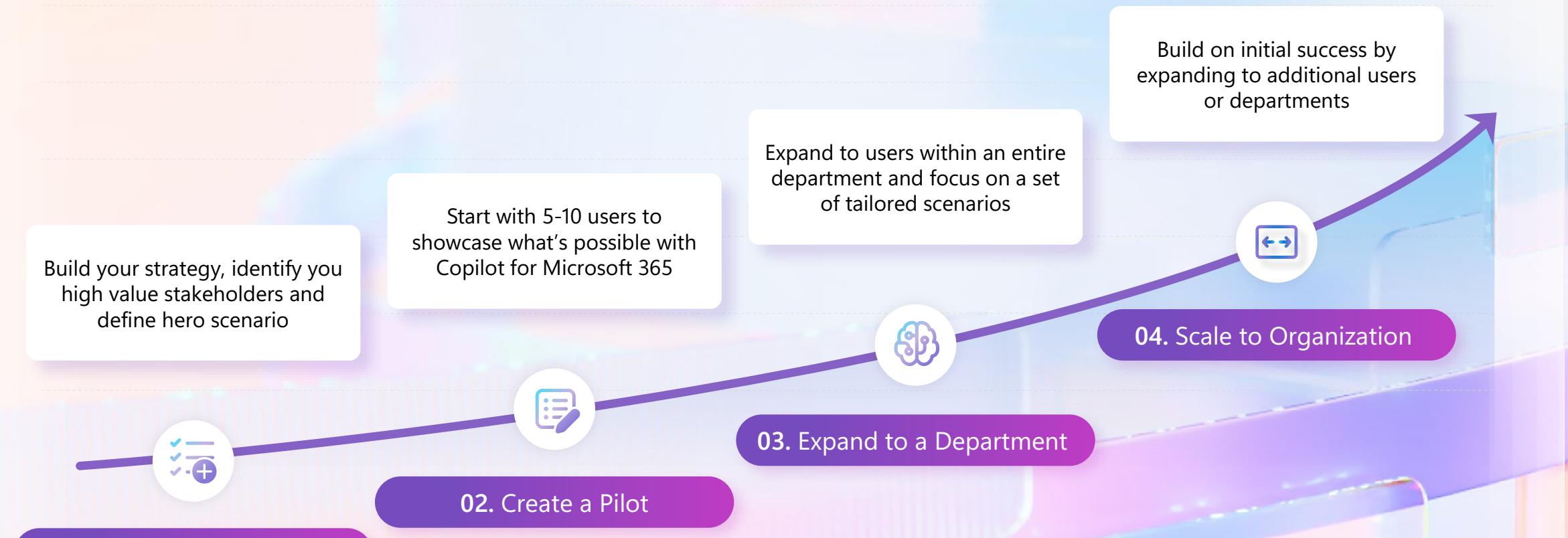




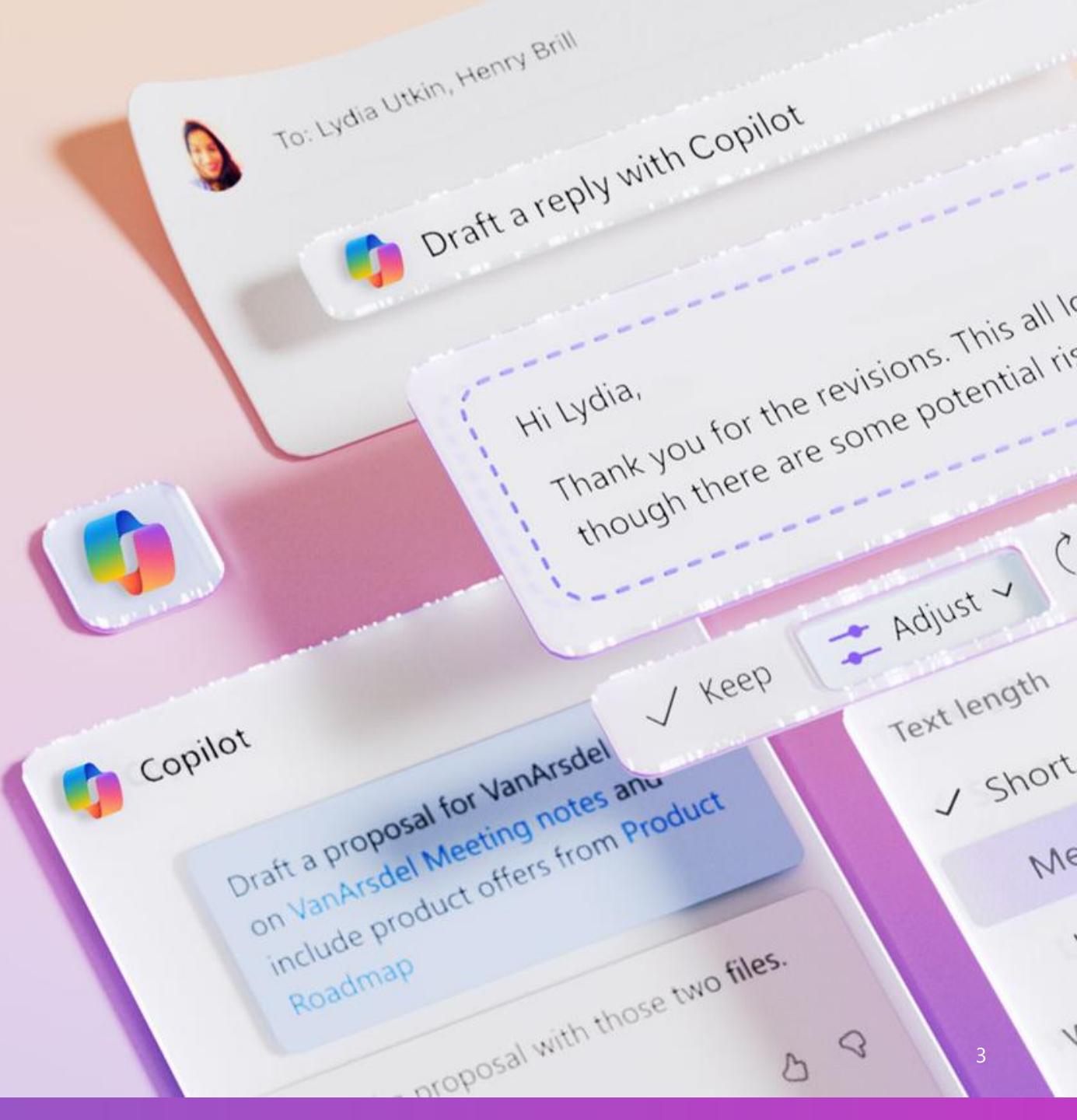
CSP Level Up In-Person Technical Training



Four steps to drive Copilot success with customers

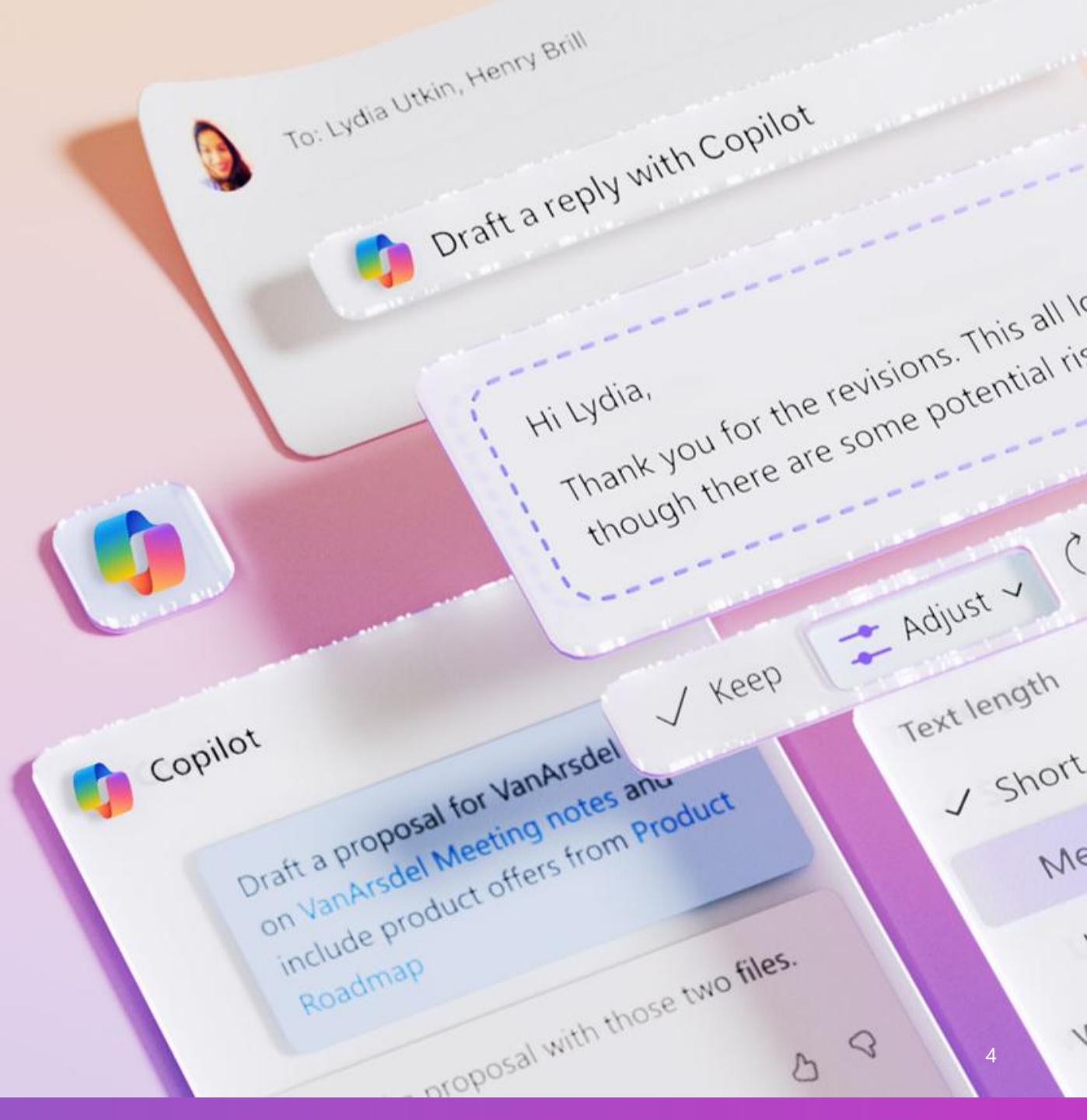


Things to consider



Things to consider

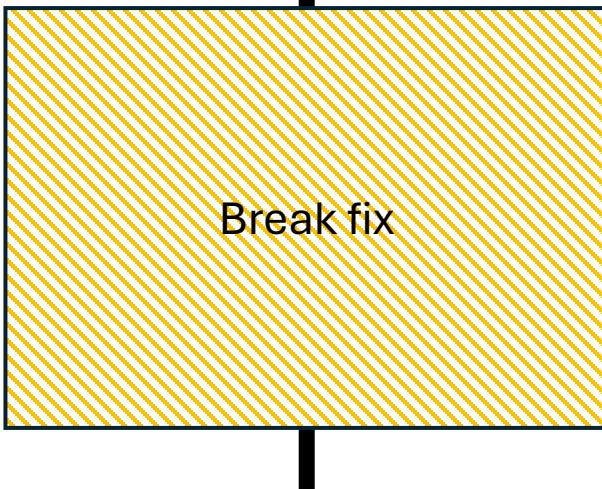
1. Changing role of the Technology advisor



V1

Reseller

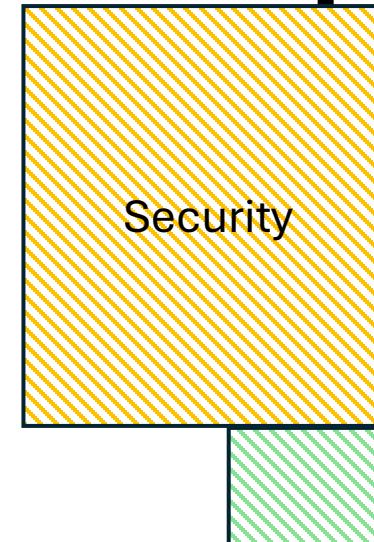
- Hardware = High
- Consult = Low
- Recurring = Low
- Tools = Low
- Dev = Low



V2

MSP

- Hardware = Medium
- Consult = Medium
- Recurring = High
- Tools = High
- Dev = Low



V3

Consultant

- Hardware = Low
- Consult = High
- Recurring = ?
- Tools = Low
- Dev = High



V1

Reseller

- Hardware = High
- Consult = Low
- Recurring = Low
- Tools = Low
- Dev = Low

V2

MSP

- Hardware = Medium
- Consult = Medium
- Recurring = High
- Tools = High
- Dev = Low

V3

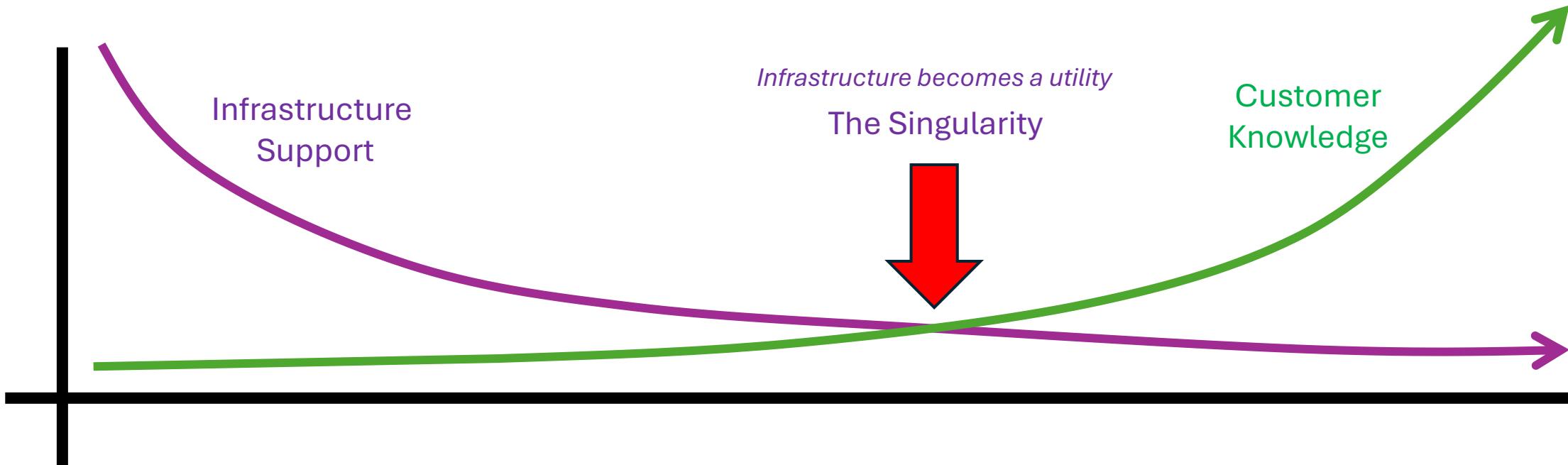
Consultant

- Hardware = Low
- Consult = High
- Recurring = ?
- Tools = Low
- Dev = High

Infrastructure
Support

Infrastructure becomes a utility
The Singularity

Customer
Knowledge



V1

Reseller

- Hardware = High
- Consult = Low
- Recurring = Low
- Tools = Low
- Dev = Low

V2

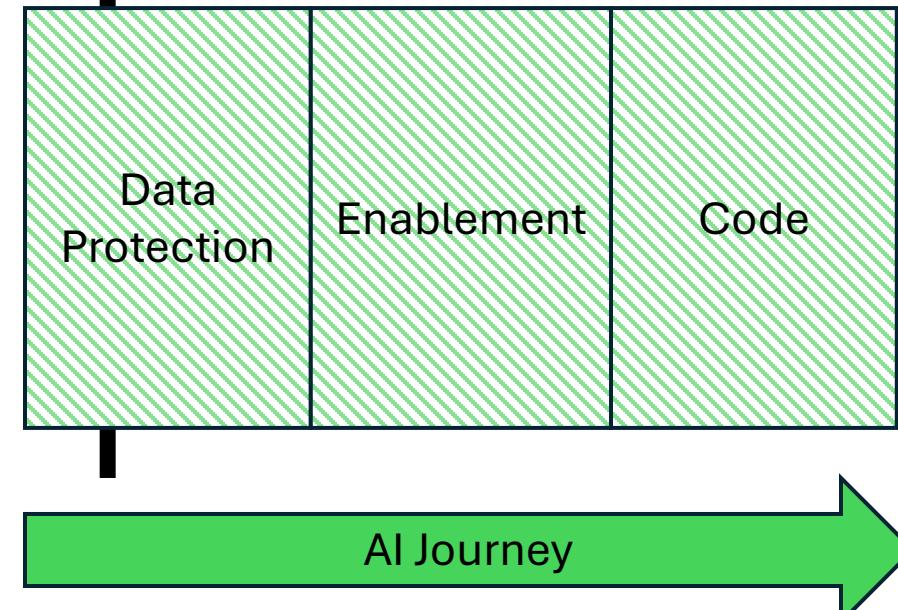
MSP

- Hardware = Medium
- Consult = Medium
- Recurring = High
- Tools = High
- Dev = Low

V3

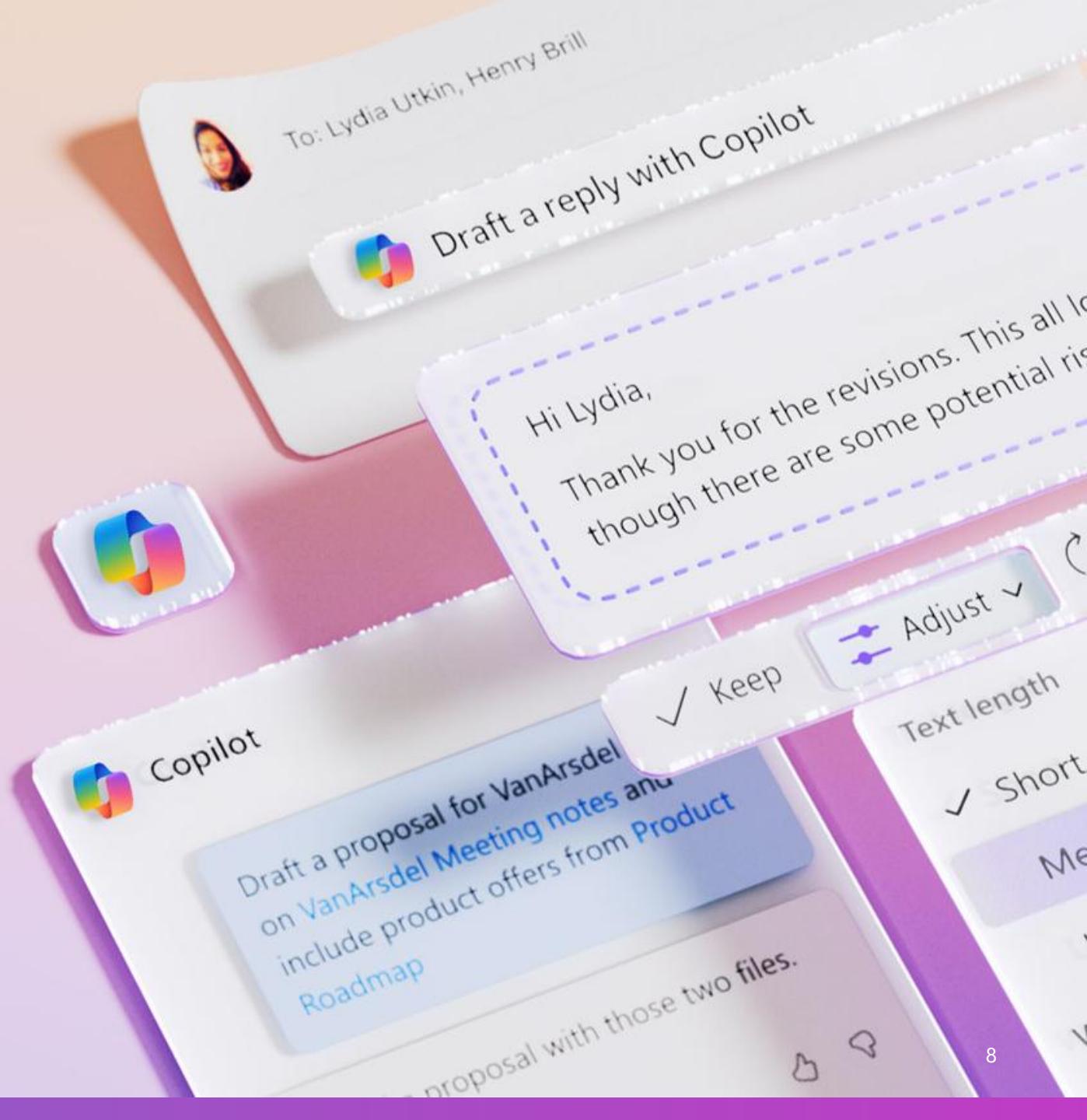
Consultant

- Hardware = Low
- Consult = High
- Recurring = ?
- Tools = Low
- Dev = High

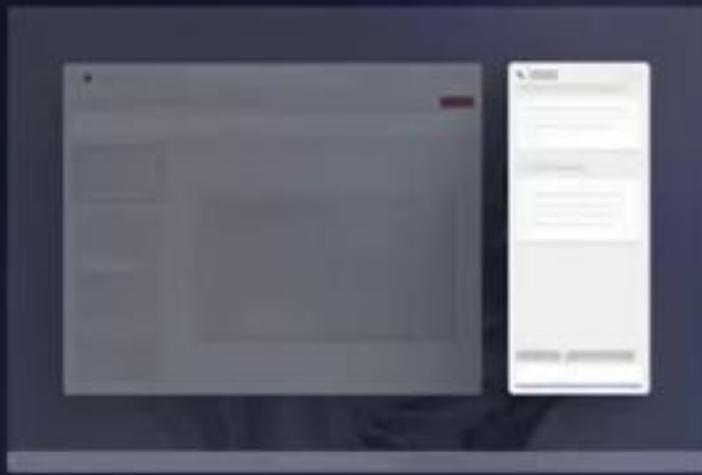


Things to consider

2. Changing role of the delivery of AI to users



Beside



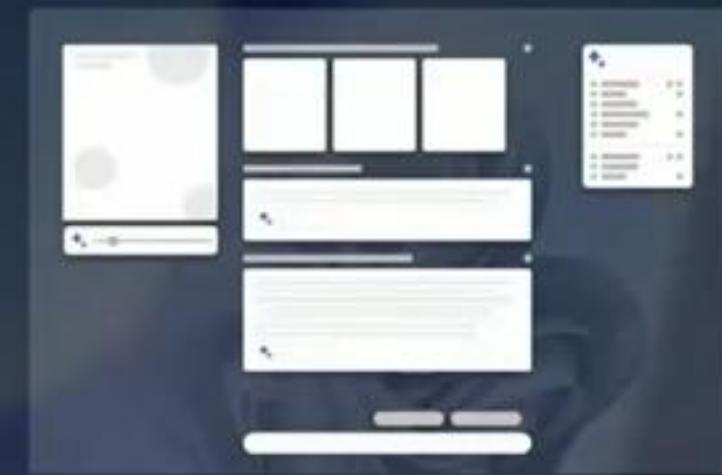
Add Copilots to be a helper
to your application

Inside

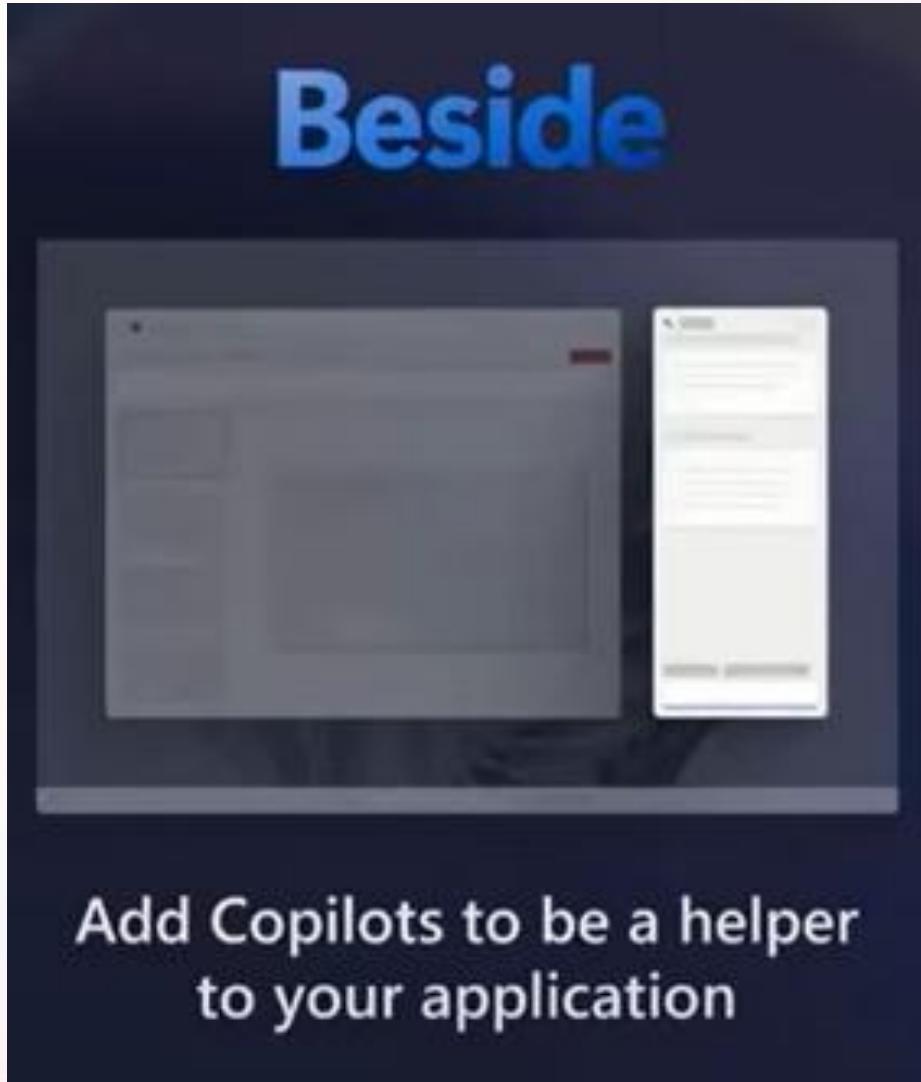


Create applications with AI
at the center of the experience

Outside



Agents help orchestrate
across apps and tasks



- Keeps original application architecture
- Keeps customer familiarity with application

Inside



Create applications with AI
at the center of the experience

- New interaction model
- More automatic
- Less explicit
- More implicit

Outside



Agents help orchestrate
across apps and tasks

- AI becomes the orchestrator
- Becomes more like an agent
- Tailored to suit the individual
- Works across applications, devices, time, etc

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

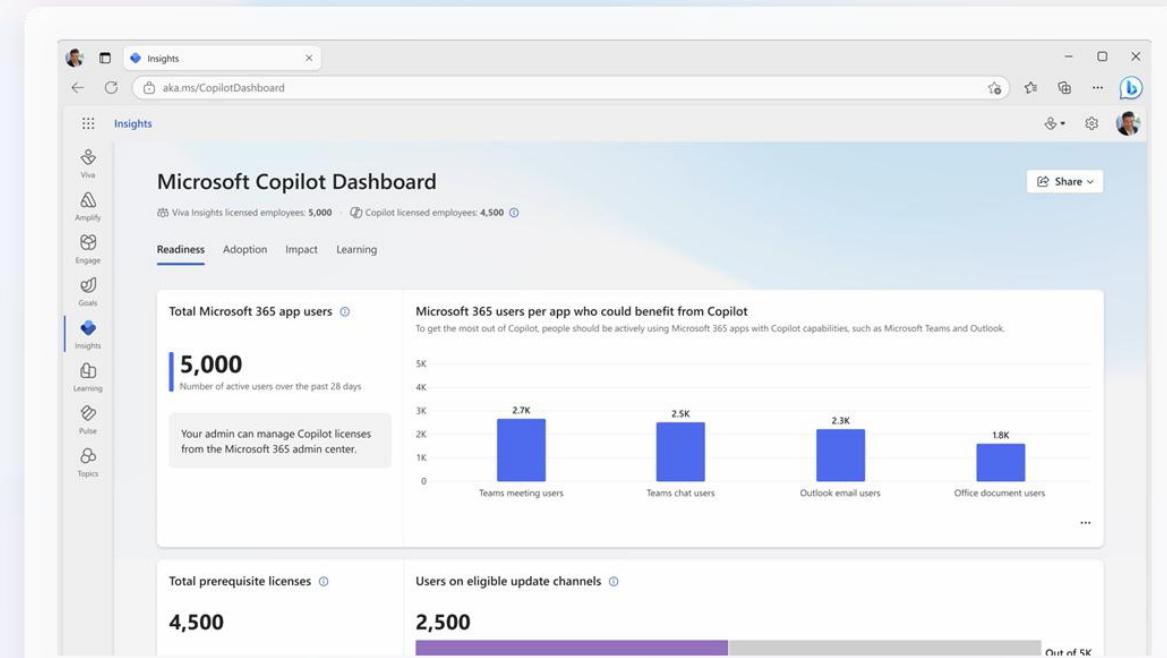
4

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

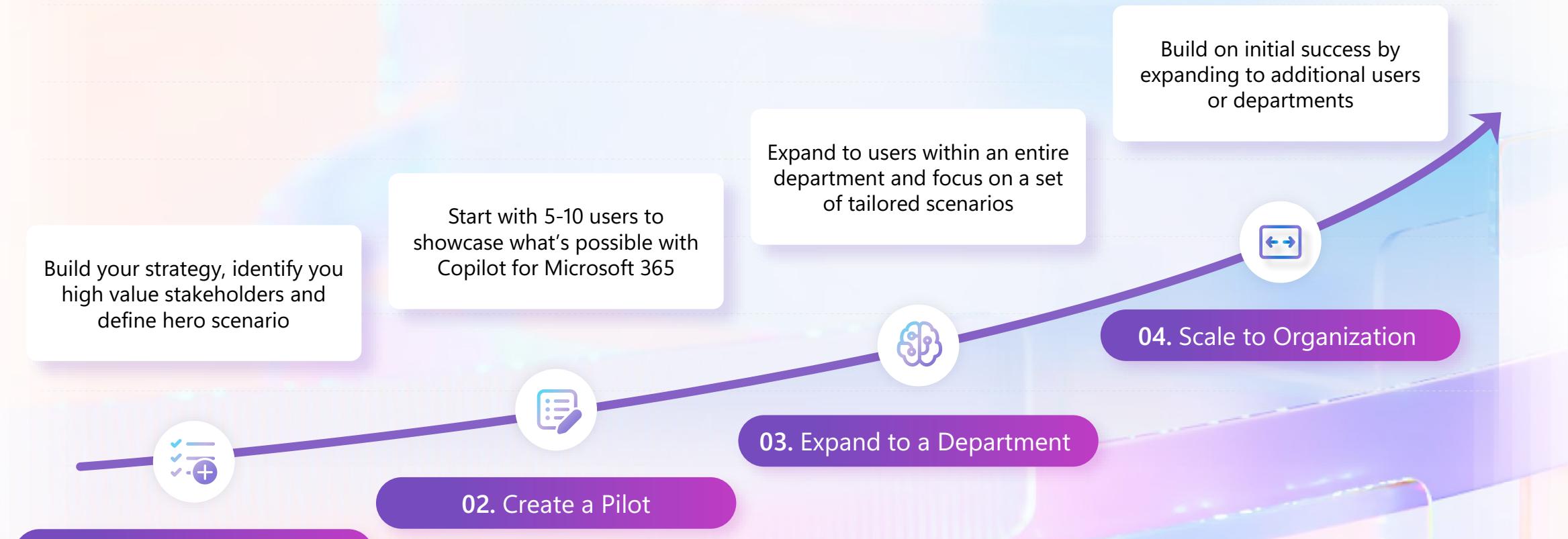
- + With a Microsoft Viva license (*available as add-on*), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns



Microsoft Copilot Dashboard

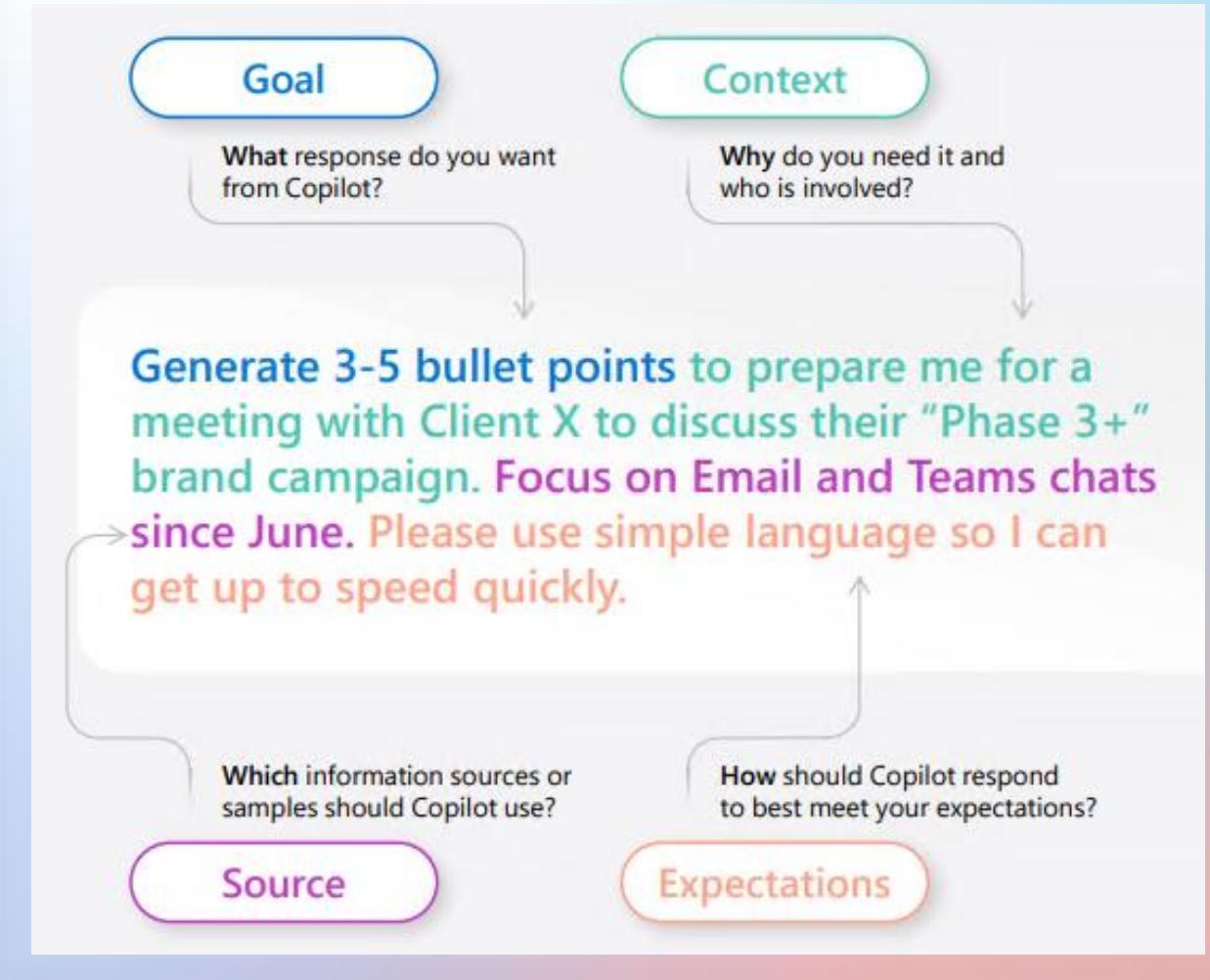
aka.ms/CopilotDashboard

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 selected. Below this are dropdown menus for "Apps" and "Categories". The main area is a grid of 16 cards, each representing a different prompt:

- Share meeting notes**: Draft an email with notes and action items from `meeting`.
- Write a status update**: Write a status report to my manager based on `file`. Include any upcoming deliverables, due dates, and key decisions.
- Catch up on messages**: Summarize Teams messages from this week about...
- How to**: How do I write a request for proposal?
- Help me write**: Write an email to my team about our top priorities for next quarter from `file`.
- 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...
- Draft an FAQ**: Create an FAQ based on `file`.
- Describe something concisely**: Summarize this doc into a high-level overview of the benefits of [topic].
- Get calendar info**: When's my next meeting with `person`?
- Create a quiz**: Write a practice quiz about [Topic]. Include at least 20 questions, and group questions by category. Provide a detailed...
- Create based on a topic**: Create 5 hypothetical courses about [Topic]. Include a brief summary for each course and a catchy title.
- Prep for a meeting**: I've got an upcoming meeting with `person`. Based on my recent communication and recent news items, create a...
- Add images**: Add a relevant image to this...
- Get key info**: List key points from `file`.
- Brainstorm**: Suggest 10 compelling taglines.
- 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 in various ways, with some appearing more solid and others more transparent. The overall effect is reminiscent of a futuristic or high-energy environment.

*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.

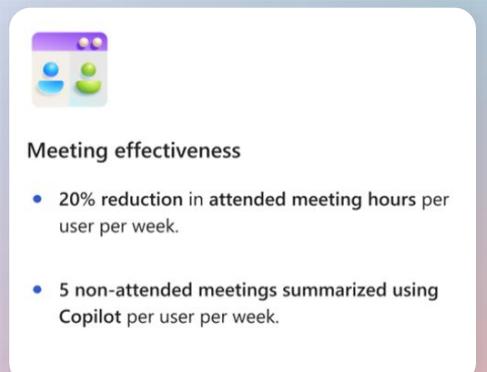
- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Sentiment tab to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them 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/0f34ff40-e6-aab6-2802e7fc5f0d", "Name": "kickoff.pptx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc5f0d", "Type": "pptx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f34ff40-e6-aab6-2802e7fc5f0d", "Name": "Design update.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc5f0d", "Type": "docx" }, { "Id": "https://moderncomms382604.sharepoint.com/sites/0f34ff40-e6-aab6-2802e7fc5f0d", "Name": "Next generation chip.docx", "SensitivityLabelId": "1f800ac5-34ff-40e6-aab6-2802e7fc5f0d", "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

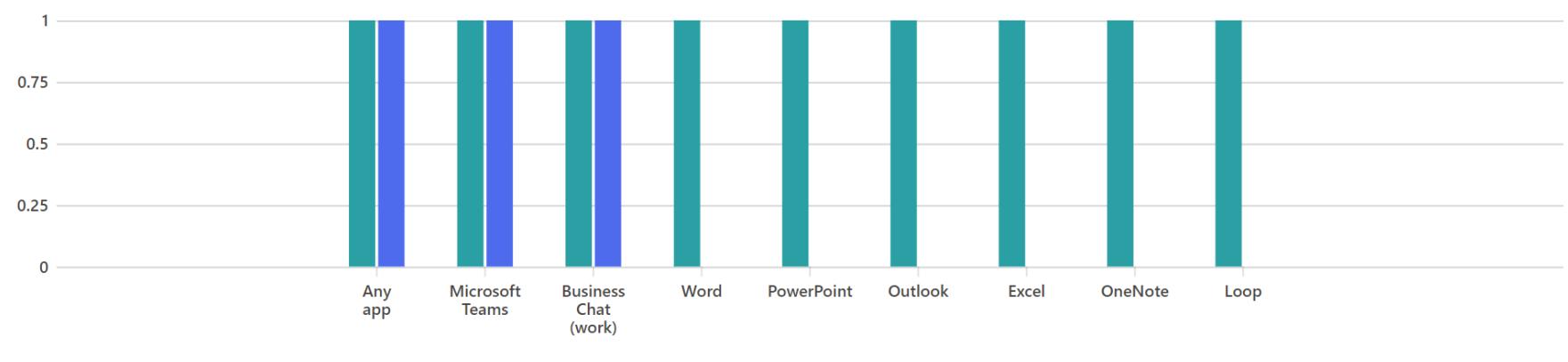
Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.

[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

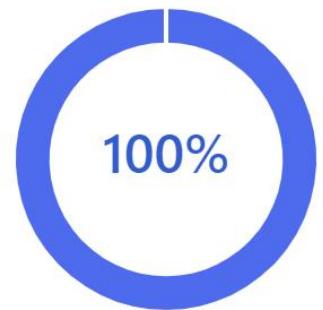
Readiness Adoption Impact Learning

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



Oversharing Assessment for the week of November 4, 2024

Default data assessments scans the top 100 sites in your organization

Sensitivity labels on data of top 100 sites

Labeled



Not labeled



No Sensitive Information Types Detected 2 more

+ Create assessment

5 items Group

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

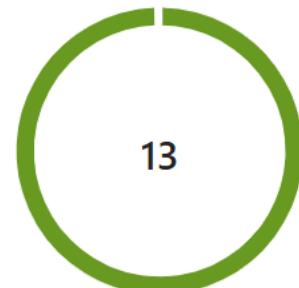
Total items

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

Label	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	
/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

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 label

Labeled

Not labeled

No Sensitive

Sensitive Info

Data Not Scanned

/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

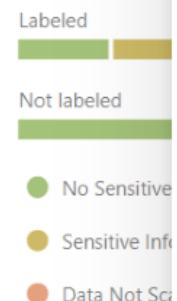
Total items



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

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Default

Group operator

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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 Refresh

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



Copilot



Visual Creator



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>

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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
Previously announced and generally available 	<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>
Announcing at Ignite 	<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](#)  

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

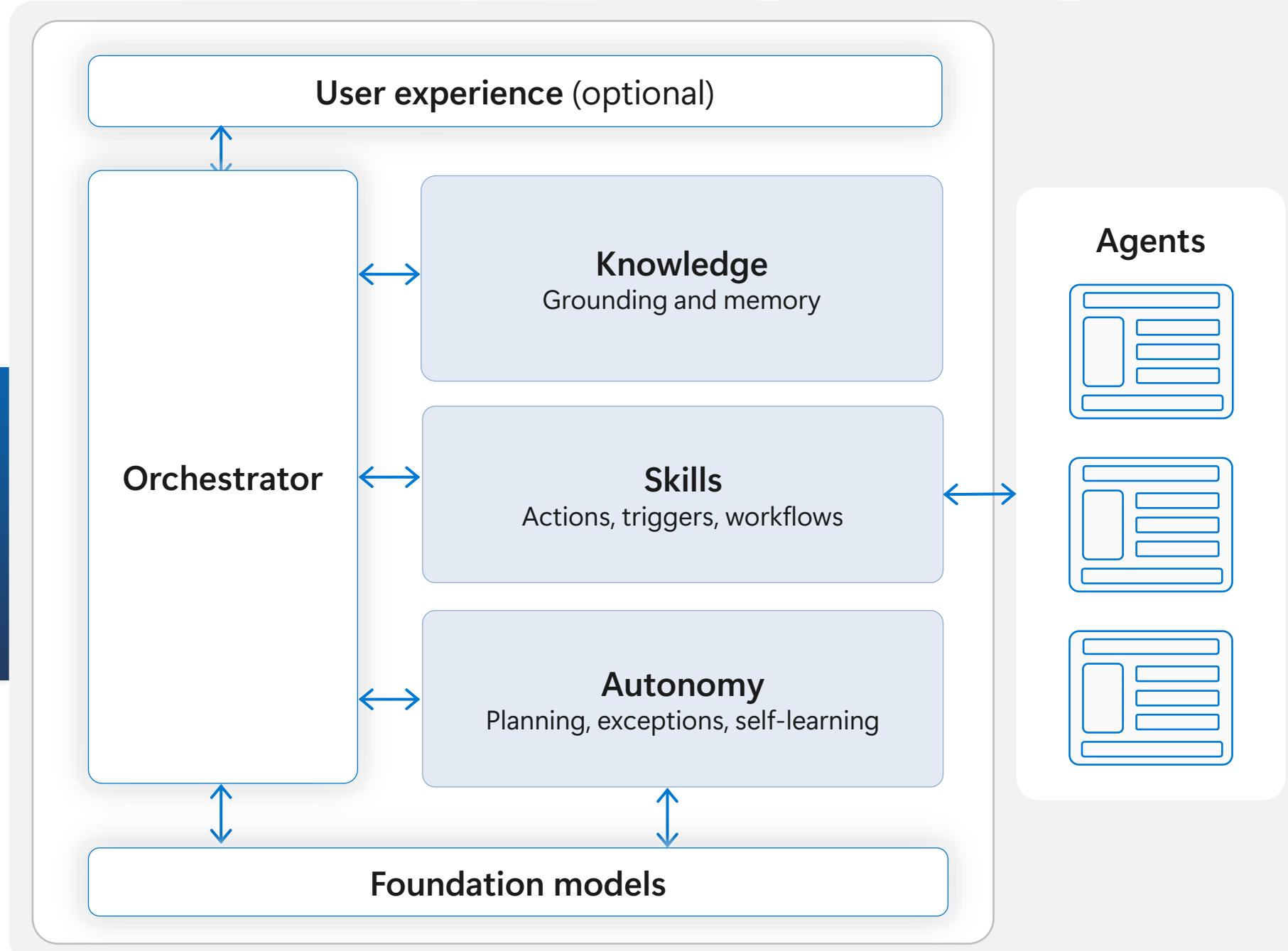
Copilot Studio has some governance and administration features that are unique to the tool



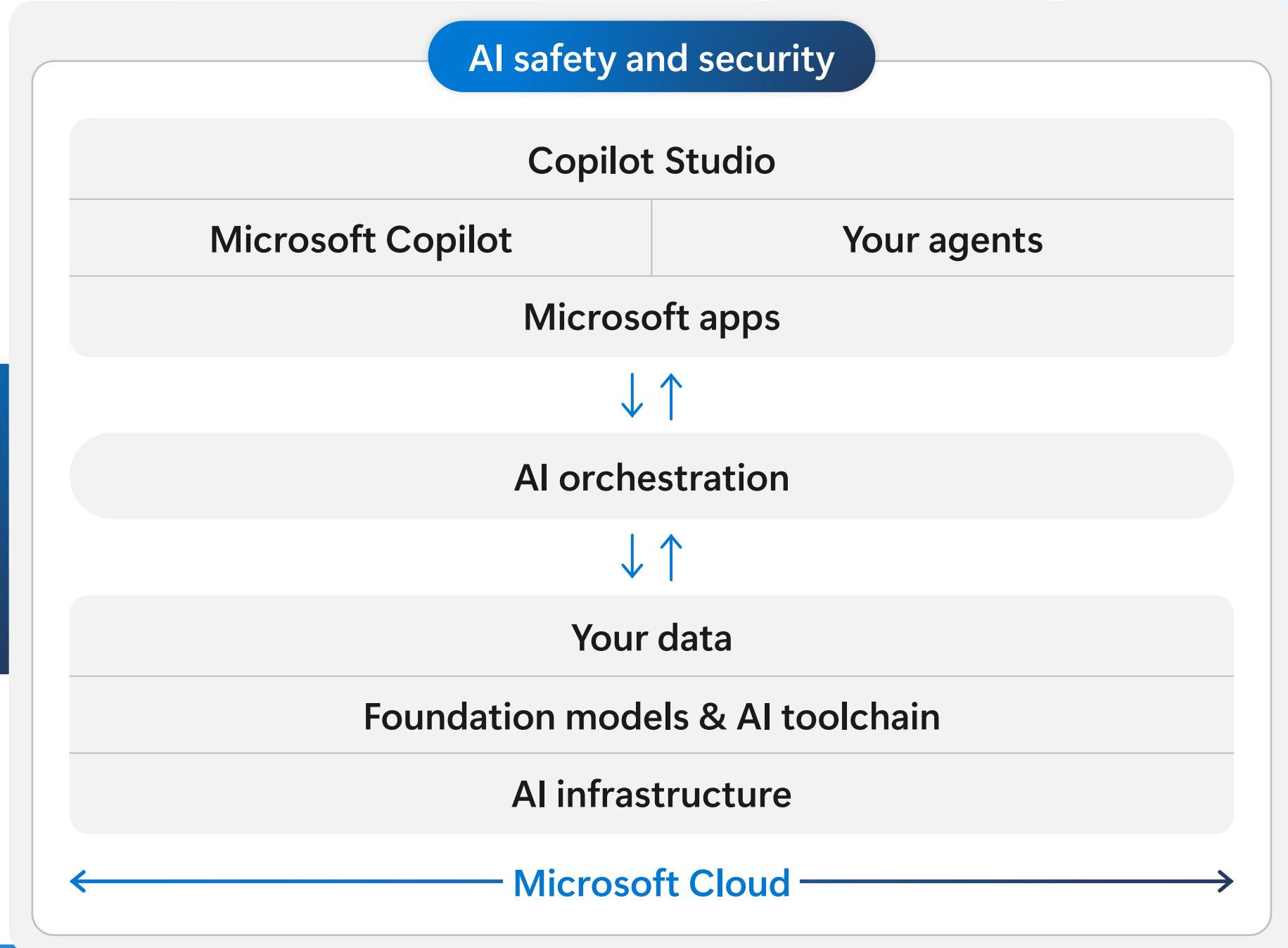
Gov/Admin through Power Platform

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

Anatomy of an agent



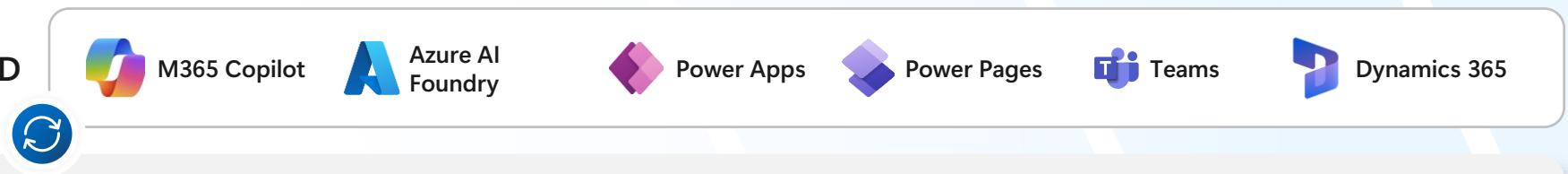
Copilot stack



Generative AI in Copilot Studio

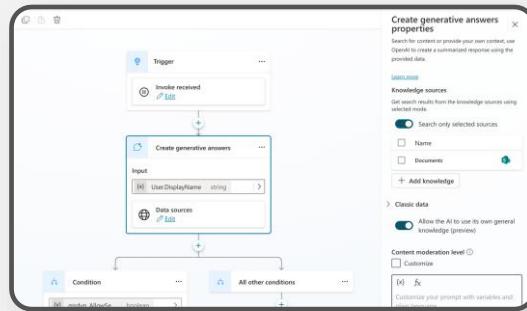
Powered by Azure

CONNECT AND EXTEND



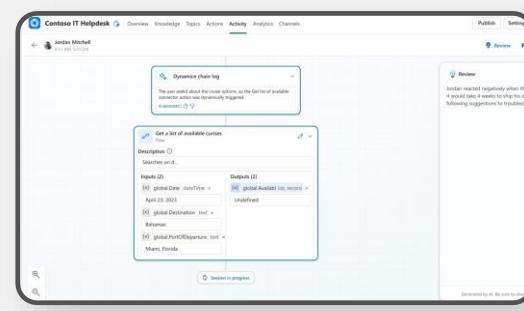
Generative Conversations

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

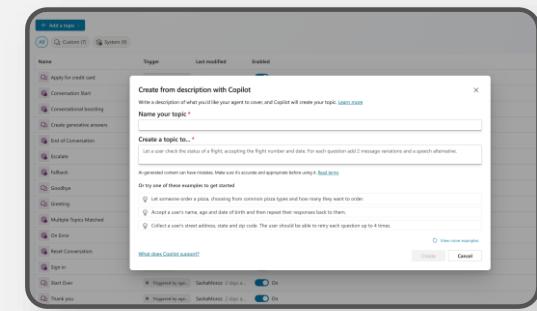
Generative Actions



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

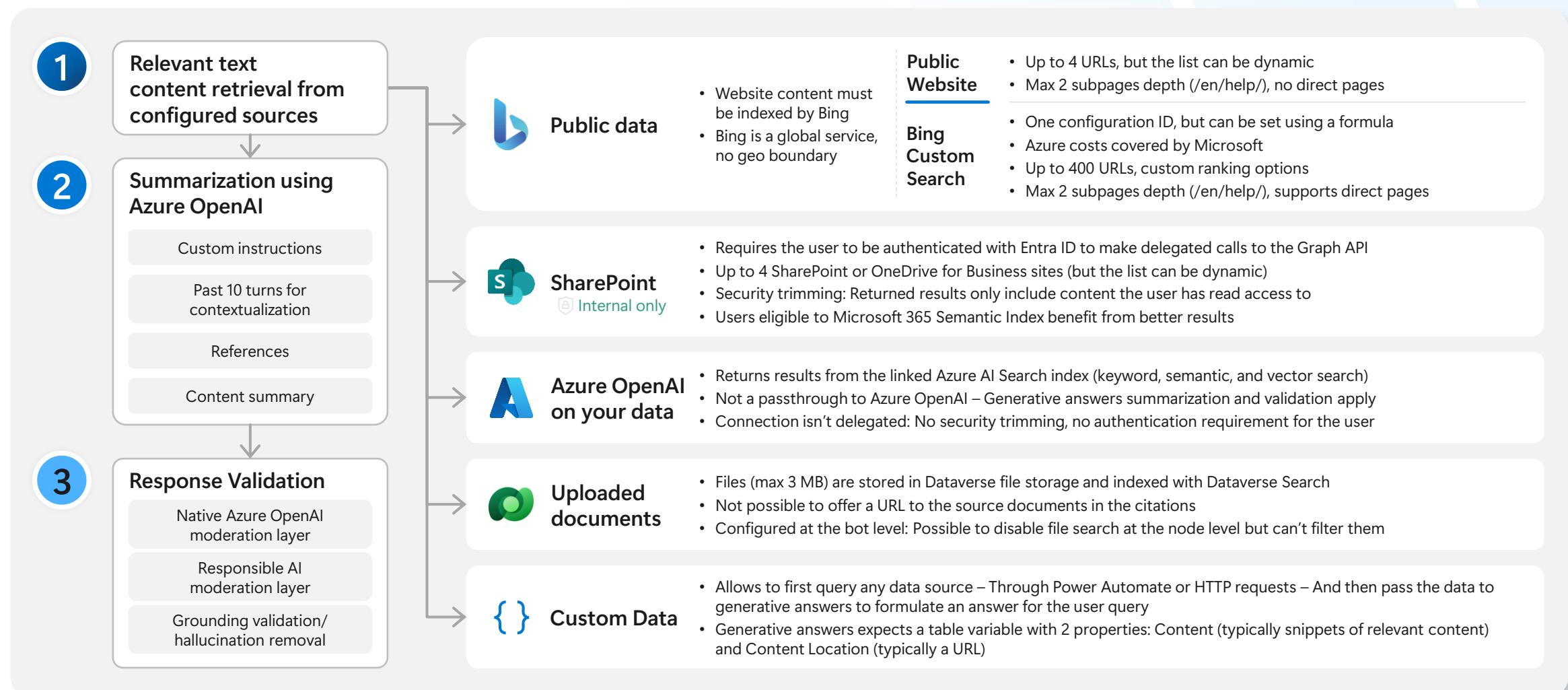
Variables

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.



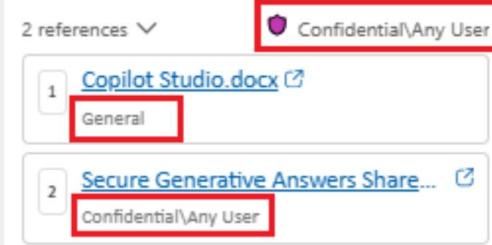
[Allow data movement across geographic locations for generative AI features](#), at the environment level.

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

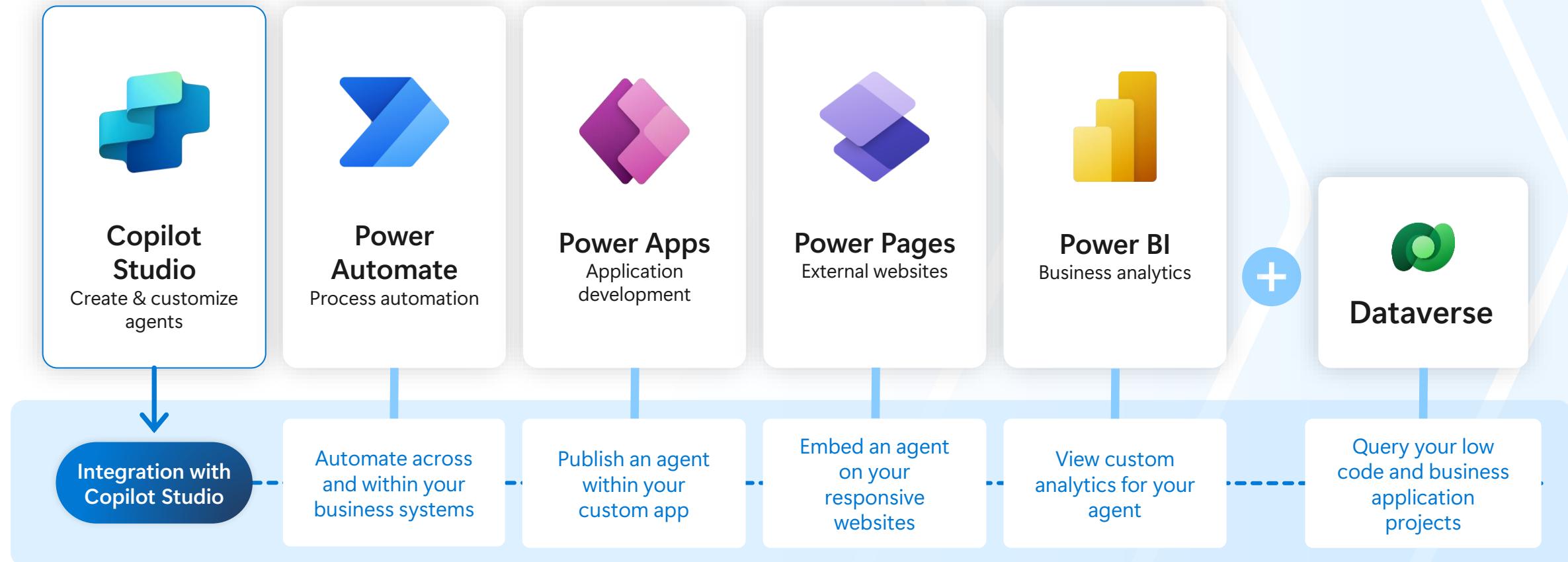


Gov/Admin through Power Platform

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

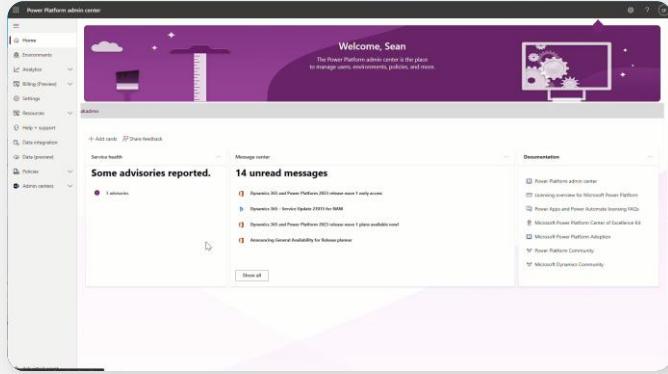
Copilot Studio is a member of the Power Platform

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



The right tools for your governance requirements

Power Platform Admin Center

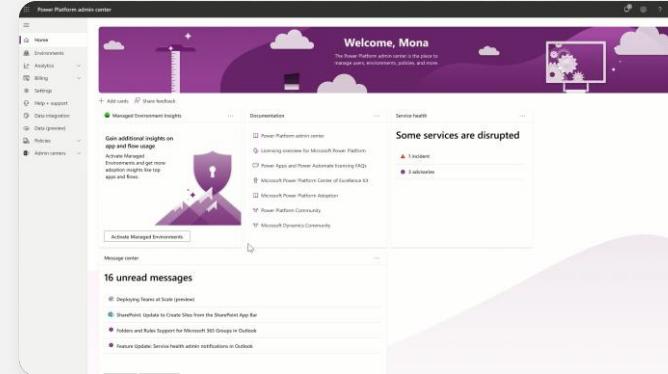


Standard governance offering

Build guardrails around data, agents, and environments

View analytics on low code assets across your organization

Managed Environments for Power Platform

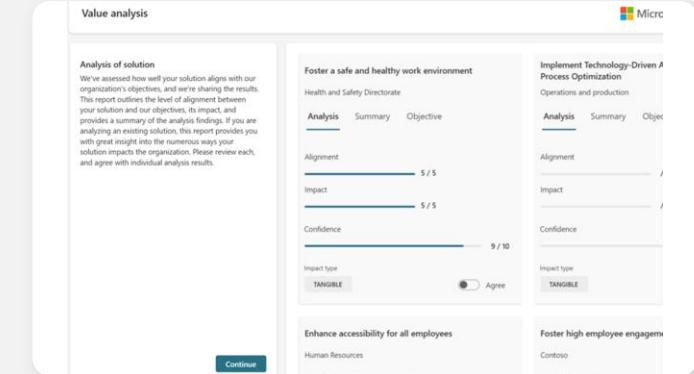


Premium governance offering

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

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 (deprecated)	 User (CRUD)	 User (CRUD)	 User (CRU)
Bot Contributor (deprecated)	 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



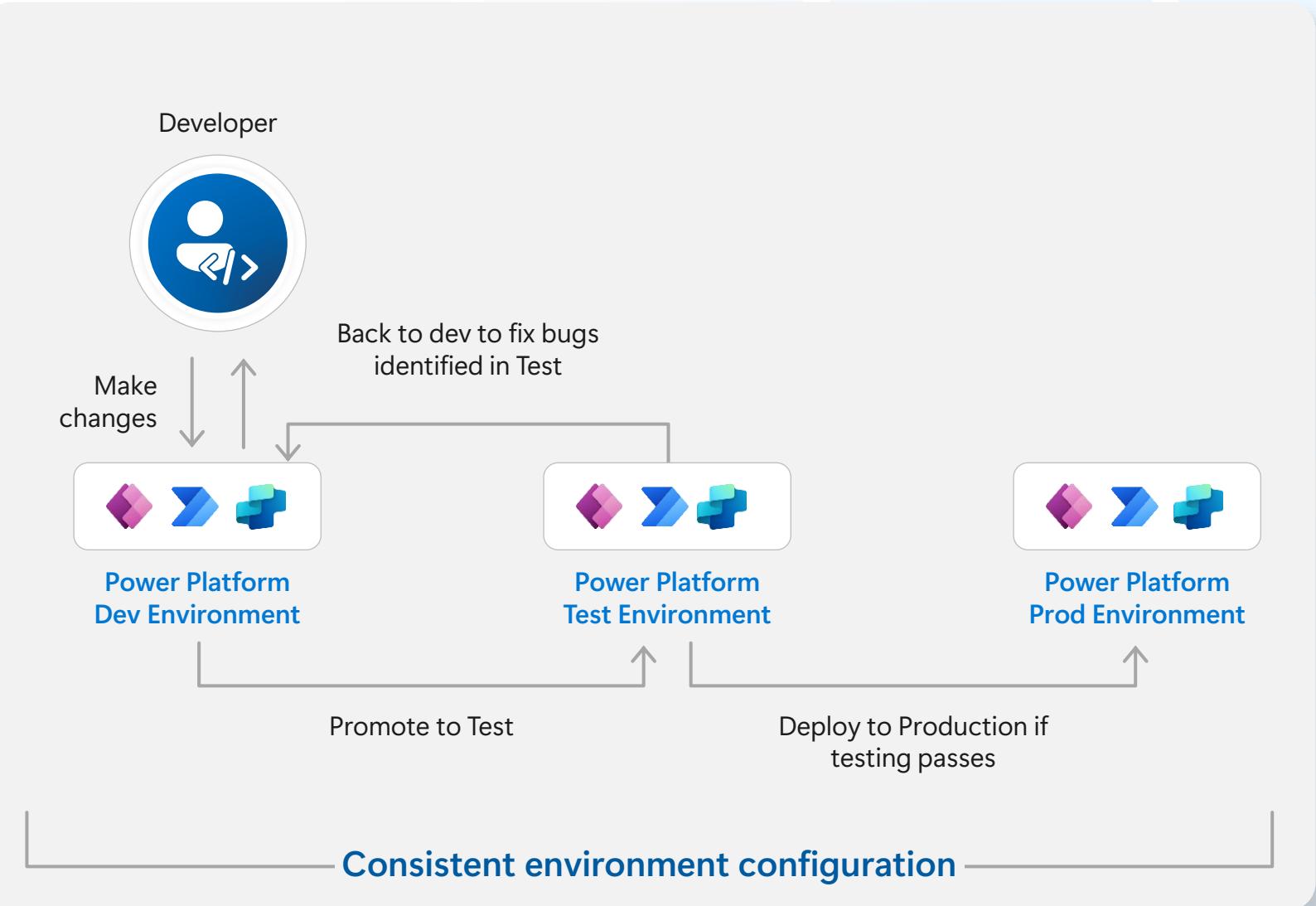
Lots of further reading:

[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 1.0	Agent • Contoso Agent • Agent Components 1.0	Agent • Contoso Agent • Agent Components 1.0	Agent • Contoso Agent • Agent Components 1.0
Cloud Flows • ServiceNow Flow • Internal API Flow 1.2	Cloud Flows • ServiceNow Flow • Internal API Flow 1.1	Cloud Flows • ServiceNow Flow • Internal API Flow 1.1	Cloud Flows • ServiceNow Flow • Internal API Flow 1.1
Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 1.3	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 1.3	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 1.3	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector 1.2

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 issues with their impact level (High or Medium) and a brief description. One 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 more details about why this is important and what can be done. It includes a 'Enable DLP enforcement' button and a 'Share in Teams' link.

Power Platform admin center

Recommendations Action history

View recommendations for issues that may be impacting the health status of your tenant.

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

Enable data loss prevention policy enforcement for Copilot Studio

Why is this important?

The data loss prevention policy enable admins to secure and govern copilot in their organization. The default setting does not apply the data loss prevention policy to copilots within a tenant. The tenant administrators have the option to activate it. This decision was made to ensure a smooth continuation of operations for those with existing policies and copilots, allowing them to enable the policy at a time that suits them best.

What can I do?

Enable data loss prevention policy enforcement for Copilot Studio.

Recommendation provided by Advisor on 8/31/2024.

Enable DLP enforcement Share in Teams



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 note about verifying user identity for a more personalized experience, a 'Choose an option' section with three radio buttons: 'No authentication' (publicly available in any channel), 'Authenticate with Microsoft' (Entra ID authentication in Teams and Power App), and 'Authenticate manually' (selected, with a sub-note about setting up authentication for any channel and a 'Require users to sign in' toggle switch which is turned off). Below this, the 'Redirect URL' field contains 'https://token.botframework.com/auth/web/' with a 'Copy' button. The 'Service provider' dropdown is set to 'Azure Active Directory v2 with Certificates', with other options like 'Azure Active Directory' and 'Azure Active Directory v2' listed. A note about 'Token exchange URL (required for SSO)' is present, along with fields for 'Enter your token exchange URL' 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 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

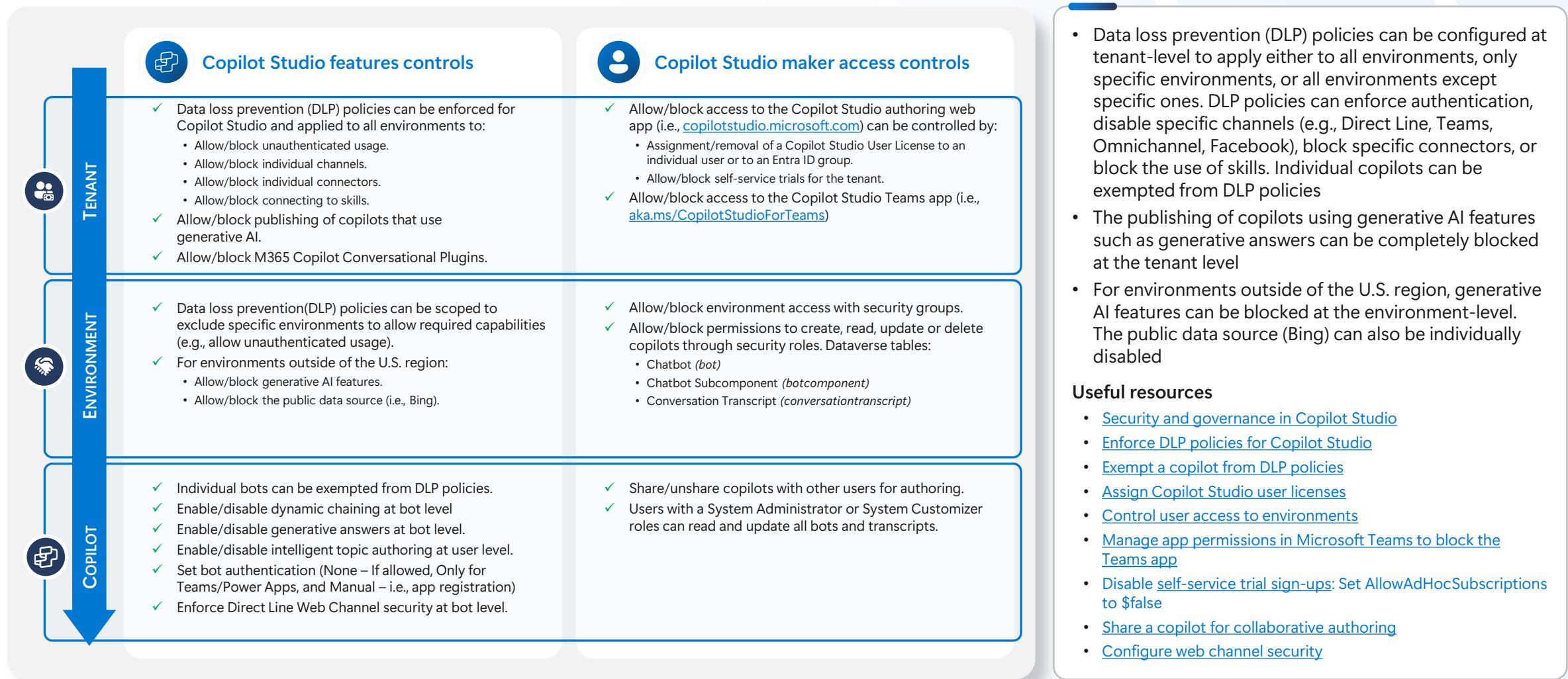
Useful resources

- [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 interface for managing account data. At the top, there are navigation buttons: Back, New row, New column, Refresh, Create an app, and Edit table properties. The main title is "Accounts". The table has columns: Account Name, Main Phone, Address 1: City, Email, and Account Number. The "Email" column is highlighted with a blue border, indicating it is the current target for masking. The data rows show various sample accounts, and the "Email" column values are partially redacted with asterisks. A legend at the bottom right identifies the masked email as "*****@*****.com".

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.

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

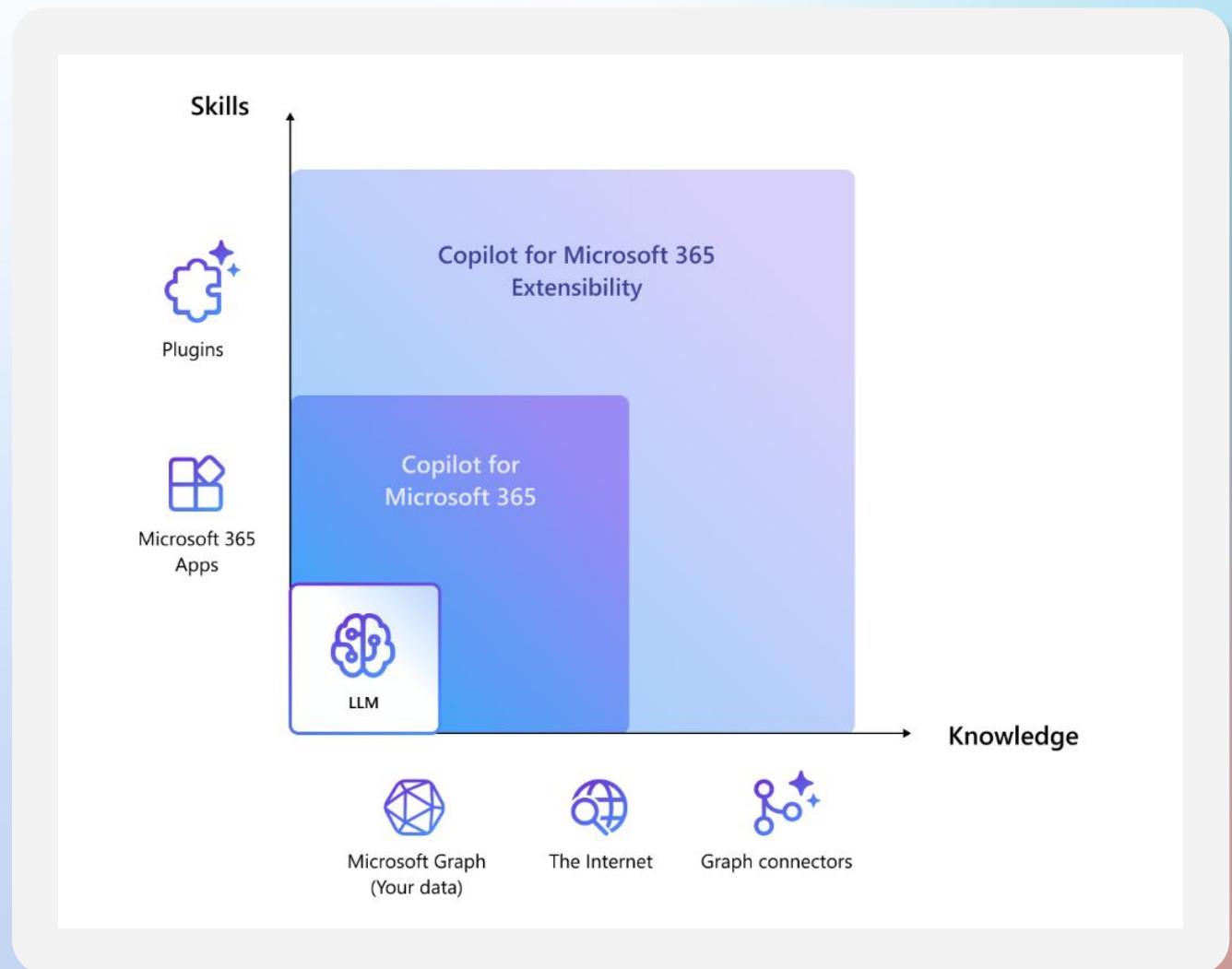
Enable and publish plugins

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.

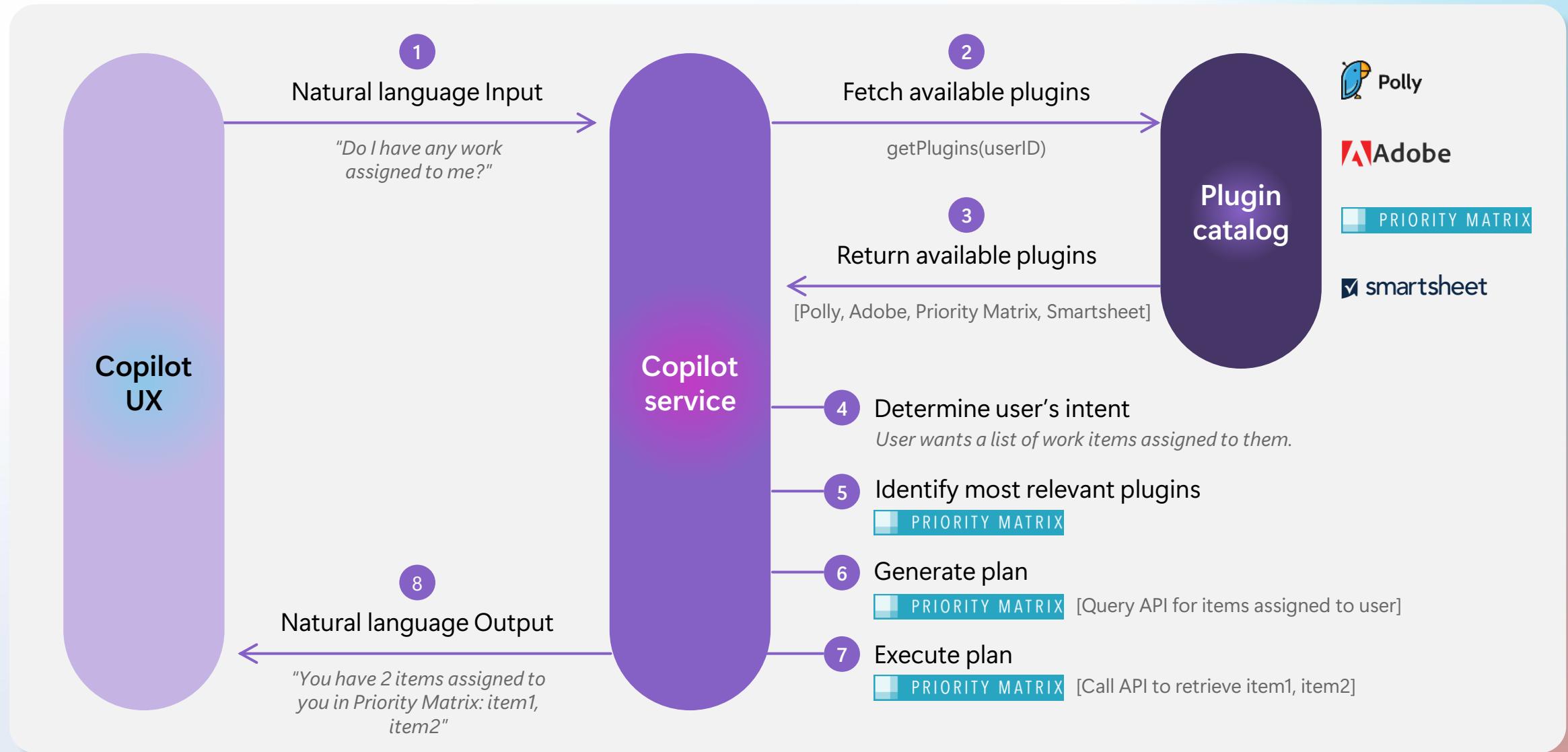


Existing Investments



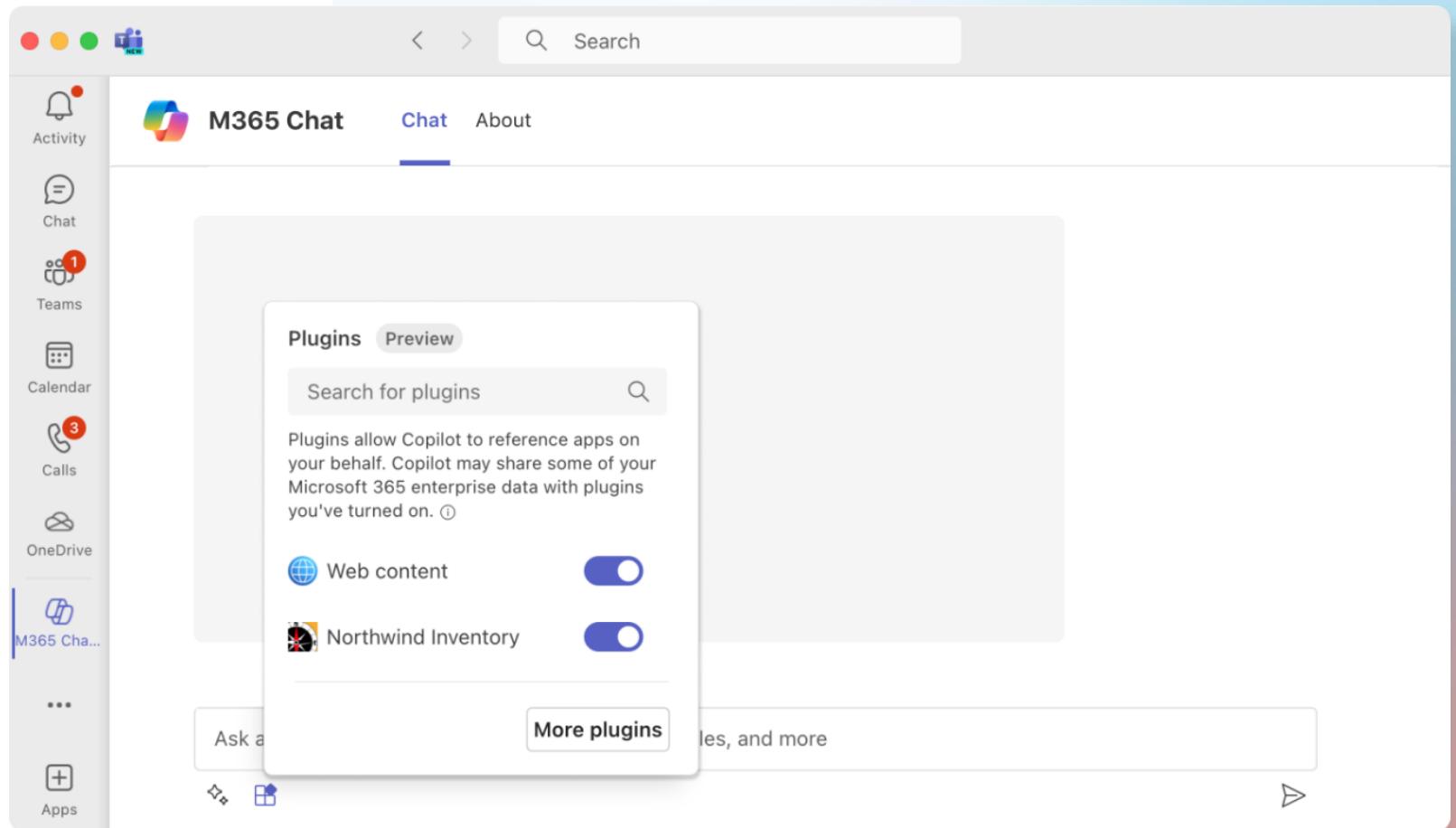
New

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".

Activity

Chat (1)

Teams

Calendar

Calls

Files

Contoso

...

Apps

Chat

Pinned

Copilot 9:16 AM
Hi Daniela, here are the major update...

Cassandra Dunn 7:27 AM
Ok. I'll send an update later

Aadi Kapoor 5:21 AM
You: Great work!

Eric Ishida 11:40 AM
Sure, I'll set something for next week t...

Recent

Cortex Framework 4:41 PM
Kayo: The review went really well! Can't wai...

Will Little 3:45 PM
I don't see that being an issue, Can you ta...

MB 1:21 PM
Ohh, I see, yes let me fix that!

Hillary Reyes 1:07 PM
Haha!

Charlotte and Babak 11:48 AM
Charlotte: The client was pretty happy with...

Reta Taylor 11:40 AM
Ah, ok I understand now

Joshua VanBuren 10:29 AM
Thanks for reviewing

DF 10:20 AM
Daichi Fukuda: You: Thank you

Kadji Bell 10:03 AM
You: I like the idea, let's pitch it!

Copilot Chat About FAQs What's new

Copilot 11:18 AM

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

1 Adatum's technical design

2 Group Chat with engineer team

3 Email with Aadi Kapoor

AI-generated content may be incorrect

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

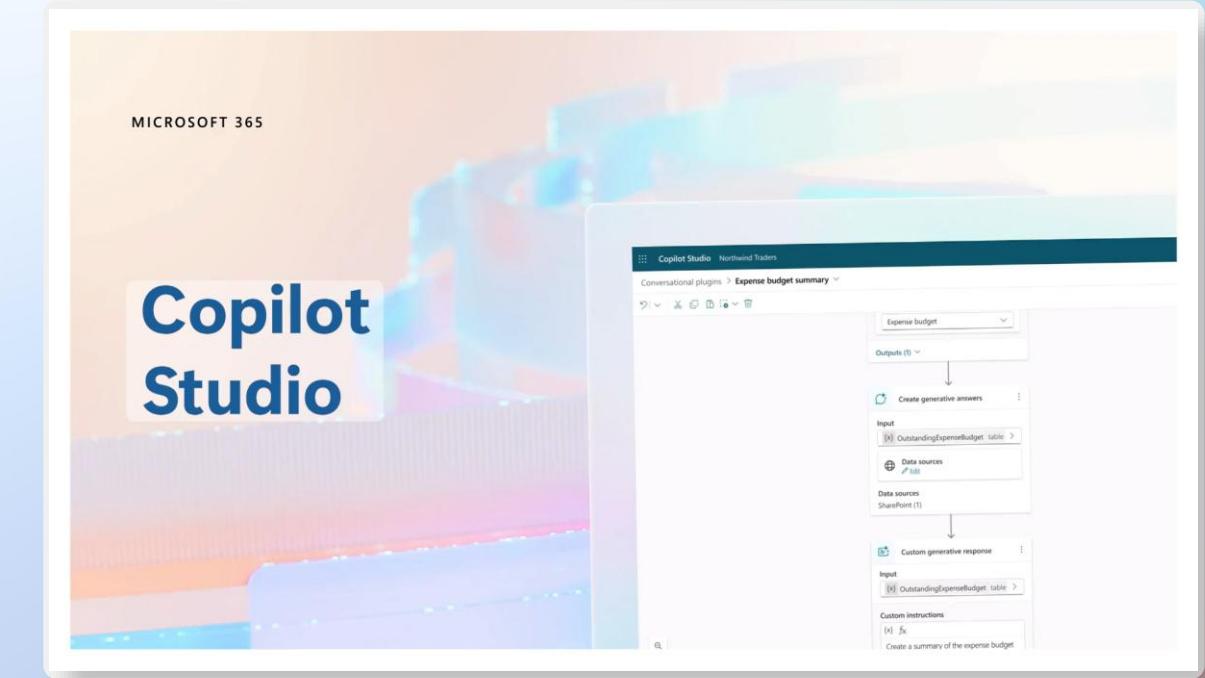
Customize Copilot for your unique business needs

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**.



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



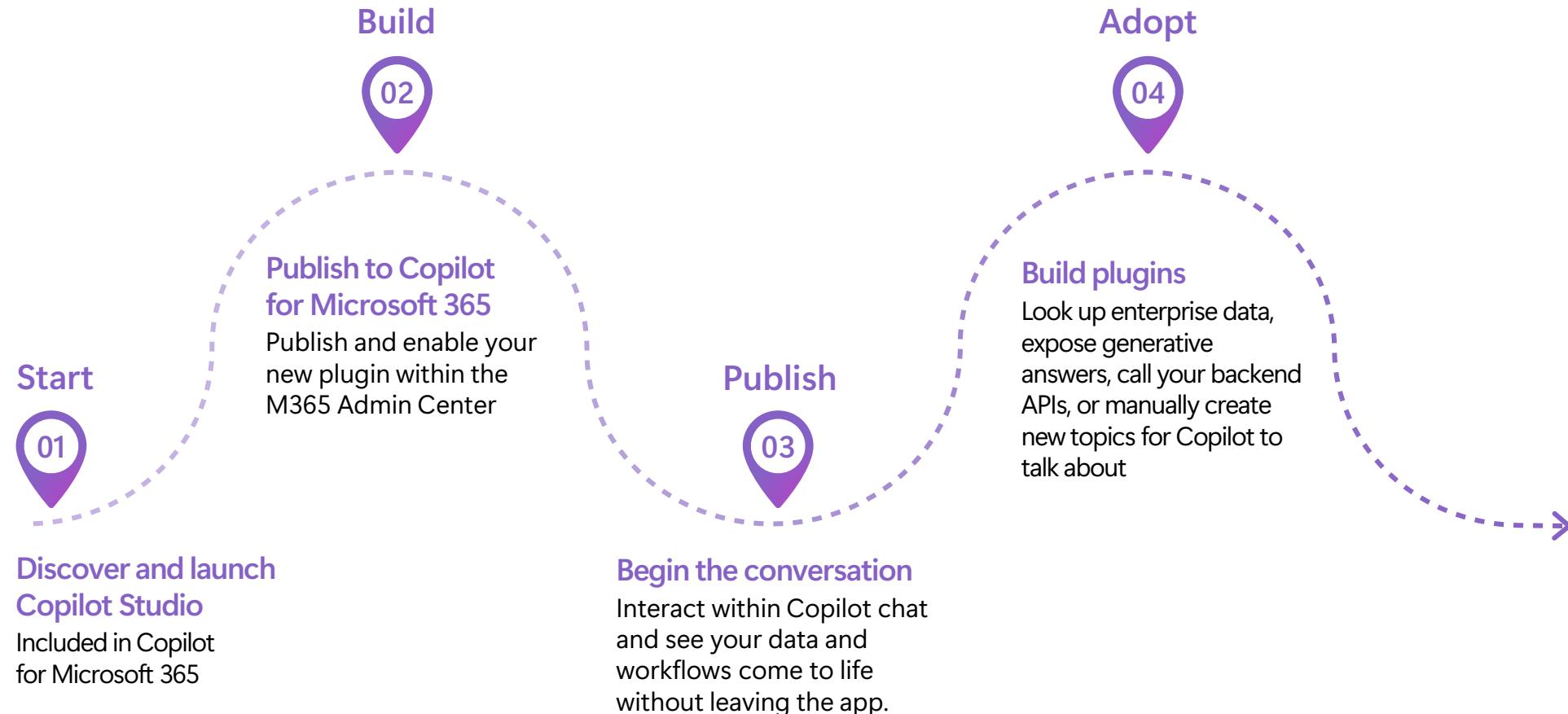
Reduce
development
costs



Monitored
and secure
through IT



How to build a plugin for Copilot for Microsoft 365



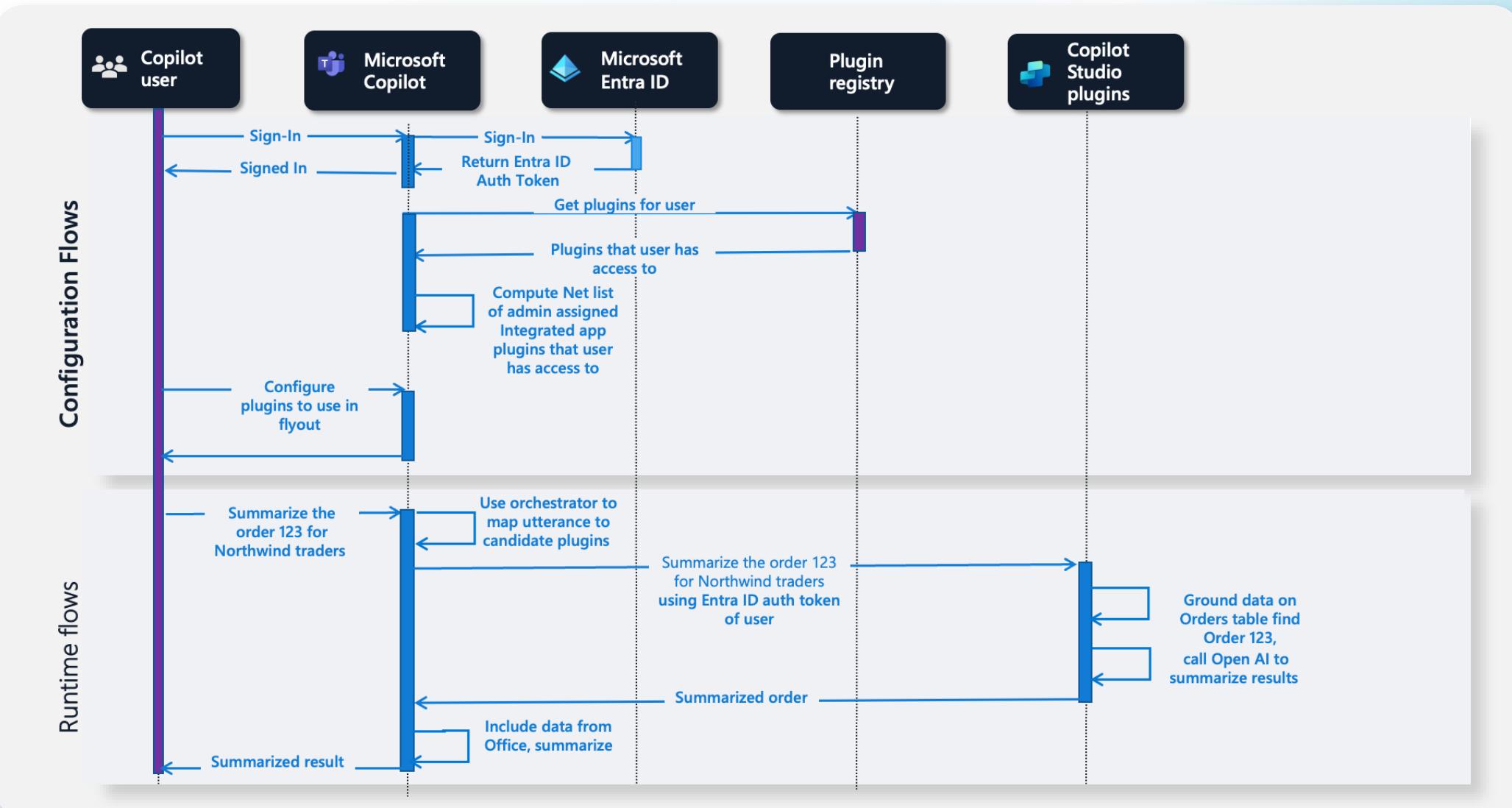
MICROSOFT 365

Copilot Studio

The screenshot shows the Microsoft Copilot Studio interface. At the top, it says "Copilot Studio Northwind Traders" and "Conversational plugins > Expense budget summary". Below this is a toolbar with various icons. The main area is a flowchart diagram illustrating the data processing pipeline:

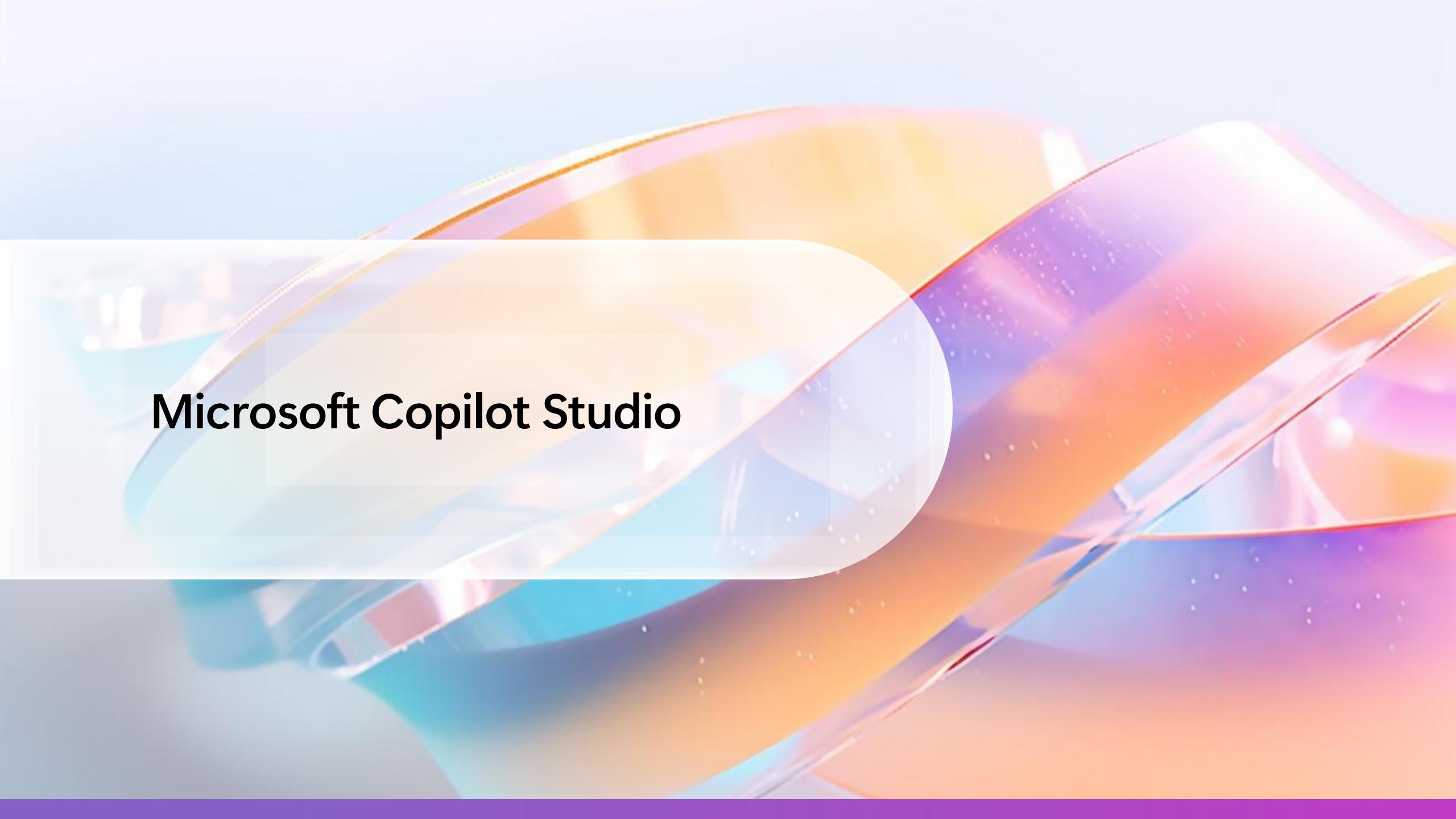
- Input:** "Expense budget" (dropdown menu) and "(x) OutstandingExpenseBudget table" (button).
- Outputs (1):** "Create generative answers" (button).
- Data sources:** "SharePoint (1)" (dropdown menu) and "Data sources" (button).
- Custom generative response:** "Custom generative response" (button) and "Input" field containing "(x) OutstandingExpenseBudget table".
- Custom instructions:** "Custom instructions" (button) and "fx" (button), with the instruction "Create a summary of the expense budget" below.

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. On the left is a sidebar with navigation links: 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 has a header for 'Northwind Trader' and a sub-header 'View solution (Northwind Trader copilot prod)'. It features a section titled 'Boost your conversations (preview)' with a sub-section 'Answer unanticipated questions in real time based on content you choose.' Below it are buttons for 'Enter your website', 'Use generative answers' (which is selected), and 'Advanced options'. A note says 'Make sure AI-generated content is accurate and appropriate before using. See terms.' To the right are three cards: 'Extend Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each card has a small icon and a 'Go to...' 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, Create a copilot, 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 for "Answer unanticipated questions in real time based on content you choose." It includes a "Learn more" link, a text input field for "Enter your website", and a "Use generative answers" button. Below this are other cards: "Extend a Microsoft Copilot (preview)", "Add plugins for dynamic chaining (preview)", and "Meet people where they are". Each card has a "Go to [action]" 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

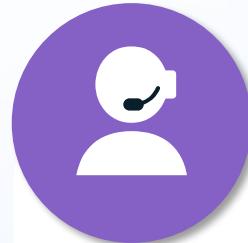
Monitor usage and gain full visibility into who is building copilots and customizing elements through built-in governance and control features.

Momentum of conversational AI to solve business challenges

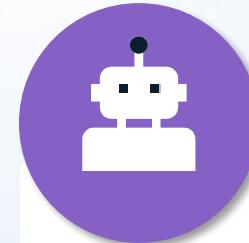
Market trends are clear, don't fall behind on this growing opportunity area



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

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Building conversational AI has traditionally been challenging

Budget & time constraints

Infrastructure & resource hosting

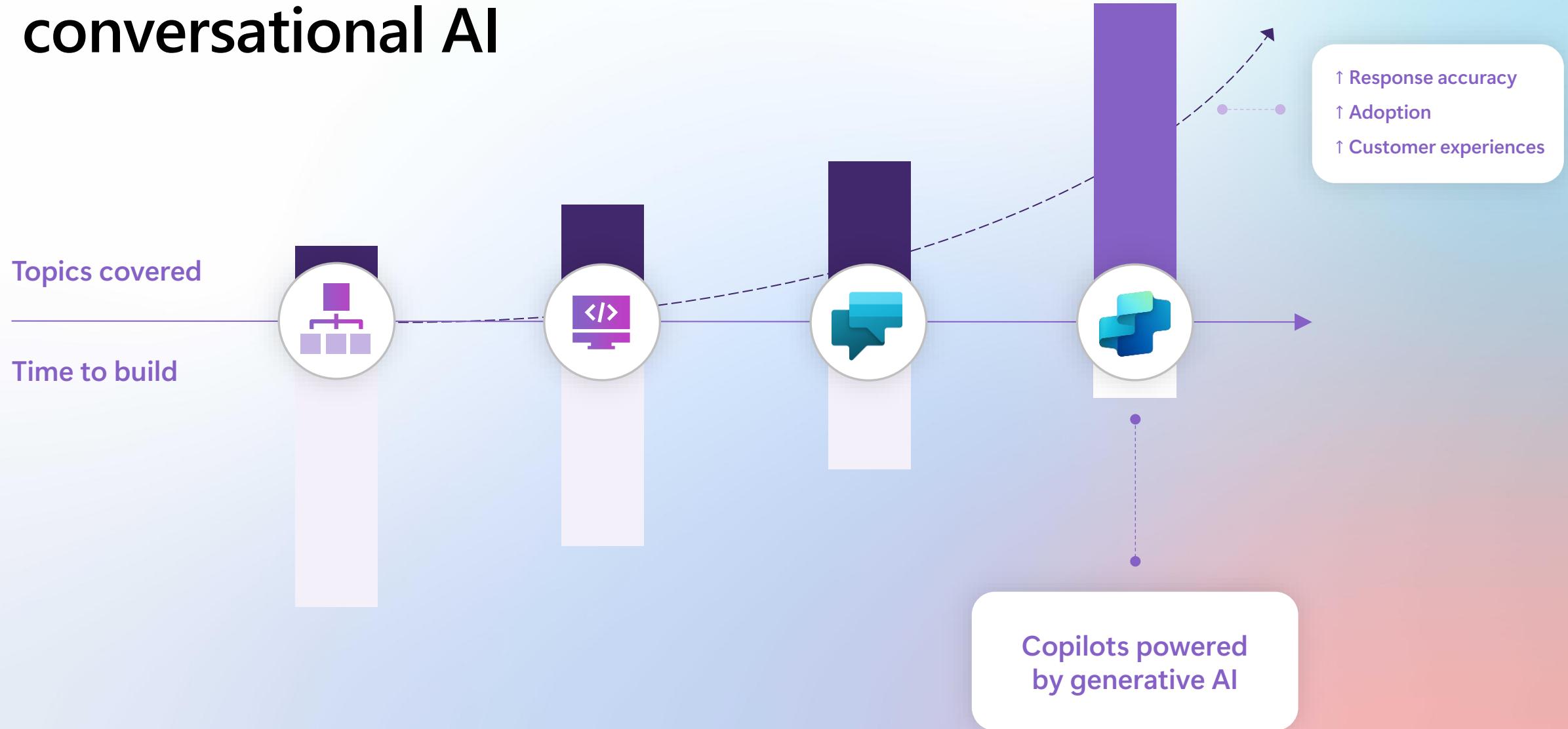
Product & technical onboarding

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.

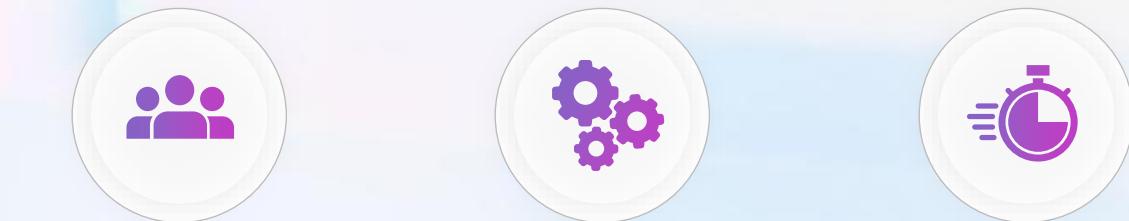
Reduce development costs

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



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.

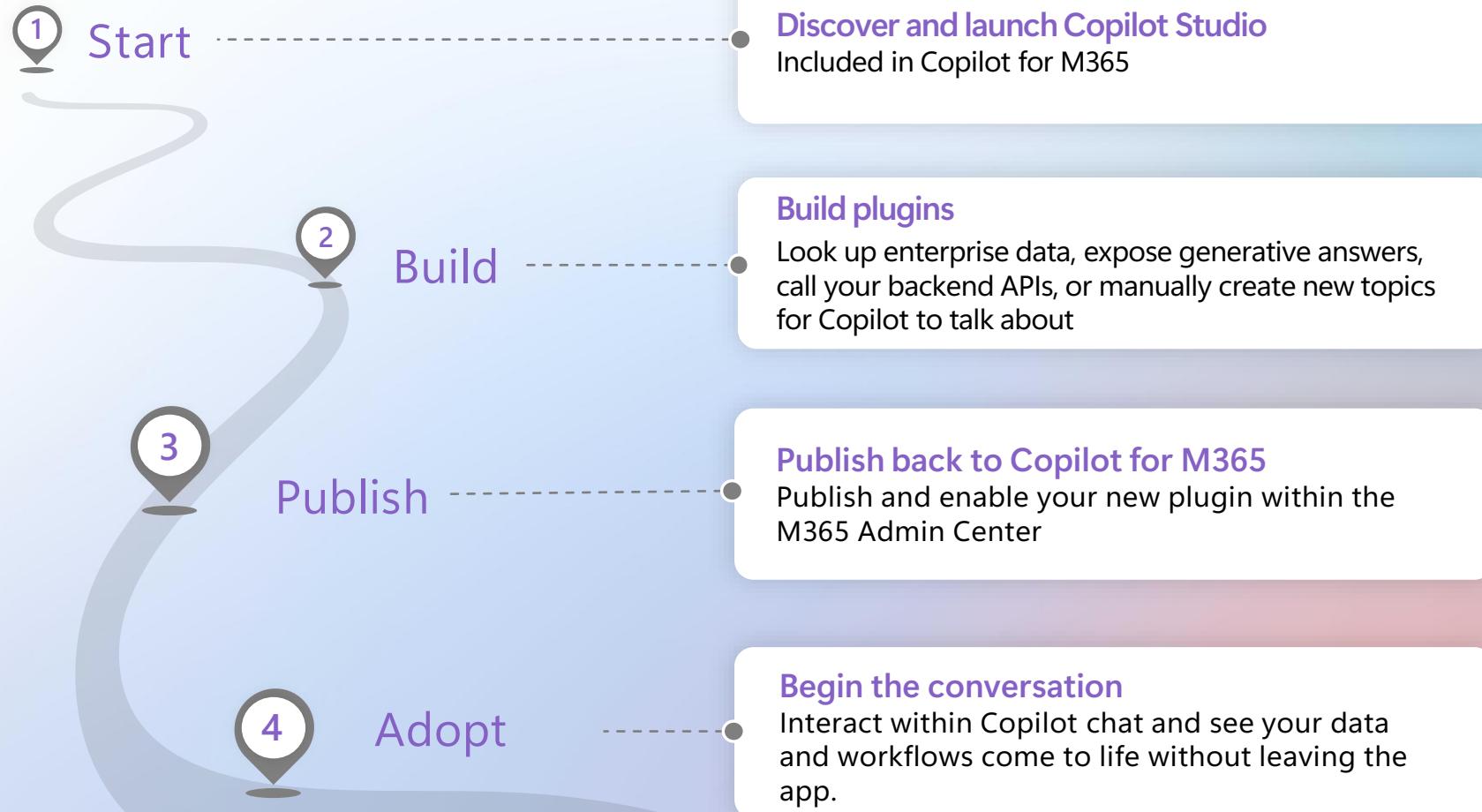
Configure how Copilot responds

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.

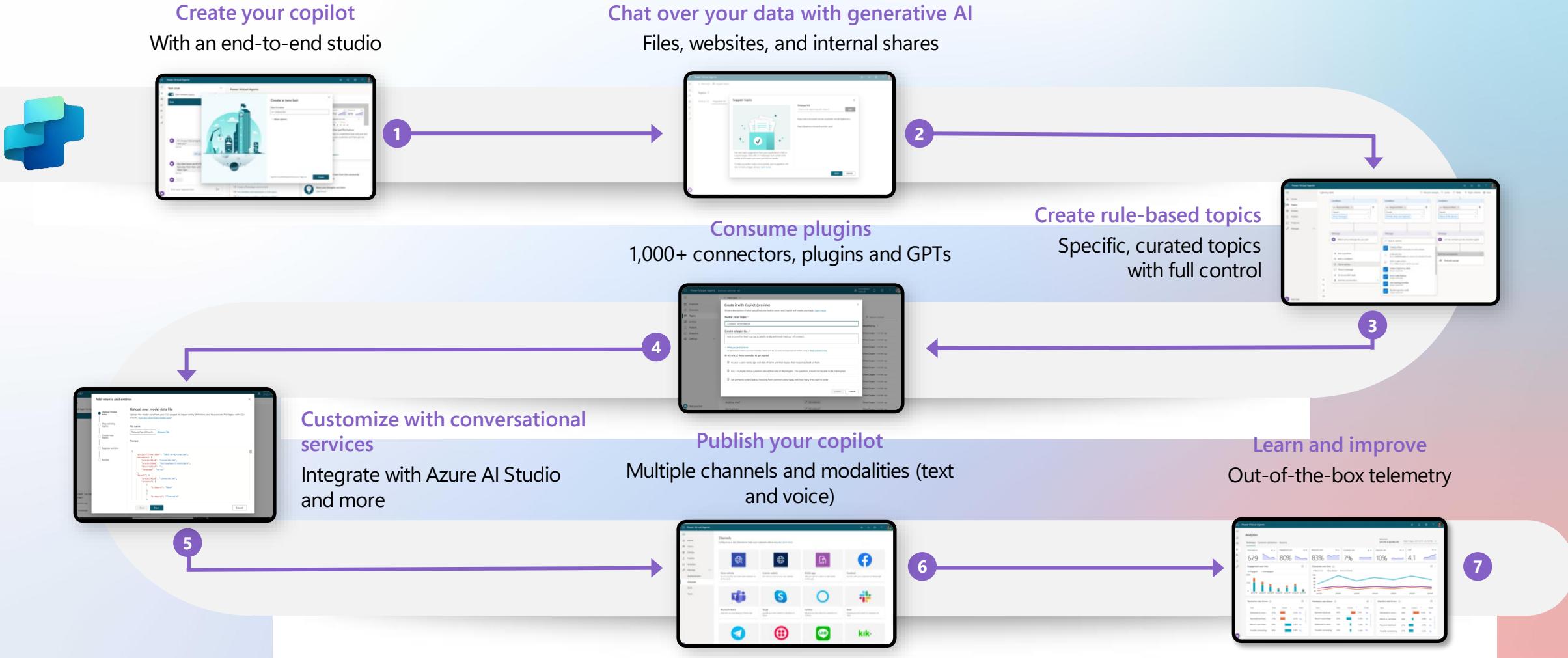
Handle complex queries with ease

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

Continuous self-learning and improvement

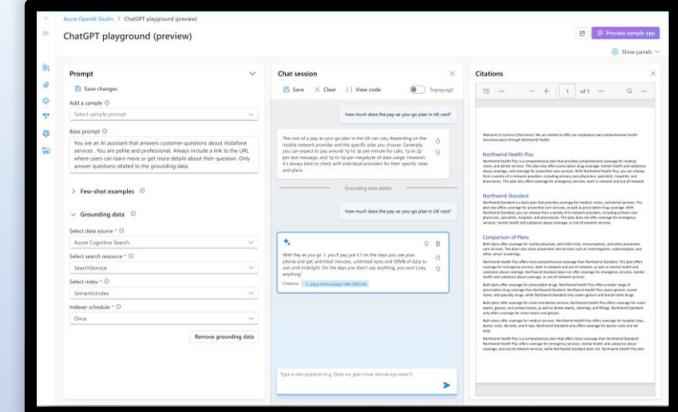
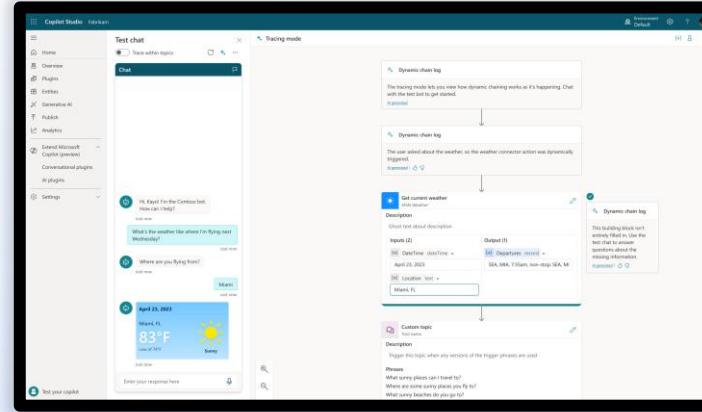
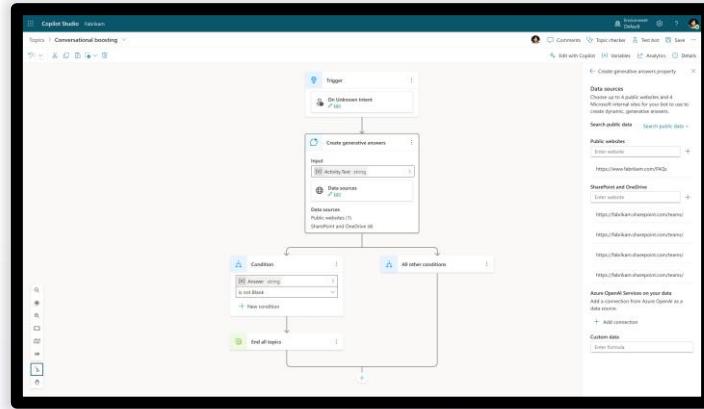
AI-driven features will improve your copilot over time and provide suggestions on how to optimize your conversations.

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

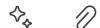
Transform IT service processes with employee self service.

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



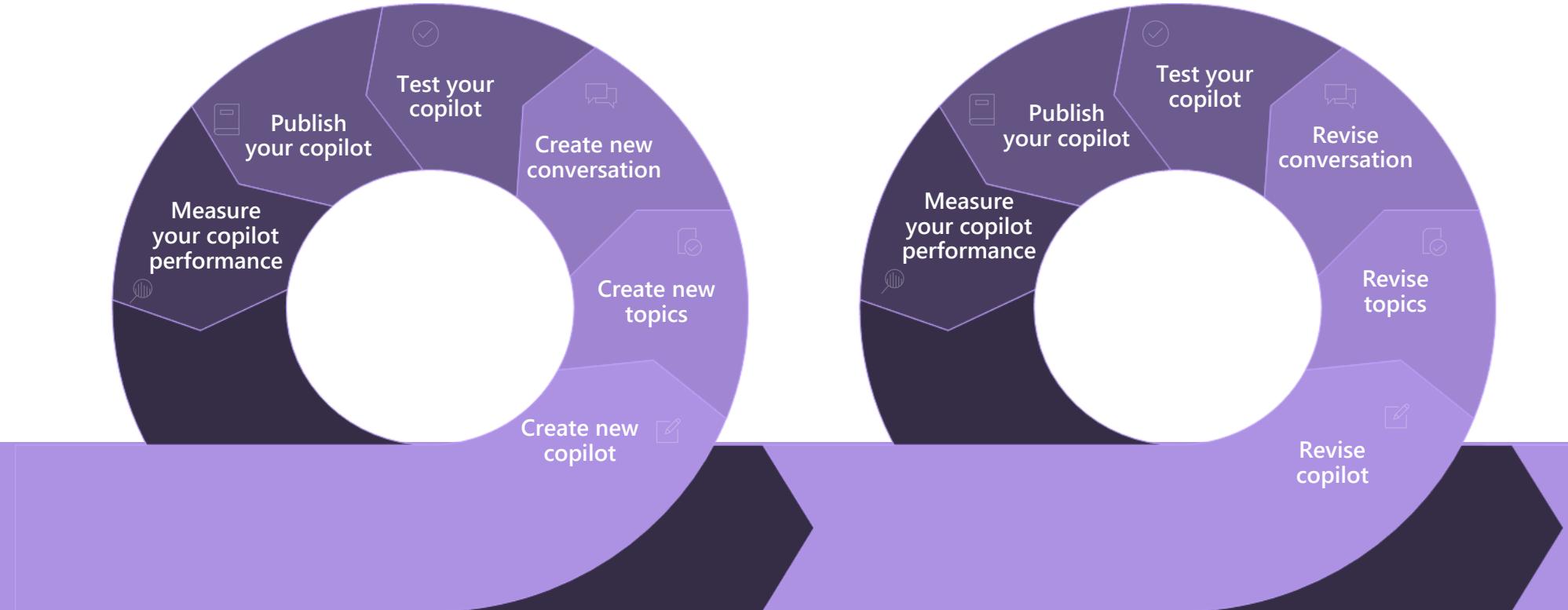
Deploying Copilot Studio



Copilot creation process overview



Creating a copilot is an easy step by step process.



Resources to support Implementation

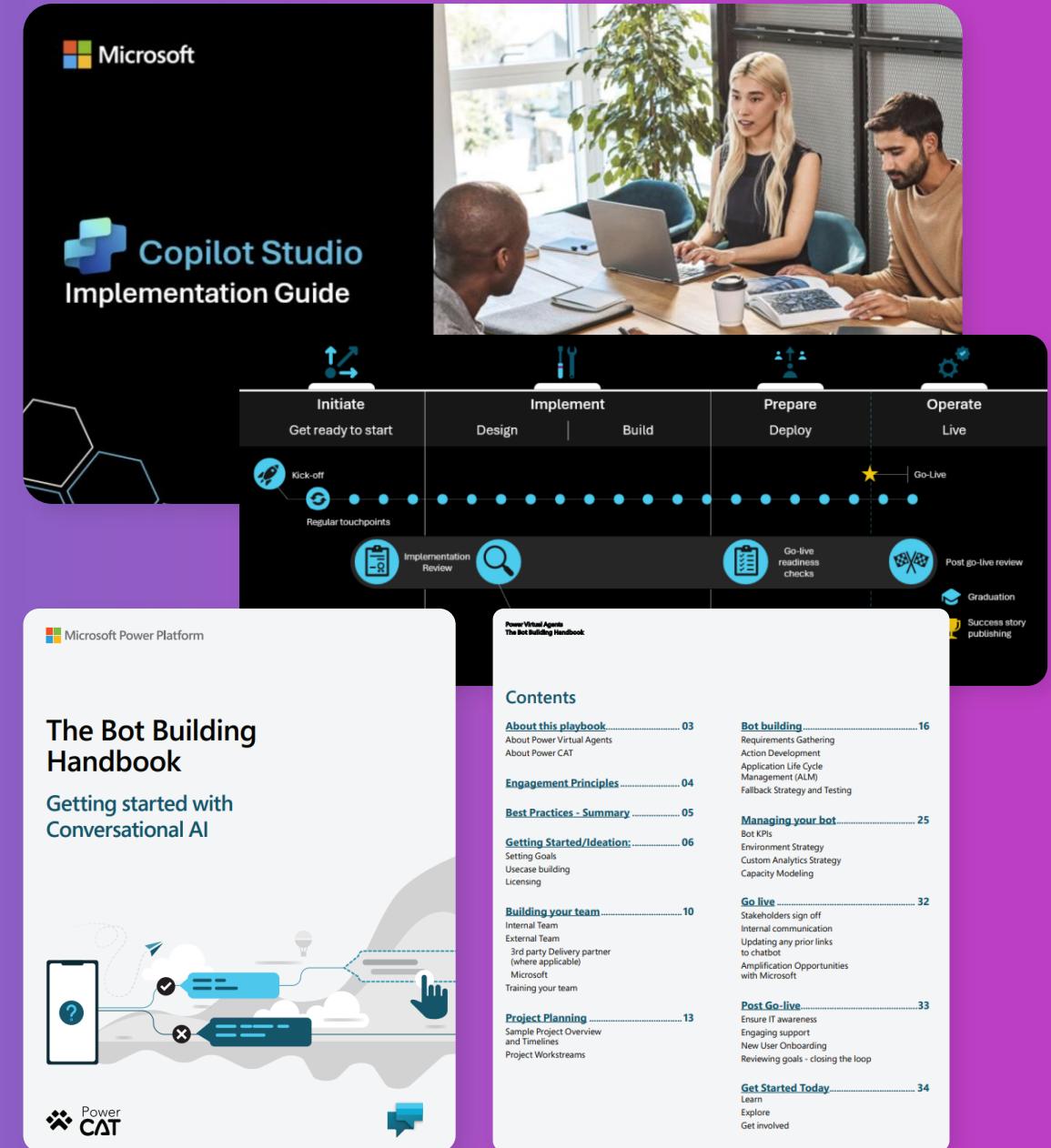
Copilot Studio Implementation Blueprint Deck (Success by Design)

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 \(coming soon!\)](#)



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



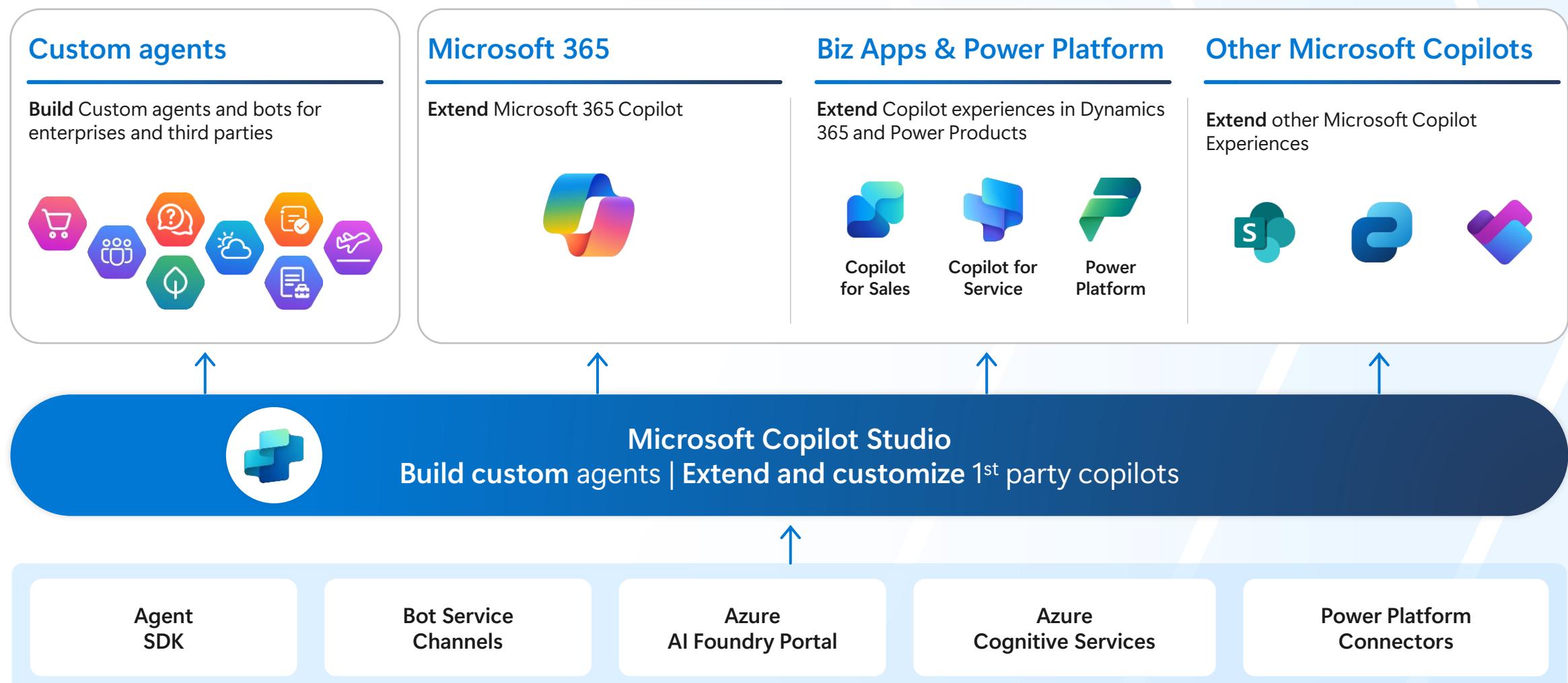
aka.ms/trycopilotstudio



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



Autonomo4us



Independently begins work based on autonomous triggers



Automates long running processes



Dynamically reasons over its capabilities



Learns and improves

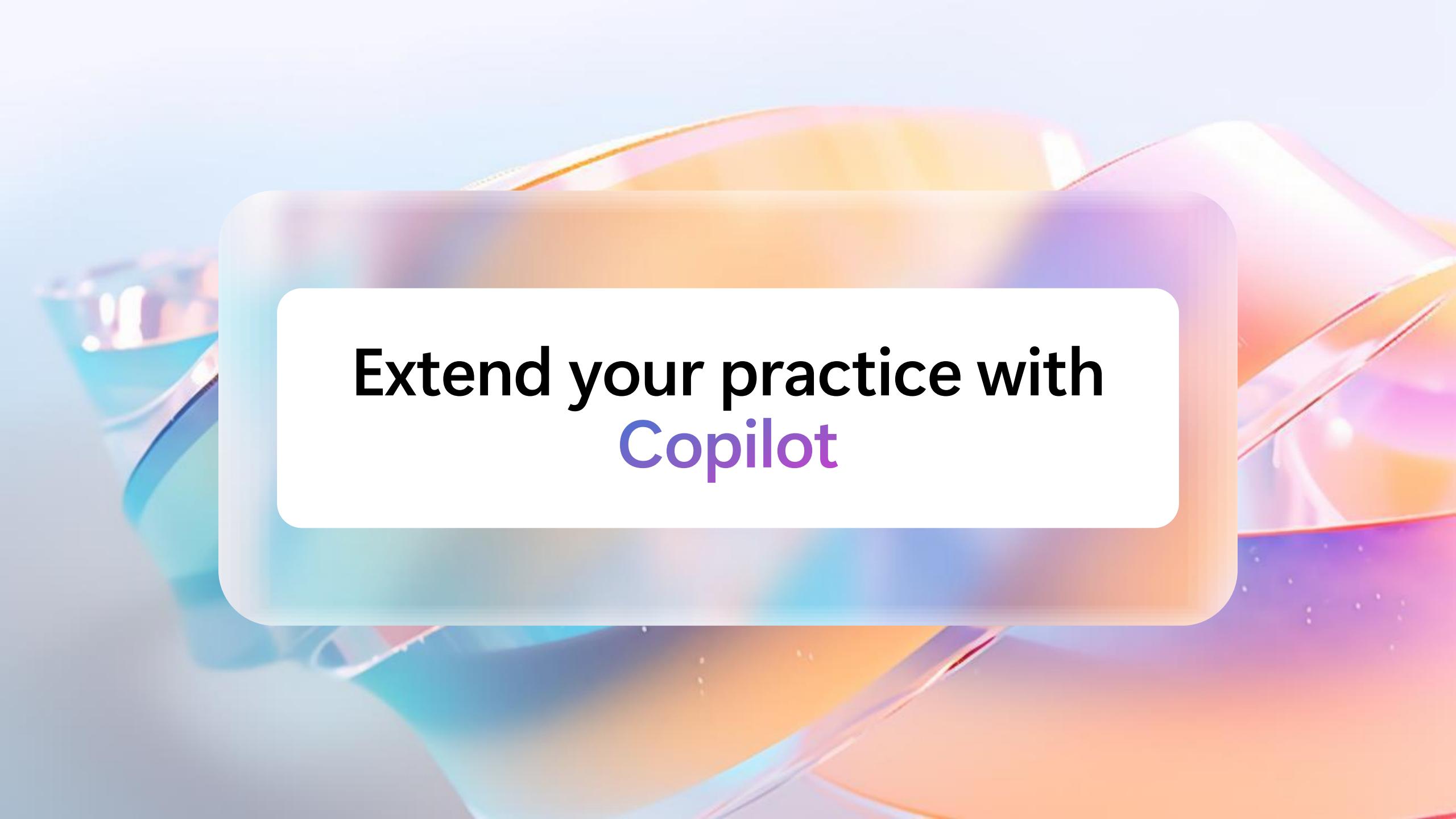


Follows human guard rails and asks for help



Orchestrate other agents

The screenshot shows the Copilot Studio interface for the 'Supply Chain Multi-Agent 1'. At the top, a blue banner reads 'Public Preview'. Below it, the agent's name 'Supply Chain Multi-Agent 1' is displayed along with tabs for Overview, Knowledge, Topics, Actions, Activity, Analytics, and Channels. The Overview tab is selected. A central panel says 'Your copilot is ready! Here's what's next:' with three items: 'Add actions so your copilot can do things for you', 'Build topics to focus and guide how your copilot answers', and 'Publish your copilot so others can use it'. To the right, there's a sidebar with environment settings and a 'Test your agent' button. The main content area shows 'Details' for the agent, including its name ('Supply Chain Multi-Agent 1'), description ('None provided'), and instructions. The instructions detail a workflow for handling invoice discrepancies. Below this is a 'Triggers (preview)' section with a 'Trigger' button and a list of triggers: 'Add a trigger based on an event to enable your copilot to act automatically.', 'Lesson 1 - A simple topic', and 'Greeting'. On the right side, there's an AI-generated response from the agent, which is a virtual assistant named Supply Chain Multi-Agent 1. The response includes a message about being a virtual assistant, a timestamp 'A minute ago', and a placeholder 'Ask a question or describe what you need'. At the bottom, there's a note about AI-generated content accuracy and a 'See terms' link.



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!

Available Now

Get customers AI Ready



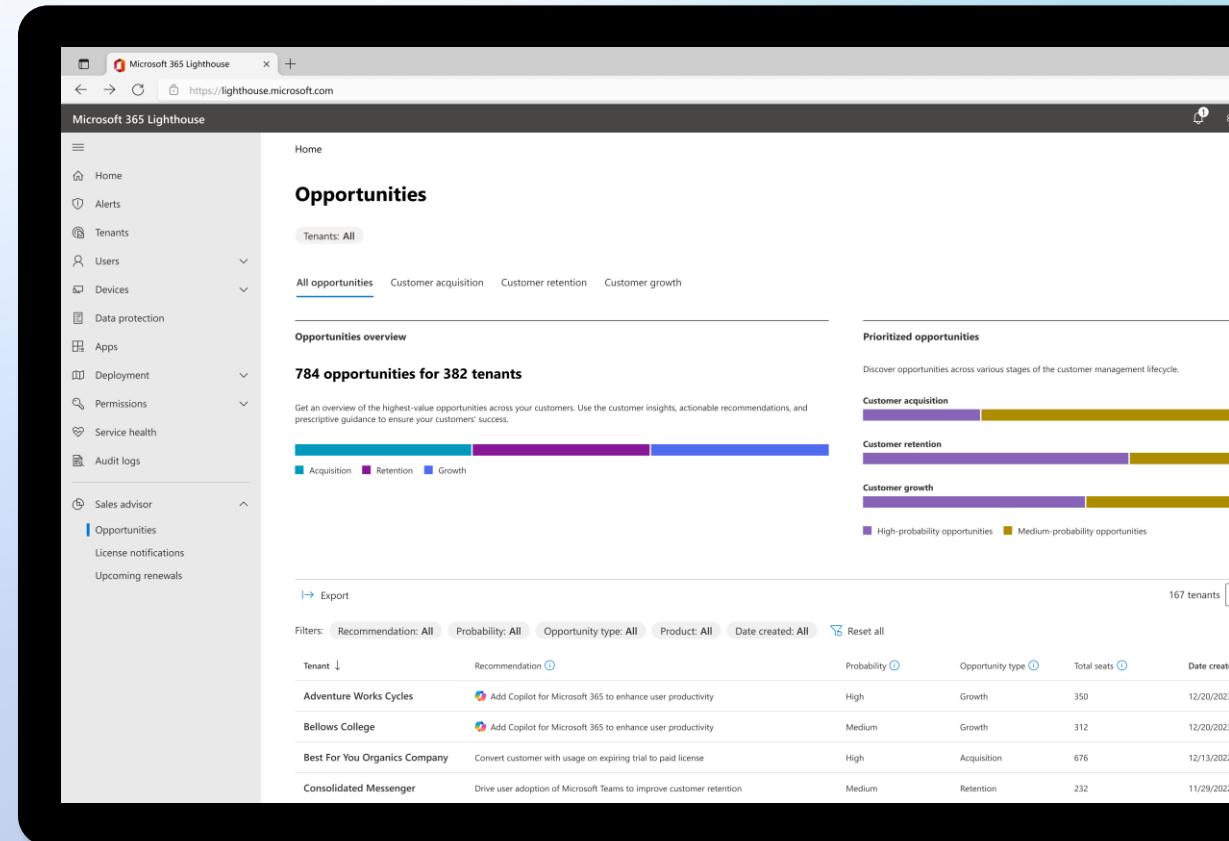
Help your customers get AI-ready to unlock Copilot's full potential for their organization

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

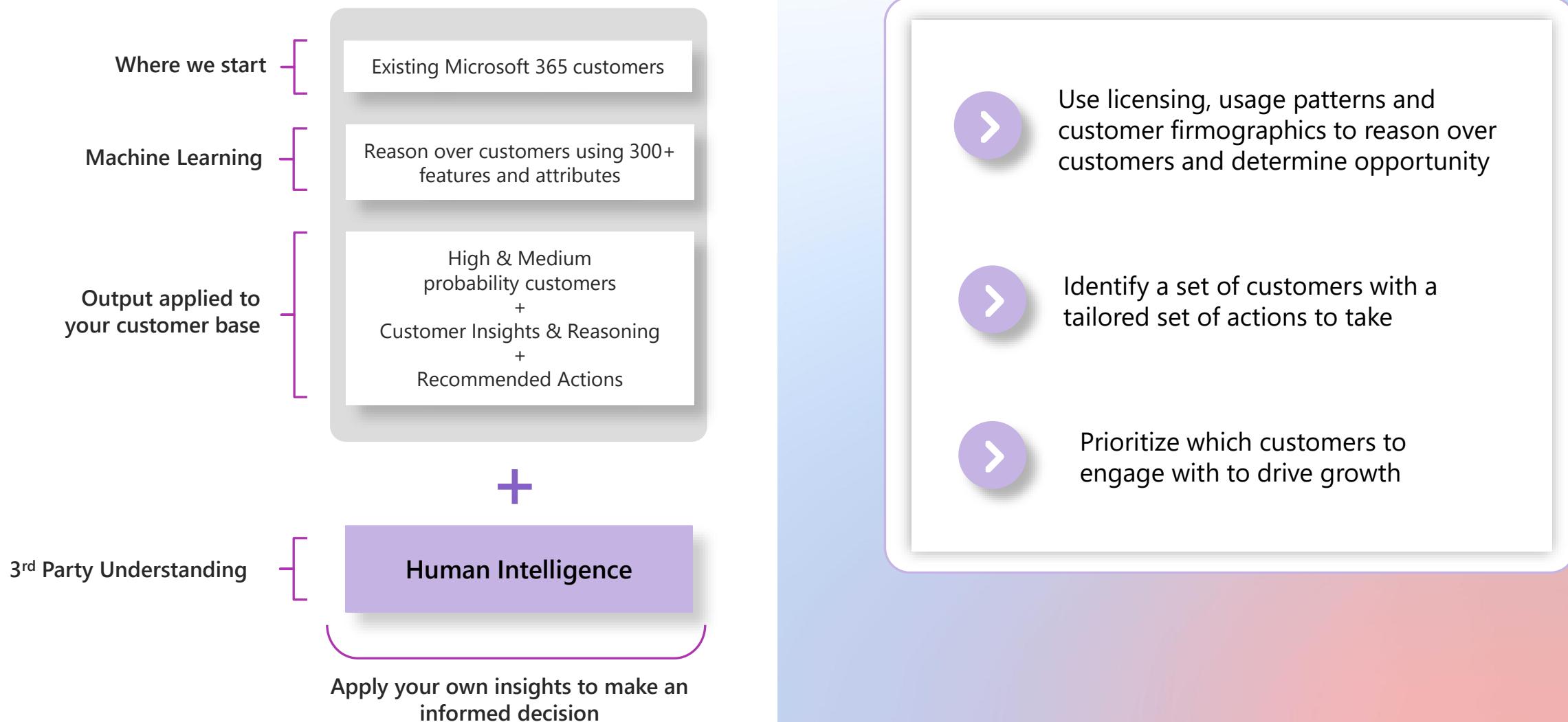
Optimize customer engagement with best practice guidance and marketing content



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, there's a section titled 'Prioritized opportunities' with a chart showing the distribution across Customer acquisition, Customer retention, and Customer growth, further broken down into High-probability opportunities (purple) and Medium-probability opportunities (yellow). At the bottom, there's a table of opportunities with columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created. The table includes rows for Adventure Works Cycles, Bellows College, Best For You Organics Company, and Consolidated Messenger.

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





<https://bit.ly/ciacopilottech>