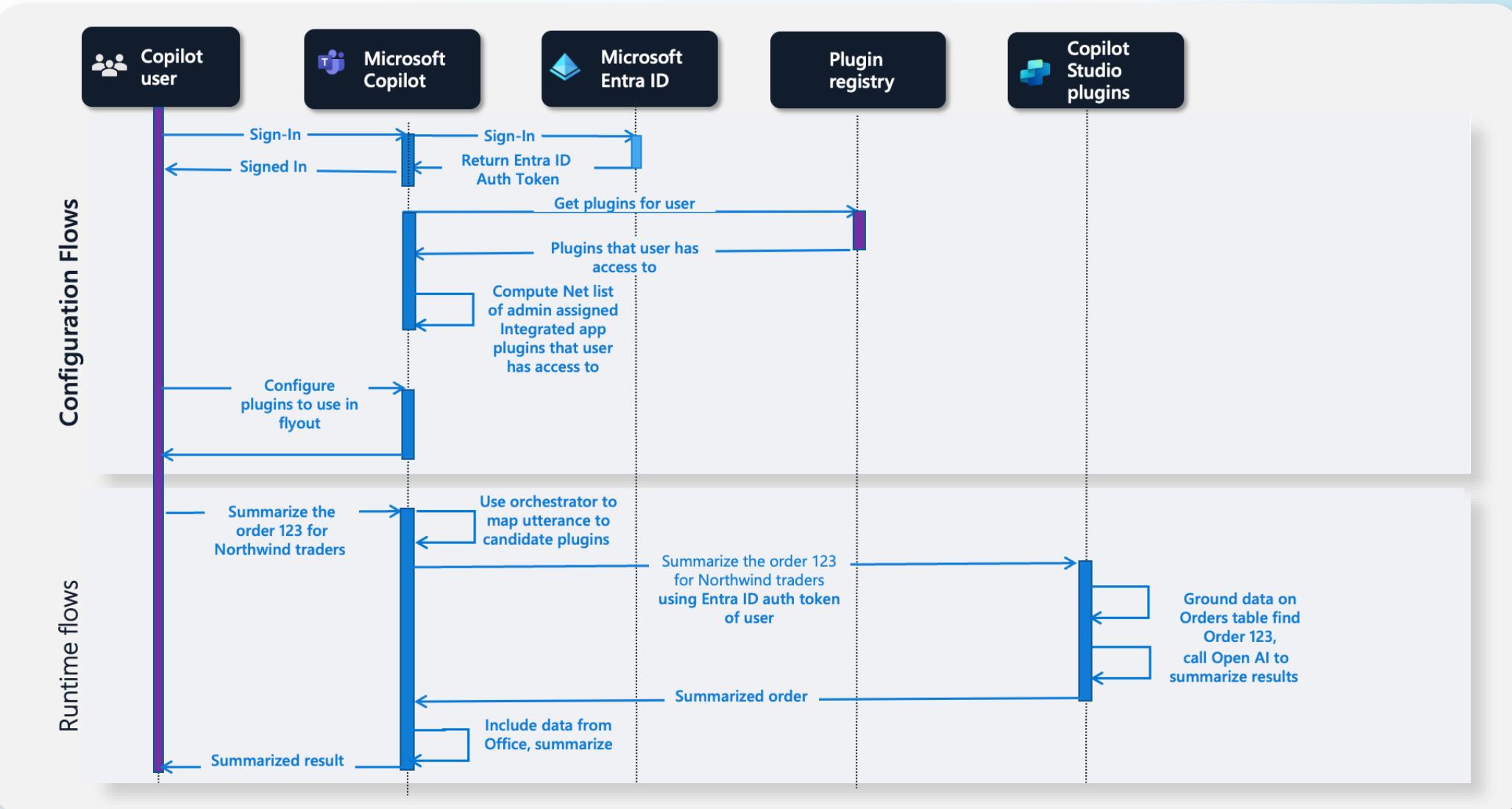
MICROSOFT 365

Copilot Studio

The screenshot shows the Microsoft Copilot Studio interface. At the top, it displays "Copilot Studio" and "Northwind Traders". Below the header, the title "Expense budget summary" is visible. The main area contains a flowchart diagram illustrating the data processing pipeline:

- Input:** "Expense budget" (text input field).
- An arrow points down to the **Outputs** section.
- Outputs:** "Create generative answers" (button).
- An arrow points down to the **Data sources** section.
- Data sources:** "SharePoint (1)" (button).
- An arrow points down to the **Custom generative response** section.
- Custom generative response:** "Custom generative response" (button).
- An arrow points down to the **Input** section.
- Input:** "OutstandingExpenseBudget table" (table input field).
- An arrow points down to the **Custom instructions** section.
- Custom instructions:** "fx" (text input field) and "Create a summary of the expense budget" (description).

How Copilot uses Copilot Studio plugins



Demo

Extend Copilot for Microsoft 365 with Copilot Studio



Microsoft Copilot Studio



Copilot Studio

Copilot Studio is an end-to-end conversational AI platform for **extending Microsoft Copilot** or **building your own copilot** experiences with generative AI and large language models.

The screenshot shows the Copilot Studio interface with the 'Northwind Trader' solution selected. The left sidebar includes options like Home, Building blocks (GPTs, Topics, Plugin actions, Prompts, Copilots), Create a copilot, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area displays the 'Northwind Trader' solution with sections for 'Boost your conversations (preview)', 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each section includes descriptive text and a 'Go to [section]' button.



Copilot Studio

Your copilot, your way

Customize

Build

Manage

Customize Microsoft Copilot

Extend and customize first-party Microsoft Copilots with your own enterprise scenarios. Copilot Studio will be included with the Copilot for Microsoft 365 SKU.

Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI.

The screenshot displays the Copilot Studio interface. The left sidebar contains navigation links such as Home, Building blocks (GPTs, Topics, Plugin actions, Prompts), Copilots, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area features a card titled "Boost your conversations (preview)" with a sub-section "Answer unanticipated questions in real time based on content you choose." It includes a "Learn more" link, a text input field "Enter your website", and a "Use generative answers" button. Below this are three more cards: "Extend a Microsoft Copilot (preview)", "Add plugins for dynamic chaining (preview)", and "Meet people where they are". Each card has a "Go to [card name]" button at the bottom.

Connect in the platform

Experience Microsoft conversational AI technology stacks through integrations with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models, and more.

Manage copilot experiences

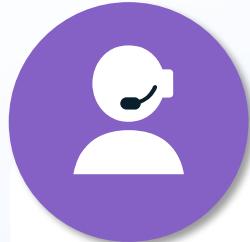
Monitor usage and gain full visibility into who is building copilots and customizing elements through built-in governance and control features.

Momentum of conversational AI to solve business challenges

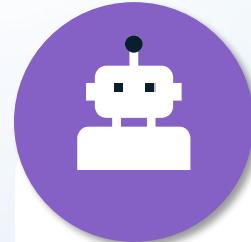
Market trends are clear, don't fall behind on this growing opportunity area



By 2025, **80%** of enterprise applications will embed a **virtual conversational assistant** to fulfill content fetching and content generation tasks.¹



By 2026, **conversational artificial intelligence** deployments within contact centers will **reduce agent labor costs by \$80 billion**²



By 2025, GenAI will be embedded in **80% of Conversational AI** offerings.¹

Source:

1. 2023 Gartner® - The Impact of Generative AI on the Conversational AI Market

2. 2022 Gartner - Forecast Analysis: Hyperautomation Enablement Software, Worldwide

GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

Building conversational AI has traditionally been challenging

Budget & time constraints

Infrastructure & resource hosting

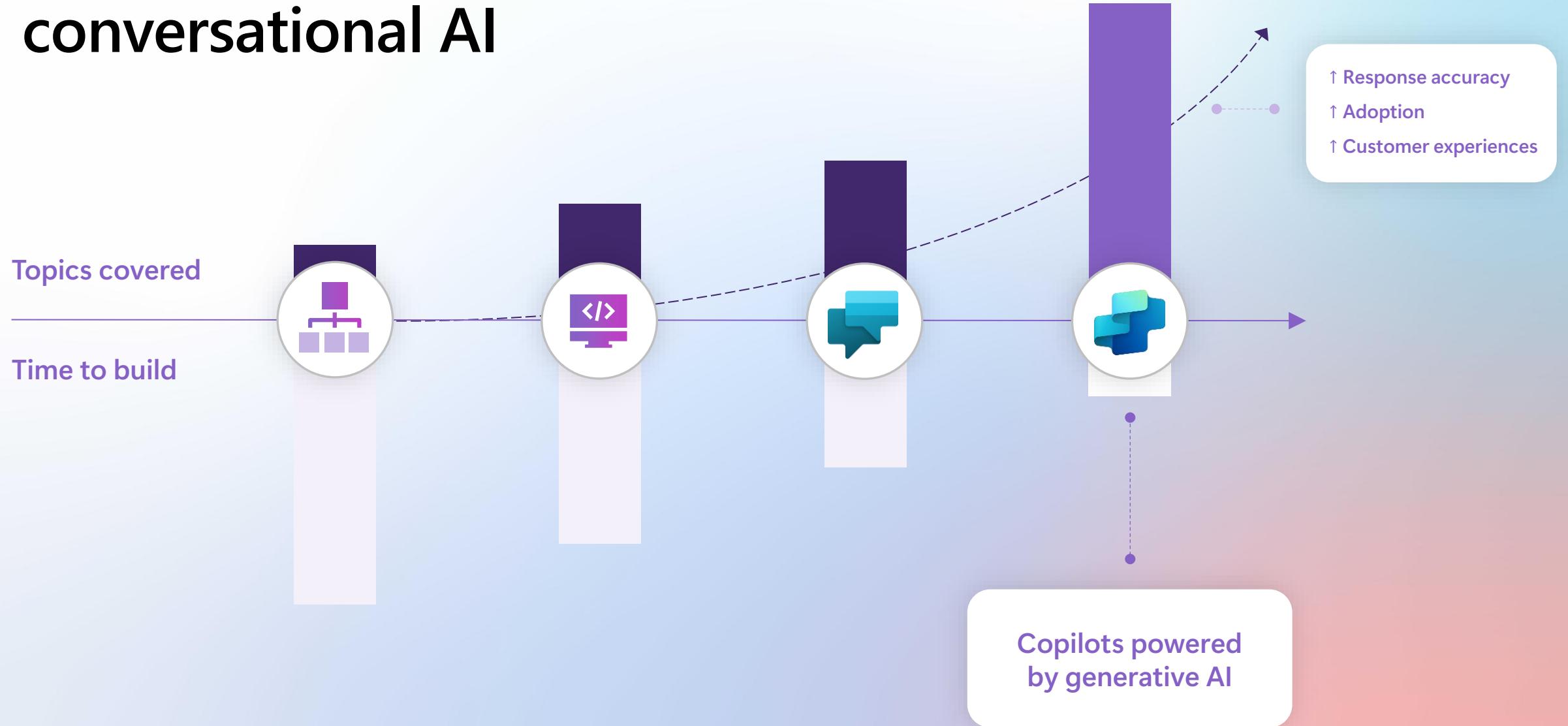
Product & technical onboarding

Integration with business systems

Security & compliance risks

Maintaining content

Welcome to a new era of building conversational AI



Copilot Studio is helping organizations achieve more with less

Innovate and improve performance and efficiency

Innovate faster, optimize and redesign business processes and enhance customer experiences.

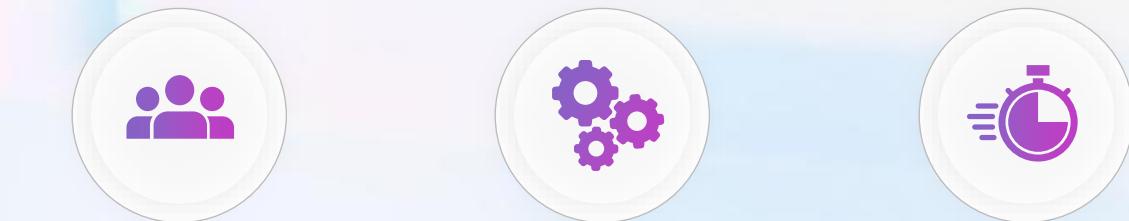
Reduce development costs

Develop faster with low code and a connected conversational AI stack and expanding the pool of available development talent.

Reduce risk and maintenance costs

Minimize the risk of custom in-house conversational AI, while improving compliance and security.

Transform your business with conversational AI



Enrich employee experiences



Bend the curve on innovation



Optimize business processes



Reinvent customer engagement



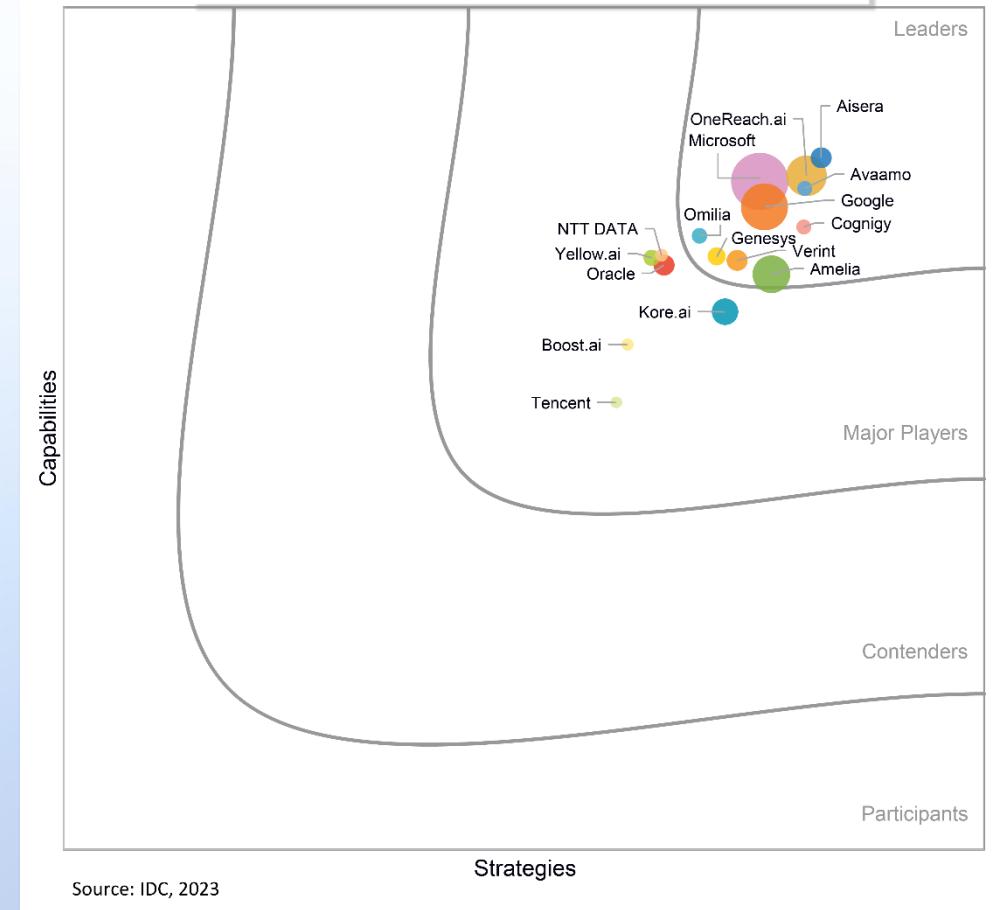
Improve efficiency & time to value

Reduce development costs & risks

IDC MarketScape: Worldwide General Purpose Conversational AI Software 2023

Recognizes Microsoft as a leader in general-purpose conversational AI software IDC highlighted Microsoft's generative AI capabilities along with our broad set of conversational AI tools. The authors also noted that, "Customers praised Microsoft's overall engineering expertise and its industry and use case expertise in conversational AI."

Source: [IDC](#)



IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral or minus next to the vendor name.



Copilot Studio

Customize Copilot for Microsoft 365

Customize Copilot to work with your unique business processes and data sources

Configure Copilot responses to specific questions

Build a plugin



with Copilot Studio
(included in Copilot for Microsoft 365)

Build your own custom copilots

Enhance customer experiences by adding a copilot to your external website or other channels

Build an internal copilot outside of Microsoft Copilot to help employees with specific functions

Build with low code



with Copilot Studio
(standalone)



Customize Copilot for Microsoft 365 to...

(Preview)

Surface your business data

Connect Copilot to your business data and apps, such as CRM, ERP, and line-of-business apps.

Incorporate your processes

Easily customize Copilot to automate your business processes and workflows.

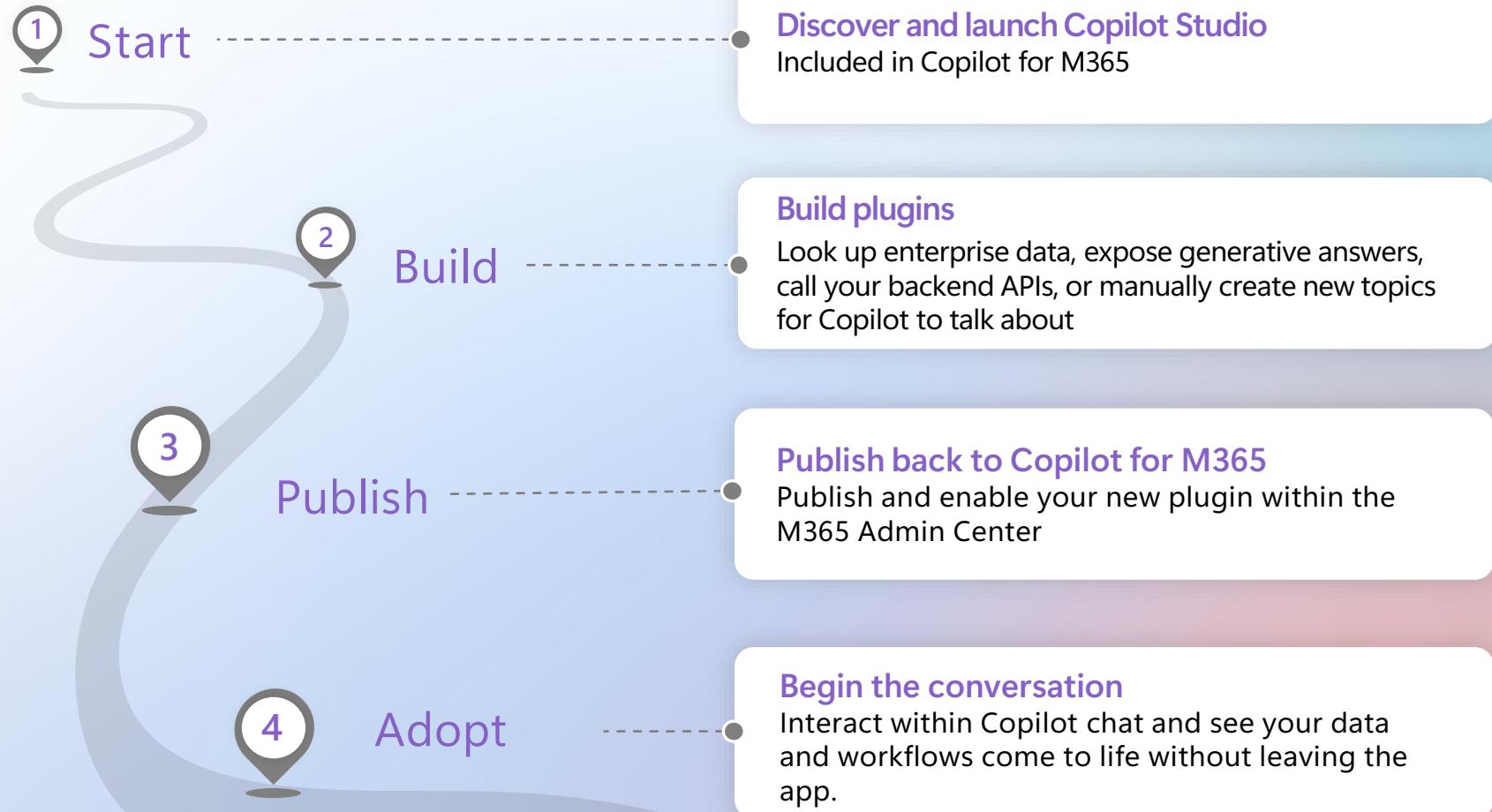
Configure how Copilot responds

Control how Copilot responds to specific questions with manually created topic flows.

Manage centrally

Secure your Copilot customizations with the right access, user controls, and analytics.

The building process



M365 Copilot extensibility through Microsoft Copilot Studio



Examples to bring to life

Plugin

Sales status

Accelerate the speed you want information from your core CRM applications.

[Ask Copilot for M365](#)

What are my open leads?



Plugin

Employee Information

Interact with your HRM systems for employee information or other.

[Ask Copilot for M365](#)

What's is my current employee profile information



Plugin

Invoice Management

Interface with your ERP systems to streamline your finance or resource planning processes

[Ask Copilot for M365](#)

Send a list of pending invoices from this week.





Create powerful custom copilots

Build and test together

Users of all skill levels can create automated, connected conversational AI experiences in one comprehensive platform.

Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

Boost your conversations

Use generative AI to dynamically respond using your organization's real-time content.

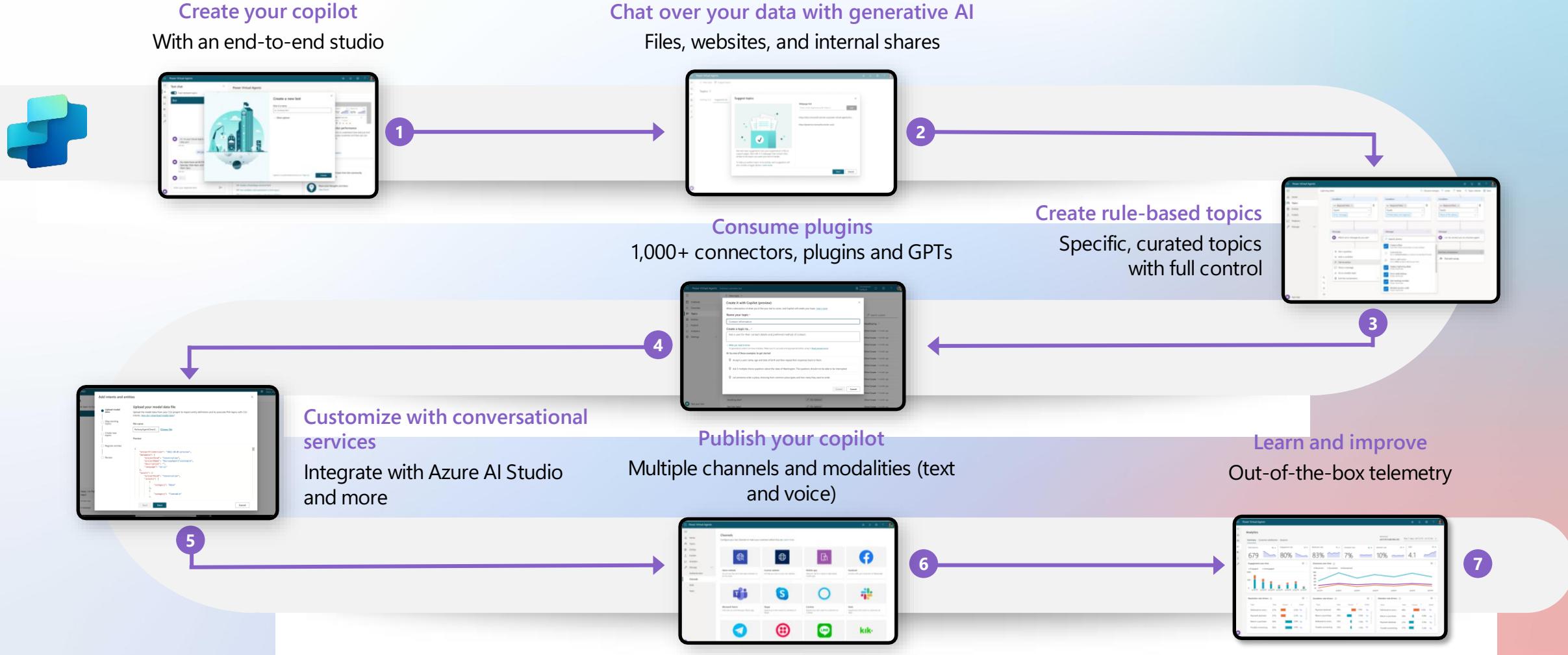
Handle complex queries with ease

Build intricate conversations with robust variable management, logic, and responses.

Continuous self-learning and improvement

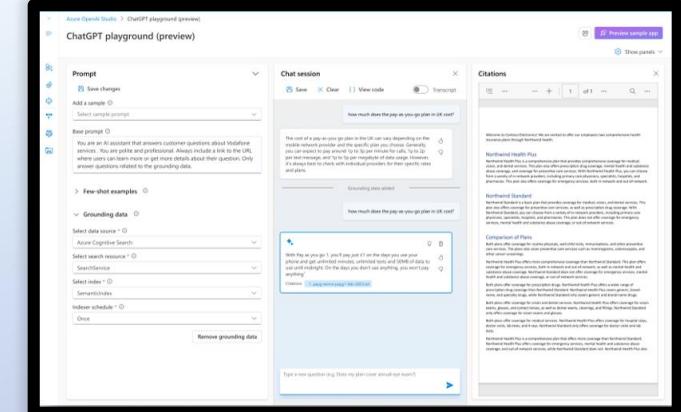
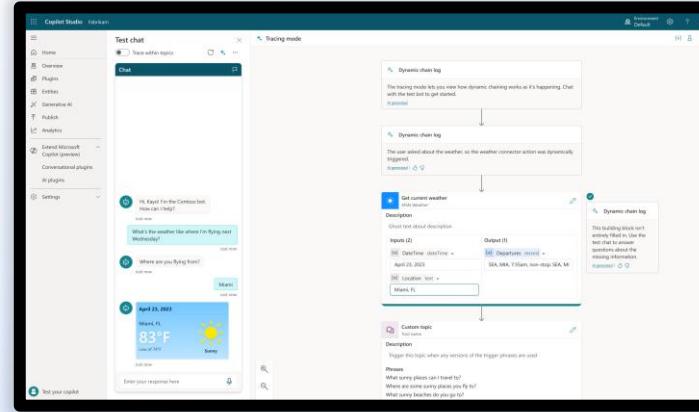
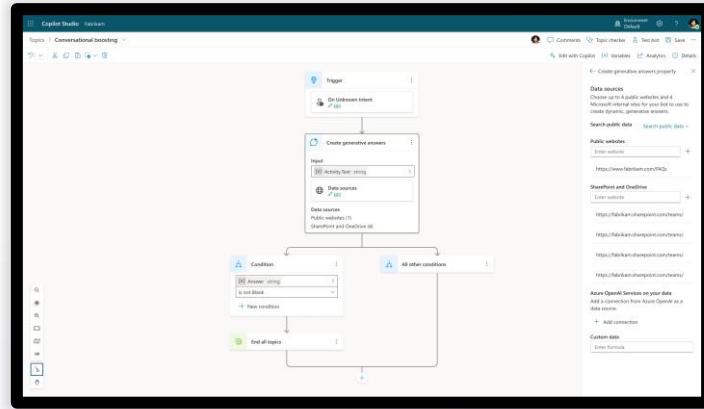
AI-driven features will improve your copilot over time and provide suggestions on how to optimize your conversations.

Design copilot experiences with ease



Generative AI in Copilot Studio

Powered by Azure OpenAI Service



Generative answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Generative actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

Bring your own custom Azure OpenAI model

Use Azure OpenAI on your data (ChatGPT, GPT-4...) and connect it to Copilot Studio.



Examples to bring to life

Custom copilot

IT Service

Transform IT service processes with employee self service.

Ask the copilot

What is the status of my [IT ticket](#)?



What are the [new laptop](#) options for my device refresh



What [software](#) can I use for photo editing and how much [budget](#) does my team have?



Custom copilot

Customer Facing

Interact with your CRM systems to provide a first-class experience for customers

Ask the copilot

Can you send me a receipt of my recent purchase and a "[how to](#)" guide on the product



What is the [best product](#) based on my needs?



What's the [next availability](#) for my service?



Custom copilot

Human Resources

Interface with your HRM systems to streamline your employees HR processes

Ask the copilot

Kick off the [onboarding](#) processes and associated task for [new colleague](#)



What is the budget for [learning and development](#) and what courses are available



Request time off and let me know how much [holiday](#) I have left





Partner Opportunity





Partner opportunity

Paths to developing and growing your Copilot Studio offerings

Microsoft Copilot Studio

Extend 1st party copilots

Extend Copilot for Microsoft 365

If you're currently a Modern Work partner, build on that expertise by focusing on the Copilot Studio capabilities included in Copilot for Microsoft 365 (currently in preview). Help your customers understand how to leverage these capabilities to expand the ROI and business impact of their investment.

Extend Microsoft 1st Party Copilots

If you're currently a Power Platform or Dynamics partner, discover opportunities to extend the Copilots available in those applications (where supported) to optimize customer experiences and increase value. *Available today for Power Apps, Copilot for Service with additional copilots becoming available soon.*

Become an end-to-end Copilot expert

Become your customer's Microsoft Copilot trusted advisor, enabling them across Copilot to navigate the options and opportunities to extend and customize their Copilots with Copilot Studio - from consulting & discovery through to implementation and adoption.

Build IP Solutions

Begin exploring how to embed copilot experiences within your product, as standalone offerings, or topics and plugins to extend Microsoft Copilots to create integrated and connected solutions. Additional opportunities coming for ISVs, stay tuned for more!

Build custom copilots

Develop a Conversational AI Practice

Become a go-to partner for Conversational AI, developing depth skills in deploying to value-added customer-facing channels including mobile and web. Bring strong skills in data & AI to support process transformation, differentiating from the competition by specializing in key industries and core systems to provide depth expertise.



Copilot Studio go-to-market overview

	Copilot Studio in Copilot for Microsoft 365 (Preview)	Copilot Studio
Use Case	Extend Copilot for Microsoft 365	Copilots for customers and employees
Licensing	Included in the Copilot for Microsoft 365 license	Capacity pack per tenant, \$200 for 25K messages
Value Prop	Customize and use Copilot Studio plug-ins in Teams and Microsoft 365	Use B2C standalone copilots, publish to any channel Use internal standalone copilots with employees
Channels where copilot can be deployed	Copilot for Microsoft 365 only	External channels (Web, mobile, social); Internal channels AAD authenticated (Web, Teams)
Availability	Available in Public Preview	Generally Available
Example Scenarios	<p>Productivity scenarios consumed via Copilot for Microsoft 365</p> <ul style="list-style-type: none">▪ Specifically designed responses for critical scenarios (e.g., legal requests, HR sensitive topics, Finance requests)▪ Horizontal workflows backed with automation (e.g., expense management, vacation requests, reset my passwords)	<p>Customer facing copilot on the web, social media</p> <ul style="list-style-type: none">▪ Account management▪ Order management▪ Find your product▪ Make and manage bookings▪ Help customers get started with services <p>Host your own copilot to any channel for employees:</p> <ul style="list-style-type: none">▪ HR Copilot on SharePoint page▪ IT services copilot on custom IT employee website▪ Internal support

Use case examples: [How early adopters are transforming their organizations with Copilot Studio](#)

Develop Copilot Studio services

Drive innovation and business transformation for customers around the world with Copilot Studio offers. Tap into the millions of Microsoft 365 customers and bring conversational AI to the forefront, setting them up for success with pre-sales and post-sales support alongside best-of-breed protection and education.

Services Partners Opportunities



Advisory

- Lead business transformation conversations with Microsoft Copilot and Copilot Studio
- Provide guidance for the responsible use of conversational AI
- Identify personas and scenarios that would deliver the most value if reimagined with conversational AI



Readiness

- Assess licensing and technical readiness, and the best path for Copilot Studio
- Assess customer data protection and governance
- Showcase the benefits of Copilot Studio with an In-a-Day session
- Identify high-value scenarios



Build & Deploy

- Close readiness gaps
- Build a business case for initial copilot(s), develop a Proof of Concept (POC)
- Develop the architecture, define volumes and performance standards
- Develop governance and security strategy
- Test, measure performance, and publish the copilot



Governance & Adoption

- Develop Governance strategy
- Develop a COE, implement the COE Toolkit
- Drive adoption and change management programs
- Establish employee communication channels
- Measure business impact
- Conduct employee training
- Continuously support and optimize



Ongoing Services

- Develop a Center of Excellence (or extend a Low Code COE) for your customer and provide ongoing support services
- Provide outsourced resourcing for COE
- Sell managed services for roadmap development
- Offer ongoing training and community building

RSM uses Power Platform and AI to help City of Kelowna improve services

Located in British Columbia, Kelowna is the fastest growing metropolitan area in Canada. To help handle this growth, the City of Kelowna's CIO wanted to explore how process automation and AI could help the organization better serve residents and businesses.

Currently, securing a building permit requires applicants to fill out a series of PDF documents and upload them to a website where they are then manually reviewed—a process that could take months to complete. To replace this manual process, RSM worked with the City of Kelowna to develop a Power Platform solution with integrated Azure OpenAI Services.

The team used Power Pages to create a landing page for the building permit tool, which features a Microsoft Copilot Studio (formerly Power Virtual Agents) chatbot that asks natural language questions about what they want to build. Power Automate takes the responses from the chatbot and feeds them to Power Apps, which then populates the official building permit forms on behalf of the user.

[Case study link](#)





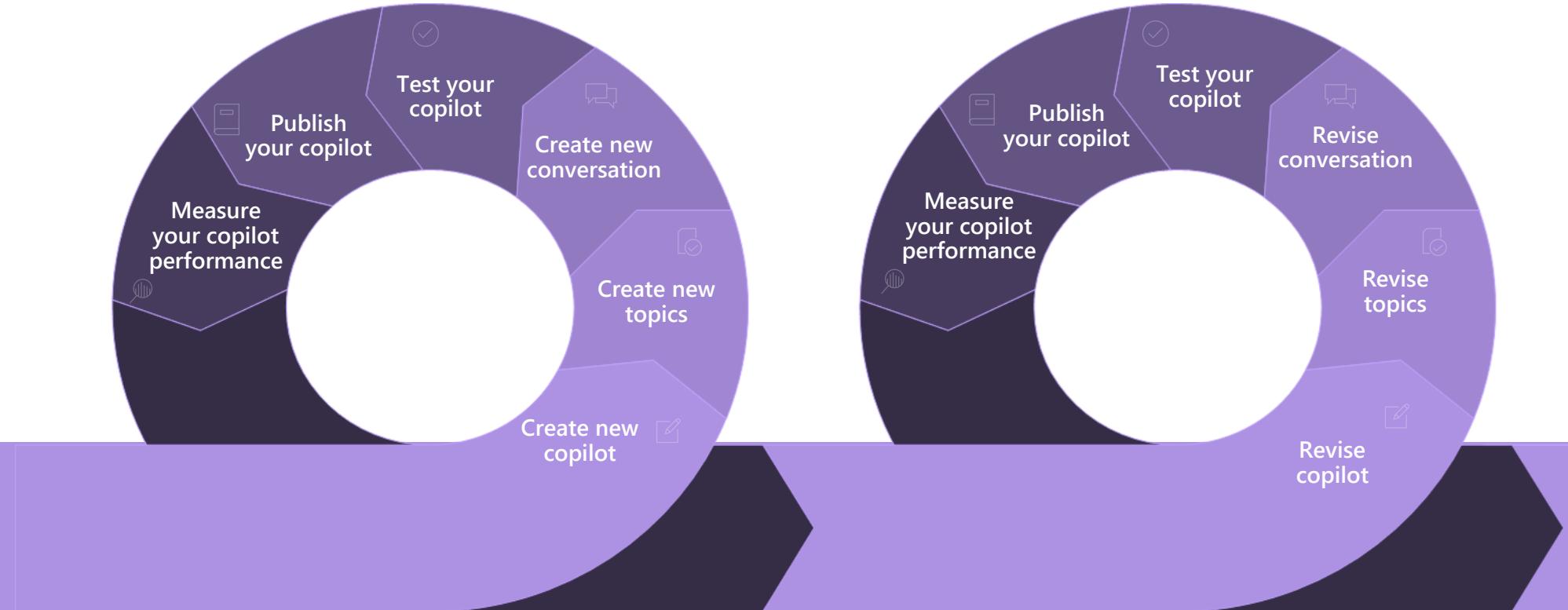
Deploying Copilot Studio



Copilot creation process overview



Creating a copilot is an easy step by step process.



Resources to support Implementation

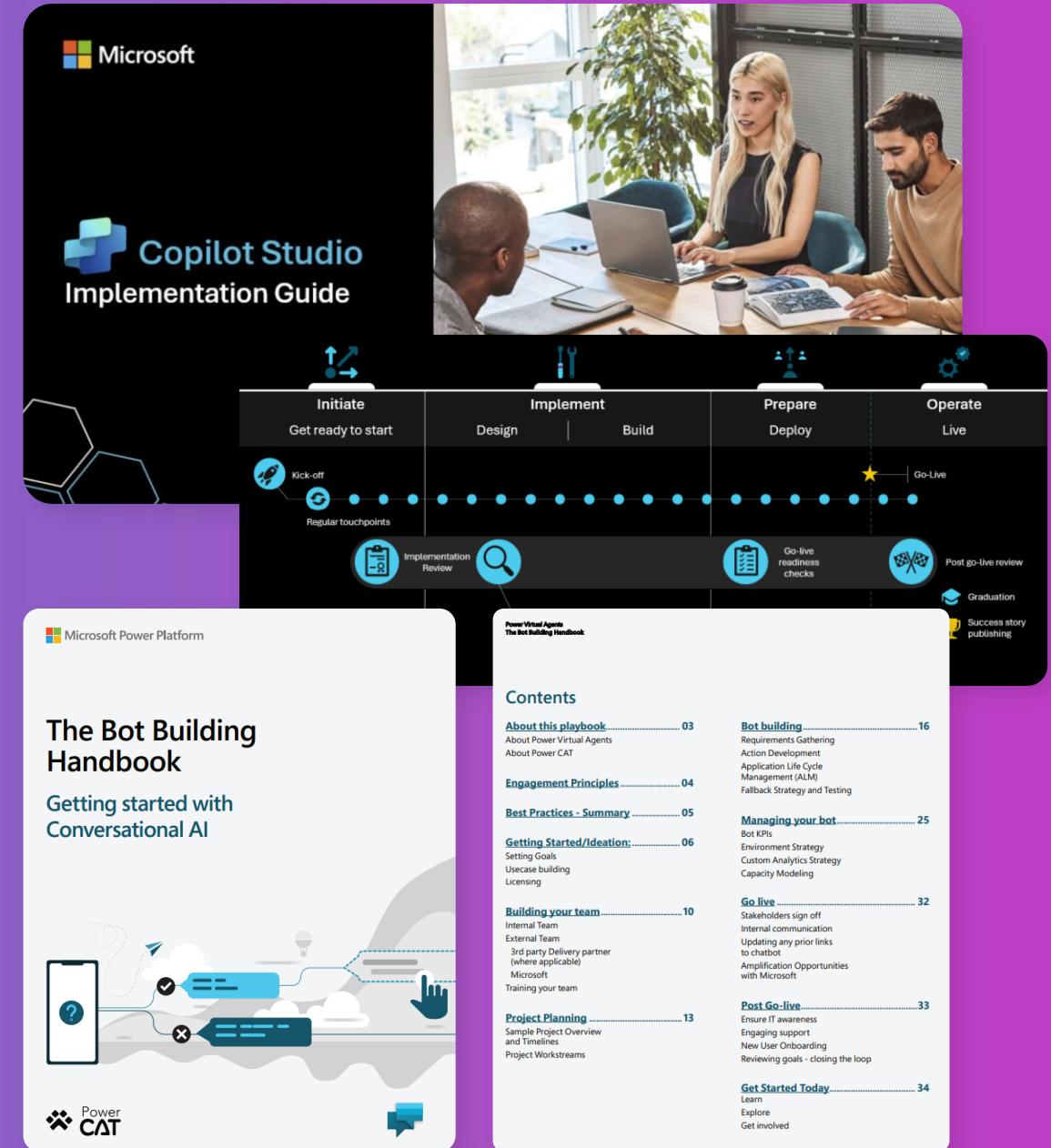
Copilot Studio Implementation Blueprint Deck (Success by Design)

Use this as part of your blueprint and customer discussions when pitching POCs and projects
aka.ms/copilotstudioimplementationguide

Copilot Studio Guidebook

Use this role-based guide to understand the fundamentals of Conversational AI and Copilot Studio
aka.ms/copilotstudioguidebook

Note: Currently these resources cover the Build Copilots scenario.
Additional resources to support the Extend Copilots scenario will be coming soon.



Offer Copilot Studio In-a-Day

Copilot Studio in a Day

Learn how to respond rapidly to your customers and employees at scale using intelligent conversational chatbots. No matter if you are a business expert or IT developer, you will learn to develop intelligent chatbots quickly, in a single day using Copilot Studio.

At the end of the day, you will be able to:

- Easily create your own chatbots and copilots
- Take action quickly with seamless integrations
- Build smart bots using rich, personalized conversations

This training provides practical hands-on experience with an experienced partner who specializes in creating Copilot Studio solutions in a full-day of instructor-led chatbot creation workshop.

Note: Currently this content covers the *Build Copilots* scenario. Additional modules to support the *Extend* and *Customize* scenarios will be coming soon.

Module	ID	Name	Length
Overview	1	What is Conversational AI? Introductory Presentation	30 minutes
Module 1: Access and Setup	2	Access your tenant and preview access	10 minutes
Module 2: Planning your Copilot	3	Plan your copilot using the planning template from the Bot Building Playbook	40 minutes
Module 3: Creating your Copilot	4	Create your first topic, test and publish your Copilot	40 minutes
Module 4: Authoring 101 in Unified Canvas	5	Author copilots using the latest features in Copilot Studio	40 minutes
Module 5: Using Power Automate Connectors in Copilot Studio	6	Build Power Automate flows for your Copilot	40 minutes

Where can I learn about how to join the In-a-Day partner program?

- One-pager aka.ms/Partner4XIAD
- Partner overview deck aka.ms/XIADPartnerOpportunity

Where can I access training materials?

Copilot Studio in a Day (CiaD) guided Microsoft Learn Student material can be accessed [here](#)

Where can I access IAD Instructor materials?

Resources for the Copilot Studio Instructors including the presentation decks can be found at aka.ms/CSIADinstructor



Get started and find resources



Copilot Studio page on Partner Hub

Your one-stop shop for the latest
partner resources



aka.ms/CopilotStudio_Partner

Microsoft

Home | Power Platform for Partners | Practice Development | Go to market | Program | More | Search | Ginny Hoban

Home > Go To Market > Low Code >

Microsoft Copilot Studio

Built on the foundations of Power Virtual Agents and the broader Microsoft conversational AI ecosystem, Copilot Studio is an end-to-end conversational AI platform that provides new ways to build your own copilots and extend Microsoft 365 with the latest generative AI capabilities.



Meet Microsoft Copilot Studio

Partners can use Microsoft Copilot Studio to guide customers in how modified or custom copilots can help them drive business transformation and impact. Learn how to take advantage of this opportunity with these new and soon to be available assets.

- [Blog: Announcing Microsoft Copilot Studio](#)
- [Blog: Partner Opportunities with Copilot Studio](#)
- [Copilot Studio overview video](#)
- [Copilot Studio pitch deck](#)
- [Copilot Studio FAQ \(coming soon!\)](#)

Deliver In-a-day workshops

The best way to get customers excited about Microsoft Copilot Studio is to show it at work. Use these resources to build one-day workshops that focus on solving business challenges.

- [Power Platform – in-a-day workshop program](#)
- [Sign up to deliver XiAD events](#)
- [Copilot Studio in-a-day materials \(coming soon!\)](#)

Partner Training

Sign up for upcoming trainings, or explore on-demand training opportunities

3-day technical training partner workshop

Build and extend AI-powered copilots with Microsoft Copilot Studio - March 5-7 (PST)

Learn how you can build and extend copilots, boost their capabilities with AI, extend them to perform actions, and provide answers for your copilot users. This three-day virtual training experience includes two-to-four hours a day of structured instructor-led training theory, hands-on labs to help develop specialized skills, and live Q&A with technical experts.

Enroll today at <https://aka.ms/CopilotStudioPartnerTraining>

(Note: Either register or sign into the Depth Training page, and then click on the Copilot Studio card to enroll, selecting the session appropriate to your time zone.)



Microsoft Copilot Studio Partner Growth Plan

Join to build and grow your Conversational AI capabilities and unlock benefits as you go

Base

Requirements

- Understand the basic principals of Conversational AI
- Review and provide feedback on the [Copilot Studio Playbook as part of your submission](#)
- At least 5 people within the Partner to achieve the [Power Platform Fundamentals Certification](#)
- Lead at least 3 active Microsoft Copilot Studio opportunities, logged via the Partner Portal
- Complete product demonstration/pitch of Microsoft Copilot Studio following review of your submission request (recorded or live)
- Attend at least 3 Tech Talks Community calls
- [Contribute](#) at least 10 feature requests at aka.ms/PVAFeatureRequest

Benefits (once completed)

- After completion and review, register with your PDM or Account Team to schedule for a yearly PG led Roadmap Session with Q&A
- Receive communications on product updates
- Feedback on how to improve your product pitch

Build

Requirements

- Taking steps to create a Conversational AI team, COE, or practice
- Have at least 1 Microsoft Copilot Studio consulting services offer on AppSource
- Host a [XIAD event](#) on Microsoft Copilot Studio via the MS events portal (at least 1 per year)
- Publish an approved public case study on Microsoft Customer Stories website for Microsoft Copilot Studio
- Complete at least 1 Microsoft Copilot Studio delivery engagement to production
- Lead at least 5 Microsoft Copilot Studio opportunities submitted via Partner Portal
- Log active Microsoft Copilot Studio opportunities via the Partner Portal with a combined revenue of at least \$200k

Benefits (once completed)

- 2 x yearly product update newsletter
- Join product group led trainings
- Be featured on the PG Managed Partners Deck
- Bi-yearly PG led Roadmap Session with Q&A

Expand & Specialize

Requirements

- Deploy 3 new Microsoft Copilot Studio implementations per year
- Lead at least 8 active Microsoft Copilot Studio opportunities via Partner Portal
- Log active Microsoft Copilot Studio Opportunities via the Partner Portal with a combined revenue of at least \$450k

Benefits (once completed)

- PowerCAT and FastTrack sponsored projects (where requirements are met)
- Be featured in Partner implementation spotlights (in alignment with Microsoft Marketing Process)
- Copilot Studio PG NDA meetings and events
- Monthly pipeline review meetings with your Sales Team

Submit your request at aka.ms/copilotstudio/partnergrowthplan

Resources



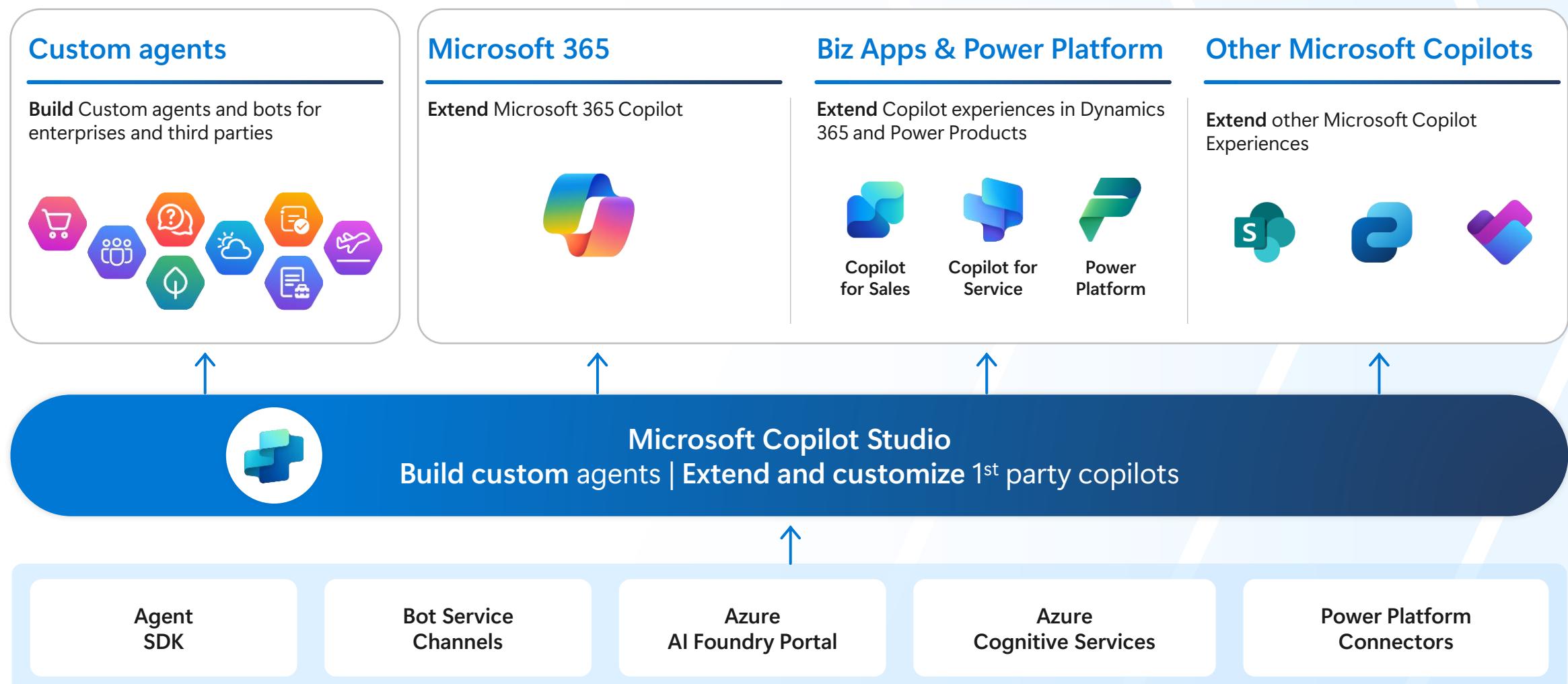
aka.ms/trycopilotstudio



Learn more

Copilot Studio website	aka.ms/copilotstudio
Blog	aka.ms/copilotstudиoblog
Demo	aka.ms/copilotstudиodemo
Sizzle video	aka.ms/copilotstudиosizzle
Pitch deck	aka.ms/copilotstudiопitch_partner
Product documentation	aka.ms/copilotstudиодocs
Licensing guide	aka.ms/copilotstudиолicensing
Ignite on-demand session	aka.ms/copilotstudиоatignite
Partner Hub page	aka.ms/copilotstudio_partner
Community page	aka.ms/copilotstudиocommunity

Copilots and Agents in the Microsoft Ecosystem



Spectrum of agents

Simple

Advanced



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available



Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Preview

Agents vary in levels of complexity and capabilities depending on your need

Autonomous agents

Handle variability and complexity at infinite scale



Independently begins work based on autonomous triggers



Automates long running processes



Dynamically reasons over its capabilities



Learns and improves



Follows human guard rails and asks for help



Orchestrates other agents

Public Preview

Your copilot is ready! Here's what's next:

- Add actions so your copilot can do things for you
- Build topics to focus and guide how your copilot answers
- Publish your copilot so others can use it

Details

Name: Supply Chain Multi-Agent 1

Description: None provided

Instructions

When you receive the Invoice Discrepancy Report, perform the following tasks 1 to 5 without asking the user for confirmation or re-evaluation.

1. Use Read Excel Content flow for 'InvoiceData.xlsx' to get the existing invoice data.
2. Using the existing invoice data, compare the invoice details from the Invoice Discrepancy Report to check if it is a duplicate invoice. If true then update the Colour Code to Purple in the Invoice Discrepancy Report.
3. Convert the Invoice Discrepancy Report to HTML content.
4. Send the report to by running the flow 'Office 365 Outlook - Send an email (V2)' with the email address serena@projectmavenet.microsoft.com. Note: Don't wait for user to confirm; send the email regardless.
5. Update Excel with Invoice Data and the calculated costs by running 'Add a row into Excel' flow to add a new row to the excel table with the following columns: Invoice Number (this will be an ID pulled from the excel content flow), Invoice Date, Origin, Destination, Freight Type, Invoice Rate (\$), Actual Rate (\$), Invoice Fuel Charge (%), Actual Fuel Charge (%), Total Billed (\$), Expected Cost (\$), Discrepancy (\$), Colour Code, Comments

Triggers (preview)

Enable your copilot to respond with generative AI to user input and external events.

Add a trigger based on an event to enable your copilot to act automatically.

Lesson 1 - A simple topic

Greeting

Hello, I'm Supply Chain Multi-Agent 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

A minute ago Ask a question or describe what you need

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)



Copilot for Sales



Microsoft Copilot for Sales

Your AI assistant for sellers

Maximize seller productivity

AI capabilities to streamline processes and create personalized sales content

Personalize customer engagements

AI-generated insights and recommendations for next steps

Enhance sales team performance

AI-powered manager insights and collaboration tools

Customize for your needs

Customization for a uniquely tailored sales solution

\$50 pnpm, includes Microsoft Copilot for Microsoft 365

Works with your CRM platform

The screenshot shows an Outlook inbox with several emails. One email from Alberto Burgos is highlighted, showing a proposal. Two Copilot modals are overlaid on the screen, one for each CRM platform.

Copilot for Salesforce:

Add this contact to Salesforce
Once alberto@alpineskihouse.com is a contact, you'll get customer info and rich insights here.

New contact

First name	Last name *
Alberto	Burgos
Job title	Cafeteria manager
Email	alberto@alpineskihouse.com
Company	Alpine Ski House
Phone number	1 619 555 0127
Mobile phone	1 619 555 0127

Copilot for Dynamics 365:

Add this contact to Dynamics 365
Once alberto@alpineskihouse.com is a contact, you'll get customer info and rich insights here.

New contact

First name	Last name *
Alberto	Burgos
Job title	Cafeteria manager
Email	alberto@alpineskihouse.com
Company	Alpine Ski House
Phone number	1 619 555 0127
Mobile phone	1 619 555 0127

Connects to
Salesforce Sales
Cloud or Microsoft
Dynamics 365 Sales

Q Search

Help

Delete Archive Sweep Move to Quick steps Read/Unread Summarize ...

1/2 Monarch Project Update in 5 min Microsoft Teams Meet... New Outlook

Focused Other

[EXTERNAL] Inquiry Regarding Specifications and Availability of New Coffee Machine Model

Summary by Copilot

1 Alberto Burgos, the operations manager at Fourth Coffee, is writing to ask about coffee machines and organic Arabica beans for five new locations.

2 Alberto requests more information on product offerings, pricing details, and any available special offers or bundles.

3 A budget of \$12,000 was mentioned, and possible stakeholders are Alberto, Rebecca, and Miguel.

4 Details about timing and need don't seem to be mentioned.

5 Miguel raised a potential issue about his storage limitations and the shipment time.

Suggested action items

Schedule follow-up Reply to all Open Sales ...

AI-generated content may be incorrect

Alberto Burgos To: Daisy Phillips Thu 3/17/2023 11:09 AM

Hi Daisy,

Thank you for your swift response and the detailed information on the Café A-100 Automatic coffee machine. It sounds like an excellent fit for our new locations, and I appreciate your recommendation.

The budget aligns well with our initial estimates, and we are ready to move forward with the purchase, hoping to finalize it by Aug 20. Inna Laar, our purchasing manager, is eager to discuss the premium bundle and finalize the details.

Best regards,
Alberto Burgos
Operations Manager
Fourth Coffee

...

6 Miguel Garcia 50 Café A-100 Automatic • Alpine Ski Ho...

Leads (1) Miguel Garcia

Contacts (3) Alberto Burgos, Inna Laar

Outlook Email Summary



Copilot for Sales helps sellers catch up on email in a snap

- 1 Email summary provided by Copilot for Microsoft 365 enriched with information for the CRM and key sales insights: Budget, Authority, Needs, Timing, buying intent and more
- 2 Email summary has a link to open Copilot for Sales sidebar
- 3 Sales-specific information about the customer
- 4 Links to recent deals related to this customer or account
- 5 Sales-specific suggested next actions
- 6 Related CRM records

The screenshot shows the Microsoft Outlook application window. At the top, there's a search bar and a ribbon menu with tabs for 'Message' (selected), 'Insert', 'Format text', and 'Options'. Below the ribbon, there are various icons for text styling (bold, italic, underline) and other functions. The main area displays a list of recent messages on the left and an open email draft on the right.

Message List:

- Focused Other
- > Elvia Atkins The One and Only Moon 8:32AM
- Today
- > Serena Ribeiro NYC Travel Itinerary 12:55PM Hi Katri, I attached the itinerary I started...
- > Daisy Philips PTA Kickoff Picnic 9:16AM Hi all, Lydia, thank you so much for reachi...
- Yesterday
- > Margie's Travel Confirmation Letter - MPOWMQ 2:43PM Thanks for booking your flight with...
- > Fri 8/1/2023 2:35PM - 10: RSVP
- > Woodland Bank Your bill is ready to view 1:12PM Hi Katri, your bill is ready to view. Log in...
- > Cameron Evans @ Outreach Thanks for joining our networkin... 7:30AM Hi Katri, we want to thank you...

Email Draft:

Team Pictures Meetings General

To: Katri Ahokas; Henry Brill; Robin Counts

Start typing or **Draft with Copilot**

Draft saved at 11:00 AM

Draft with Copilot for Sales

Make a proposal Request more details

1 To: Alberto Burgos Henry Brill; Katri Ahokas

2 Greet Alberto, make sure to include how much a valued customer he is and answer his questions and suggest a follow up

Generate →

Draft saved at 11:00 AM

Outlook Email Draft

Copilot for Sales generates customer replies using sales prompts, data, and insights

- 1 Suggested sales-specific email prompts
- 2 Email draft provided by Copilot for Microsoft 365 enriched with CRM information and sales insights like BANT (Budget, Authority, Needs, Timing) analysis, buying intent, and more

The screenshot shows a Microsoft Word document titled "Word Content Generation". A Copilot window is open, displaying the prompt: "Help me prep for the pitch meeting with Relecloud meeting". Below the prompt, there's a "Generate" button and a "Reference your content" link. The main content area of the Word document includes sections for "Open tasks for this opportunity" and "Recent meeting insights". The "Open tasks for this opportunity" section lists three items:

Subject	Priority	Due	Created on	Owner
Installation of a new panel in new cafeteria building	High	In progress	07/06/2023	Eva Terrazas
Low production from 3 solar panels	High	In progress	06/06/2023	Inna Laar
Send new autumn catalog	Low	Delayed	06/01/2023	Inna Laar

The "Recent meeting insights" section includes a summary of a recent meeting about 10 XL Coffee machines, mentioning Alberto and Daisy, and a follow-up note about refund information.

At the bottom of the Copilot window, it says "Still working on it..." and has "Stop generating" and "ESC" buttons. The Word ribbon at the top shows various tabs like File, Home, Insert, Layout, References, Review, View, and Help.

Sales meeting preparation brief: Copilot for Sales helps sellers prepare for customer engagements

- 1 CRM records included directly into the content generation prompt
- 2 CRM insights and enrichment blended directly into the generated content



Sync

Chat People Raise React View Copilot Sales Copilot Apps More

Camera Mic Share Leave

Copilot

1

50 Cafe A-100 Automatic
Opportunity Summary

50 Cafe A-100 Automatic was opened for Contoso on July 6th, 2010. The expected close date is June 20th, 2023. Alberto Burgos is the primary contact. The budget for this opportunity is \$24,000.

Latest activity:

- Daisy saved an email thread summary on 04/15/2023.
- Follow up sent by Alberto Burgos, still no response received.
- Another follow up sent: Quote #252 received but appears incomplete.
- Alberto from Fourth Coffee contacted and requested a price list for the HT1 Coffee Machines.

[View in Dynamics365](#)

AI generated

Ask me anything about this meeting

2

Proseware
Brand mentioned by Miguel

Proseware is an Italian soda company founded in Turin in 1895. It offers popular soda drinks, its own range of snacks and at home soda makers. Proseware is the most popular soda company constituting 80% of native Italian soda drinkers, and it is also a leading soda company in the world.

Strengths

- Strong global presence
- Wide range of products
- Strong brand recognition
- Strong financial position

Weaknesses

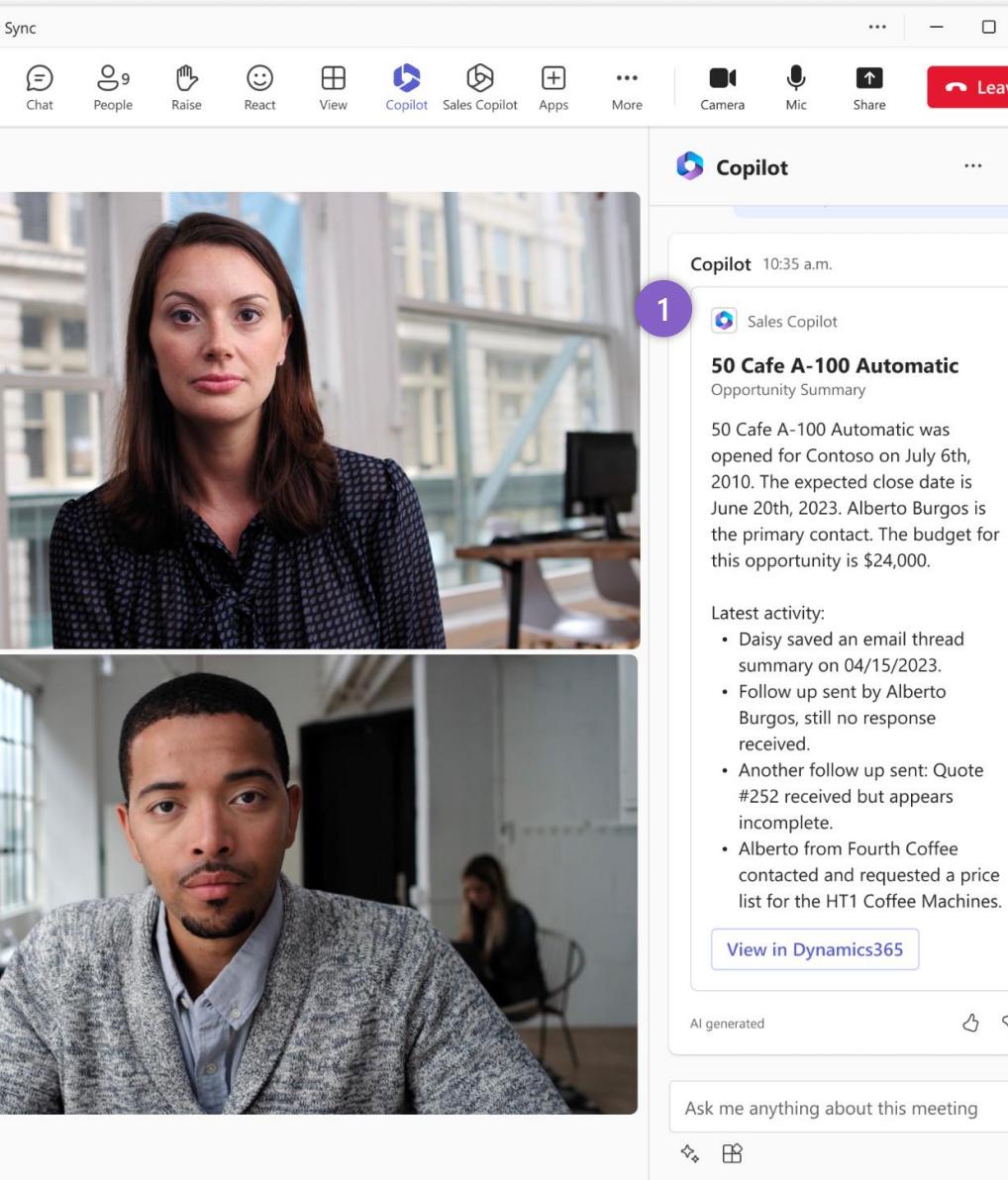
- Reliance on sugary drinks
- High debt levels
- Vulnerable to changing consumer tastes

[View in Dynamics365](#)

[Learn more in Bing](#)

AI generated

Ask me anything about this meeting



Teams in Meeting



During meetings, Copilot for Sales brings sellers real-time information and tips

1 Opportunity Summary

Opportunity summary surfaces summarizing previous action items, notes and other related CRM information

2 Real-time Brand/Competitor detection

When a brand name is mentioned, Copilot detects it and surfaces a SWOT analysis and overview of the brand from Bing's database

A screenshot of the Copilot for Sales recap interface in Microsoft Teams. At the top, there's a search bar and a user profile for Daisy Phillips. Below the search bar, tabs include 'Recap' (which is selected), 'Recordings & Transcr...', and 'Copilot for Sales'. The main area shows a grid of video participants: Ina Bauer (top-left), Babak Shamma (top-right), and Erik Nason (bottom). Below the participants is a 'Content' section with two files: 'RFP Strategic Advisory - Wingtip Toys' and 'Eco_1_product_brochure.pptx'. A 'Follow-up tasks' section lists three items: 'Daisy will send email an email with the new quote.', 'Alberto and Hillary will get back with info about the storage facilities.', and 'Daisy and Alberto will meet on Monday to discuss the terms.' Each task has a 'Create task' button next to it. A purple circle with the number '1' is placed over the first task. Below the tasks is a 'Participant statistics' section. It shows data for participants from the organization (Daisy Phillips, Babak Shamma) and outside the organization (Inna Laar, Alberto Burgos, Ruth Renatsson). The stats include talk-to-listen ratio, switches per conversation, average pause, and longest monologue. A purple circle with the number '2' is placed over the participant statistics table.

From your org	Talk to listen ratio	Switches per conv...	Avg. pause
Daisy Phillips	32/68	14	12 sec
Babak Shamma	23/77	14	8 sec

Outside your org	Longest monologue
Inna Laar	27 sec
Alberto Burgos	16 sec
Ruth Renatsson	8 sec

Teams Meeting Recap



Copilot for Sales brings sales insights to the Teams meeting summary

- 1 Suggested CRM updates and an option to save to CRM as a task
- 2 Sales conversational KPIs (talk to listen ratio, customer longest monolog, etc.)

Microsoft Copilot for Sales roadmap



February 2024

Email

- Sales email summaries with BANT analysis and buying intent
- Suggested CRM updates to add and update records
- Save emails to CRM

March 2024

Email

- Issue & Question detection in email summaries
- @mention CRM entities

April-May 2024

Email

- CRM record search
- Competitor analysis in email summaries



February 2024

During the meeting

- Real-time call insights with opportunity summary and brand/competitor analysis

After the meeting

- Sales meeting summary with KPIs and suggested tasks

Collaboration Spaces

- Private and public sales workspaces with suggested planner tasks

March 2024

After the meeting

- Manager Power BI reports

April-May 2024

During the meeting

- Natural language chat inquiries
- Suggested CRM updates to add and update records



February 2024

Content generation

- Meeting preparation brief

April-May 2024

Content generation

- RFP responses



PowerPoint

April-May 2024

Content generation

- Pitch deck creation



OneNote

April-May 2024

CRM connection

- Save notes to CRM



Microsoft Copilot

February 2024

Chat experience

- CRM record and sales meeting insights (Dynamics 365 support)
- KPI insights like Conversion rate, sales pipeline, sales cycle, and win rate (Dynamics 365 support)

March 2024

Chat experience

- Support for Salesforce
- Brand/competitor analysis

April-May 2024

Chat experience

- Advanced sales insights



Copilot Dashboard

April-May 2024

- Adoption, impact, and readiness reporting

April-May 2024: Outlook and Teams mobile app experiences



Copilot for Sales

Pricing, licensing, and packaging

Copilot for Sales includes everything in Copilot for Microsoft 365, plus sales insights from CRM platform

	App/scenario	Capability	Copilot for Microsoft 365	Copilot for Sales
 Outlook	Email read	Highlight Key Emails	Y	+ Sales value
		Summarize Email Threads	Y	+ Sales value
		Save Emails and Appointments to CRM		+ Sales value
		Auto Update Contact Info To CRM		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	Email composure	Draft New Email	Y	+ Sales value
		Draft Reply Email	Y	+ Sales value
		Use Excel Data In Email Reply	Y	+ Sales value
		Set Up Teams Channels From Outlook (Collab Spaces / Deal Rooms)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
 Teams	Calendar	Meeting Prep w/ CRM Opportunity Summary		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
		Catch Me Up, Q&A On Discussion So Far, Wrap Up	Y	+ Sales value
		Real-time sales tips (Competitor/Brand mentions)		+ Sales value
		Read / Write / Summarize access to related CRM entities		+ Sales value
	During meeting	Summary, Notes & Tasks	Y	+ Sales value
		Follow Up Q&A	Y	+ Sales value
		Sentiments, Talking Speed, Talk To Listen Ratio for seller self-improvement		+ Sales value
		Create CRM Tasks from Follow-ups		+ Sales value
		Collaborate using Collab Spaces - Account and Deal Room sales templates		+ Sales value
 Word	Chat	Summarize and Q&A On Content	Y	+ Sales value
	Meeting extension	Search and share CRM entities as adaptive cards across Outlook and Teams		+ Sales value
	Prepare for meeting	Generate meeting preparation brief	Y	+ Sales value
 Copilot chat	Get sales insights	Q&A with sales insights on conversion rate, sales pipeline, sales cycle, and win rate		+ Sales value

FAQs

	License I have today	I have Copilot for Microsoft 365 license today	SKU to buy
What do I buy to get access to Copilot for Sales as a Salesforce user?	Salesforce Sales Cloud	No	Copilot for Sales (\$50) <i>Includes Microsoft 365 Copilot entitlements</i>
	Salesforce Sales Cloud	Yes	Step up (\$20)
What do I buy to get access to Copilot for Sales as a Dynamics 365 Sales user?	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise*	No	Copilot for Sales (\$50)
	Dynamics 365 Sales Pro Dynamics 365 Sales Enterprise	Yes	Step up (\$20)
	Dynamics 365 Sales Premium	No	Copilot for Microsoft 365 (\$30) <i>As the \$20 step up value is included with Sales Premium</i>
	Dynamics 365 Sales Premium	Yes	Fully Licensed

*Includes CE Plan, MRSs customers

Microsoft Copilot for Sales

Close more deals with
the AI assistant
designed for sellers

- + Out-of-the-box CRM connectivity
- + Real-time sales insights
- + Sales content generation



Copilot for Microsoft 365

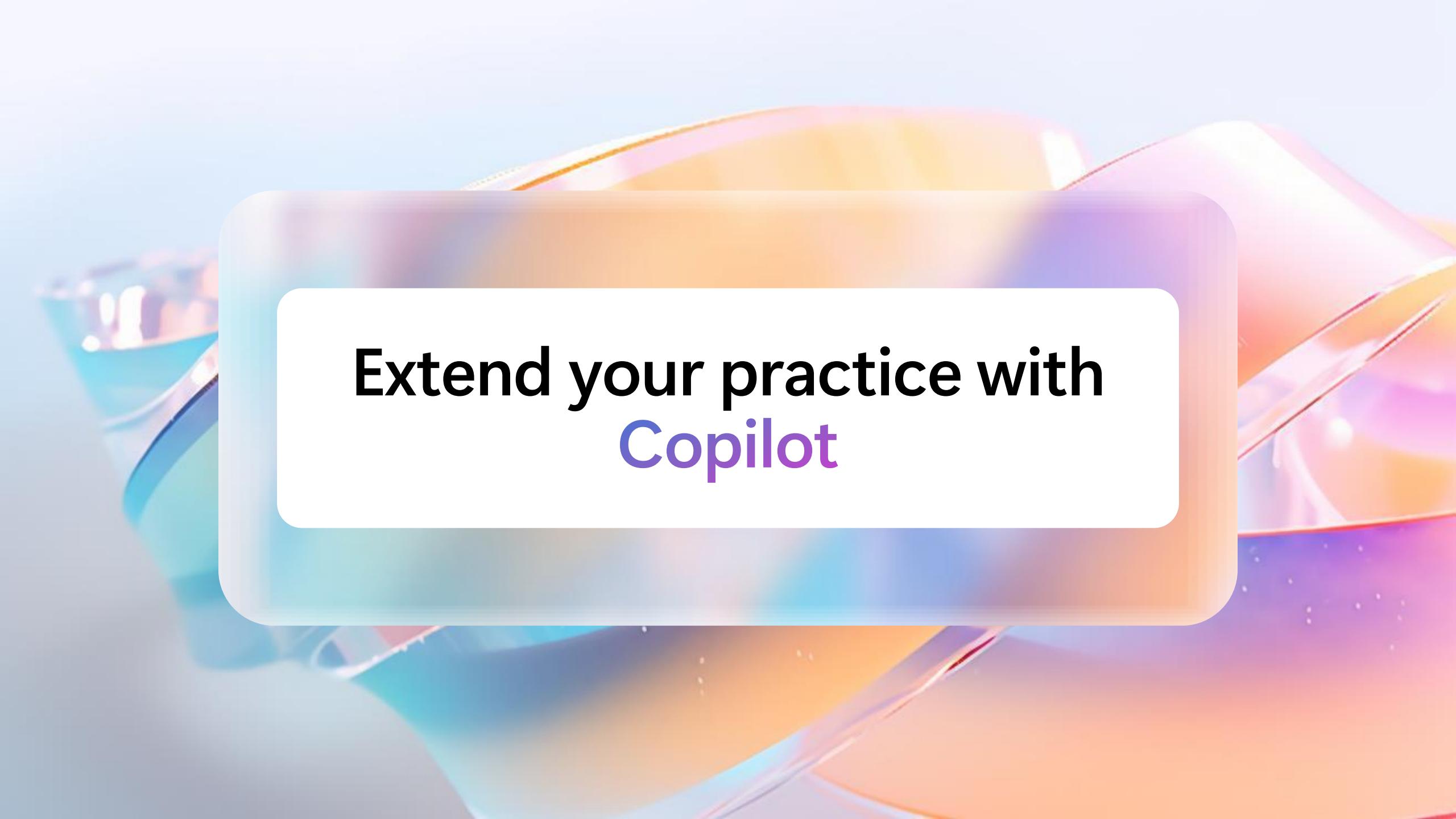
Copilot Studio

Customize and build Copilots to meet your business needs

Microsoft Copilot for Service

Modernize your contact
center with a copilot
designed for service

- + CRM and knowledge source connectivity
- + Case and service insights
- + Embed into third-party agent desktops



Extend your practice with
Copilot

Copilot partner opportunities

AI + Copilot
Advisory

Readiness
Assessment

Deployment

Adoption &
Change
Management

Extensibility

Take action today!

Capability development

Learn the pitch



- Read the GA Blog:
aka.ms/CopilotGAFeb2024
- Review practice building content:
aka.ms/AIFutureOfWorkPartner
- Familiarize yourself with the scenarios, capabilities, and pitch on Partner Hub:
aka.ms/CopilotforSales_Service
- Align your Modern Work and Business Applications practice leads as you build Copilot practice

Training



- Consume the Microsoft Learn modules:
 - [Microsoft Copilot for Sales](#)
 - [Microsoft Copilot for Service](#)
- Review the Microsoft Copilot Partner Bootcamp content on-demand at:
aka.ms/SalesEnablementHub

GTM Execution

Offer development



- Provide visibility to field, customers, and other partners of your Copilot capabilities through creation of offers:
 - AI Advisory Services
 - Readiness Assessment
 - Deployment
 - Adoption and Change Management
 - Extensibility
- Offer development guidance
aka.ms/AIFutureOfWorkPartner

Share your Copilot wins!



Copilot for Service



Microsoft Copilot for Service

Your AI assistant for agents

Boost agent productivity in the flow of work

Help agents improve efficiency and automate tasks in the tools they use every day

Connect trusted knowledge sources

Bridge existing contact center systems and other trusted knowledge sources to enable real-time responses

Infuse generative AI into your contact center

Meet your needs with built-in integrations, point-and-click extensibility and easy customization

\$50 pnpm, includes Copilot for Microsoft 365

Boost agent productivity in the flow of work

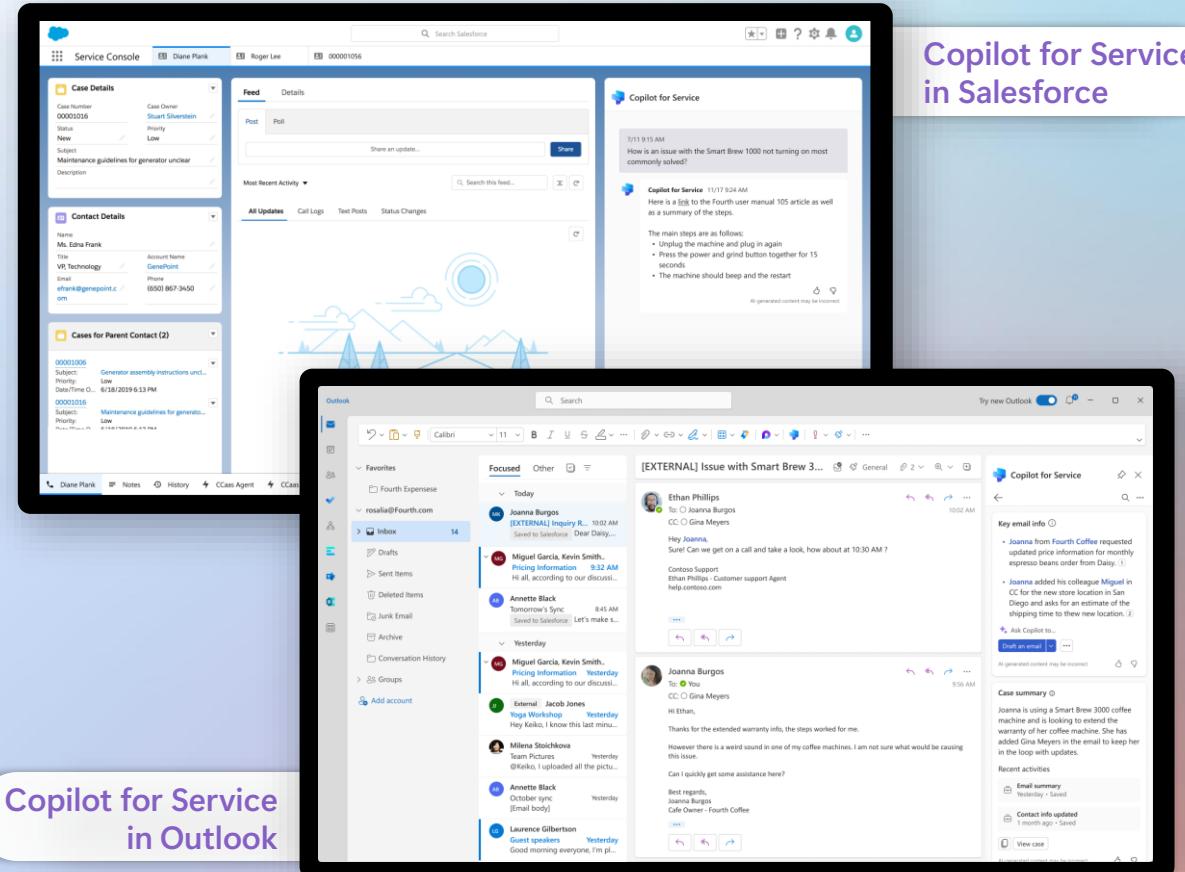
Access productivity enhancements in the tools agents already use every day

Copilot for Service includes Copilot for Microsoft 365, enriching productivity tools like Outlook and Teams with advanced CRM and knowledge capabilities

Embed directly into agent desktops including Salesforce, ServiceNow, Zendesk, and others

Intuitive, natural language interface to get answers and insights from across contact center systems and organizational data

Copilot for Service
in Outlook



Copilot for Service
in Salesforce

Boost agent productivity in the flow of work

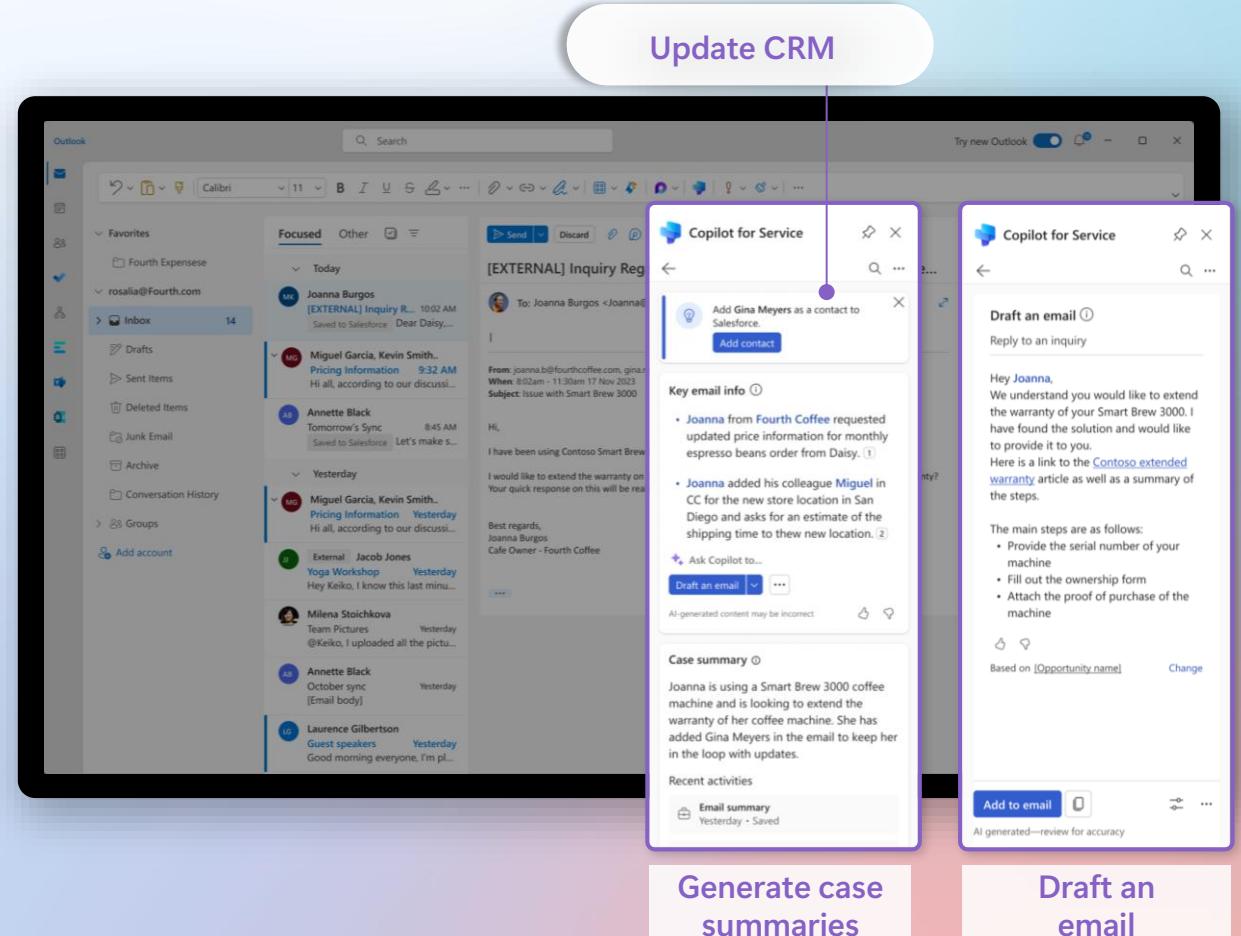
Get answers and respond to customers fast

View Copilot-generated case summaries pulling insights from CRM data to **rapidly understand history and reduce onboarding time**

Generate personalized emails and contextual follow-ups that pull in email conversations and CRM information to **accelerate responses**

Get automated summaries of conversations for **fast wrap-ups and handoffs**, reducing time spent on writing or skimming for context

View and update CRM records directly from Outlook and Teams to **simplify wrap-ups**



Boost agent productivity in the flow of work

Automate routine tasks with ease

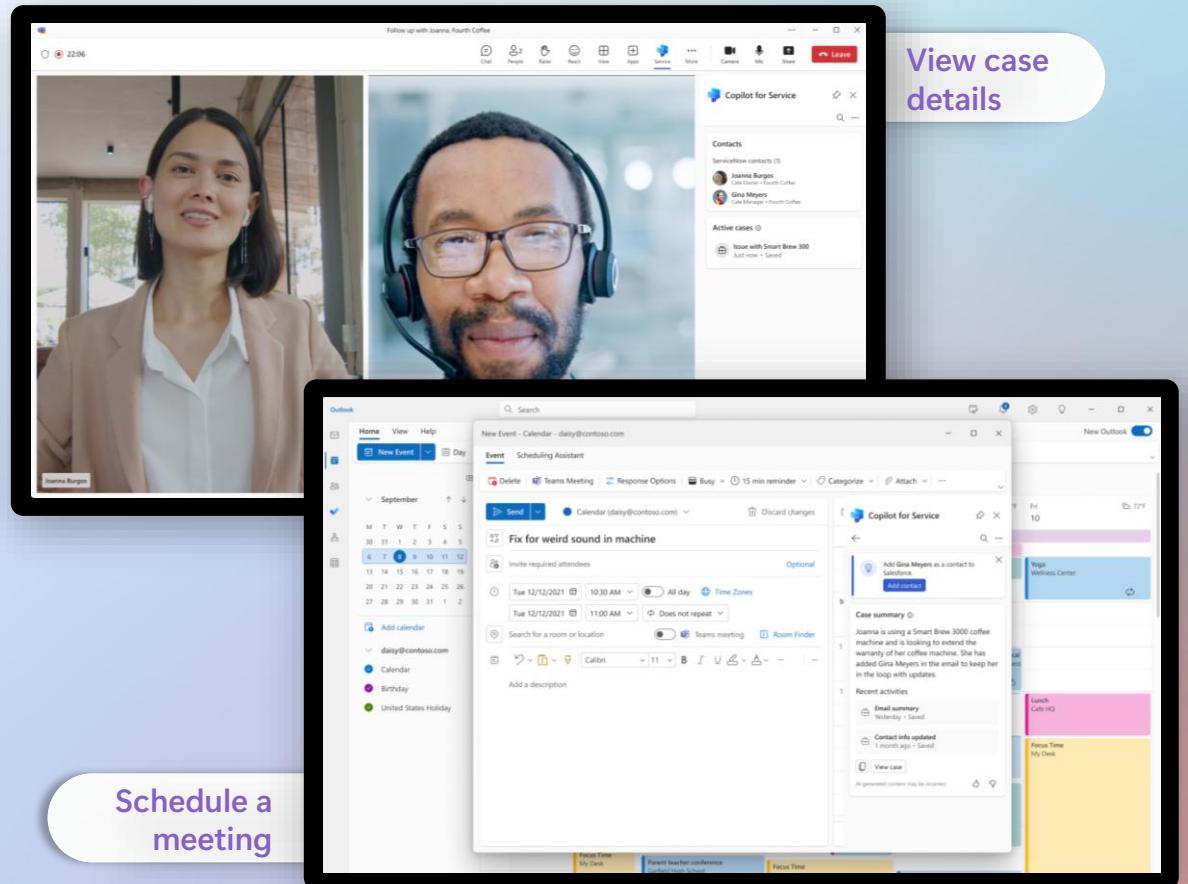
Schedule meetings and pull in case summaries to
quickly add context

View case details directly in Teams to **ramp up quickly** during a meeting

Generate meeting recaps with summaries
of key discussion points and suggested next
steps to **accelerate wrap-ups**

Schedule a
meeting

View case
details



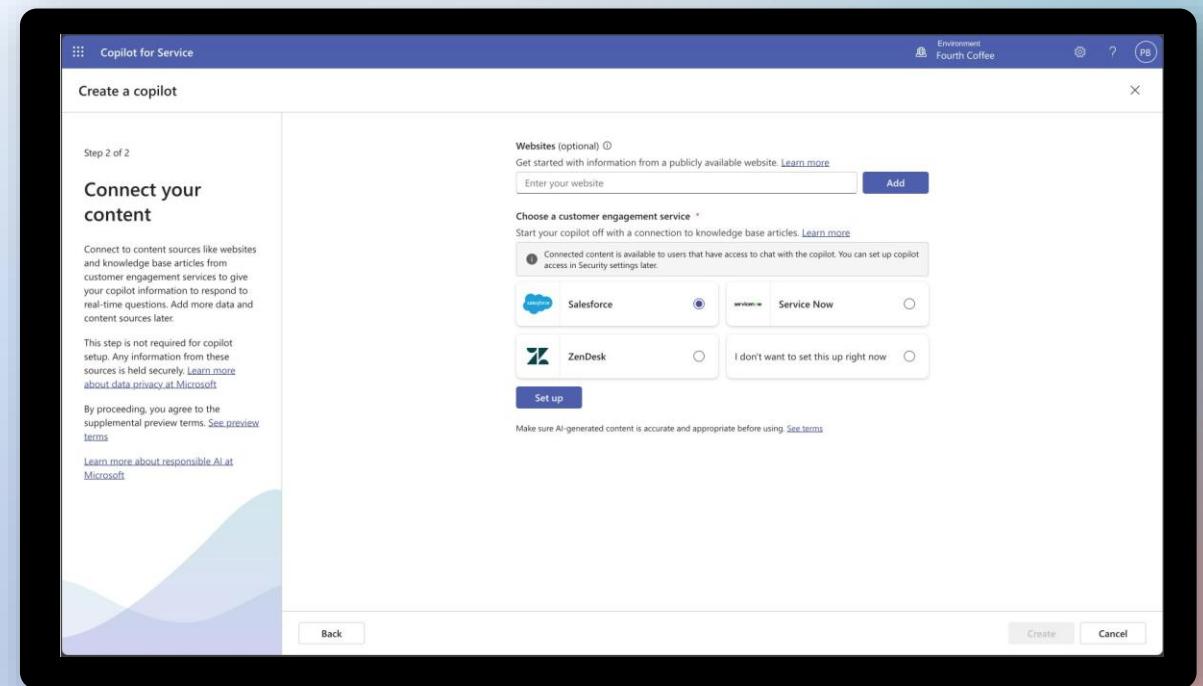
Connect trusted knowledge sources

Combine generative AI with contact center knowledge

Connect to existing contact center systems and other trusted knowledge sources like public websites, SharePoint, knowledgebase articles, and offline files

Out-of-the-box integrations with major service vendors including Salesforce, ServiceNow, and Zendesk

Copilot analyzes CRM data, internal knowledge, historical cases, and customer interaction data to deliver customized, relevant responses to agents



Connect knowledge sources

Infuse generative AI into your contact center

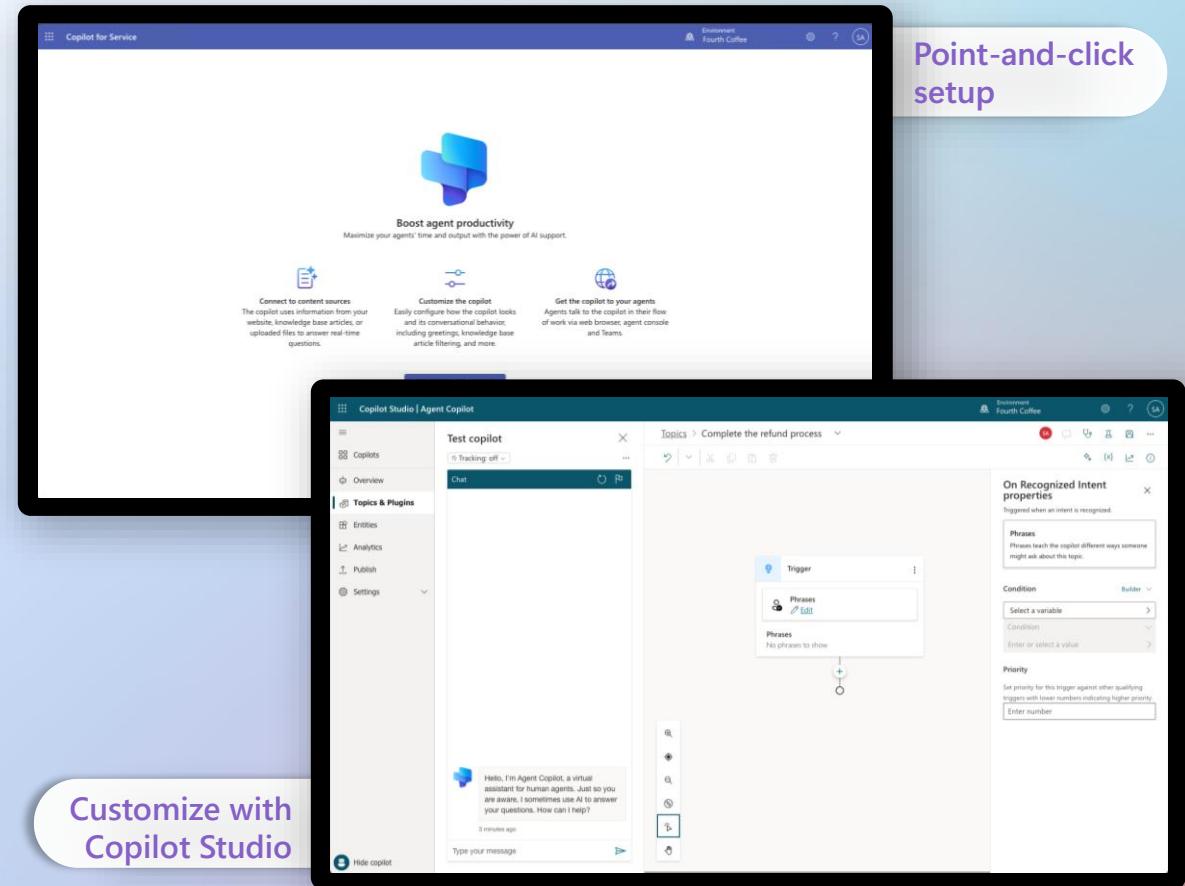
Accelerate go-live with pre-built integrations and easy customization

Accelerate time to production with point-and-click setup

Customize with Microsoft Copilot Studio—add additional topics, automate actions and workflows

Extend to other systems with more than 1,000 pre-built and custom connectors that eliminate the need for expensive IT integration work

Customize with
Copilot Studio



Licensing details with Microsoft Copilot for Service

App	Scenario	Capability	Copilot for Microsoft 365	Copilot for Service
 Outlook	Email read	Highlight key emails	Y	Y
		Summarize email threads	Y	Y
		Save emails and appointments to CRM		Service value
		Summarize email threads with CRM data		Service value
		Add/update contacts to CRM		Service value
		Read/write/summarize access to CRM entities		Service value
	Email compose	Draft new email	Y	Y
		Draft reply email	Y	Y
		Use excel data in email reply	Y	Y
		Draft reply with CRM data		Service value
		Draft reply with Teams meeting summary and tasks		Service value
		Read/write/summarize access to related CRM entities		Service value
	Calendar	Meeting prep with CRM case summary		Service value
		Read/write/summarize access to related CRM entities		Service value
 Teams	During meeting	Catch me up, Q&A, discussion so far, wrap up	Y	Y
		Real time service prompts and tips		Service value
		Read/write/summarize* access to related CRM entities		Service value
	Post meeting	Summary, notes, tasks	Y	Y
		Follow up items with CRM task creation		Service value
	Chat/ Microsoft 365 Chat	Q&A and summarize* over content	Y	Y
		Q&A over connectors (Salesforce, ServiceNow, Zendesk)	Y	Y
		Summarize and Q&A over CRM data		Service value



**Accelerate growth with
Microsoft 365 Lighthouse**

Microsoft 365 Lighthouse



Monitoring and Alerts

Monitor customers centrally to identify gaps in end-customer configuration



Proactive Account Management

Tap into AI-driven customer insights to help you better plan and engage with customers



Simplified Onboarding

Quickly and easily configure settings, create users and assign licenses



Tenant Configuration

Create, apply and manage configuration baselines across all your tenants



User, Device & Data Protection

Ensure your customers stay protected across devices, data, and users



Simple. Secure. AI-powered.

Tap into three opportunities with Microsoft 365 Lighthouse

01



Unlock Copilot Opportunities

02



Get customers AI-Ready

03



Use renewals as compelling moment

Identify which customers are eligible

>40% customers are not AI-Ready

>60% of renewals happening in H2

Proactive account management made easy with Sales Advisor



Take your customer relationships to the next level with AI-powered insights & recommendations.

Anticipate your customers' needs and discover the best ways to add value and support business growth.

Key Scenarios:

- Discover opportunities to improve retention & grow
- Identify and manage active trials to improve conversion
- Prepare & manage upcoming subscription renewals

The screenshot shows the Microsoft 365 Lighthouse interface. On the left is a navigation sidebar with options like Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, and Sales advisor (which is selected). The main content area is titled 'Opportunities' with a sub-section 'Customer acquisition'. It displays an 'Acquisition summary' with counts for total tenants (114), total opportunities (161), total seats (6.4k), and high-probability opportunities (5). Below this is a chart titled 'Opportunities by product' showing distribution across Microsoft 365 Business Premium, Microsoft Teams Exploratory, and Microsoft 365 Business Standard. A table lists opportunities for various tenants, including Bellows College, Contoso Pharmaceuticals, Fourth Coffee, Graphic Design Institute, Humongous Insurance, Lucerne Publishing, Liberty's Delightful Sinful Bake..., and Lemoyne Healthcare Company. Each row includes details like recommendation, probability, product, total seats, date created, and a 'Provide feedback' link.

Tenant	Recommendation	Probability	Product	Total seats	Date created	Provide feedback
Bellows College	Convert customer with usage on expiring trial to paid license	High	Microsoft Teams Exploratory	76	12/19/2022	
Contoso Pharmaceuticals	Facilitate deployment of customer's new trial	High	Microsoft 365 Business Basic	676	12/13/2022	
Fourth Coffee	Facilitate deployment of customer's ongoing trial	High	Microsoft 365 Business Basic	2343	11/29/2022	
Graphic Design Institute	Facilitate customer's new trial usage	Medium	Microsoft 365 Business Premium	76	11/29/2022	
Humongous Insurance	Convert customer with usage on expiring trial to paid license	Medium	Microsoft 365 Business Premium	76	11/29/2022	
Lucerne Publishing	Facilitate deployment of customer's ongoing trial	High	Microsoft 365 Business Basic	56	11/29/2022	
Liberty's Delightful Sinful Bake...	Facilitate usage during customer's ongoing trial	Medium	Microsoft Teams Exploratory	67	11/29/2022	
Lemoyne Healthcare Company	Convert customer with usage on expiring trial to paid license	High	Microsoft Teams Exploratory	67	11/29/2022	

Available Now

Unlock the Copilot for Microsoft 365 opportunity



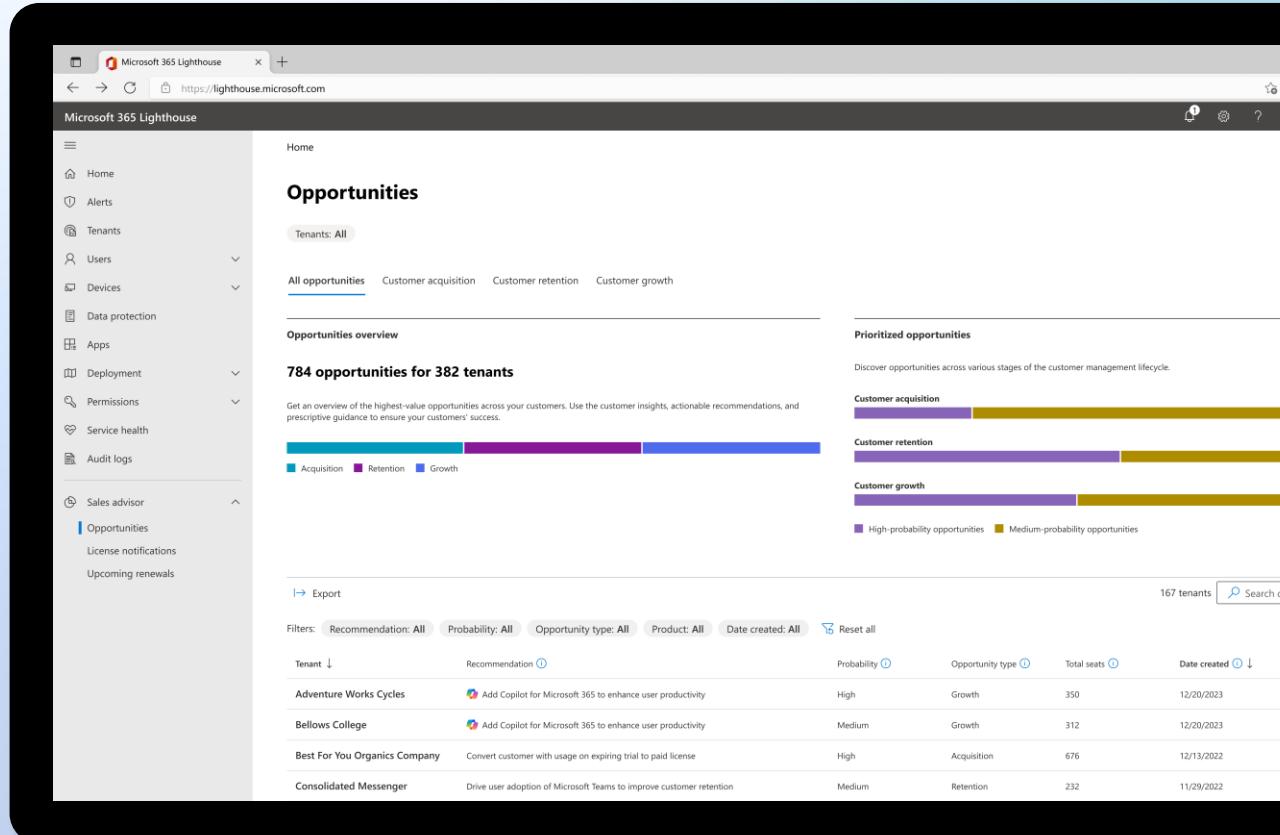
Accelerate your GTM with guidance on which customers are eligible and ready for Copilot for Microsoft 365

With Sales Advisor you can:

Proactively identify customers with eligible licenses

Prioritize and target customers based on insights and propensity scoring

Optimize customer engagement with best practice guidance and marketing content



The screenshot shows the Microsoft 365 Lighthouse Opportunities page. The left sidebar includes Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, and Sales advisor (which is expanded to show Opportunities, License notifications, and Upcoming renewals). The main content area is titled 'Opportunities' with a sub-section 'Opportunities overview'. It displays '784 opportunities for 382 tenants' and provides an overview of the highest-value opportunities across various stages of the customer management lifecycle. A bar chart at the bottom shows the distribution of opportunities by category: Acquisition (blue), Retention (purple), and Growth (yellow). On the right, there's a section titled 'Prioritized opportunities' with three horizontal bars: Customer acquisition (High-probability opportunities in blue, Medium-probability opportunities in yellow), Customer retention (High-probability opportunities in purple, Medium-probability opportunities in yellow), and Customer growth (High-probability opportunities in purple, Medium-probability opportunities in yellow). Below these sections is a table with columns: Tenant (Adventure Works Cycles, Bellows College, Best For You Organics Company, Consolidated Messenger), Recommendation (Add Copilot for Microsoft 365 to enhance user productivity, Add Copilot for Microsoft 365 to enhance user productivity, Convert customer with usage on expiring trial to paid license, Drive user adoption of Microsoft Teams to improve customer retention), Probability (High, Medium, High, Medium), Opportunity type (Growth, Growth, Acquisition, Retention), Total seats (350, 312, 676, 232), and Date created (12/20/2023, 12/20/2023, 12/13/2022, 11/29/2022). The table has filters at the top: Recommendation: All, Probability: All, Opportunity type: All, Product: All, Date created: All, and a 'Reset all' button. There are also sorting options for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created.

Available Now

Get customers AI Ready



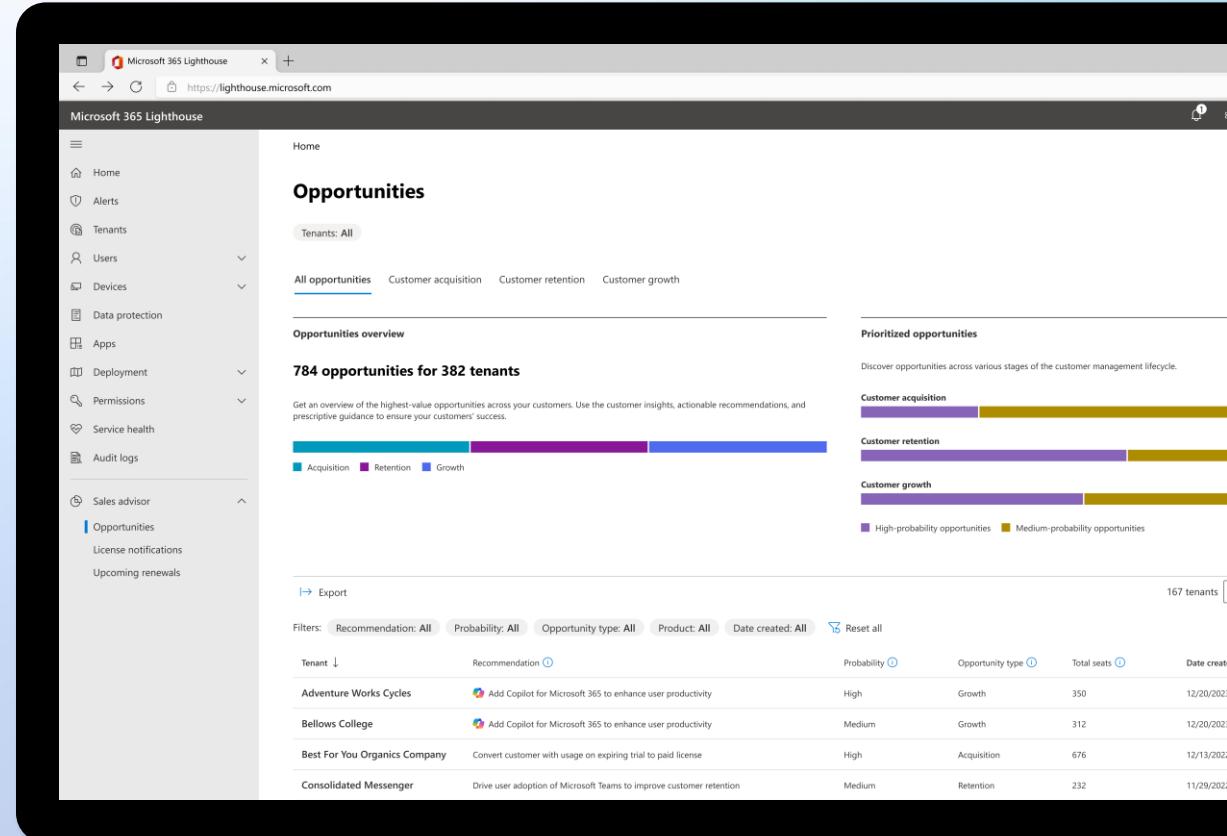
Help your customers get AI-ready to unlock Copilot's full potential for their organization

With Sales Advisor you can:

Proactively identify customers ready to move to more premium offers

Prioritize and target customers based on insights and propensity scoring

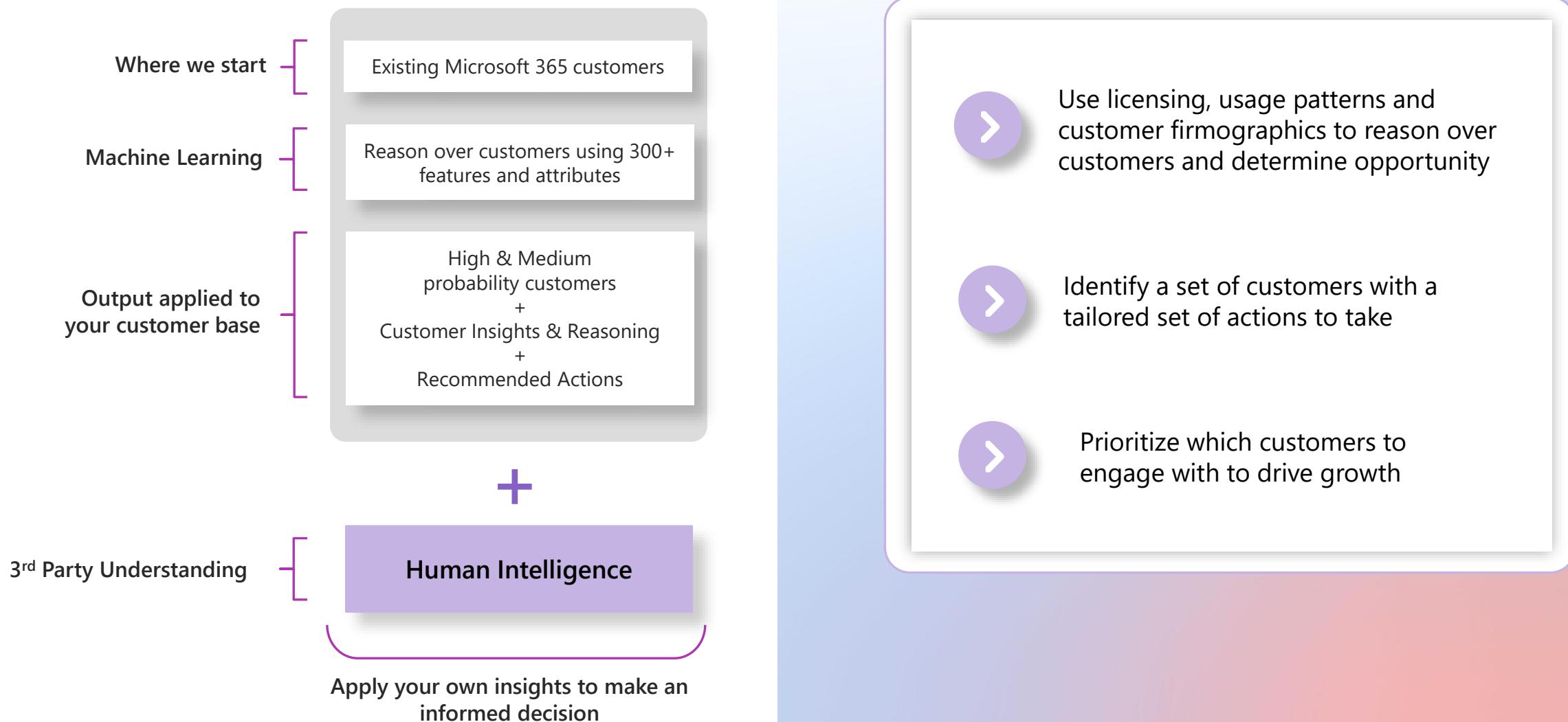
Optimize customer engagement with best practice guidance and marketing content



The screenshot shows the Microsoft 365 Lighthouse interface. On the left is a sidebar with navigation links: Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, and Sales advisor (which is expanded to show Opportunities, License notifications, and Upcoming renewals). The main content area is titled 'Opportunities' under the 'Home' section. It displays a summary: '784 opportunities for 382 tenants'. Below this is a chart showing the distribution of opportunities by stage: Acquisition (blue), Retention (purple), and Growth (yellow). A callout box highlights the 'Customer acquisition' bar. To the right of the chart is a section titled 'Prioritized opportunities' with three horizontal bars: 'Customer acquisition' (purple), 'Customer retention' (purple), and 'Customer growth' (purple). At the bottom of the page is a table listing opportunities for various tenants, including columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created.

Tenant	Recommendation	Probability	Opportunity type	Total seats	Date created
Adventure Works Cycles	Add Copilot for Microsoft 365 to enhance user productivity	High	Growth	350	12/20/2023
Bellows College	Add Copilot for Microsoft 365 to enhance user productivity	Medium	Growth	312	12/20/2023
Best For You Organics Company	Convert customer with usage on expiring trial to paid license	High	Acquisition	676	12/13/2023
Consolidated Messenger	Drive user adoption of Microsoft Teams to improve customer retention	Medium	Retention	232	11/29/2023

AI-driven opportunities & insights



Available Now

Renewal management made easy with M365 Lighthouse

Boost customer retention & grow revenue with new renewal insights and recommendations

With Sales Advisor you can:

Quickly & easily track subscriptions approaching expiration within the next 7-90 days

Prioritize customer outreach by sorting or filtering on expiration, seat size, product or auto-renew status

Optimize the renewal conversation with contextual retention, upsell and expansion recommendations

The screenshot shows the Microsoft 365 Lighthouse web interface. On the left is a sidebar with navigation links: Home, Alerts, Tenants, Users, Devices, Data protection, Apps, Deployment, Permissions, Service health, Audit logs, Sales advisor, Opportunities, and Upcoming renewals (which is currently selected). The main content area is titled 'Upcoming renewals'. It displays a summary of tenant renewals: Within 30 days (12), Within 60 days (2), Within 90 days (115), and No recurring billing (45). Below this is a table of tenant details. The columns include Tenant, End date, Product, Recurring billing, Total licenses, Recommendations, Status, and Actioned by. Each row lists a tenant name, its remaining days until expiration, the product it uses, whether it has recurring billing, the total number of licenses, the number of recommendations, its current status (e.g., New, Accepted, Dismissed), and the user who last interacted with it. The table is paginated at the bottom.

Partners have seen benefit both in **productivity** as well as **increased revenue** when using Microsoft 365 Lighthouse

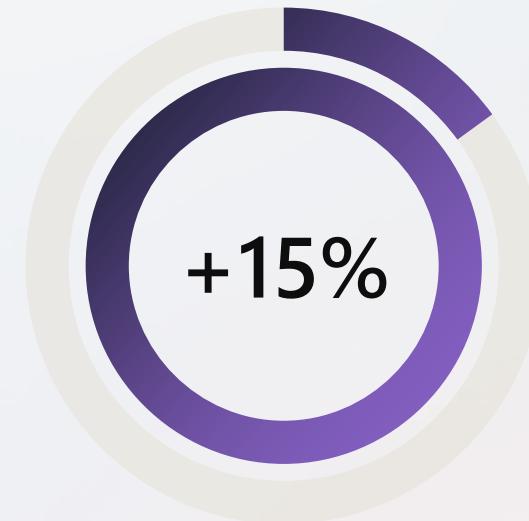
Increased productivity

Partners are able to engage customers faster with relevant recommendations, allowing them to scale.



Increased revenue

Partners have seen a 15% increase in revenue across existing customer base.



Revenue





Let us help you get started:

If you are not already using
Microsoft 365 Lighthouse, visit:



Lighthouse.microsoft.com

If you are a current Microsoft 365
Lighthouse user, start building your
plan to leverage AI-driven insights
today with Sales Advisor

