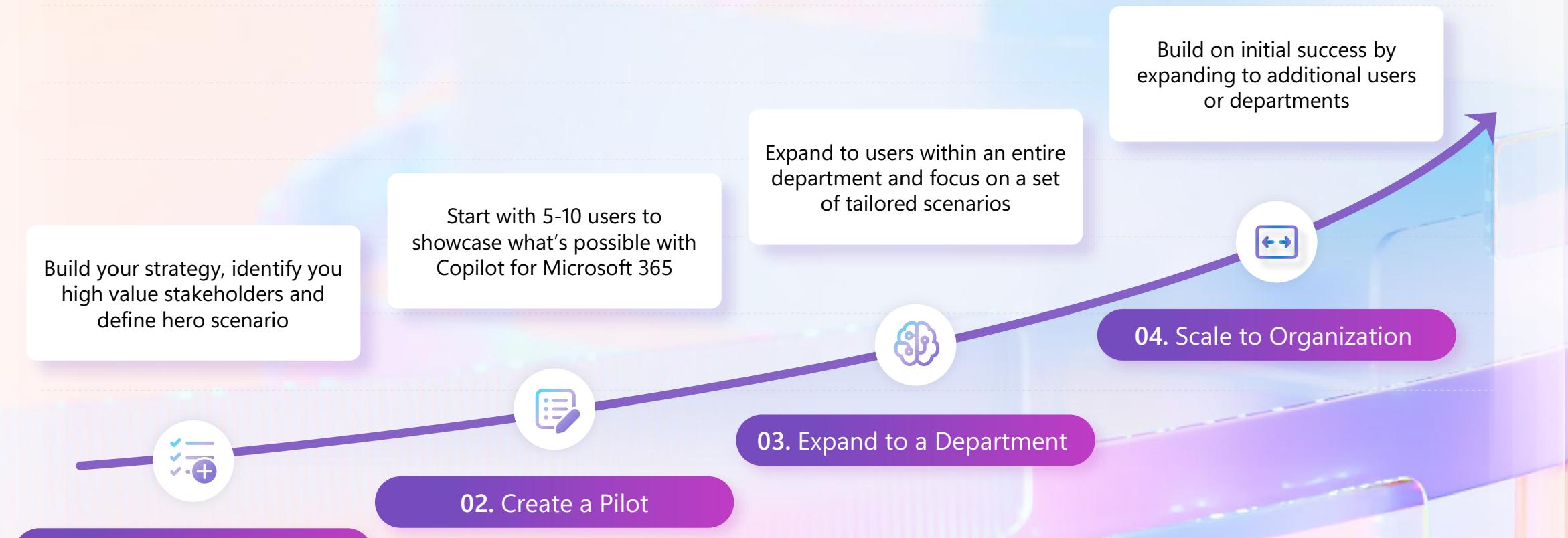




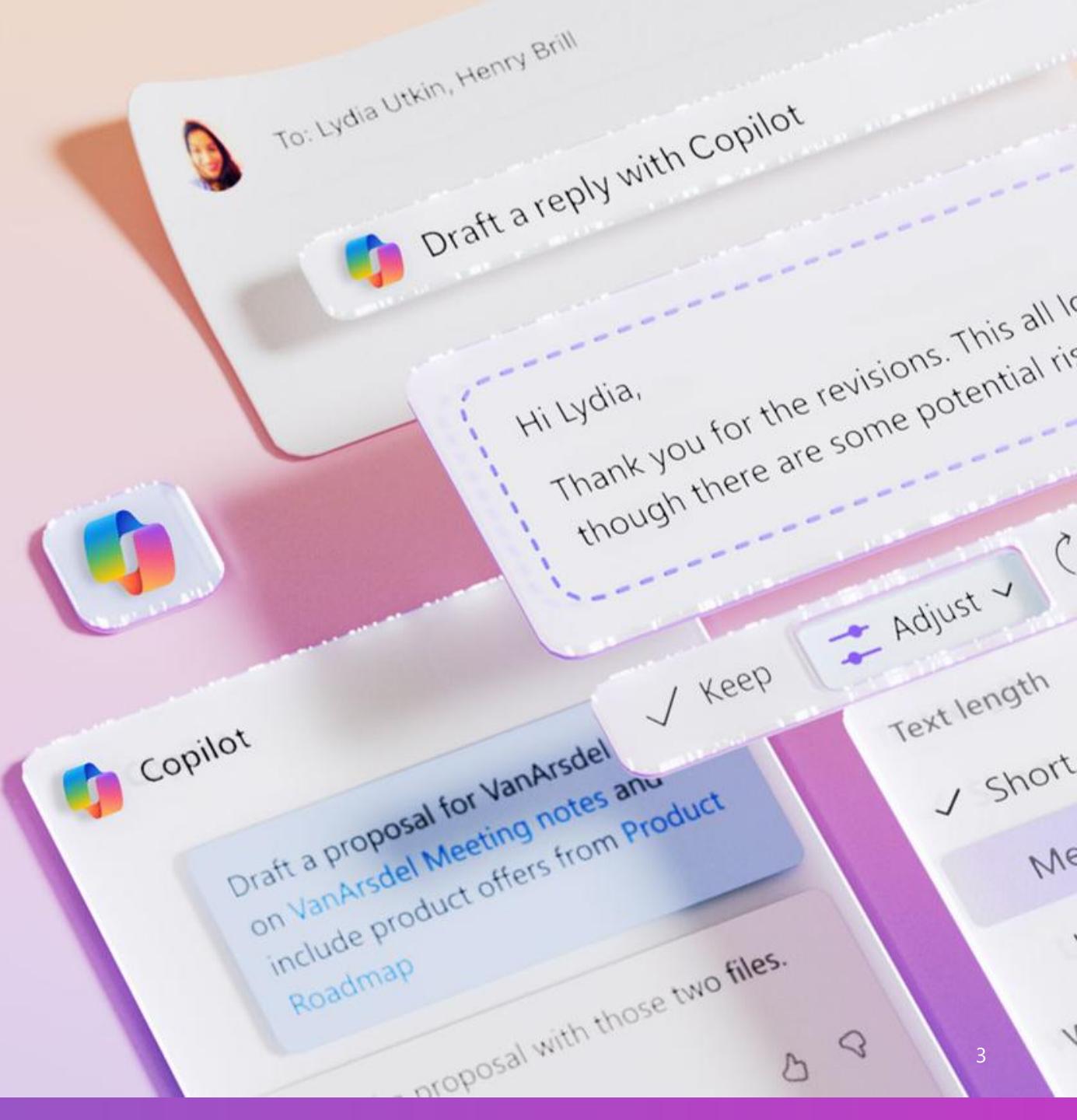
# CSP Level Up In-Person Technical Training



# Four steps to drive Copilot success with customers

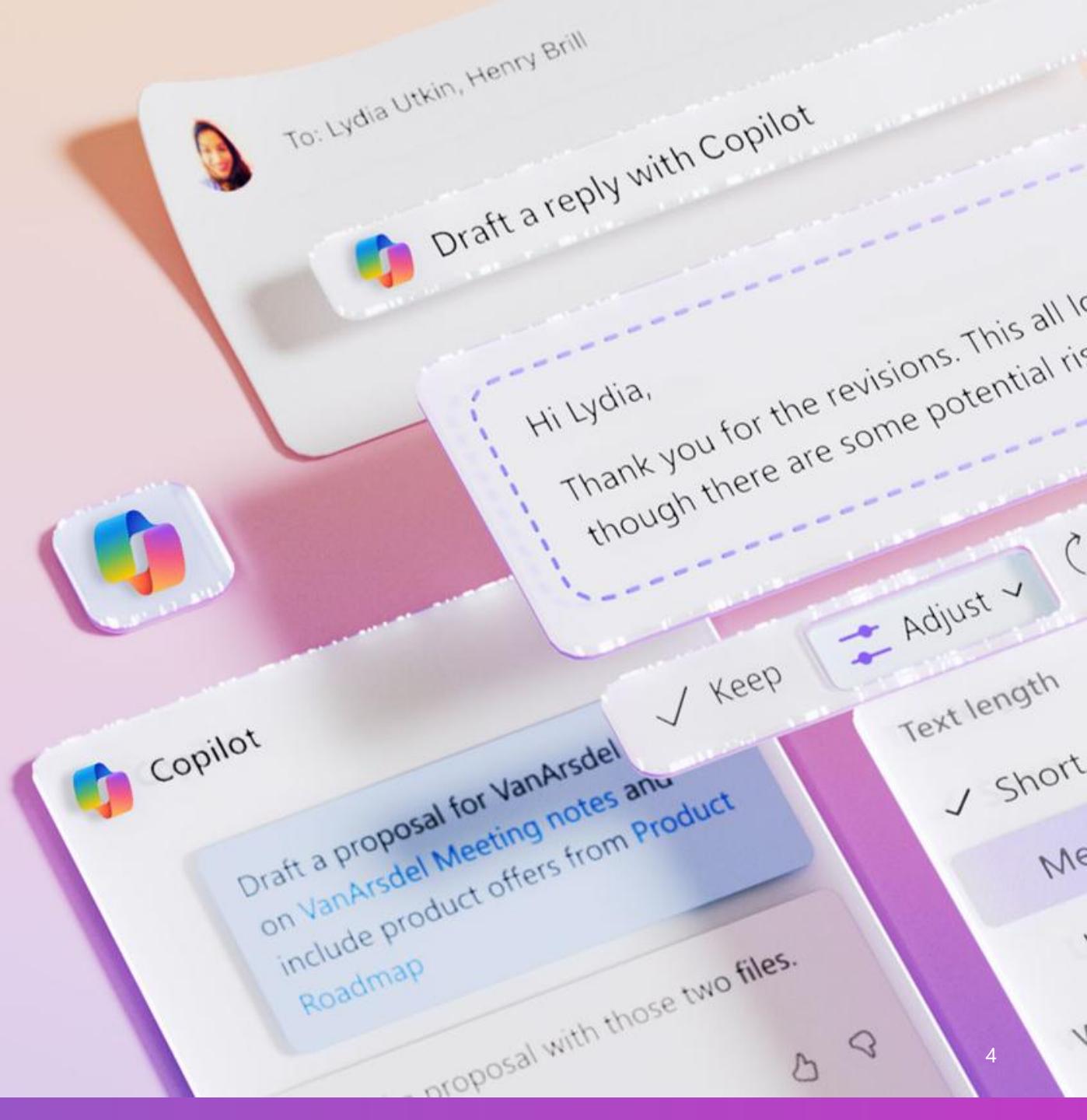


# Things to consider



## Things to consider

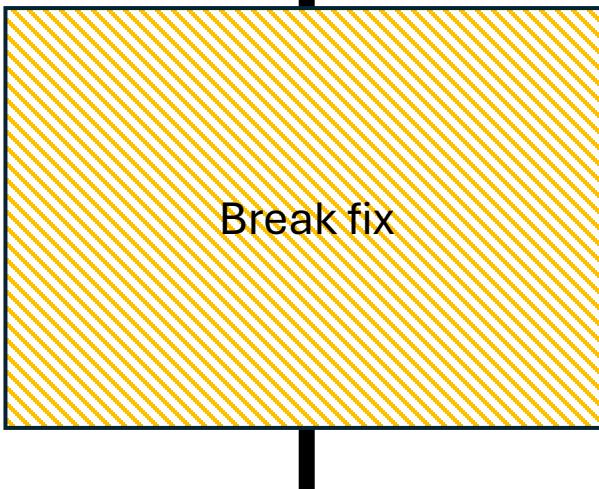
### 1. Changing role of the Technology advisor



V1

Reseller

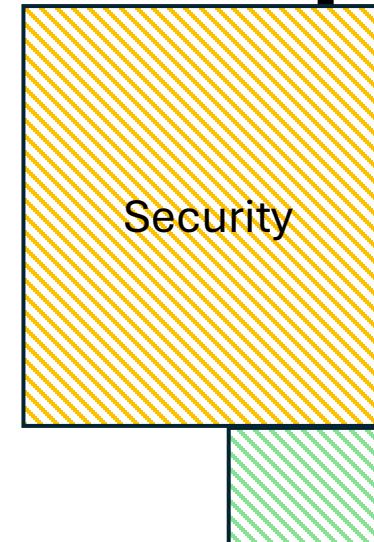
- Hardware = High
- Consult = Low
- Recurring = Low
- Tools = Low
- Dev = Low



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

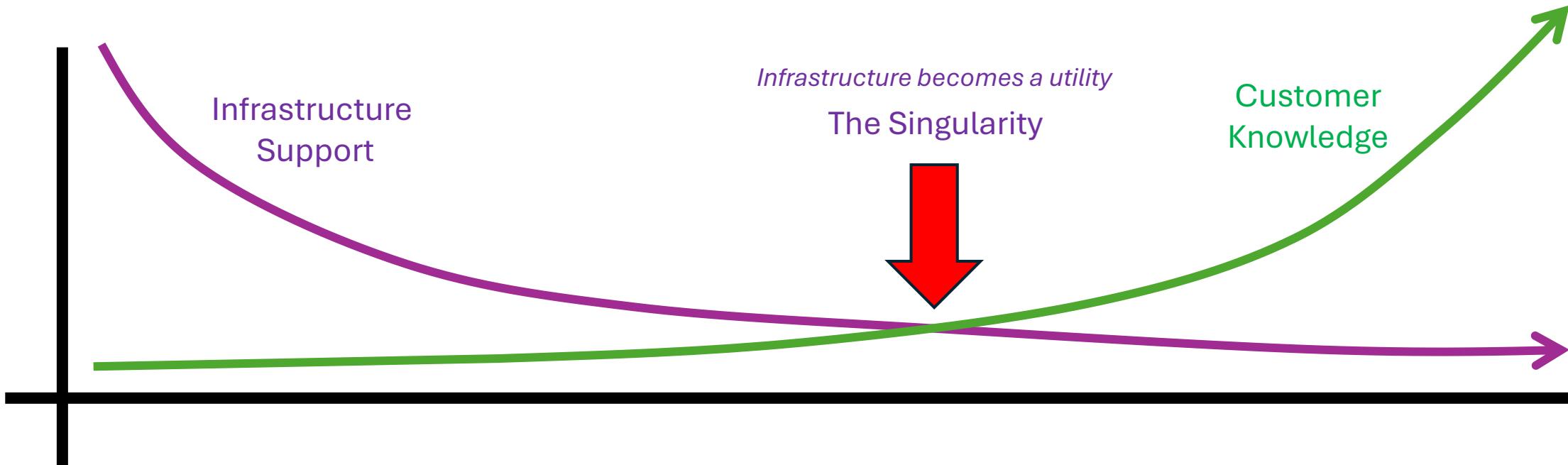
Consultant

- 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

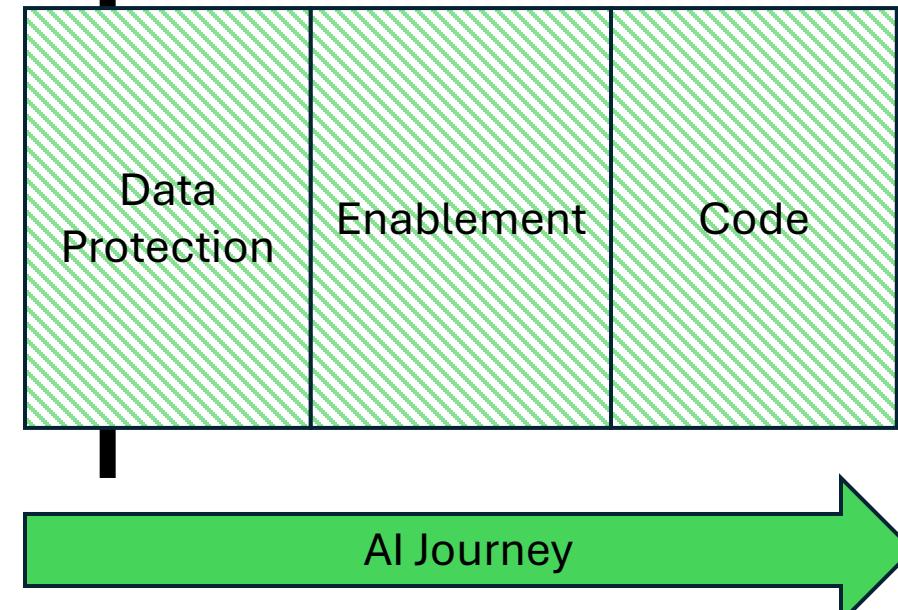
MSP

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

V3

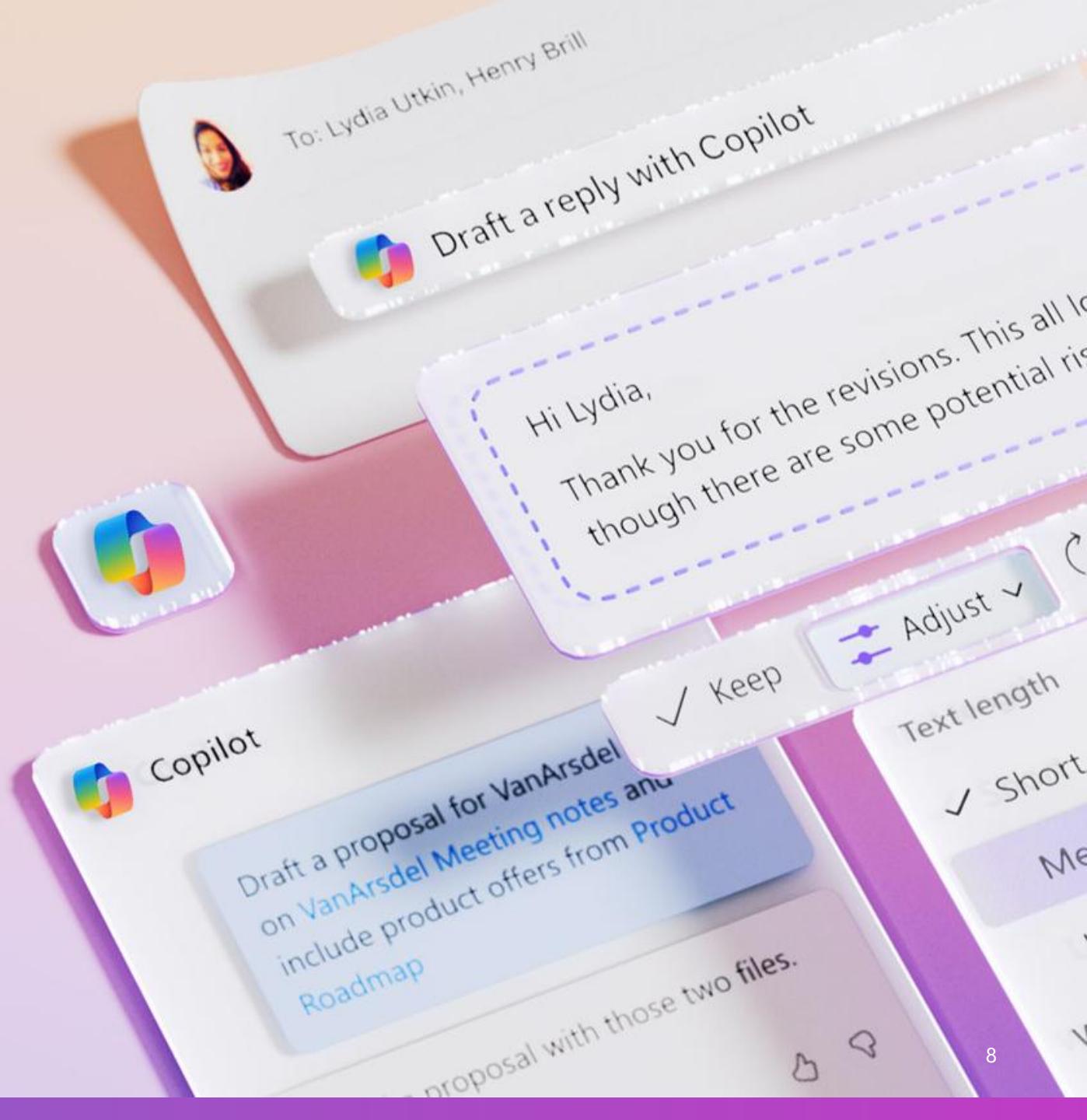
Consultant

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

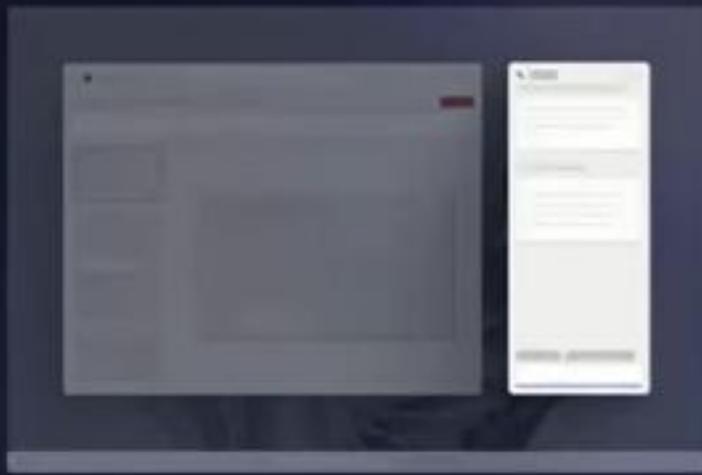


## Things to consider

### 2. Changing role of the delivery of AI to users

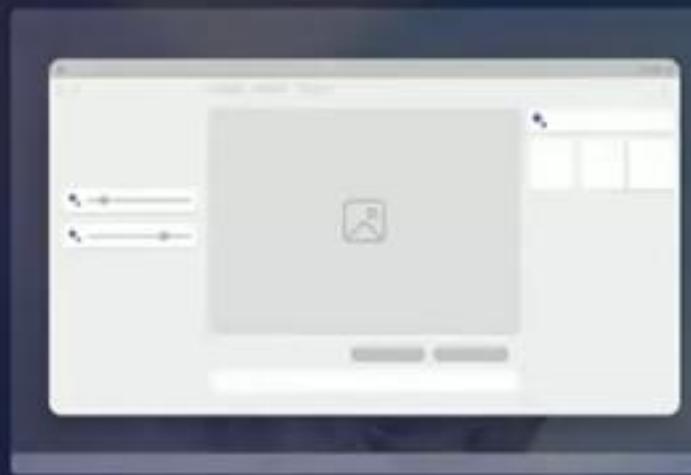


## Beside



Add Copilots to be a helper  
to your application

## Inside

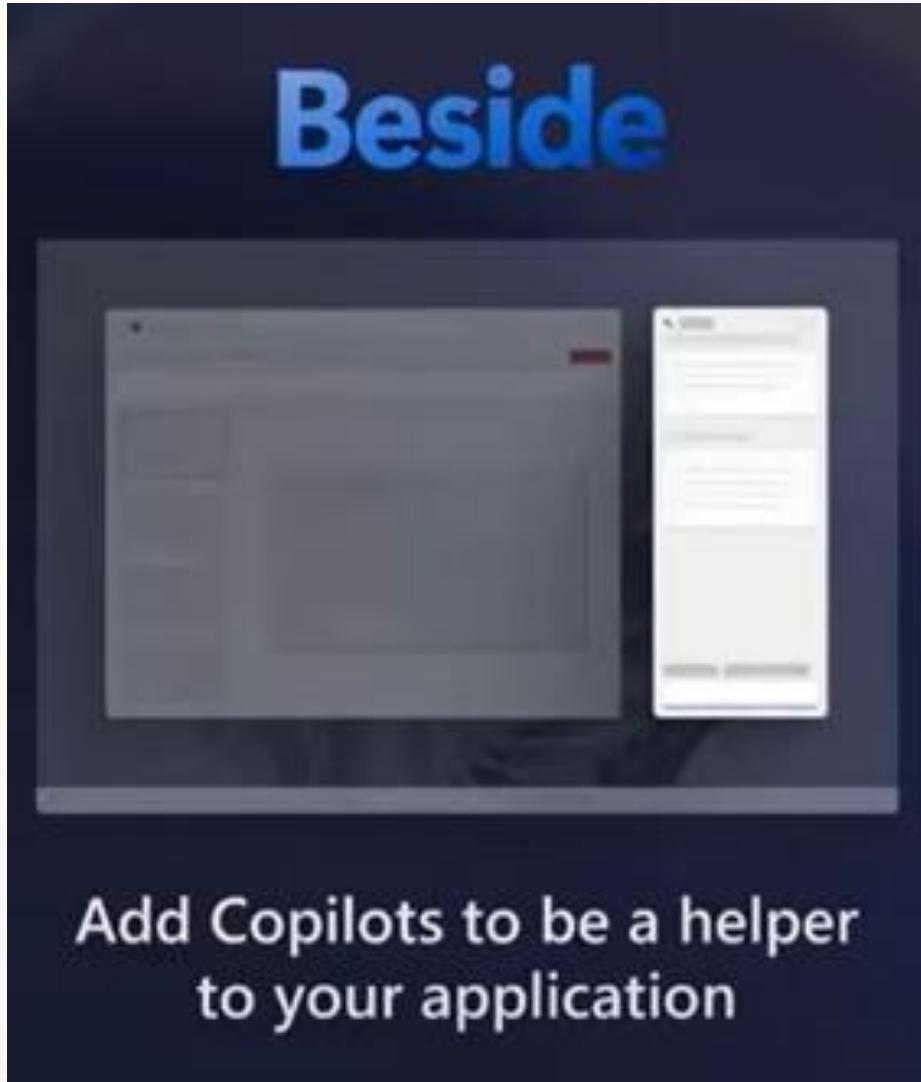


Create applications with AI  
at the center of the experience

## Outside



Agents help orchestrate  
across apps and tasks



- Keeps original application architecture
- Keeps customer familiarity with application

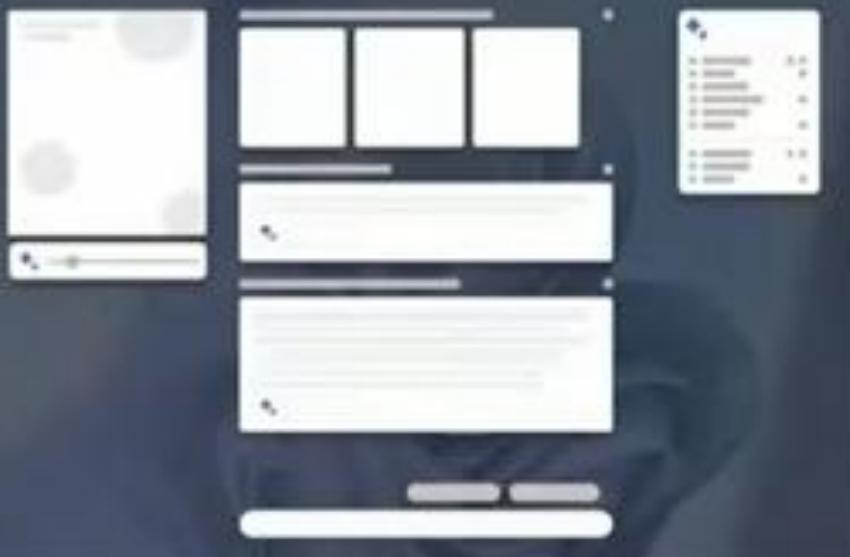
# Inside



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

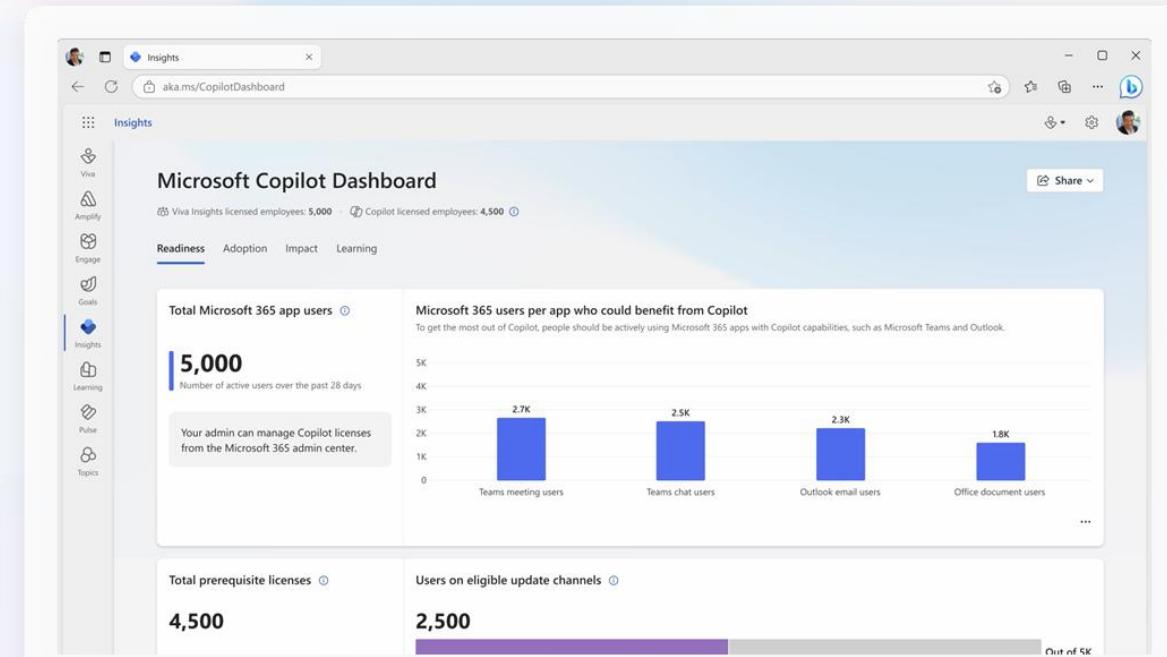
4

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

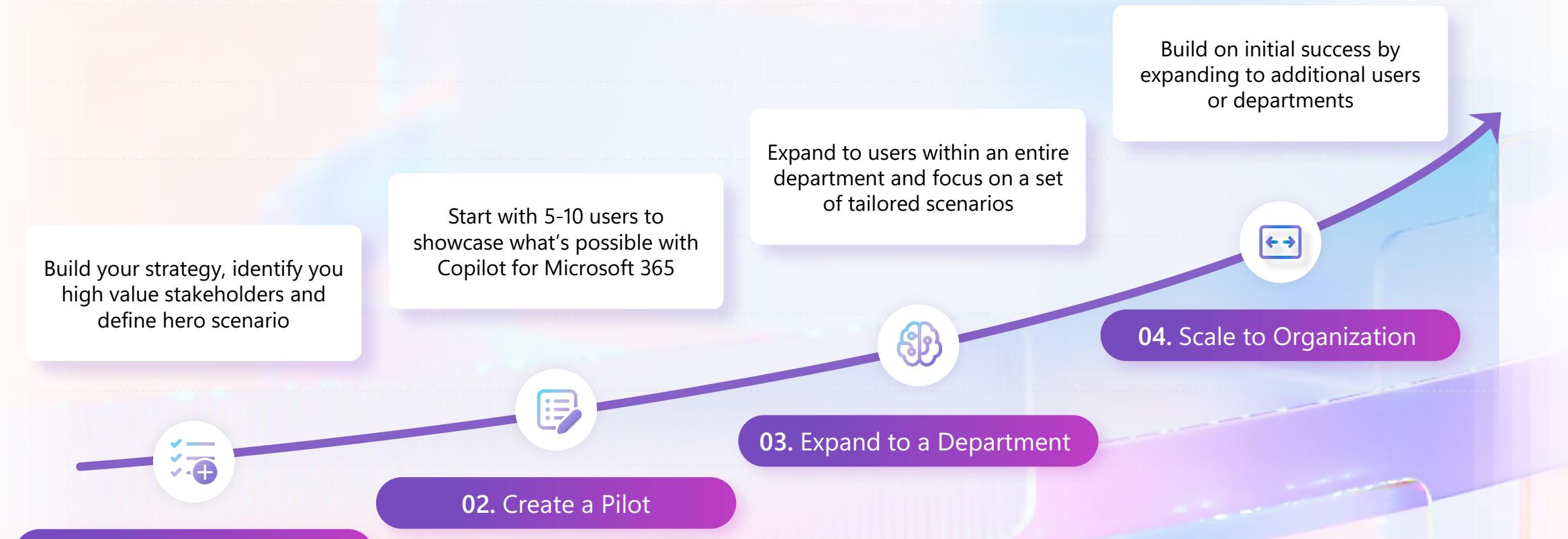
- + With a Microsoft Viva license (*available as add-on*), get advanced analytics across behavioral, collaboration and sentiment data to measure how Copilot has impacted work patterns



## Microsoft Copilot Dashboard

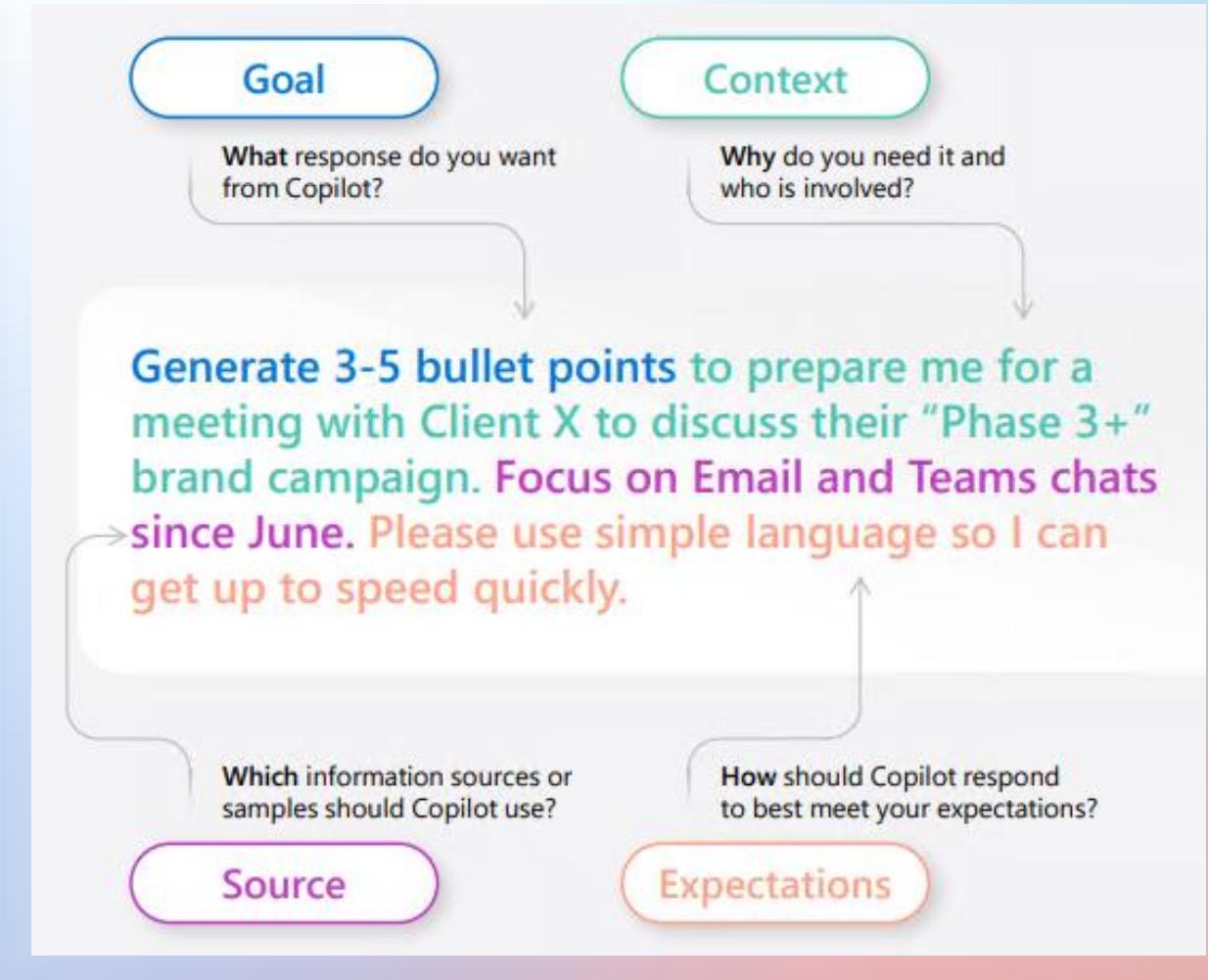
[aka.ms/CopilotDashboard](http://aka.ms/CopilotDashboard)

# Four steps to drive Copilot success with customers



# Teach users how to use prompts with Copilot for Microsoft 365

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



# Copilot Lab

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

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

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

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

# How to get started

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

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

*D*eliver impact

**Deliver Managed Services**

# Deliver impact: Managed services

Establish process for continuous service improvement

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

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

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



## Managed Service components



# Shared deliverable: Service Health Review



Performance



Feedback analysis



Incident review



Success stories



Roadmap planning



Risk mitigation

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

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

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

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

## Recommended practices include:

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



**Deliver impact**

**Analyze usage reports**

# Deliver impact: Access usage reports

Interpret the Microsoft Copilot Dashboard data

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

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

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

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



# Deliver impact: Analyze usage reports

Interpret the Microsoft Copilot Dashboard data

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

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

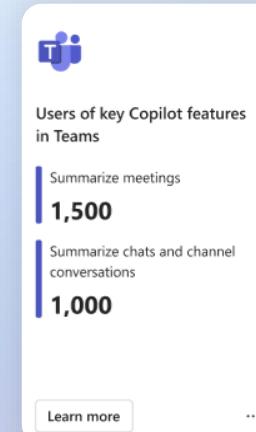
In the Impact tab, you assess Copilot impact by layering the results of Microsoft's quantitative and qualitative research on top of your organization's Copilot and Microsoft 365 usage patterns.

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

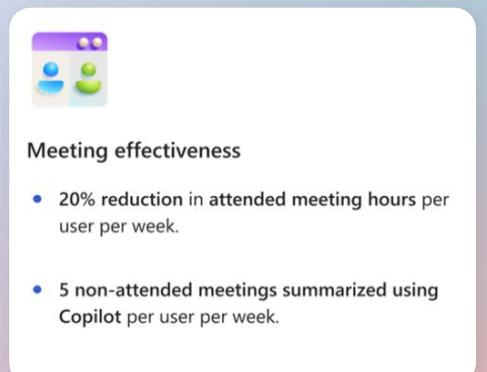
- Instruct users to [access the Copilot Dashboard in Teams or web app](#) to analyze the tabs
- Analyze Readiness, Adoption, and Impact tabs
- Follow the instructions on the Sentiment tab to deliver a survey to users
- [Upload](#) the survey results through the Microsoft 365 admin center to have them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



Readiness



Adoption



Impact



**Deliver impact**  
**Investigations**

# Audit: Types of events for forensic investigations



## Copilot Interactions

Helps determine scope of prompt and response messages sent



## Teams

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



## User Search

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

# Investigations: How Audit can help

## For your regulatory and legal obligations

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



Forensic investigations



Responding to legal requests

Audit &gt; 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 &gt; 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 &amp; groups

Roles

Resources

Billing

Copilot

Support

Settings

Domains

Search &amp; intelligence

Org settings

Microsoft 365 Backup

Integrated apps

Viva

Partner relationships

Microsoft Edge

Setup

Reports

Home &gt; Copilot

Enable Dark mode

# Copilot

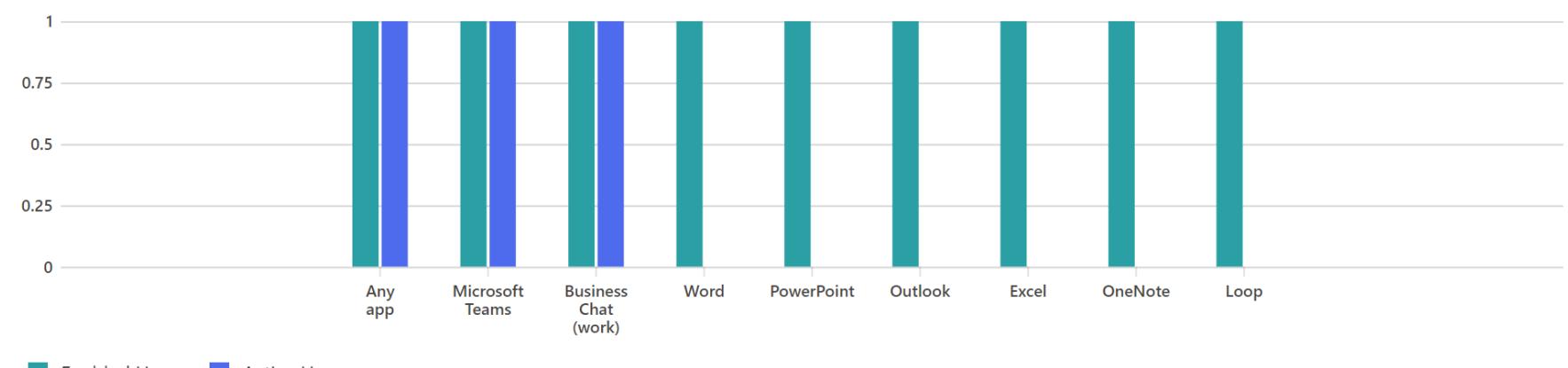
Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.

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

## Reports

### Adoption by app

Adoption status of Microsoft 365 Copilot over the past 30 days. See metric definitions

[Learn more in Usage](#)

# Microsoft Copilot Dashboard

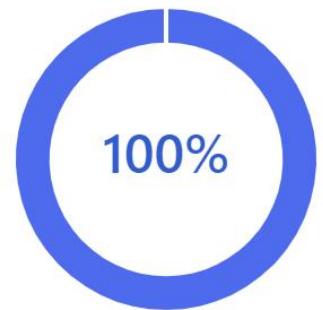
Readiness   Adoption   Impact   Learning

## Activate Microsoft 365 Copilot for your organisation

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

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

### Copilot adoption rate i



- Active Copilot users
- Copilot licensed employees

### Copilot activation steps

Total Microsoft 365 licences i



Total Copilot licences i



Copilot licences assigned i



Active Copilot users i



[Explore adoption](#)

...

## DSPM for AI (preview)

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

# Data assessments (preview)

## Identify oversharing risks

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

## Assess and prevent oversharing

### ① Create an assessment

Choose the sources and users you want to assess.

### ② Evaluate data

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

### ③ Apply remediations

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

## Assessment status

[+ Create assessment](#)

### Assessment name

Status

Scan started

### Default assessments (1)

[Oversharing Assessment for the week of November 4, 2024](#)

Scan completed

Nov 8, 2024 1

### Custom assessments (4)

[Oversharing Assessment for the week of Nov 4, 2024](#)

Scan completed

Nov 6, 2024 1

[Oversharing Assessment for Obsidian Merger](#)

Scan completed

Nov 6, 2024 8

## Oversharing Assessment for the week of November 4, 2024

### Assessment info

Description  
Default assessment created by Purview

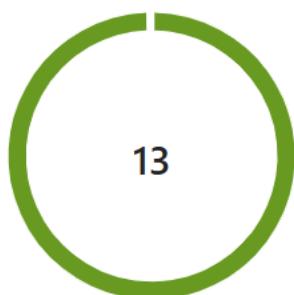
Total items

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

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

## Oversharing Assessment for the week of November 4, 2023

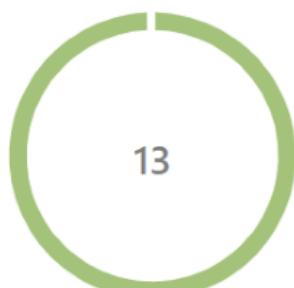
### Assessment info

Description  
Default assessment created by Purview

Total items  
13

Sources included  
7

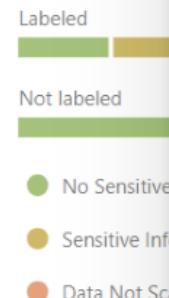
### Total items



Scanned For Sensitive Info Type:

Not Scanned

### Sensitivity label



**/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

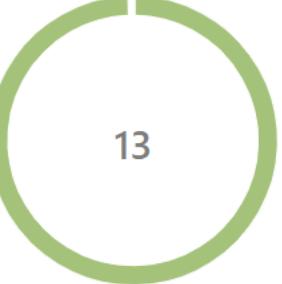
**Assessment info**

Description  
Default assessment created by Purview

Total items  
13

Sources included  
7

**Total items**



Scanned For Sensitive Info Types

Not Scanned

**Sensitivity label distribution**

Sensitivity 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	<span>View details</span>
/sites/marketanalysis/	SharePoint	2	<span>View details</span>
/sites/projectblue/	SharePoint	1	<span>View details</span>

## /sites/obsidianmerger/

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

### Limit Microsoft 365 Copilot access to this site

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

#### Restrict access by label

Microsoft Purview Data Loss Prevention

#### Restrict all items

SharePoint Restricted Content Discovery

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

### Steps at a glance

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

### Other labeling policies

#### Default sensitivity label for SharePoint document library

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



Create default sensitivity label for SharePoint document library

Microsoft SharePoint location

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

## Oversharing Assessment for the week of November 4, 2023

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

**Assessment info**

Description: Default assessment created by Purview

Total items: 13

Sources included: 7

**Total items**

Scanned For Sensitive Info Types: Not Scanned



**Sensitivity label distribution**

Sensitivity Label	Count
No Sensitive	13
Sensitive Info	0
Data Not Scanned	0

## /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

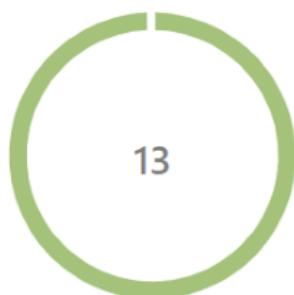
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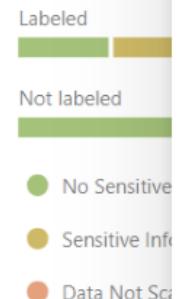
### Total items



Scanned For Sensitive Info Type:

Not Scanned

### Sensitivity label



/sites/obsidianmerger/

Overview Protect Monitor

### Run a site access review

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

Shared with anyone

0

[View items](#)

Shared organization wide

0

[View items](#)

Shared with specific people

2

[View items](#)

Shared externally

1

[View items](#)

### Start a SharePoint site access review

SharePoint Admin Portal

### Run an identity access review

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



### Run a Microsoft Entra ID user access review

Microsoft Entra

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

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

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

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

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

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

Template or custom policy Name Admin units Locations

## Policy settings

 Advanced DLP rules Policy mode Finish

## Create rule

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

**Name \***

Restrict Copilot from processing Obsidian Merger

**Description**

Exclude sensitivity label Obsidian Merger

### Conditions

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

#### Content contains

**Group name \***

Default

**Group operator**

Any of these

Add ▾

Create group

+ Add condition ▾

### Actions

Use actions to protect content when the conditions are met.

**Save****Cancel**

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

## Create rule

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

Name \*

Restrict Copilot from processing Obsidian Merger

Description

Exclude sensitivity label Obsidian Merger

### Conditions

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

#### Content contains

Group name \*

Default

Add ▾

Sensitivity labels

+ Add condition ▾

#### Actions

Use actions to protect content when the conditions are met.

Save

Cancel

## Sensitivity labels

Search for Sensitive info types

1 selected

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

Add

Cancel

Template or custom policy Name Admin units Locations

## Policy settings

 Advanced DLP rules Policy mode Finish

## Create rule

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

Name \*

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Exclude sensitivity label Obsidian Merger

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

#### Content contains

Group name \*

Default

Group operator

Any of these

#### Sensitivity labels

Obsidian Merger

Add ▾

Create group

+ Add condition ▾

SaveCancel

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

## Create rule

### Content contains

Group name \*

Default

Group operator

Any of these

### Sensitivity labels

Obsidian Merger

Add ▾

Create group

+ Add condition ▾

### Actions

Use actions to protect content when the conditions are met.

### Prevent Copilot from processing content

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

[Learn more about this action](#)

(i) 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



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<sup>①</sup>.

**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<sup>①</sup>.

**Key Terms:**

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

Can you provide more details on the financial projections?

What are the specific cost synergies expected?

How will the cultural integration be managed?

View prompts

Message Copilot

Add people, files, and more for better results

0 / 16000

@ ⌂ ⌁ ⌂

User not in DLP Policy



Search



Copilot

Summarize https://fabrikampurv...

Work

Web

New chat



...



November 11, 2024 at 10:10 PM

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

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

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

[Project Obsidian M&A](#)

SharePoint: ObsidianMerger > Shared Documents

Adele Vance modified 9 hours ago

Ask

1 Project Obsidian M&A

[Edit in Pages](#)

[Copy](#)

1 of 30 responses AI-generated content may be incorrect



Can you list the sections or headings in the document?

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

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

[View prompts](#)

Message Copilot

Add people, files, and more for better results

0 / 16000

@

User in DLP Policy



Visual Creator

Get Copilot agents

Chats

[Show more](#)

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

Summarize Project Obsidi... 10:09 PM

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

Project obsidian 11/7

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

# Microsoft deployment blueprint to address internal oversharing in Microsoft 365 Copilot

**Customers with E5   Foundational**

**Address internal oversharing concerns in Microsoft 365 Copilot**

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

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

Phase	Pilot	Deploy	Operate
Effort	2-4 days	2-4 weeks	1+ months
Deployment steps	<ul style="list-style-type: none"> <li>Identify the most popular sites &amp; assess oversharing           <ul style="list-style-type: none"> <li>Export the top 100 most used sites from SPO admin center</li> <li>Run SAM permission state report<sup>1</sup></li> <li>Use Purview Content Explorer to view which sites contain sensitive information types (SITs)<sup>2</sup></li> </ul> </li> <li>Grant Copilot access to popular, low risk sites           <ul style="list-style-type: none"> <li>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 discovery<sup>3</sup></li> <li>Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified<sup>4</sup></li> </ul> </li> <li>Turn on proactive audit and protection           <ul style="list-style-type: none"> <li>Turn Off EEEU (everyone except external users) at the tenant level<sup>5</sup></li> <li>Turn on Audit and view Copilot interaction activity reports and charts<sup>6</sup></li> <li>Turn on audit-mode oversharing SPO DLP policy to restrict access to sensitive data exposure &amp; start remediating them<sup>7</sup></li> <li>Disable RSS (if enabled) to allow full Copilot experience<sup>8</sup></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Discover oversharing risks           <ul style="list-style-type: none"> <li>Use permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)<sup>9</sup></li> <li>Identify Copilot agent insights &amp; take actions<sup>10</sup></li> </ul> </li> <li>Further reduce risk and simplify oversight           <ul style="list-style-type: none"> <li>Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners<sup>11</sup></li> <li>Automate SAM permission state report to maintain permissions hygiene<sup>12</sup></li> <li>Automate permission reports and actions to maintain permissions hygiene<sup>13</sup></li> </ul> </li> <li>Restrict sensitive info from Copilot access and/or processing           <ul style="list-style-type: none"> <li>Initiate Access Review for all sites that are overshared<sup>14</sup></li> <li>Apply restricted access control (RAC) on business-critical sites<sup>15</sup></li> <li>Exclude critical sites from Copilot reasoning over them<sup>16</sup></li> </ul> </li> <li>Increase site privacy           <ul style="list-style-type: none"> <li>Publish labels to Office apps, Container/Sites, Outlook for manual data protection by user<sup>17</sup></li> <li>Use site labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members<sup>18</sup></li> <li>Periodically review inactive sites and take necessary action<sup>19</sup></li> <li>Control site provisioning by allowing creation for users that complete training<sup>20</sup></li> <li>Use change history to identify site changes that may cause oversharing<sup>21</sup></li> <li>Continuously manage all your oversharing DLP alerts via the Microsoft Purview Portal<sup>22</sup></li> </ul> </li> <li>Further secure sensitive data           <ul style="list-style-type: none"> <li>Reduce risk by remediating alerts for overshared documents from the SPO DLP policy and applying sensitive labels<sup>23</sup></li> </ul> </li> <li>Improve Copilot responses           <ul style="list-style-type: none"> <li>Setup retention/deletion policies for SharePoint to reduce data surface<sup>24</sup></li> <li>Identify inactive sites, then restrict access, archive or delete<sup>25</sup></li> </ul> </li> </ul>	

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

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

**Customers with E5   Foundational**

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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

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start remediating them<sup>7</sup></li> <li>Disable RSS (if enabled) to allow full Copilot experience<sup>8</sup></li> </ul> </li> <li>Increase site privacy           <ul style="list-style-type: none"> <li>Use site sensitivity labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members<sup>18</sup></li> <li>Apply default site library sensitivity labels to protect new and modified unlabeled documents<sup>27</sup></li> <li>Reduce risk by remediating alerts for overshared documents from the SPO Purview DLP policy by applying sensitive labels and disabling anyone access<sup>28</sup></li> </ul> </li> <li>Further secure sensitive data           <ul style="list-style-type: none"> <li>Automatically label new documents and prevent them from oversharing with run time labeling policy, starting with client-side policies and extend to server-side policies<sup>29</sup></li> <li>Identify inactive sites with SAM, then restrict access or delete<sup>30</sup></li> </ul> </li> <li>Improve Copilot responses           <ul style="list-style-type: none"> <li>Setup Purview retention/deletion policies for SharePoint to reduce data surface<sup>24</sup></li> <li>Identify inactive sites with SAM, then restrict access or delete<sup>30</sup></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Discover oversharing risks           <ul style="list-style-type: none"> <li>Use DAG permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)<sup>9</sup></li> <li>Identify Copilot agent insights &amp; take actions<sup>10</sup></li> </ul> </li> <li>Further reduce risk and simplify oversight           <ul style="list-style-type: none"> <li>Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners<sup>11</sup></li> <li>Automate SAM permission state report to maintain permissions hygiene<sup>12</sup></li> <li>Automate permission reports and actions to maintain permissions hygiene<sup>13</sup></li> </ul> </li> <li>Restrict sensitive info from Copilot access and/or processing           <ul style="list-style-type: none"> <li>Proactively review oversharing reports and restrict access as needed<sup>14</sup></li> <li>Proactively avoid oversharing by applying RAC at site provisioning<sup>15</sup></li> <li>Periodically review ownerless sites and take necessary action<sup>19</sup></li> <li>Control site provisioning by allowing creation for users that complete training<sup>20</sup></li> <li>Use change history to identify site changes that may cause oversharing<sup>21</sup></li> <li>Continuously manage all your oversharing DLP alerts via incidents with Microsoft Defender XDR incident queue<sup>22</sup></li> <li>View risky user activity in context of oversharing Purview DLP incidents<sup>23</sup></li> </ul> </li> <li>Grant Copilot access to popular, low risk sites           <ul style="list-style-type: none"> <li>Cross reference the report results from SAM and Purview DSPM for AI with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery<sup>3</sup></li> <li>Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified<sup>4</sup></li> </ul> </li> <li>Turn on proactive audit and protection           <ul style="list-style-type: none"> <li>Turn Off EEEU (everyone except external users) at the tenant level<sup>5</sup></li> <li>Turn on Purview Audit and view Copilot interaction activity reports and charts<sup>6</sup></li> <li>Turn on proactive analysis for sensitive data handling with prompts and responses with Purview Communications Compliance<sup>26</sup></li> <li>Turn on audit-mode oversharing SPO Purview DLP policy to restrict access to sensitive data exposure &amp; start remediating them<sup>7</sup></li> <li>Disable RSS (if enabled) to allow full Copilot experience<sup>8</sup></li> </ul> </li> <li>Increase site privacy           <ul style="list-style-type: none"> <li>Use site sensitivity labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members<sup>18</sup></li> <li>Apply default site library sensitivity labels to protect new and modified unlabeled documents<sup>27</sup></li> <li>Reduce risk by remediating alerts for overshared documents from the SPO Purview DLP policy by applying sensitive labels and disabling anyone access<sup>28</sup></li> </ul> </li> <li>Further secure sensitive data           <ul style="list-style-type: none"> <li>Automatically label new documents and prevent them from oversharing with run time labeling policy, starting with client-side policies and extend to server-side policies<sup>29</sup></li> <li>Identify inactive sites with SAM, then restrict access or delete<sup>30</sup></li> </ul> </li> <li>Improve Copilot responses           <ul style="list-style-type: none"> <li>Setup Purview retention/deletion policies for SharePoint to reduce data surface<sup>24</sup></li> <li>Identify inactive sites with SAM, then restrict access or delete<sup>30</sup></li> </ul> </li> </ul>	

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

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

Get the blueprint:

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

# Secure, Govern and Manage Copilot Agents





**IT control and management  
for agents**

# Copilot Control System

Equipping IT to lead AI transformation

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



## Data Protection

Identify and mitigate oversharing

Intelligent grounding respects your permissions and security controls

RAI checks for every prompt protect from AI risks



## Management Controls

Control which agents are available and who can access agents

Review agent permissions and actions before making available in your tenant

Track and manage agent lifecycle, access usage and operational insights



## Measurement & Reporting

View core usage telemetry and track license utilization

Track improvements in user productivity and compare impact across groups

Analyze Copilot & agents impact to business outcomes

# Copilot Control System product capabilities

	Data Protection	Management Controls	Measurement & Reporting
<b>Previously announced and generally available</b> 	<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 &amp; policy checks at runtime</p> <p>Monitor &amp; 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 &amp; Viva]</p> <p>Understand how Copilot usage is correlating to time savings and changes in collaboration &amp; behavioral outcomes [Viva/Copilot Dashboard]</p>
<b>Announcing at Ignite</b> 	<p><b>NEW:</b> SharePoint Advanced Management now included in Microsoft 365 Copilot to monitor content oversharing</p> <p><b>NEW:</b> Copilot Activity APIs to export prompts and responses [Graph APIs]</p> <p><b>NEW:</b> DLP for Microsoft 365 Copilot prevents processing and summarizing of protected content [Microsoft Purview]</p> <p><b>NEW:</b> Gen-AI risk detection capabilities [Microsoft Purview]</p>	<p><b>NEW:</b> 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><b>NEW:</b> No extra cost for indexing your data into Copilot with connectors [MAC]</p>	<p><b>NEW:</b> Introducing Copilot Analytics</p> <ul style="list-style-type: none"><li><b>NEW:</b> Viva Insights included in M365 Copilot; conduct deeper Copilot impact and ROI analysis by filters and 3P data with pre-built reports</li><li><b>NEW:</b> Copilot Business Impact Report (VI) analyze M365 Copilot usage across business KPIs (sales, finance)</li></ul>

# IT can directly customize Copilot's knowledge

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



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



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



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

## Graph connectors

What are Graph connectors?

Microsoft Graph APIs to index items from other systems



# IT management controls for agents

## Power Platform Admin Center

Developer and resource access

### Agent & connector catalog

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

### Management and monitoring

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

### Developer access

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

### Resources

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

## Microsoft 365 Admin Center

Copilot agent access and deployment

### Agent & connector catalog

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

### Management and monitoring

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

### User access

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

### Resources

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

## Teams Admin Center (TAC)

### User access

- Admin can manage who can upload and use custom apps

### Resources

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

# Governing and Administering Copilot Studio



## Copilot Studio-specific Gov/Admin

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



## Gov/Admin through Power Platform

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



## Manage

[+ New](#)  Recently deleted environments

Search



center



center



Monitoring



Security



Deployment



Licensing



Copilot



Support



Admin centers

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	

Feedback

# Governing and Administering Copilot Studio



## Copilot Studio-specific Gov/Admin

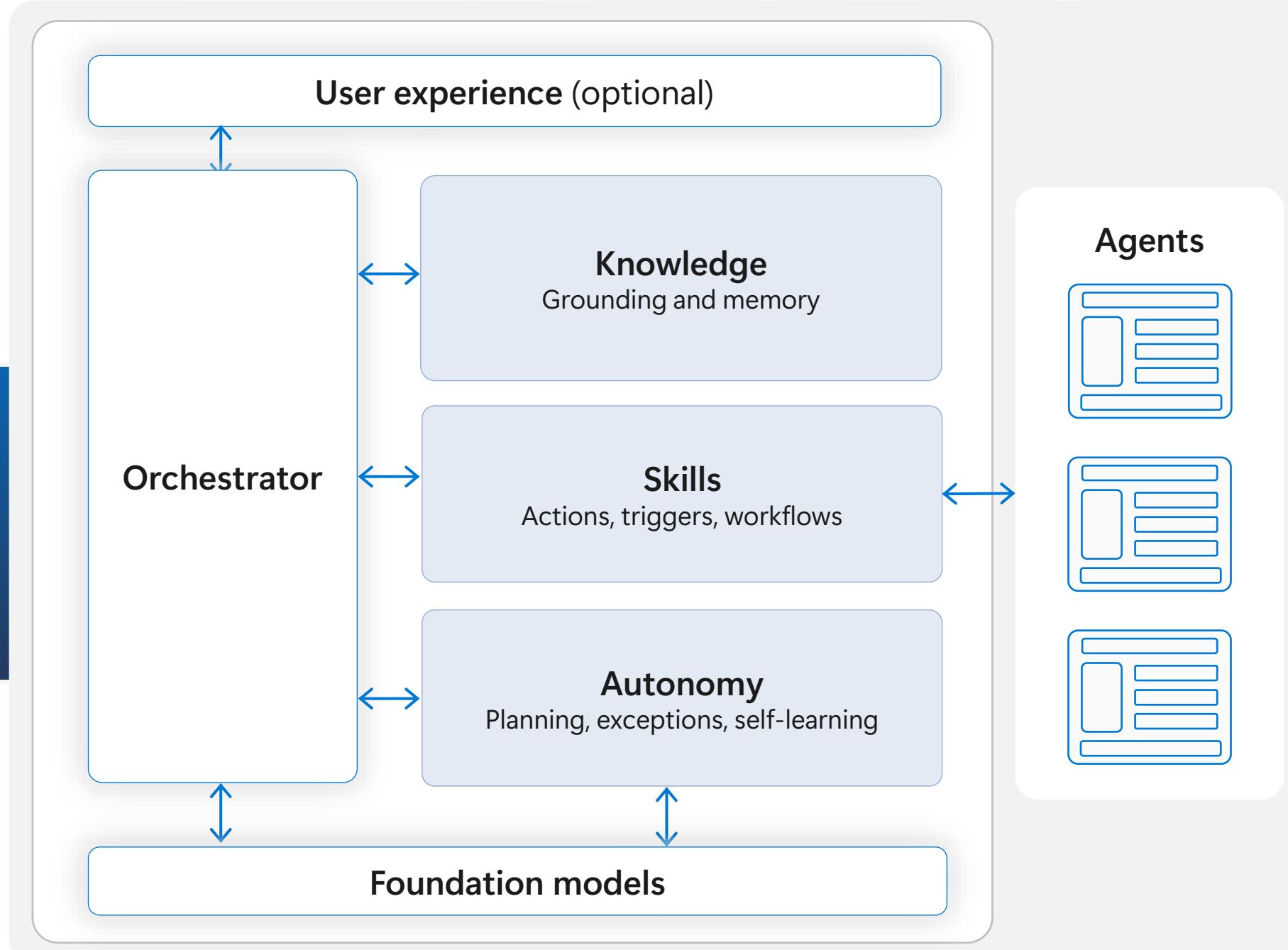
Copilot Studio has some governance and administration features that are unique to the tool



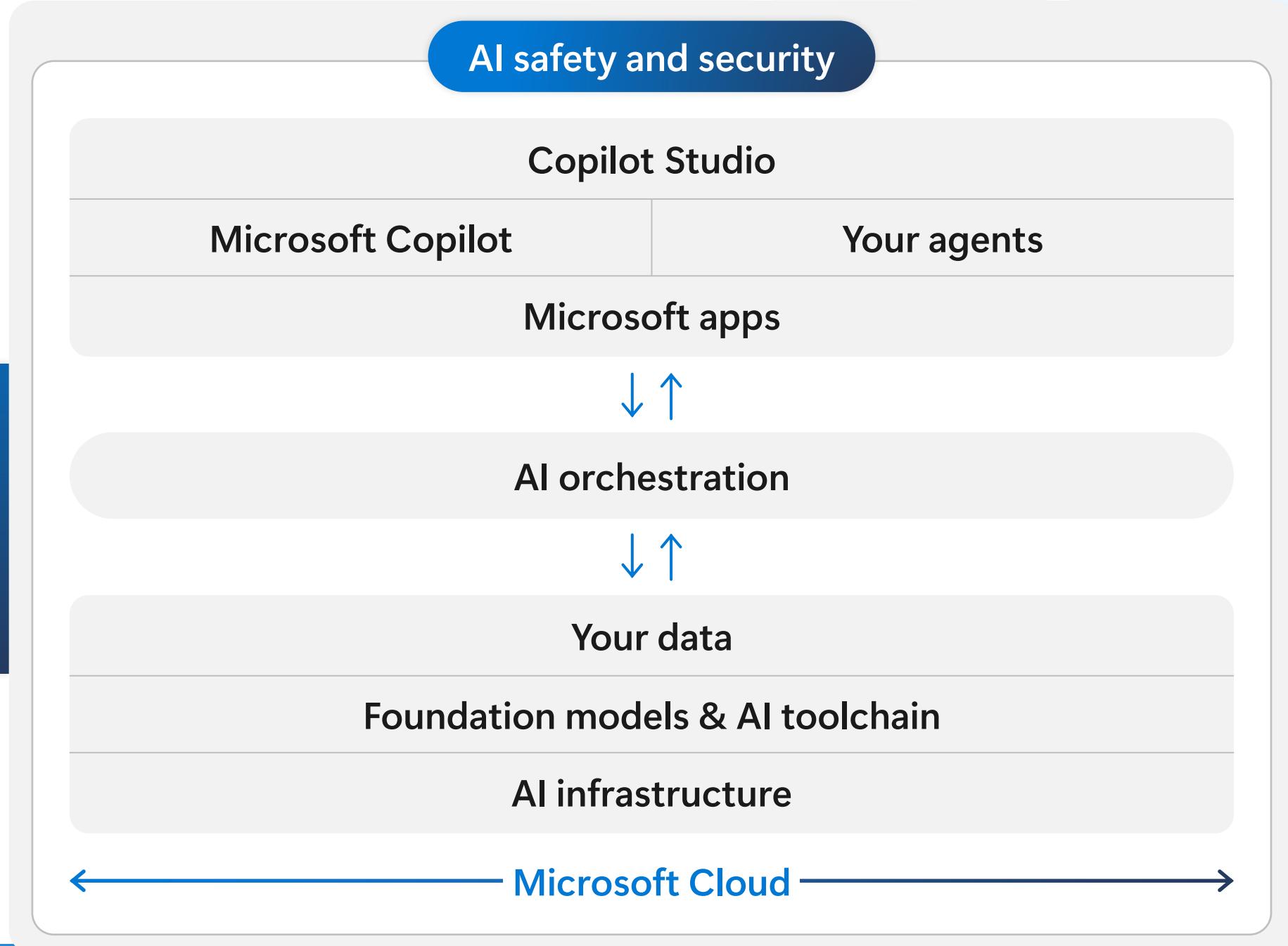
## Gov/Admin through Power Platform

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

# Anatomy of an agent



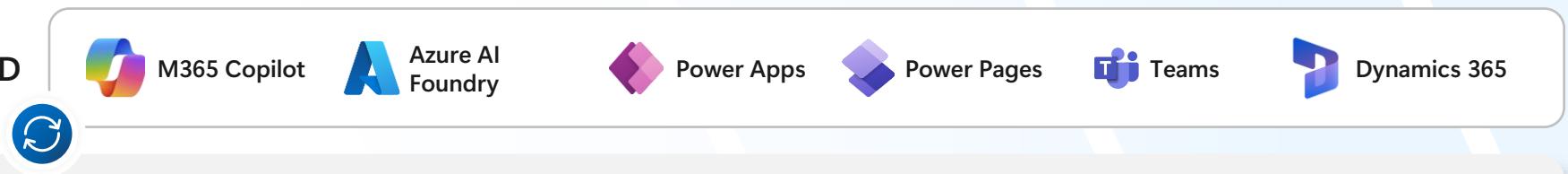
# Copilot stack



# Generative AI in Copilot Studio

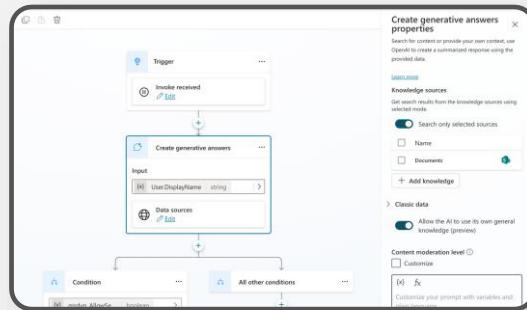
Powered by Azure

CONNECT AND EXTEND



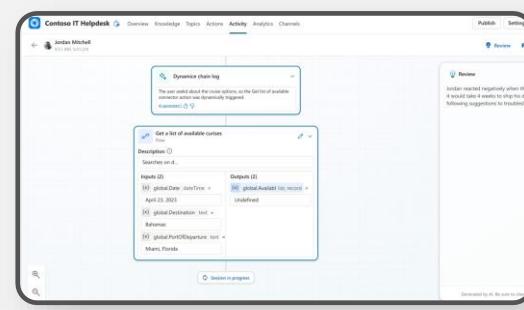
## Generative Conversations

### 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

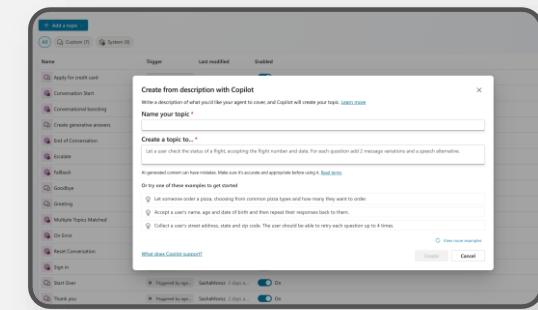
### Generative Actions



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

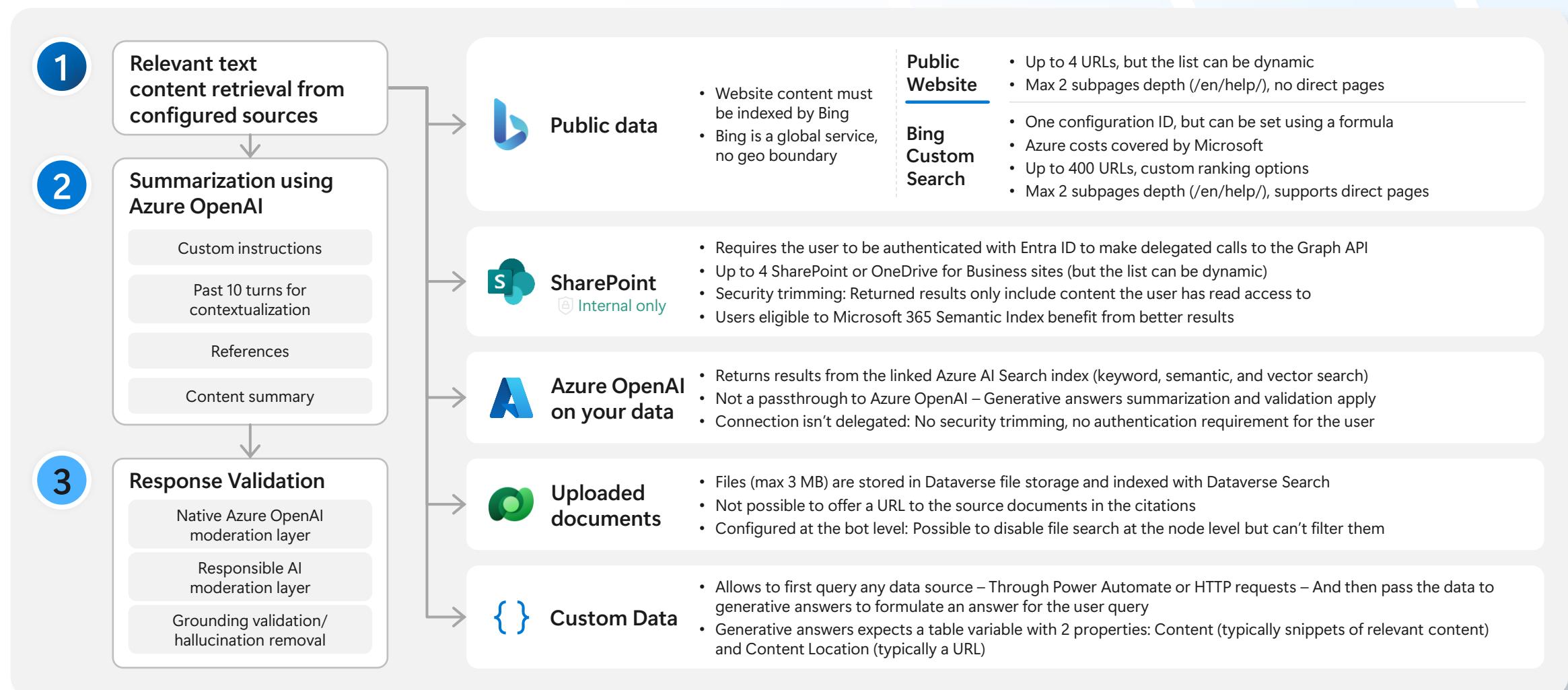
Variables

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.



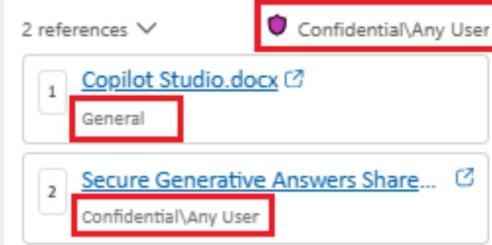
[Allow data movement across geographic locations for generative AI features](#), at the environment level.

# 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

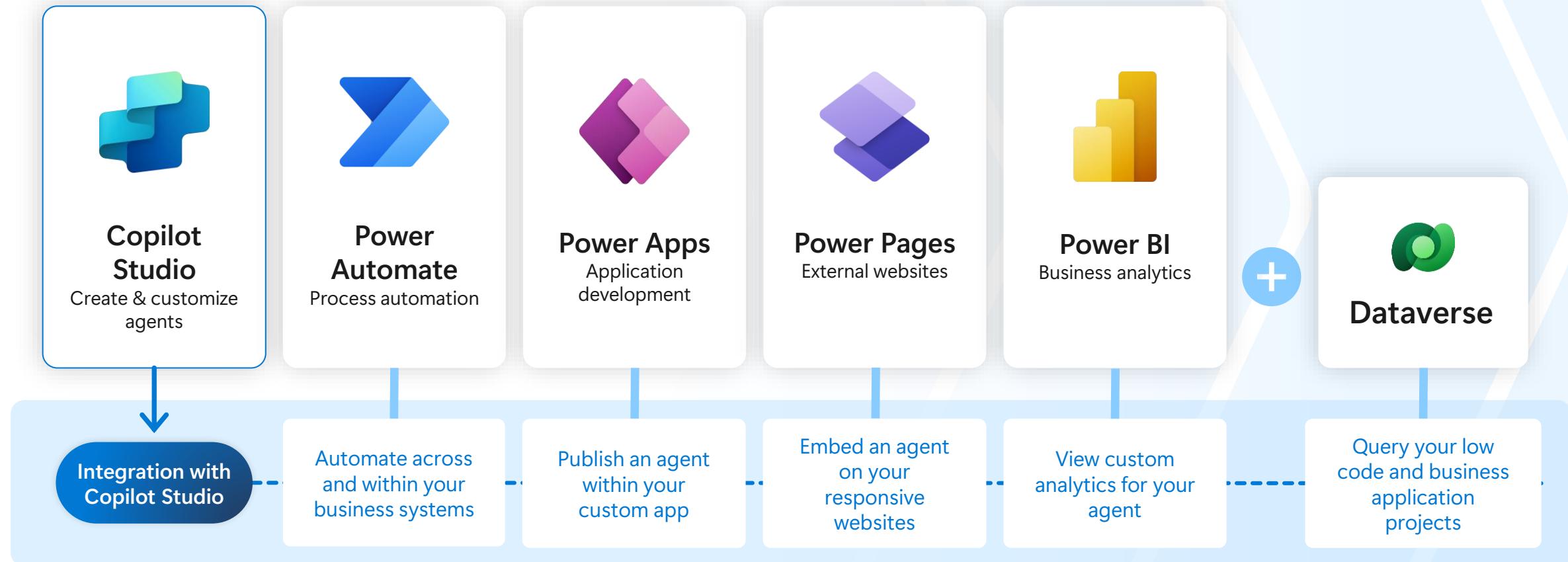


## Gov/Admin through Power Platform

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

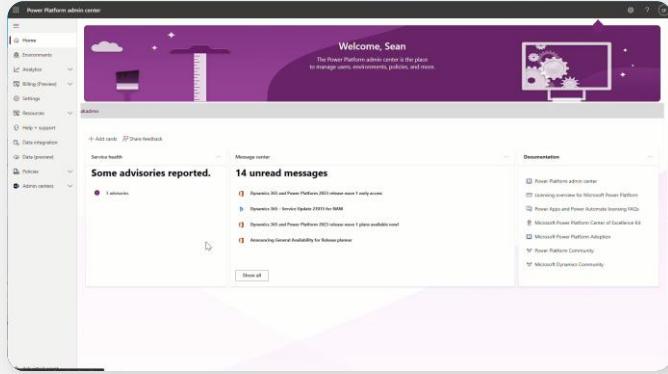
# Copilot Studio is a member of the Power Platform

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



# The right tools for your governance requirements

## Power Platform Admin Center

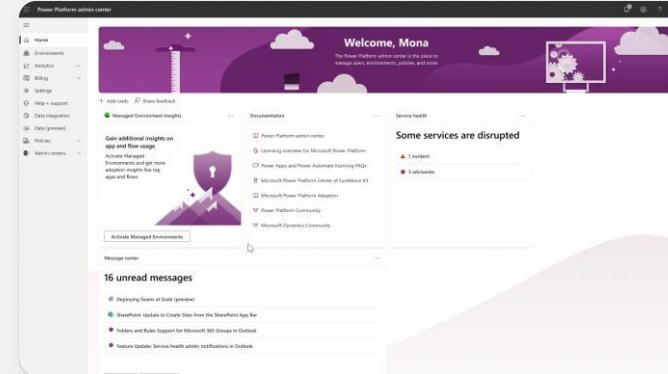


### Standard governance offering

Build guardrails around data, agents, and environments

View analytics on low code assets across your organization

## Managed Environments for Power Platform

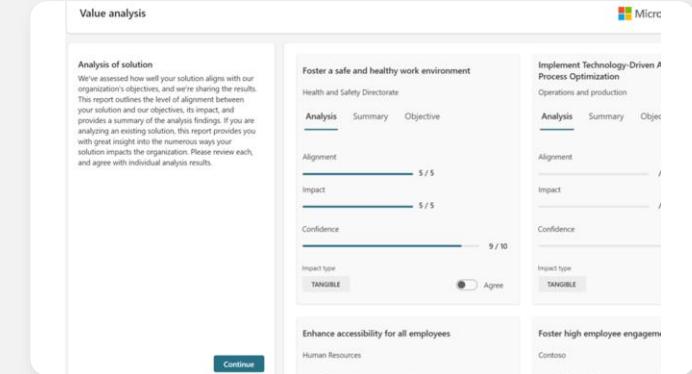


### Premium governance offering

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



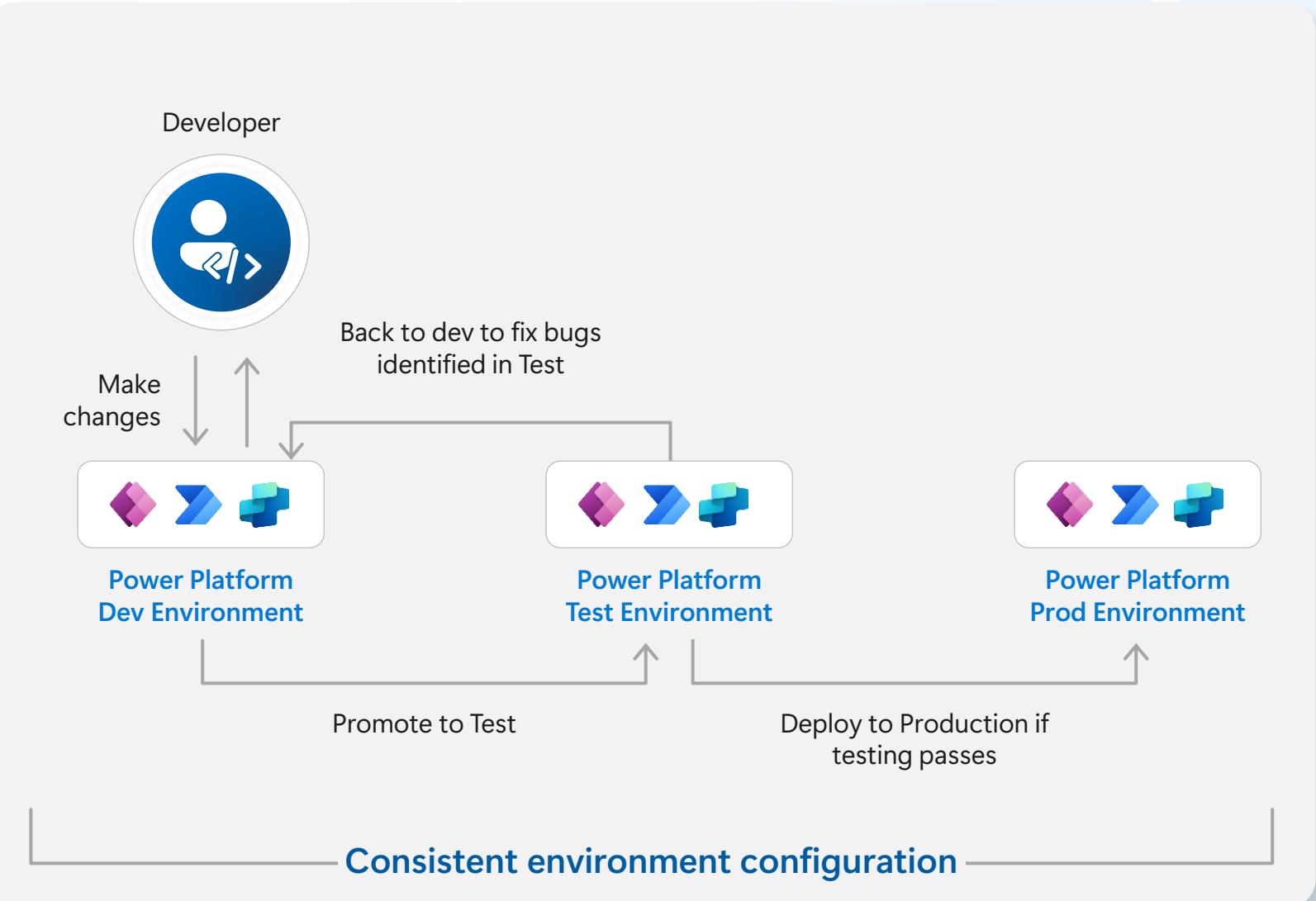
Lots of further reading:

[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 <span style="color: #ccc;">1.0</span>	Agent • Contoso Agent • Agent Components <span style="color: #ccc;">1.0</span>	Agent • Contoso Agent • Agent Components <span style="color: #ccc;">1.0</span>	Agent • Contoso Agent • Agent Components <span style="color: #ccc;">1.0</span>
Cloud Flows • ServiceNow Flow • Internal API Flow <span style="color: #ccc;">1.2</span>	Cloud Flows • ServiceNow Flow • Internal API Flow <span style="color: #ccc;">1.1</span>	Cloud Flows • ServiceNow Flow • Internal API Flow <span style="color: #ccc;">1.1</span>	Cloud Flows • ServiceNow Flow • Internal API Flow <span style="color: #ccc;">1.1</span>
Connectors & Variables • Connection Reference • Env. Variables • Custom Connector <span style="color: #ccc;">1.3</span>	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector <span style="color: #ccc;">1.3</span>	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector <span style="color: #ccc;">1.3</span>	Connectors & Variables • Connection Reference • Env. Variables • Custom Connector <span style="color: #ccc;">1.2</span>

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, and Advisor. The main area is titled "Recommendations" and displays a list of items with "Impact" (High or Medium) and "Recommendations". One specific recommendation is highlighted: "Enable data loss prevention policy enforcement for Copilot Studio". A modal window titled "Enable data loss prevention policy enforcement for Copilot Studio" provides details about why this is important and what can be done.

**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

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



# Authentications in copilot

Generally available

Copilot authentication is **secure** by default

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

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

The screenshot shows the Copilot Studio interface with the 'Copilots' section open. Under 'Custom copilots', there are three entries: 'Security Health Copilot' (selected), 'Safe Travels Copilot', and 'Governance and Security Copilot...'. Under 'Microsoft', there are two entries: 'Copilot for Microsoft 365' and 'Copilot for Sales'. A 'Coming soon' section is also visible. On the right, the 'Settings' sidebar is open, and the 'Security' tab is selected. In the main content area, the 'Authentication' section is displayed. It includes a note about verifying user identity and taking actions on their behalf, with a link to 'Learn more'. Three authentication options are listed: 'No authentication' (radio button), 'Authenticate with Microsoft' (radio button), and 'Authenticate manually' (radio button, currently selected). The 'Authenticate manually' section contains a 'Require users to sign in' toggle switch, which is turned off. Below this, the 'Redirect URL' field contains the value 'https://token.botframework.com/auth/web/1'. A 'Copy' button is next to the URL field. A dropdown menu for 'Service provider' shows 'Azure Active Directory v2 with Certificates' as the current selection. Other options listed are 'Azure Active Directory', 'Azure Active Directory v2', 'Azure Active Directory v2 with Certificates' (which is checked), and 'Generic OAuth 2'. At the bottom, there are fields for 'Token exchange URL (required for SSO)' and 'Login URL', both with placeholder text 'Enter your token exchange URL (required for SSO)' and 'Enter your login URL' respectively.



# 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 below 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 below 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

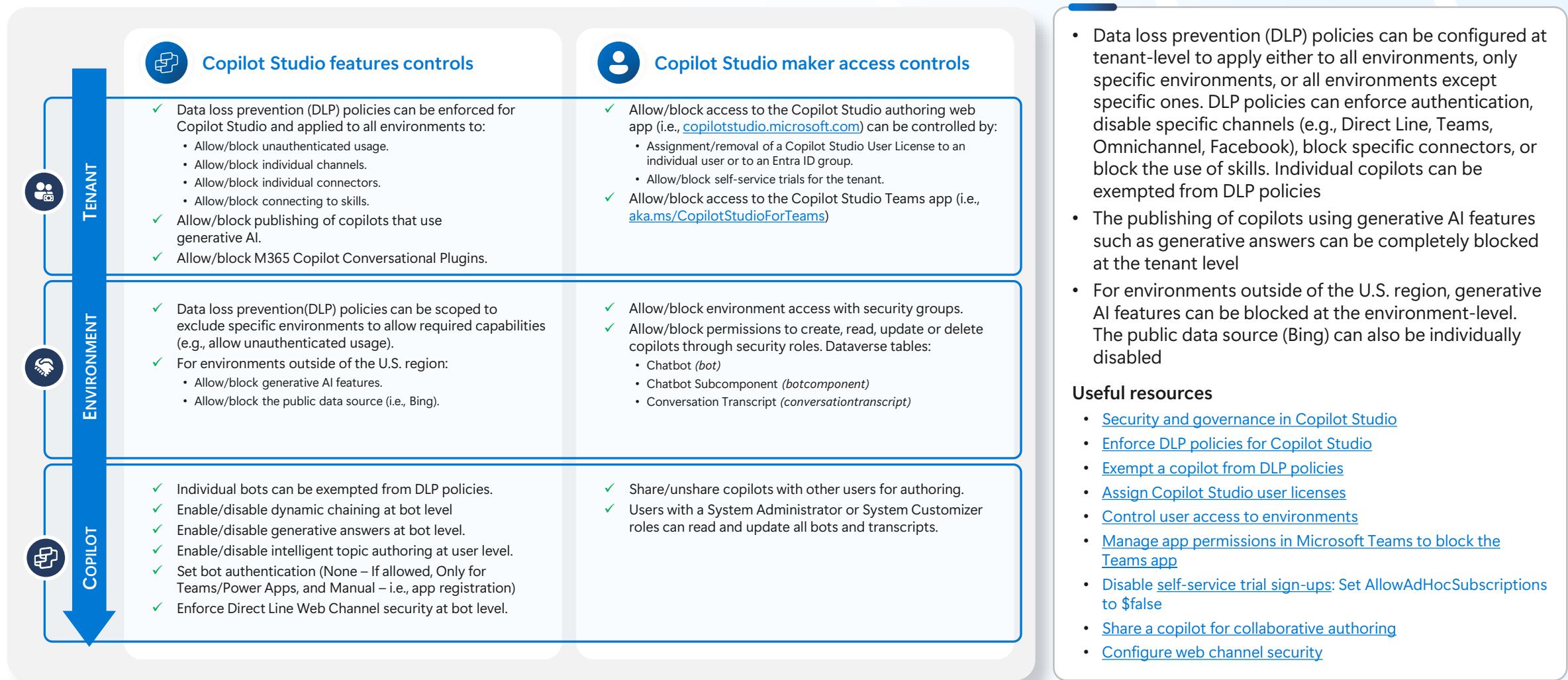
### Useful resources

- [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's a toolbar with Back, New row, New column, Refresh, Create an app, and Edit table properties buttons. Below the toolbar, the title 'Accounts' is displayed next to a grid icon. The main area is a table with four columns: Account Name, Main Phone, Address 1: City, and Email (which is highlighted with a blue border). The table contains 12 rows of sample data. The 'Email' column shows masked email addresses starting with '\*\*\*\*\*@\*\*\*\*\*.com'. The 'Account Number' column shows various unique identifiers.

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

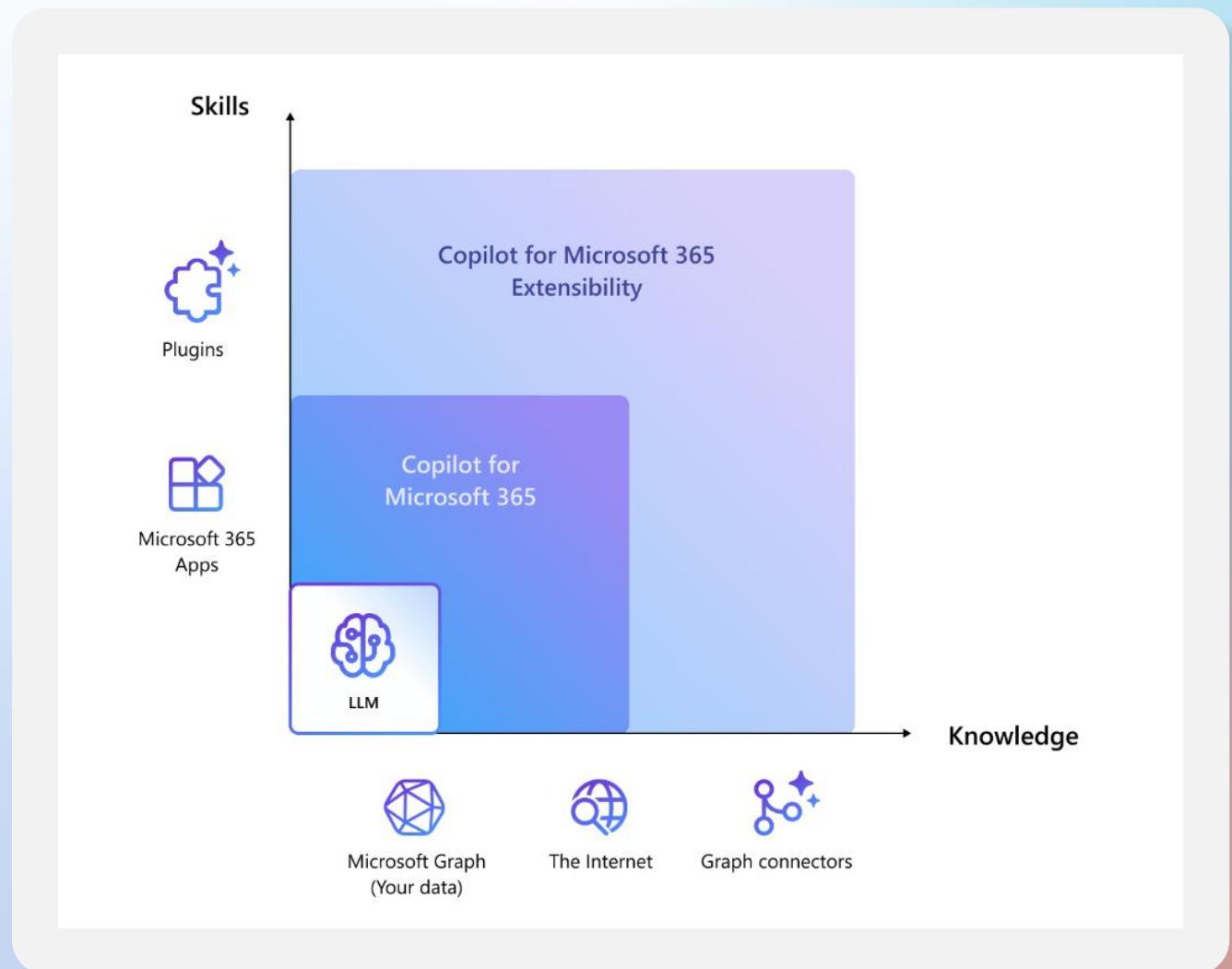
**Enable and publish plugins**

# 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.

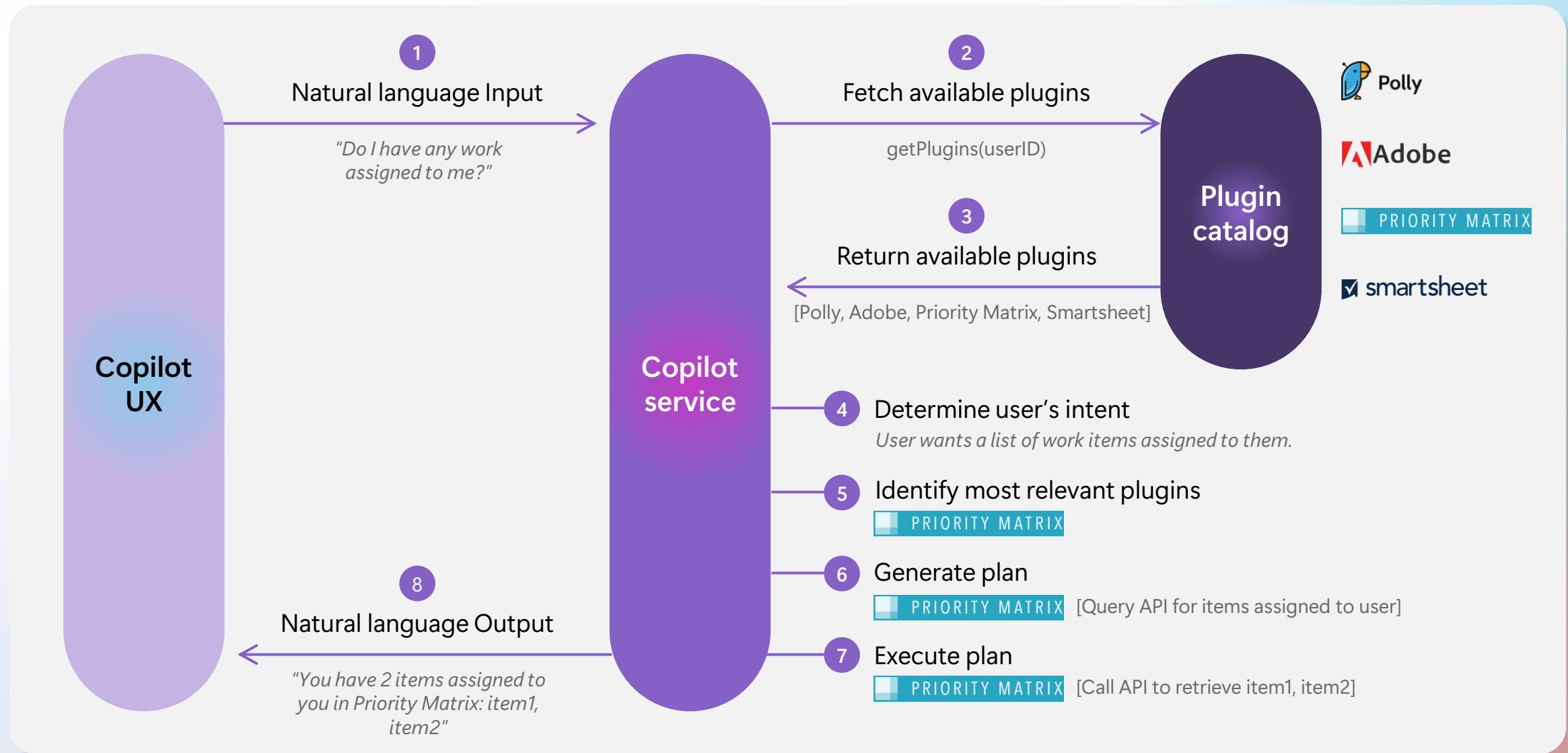


Existing Investments



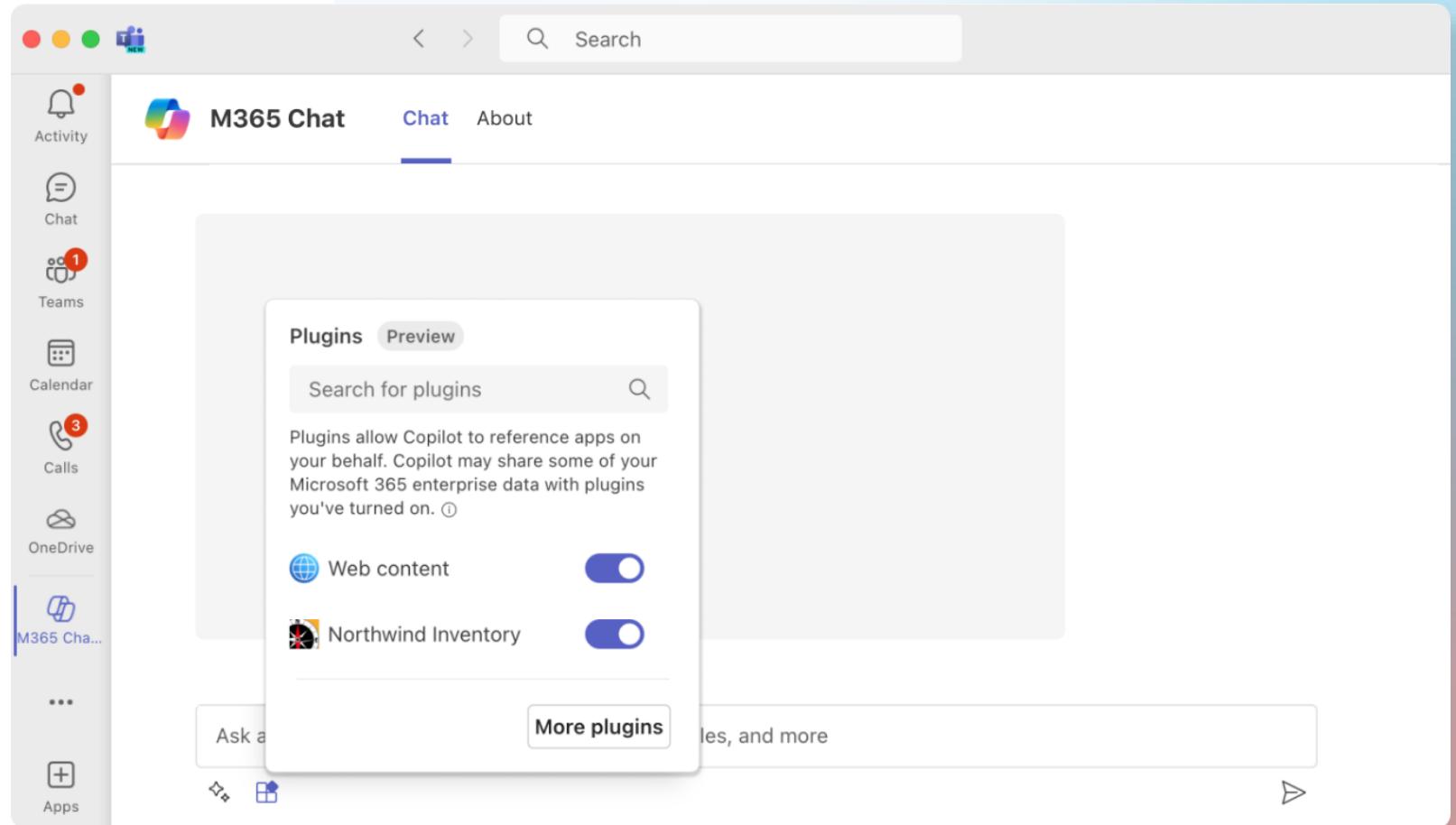
New

# 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

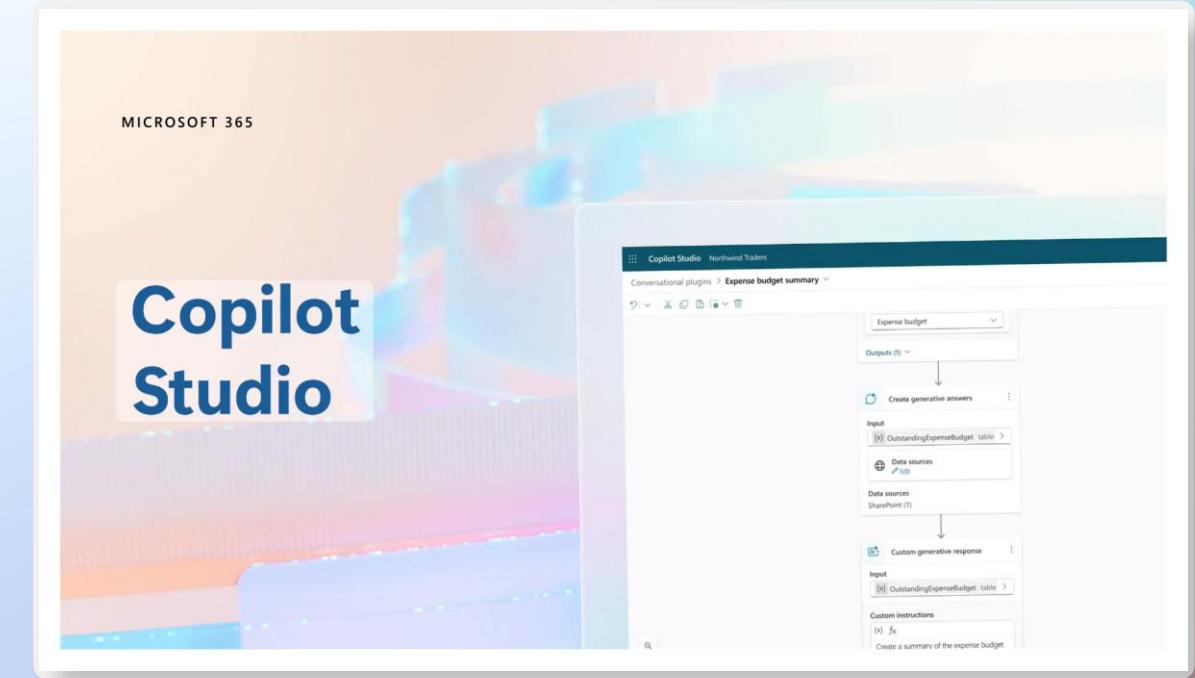
# Customize Copilot for your unique business needs

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**.



1200+

# Extend with Plugins, but what are they?

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

Reusable building blocks

Author with visual workflows to suit your needs

Publish and manage through IT

# Traditional plugin development can be challenging

Budget &  
time constraints

Infrastructure &  
resource hosting

Developer and  
technical expertise

Integration with  
business systems

Security &  
compliance risks

Maintaining  
content

# Transform plugin building with low code + AI



Build together  
in low code



Optimize  
business  
processes



Accelerate  
time to value



Unlock new  
ideas with the  
business



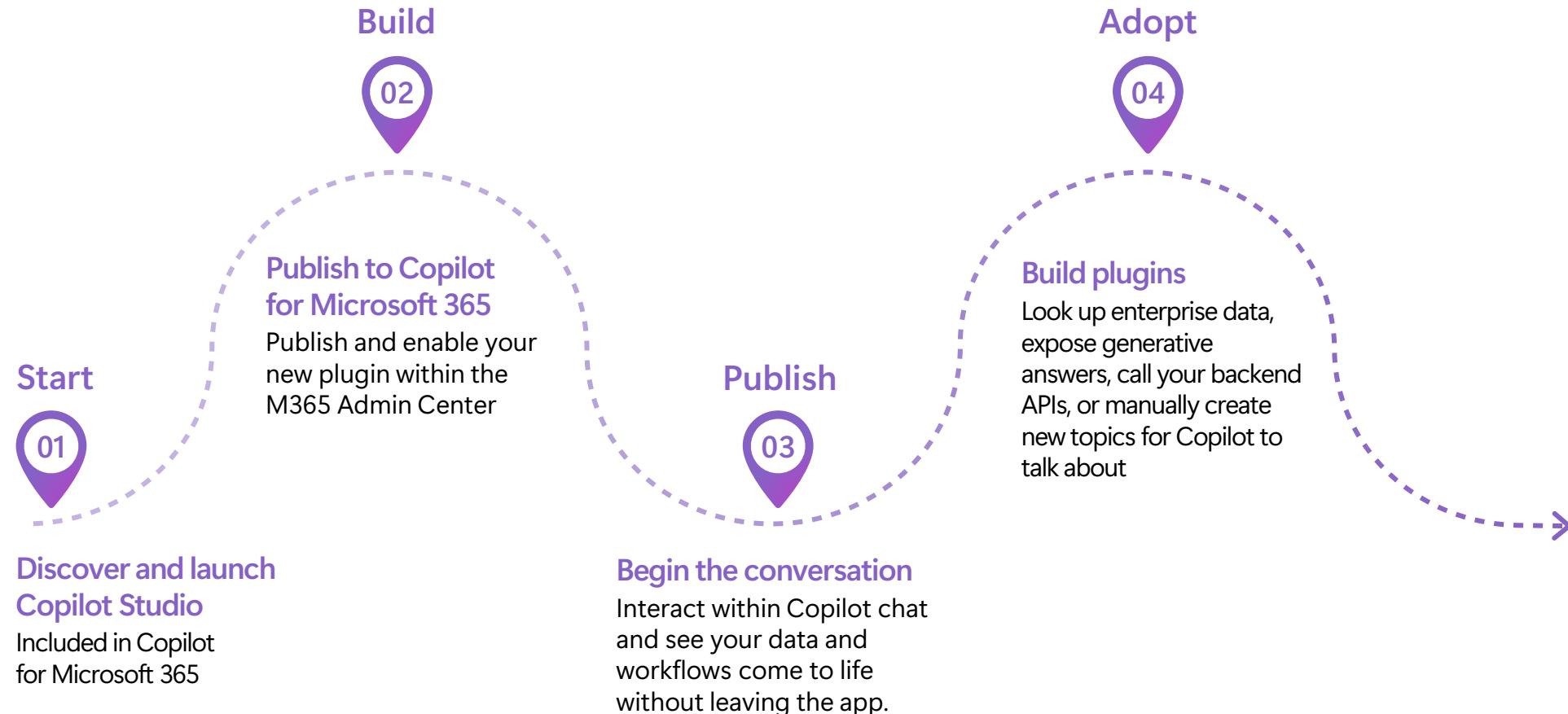
Reduce  
development  
costs



Monitored  
and secure  
through IT



# How to build a plugin for Copilot for Microsoft 365



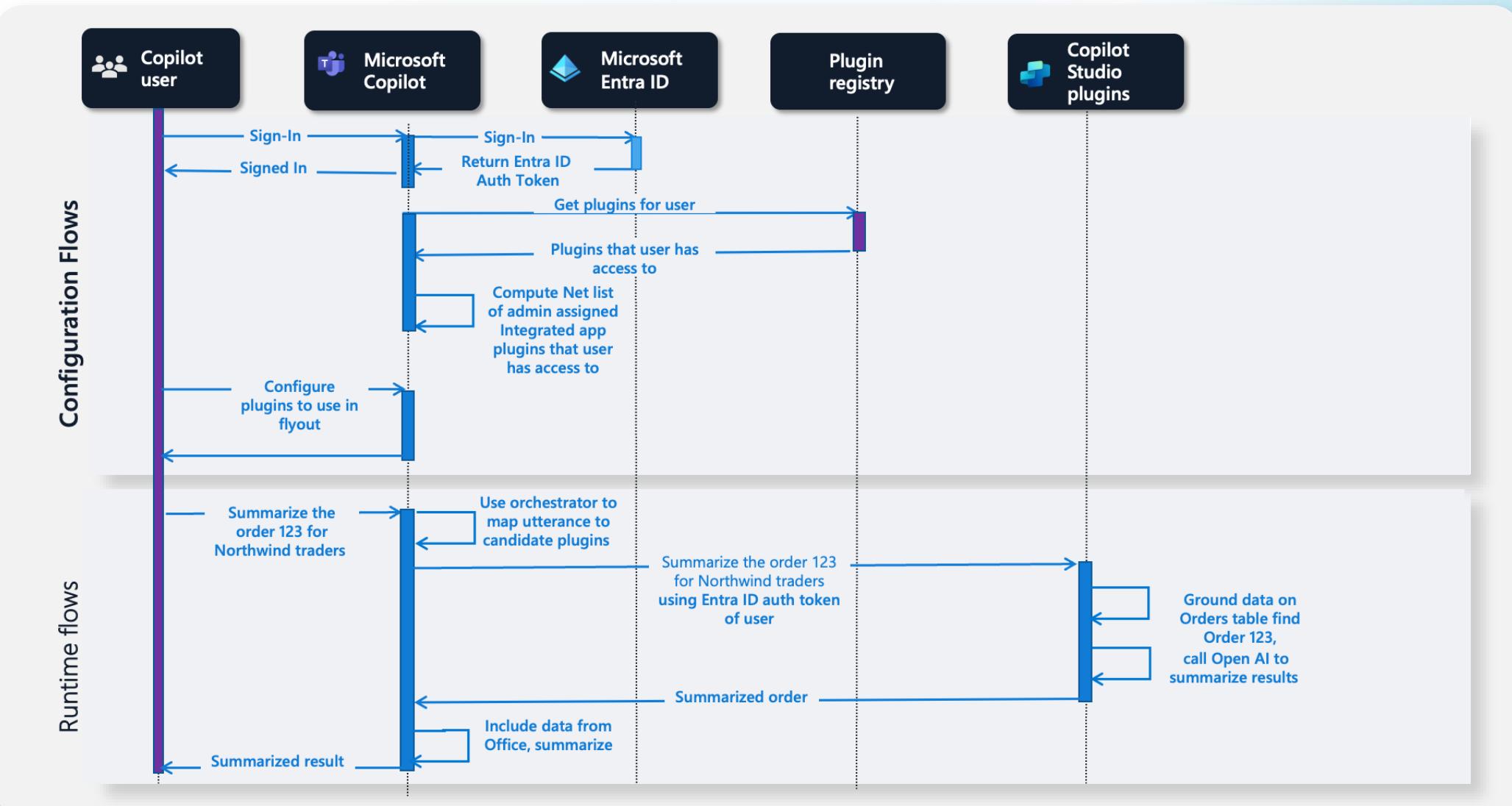
MICROSOFT 365

# Copilot Studio

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

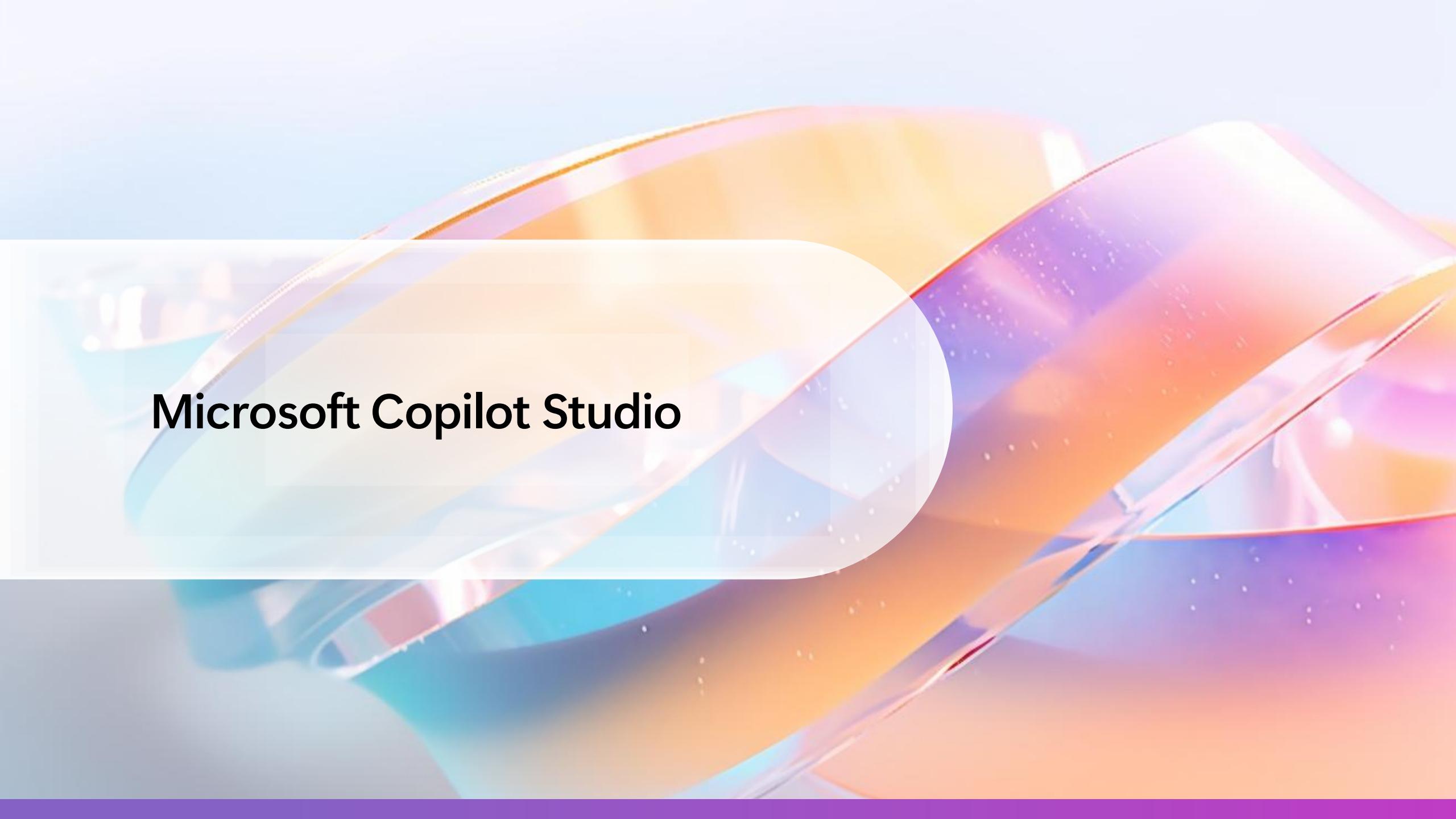
- Input:** "Expense budget" (text input field).
- Outputs (1):** "Create generative answers" (button).
- Data sources:** "SharePoint (1)" (button).
- Custom generative response:** "Custom generative response" (button).
- Input:** "OutstandingExpenseBudget table" (table input field).
- Custom instructions:**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

# How Copilot uses Copilot Studio plugins



**Demo**

Extend Copilot for Microsoft 365 with Copilot Studio



# Microsoft Copilot Studio



# Copilot Studio

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

The screenshot shows the Copilot Studio interface with the 'Northwind Trader' solution selected. The left sidebar includes options like Home, Building blocks (GPTs, Topics, Plugin actions, Prompts, Copilots), Create a copilot, Extend Microsoft Copilot (Publish, Analytics), Settings, AI integration tools, Channels, and Test your copilot. The main content area displays the 'Northwind Trader' solution with a title 'Boost your conversations (preview)', a sub-section 'Enter your website', and buttons for 'Use generative answers' and 'Advanced options'. Below this are three cards: 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each card has a corresponding 'Go to [action]' 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 for the 'Northwind Trader' solution. 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 cards for 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each card includes descriptive text and a 'Go to [card name]' button.

## 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

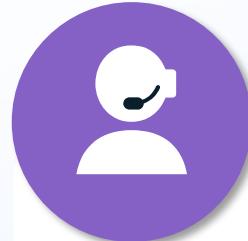
Monitor usage and gain full visibility into who is building copilots and customizing elements through built-in governance and control features.

# Momentum of conversational AI to solve business challenges

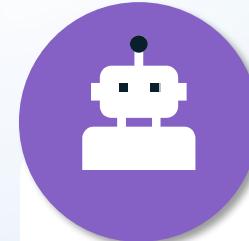
Market trends are clear, don't fall behind on this growing opportunity area



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



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



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

## 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

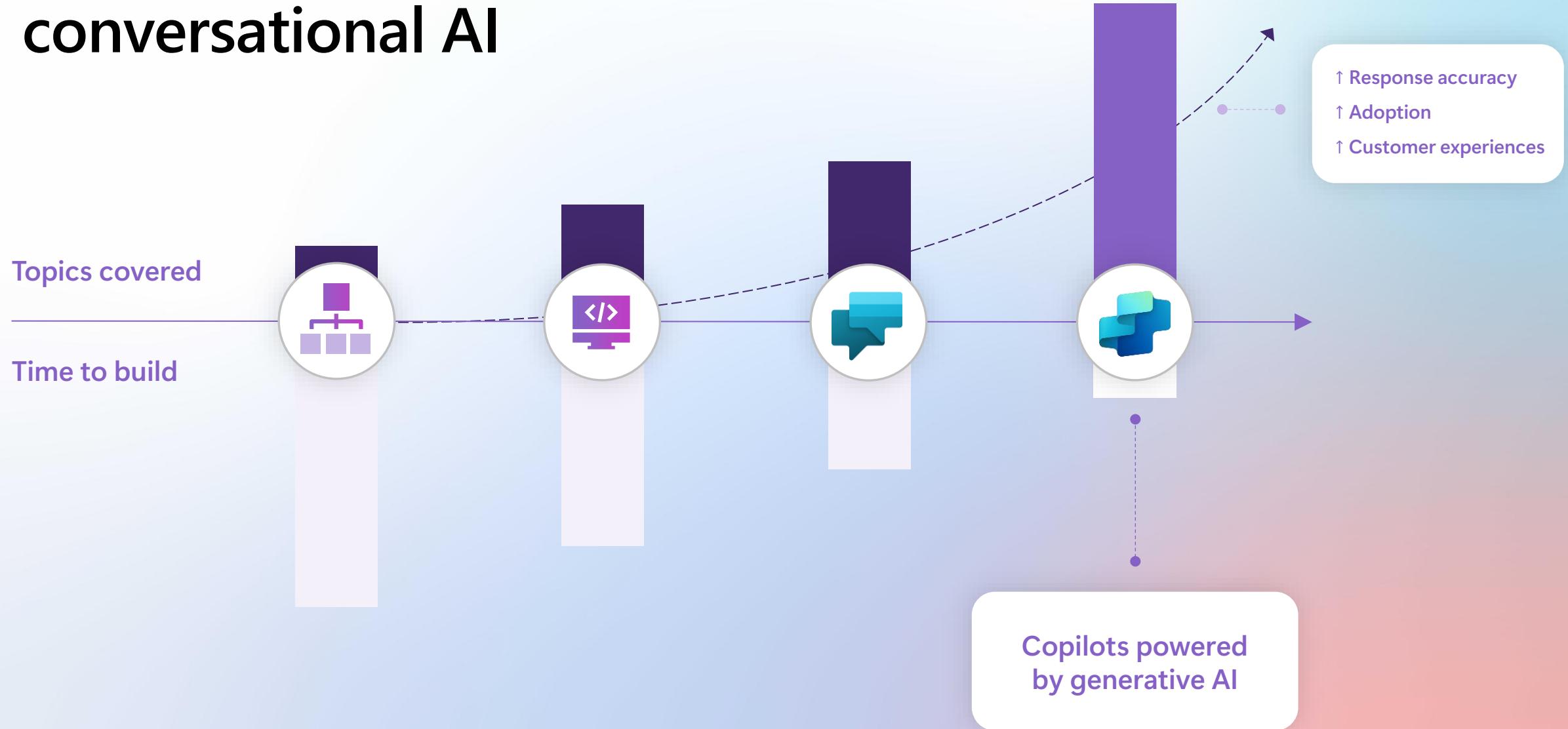
Product & technical onboarding

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

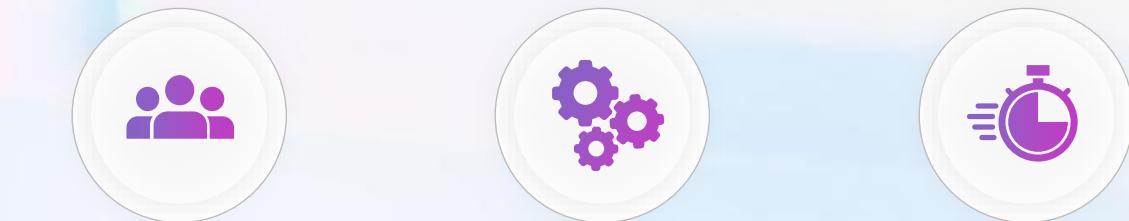
Develop faster with low code and a connected conversational AI stack and expanding the pool of available development talent.

---

## 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

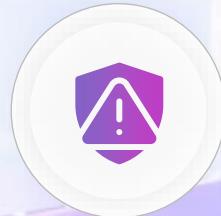


Optimize business processes



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.

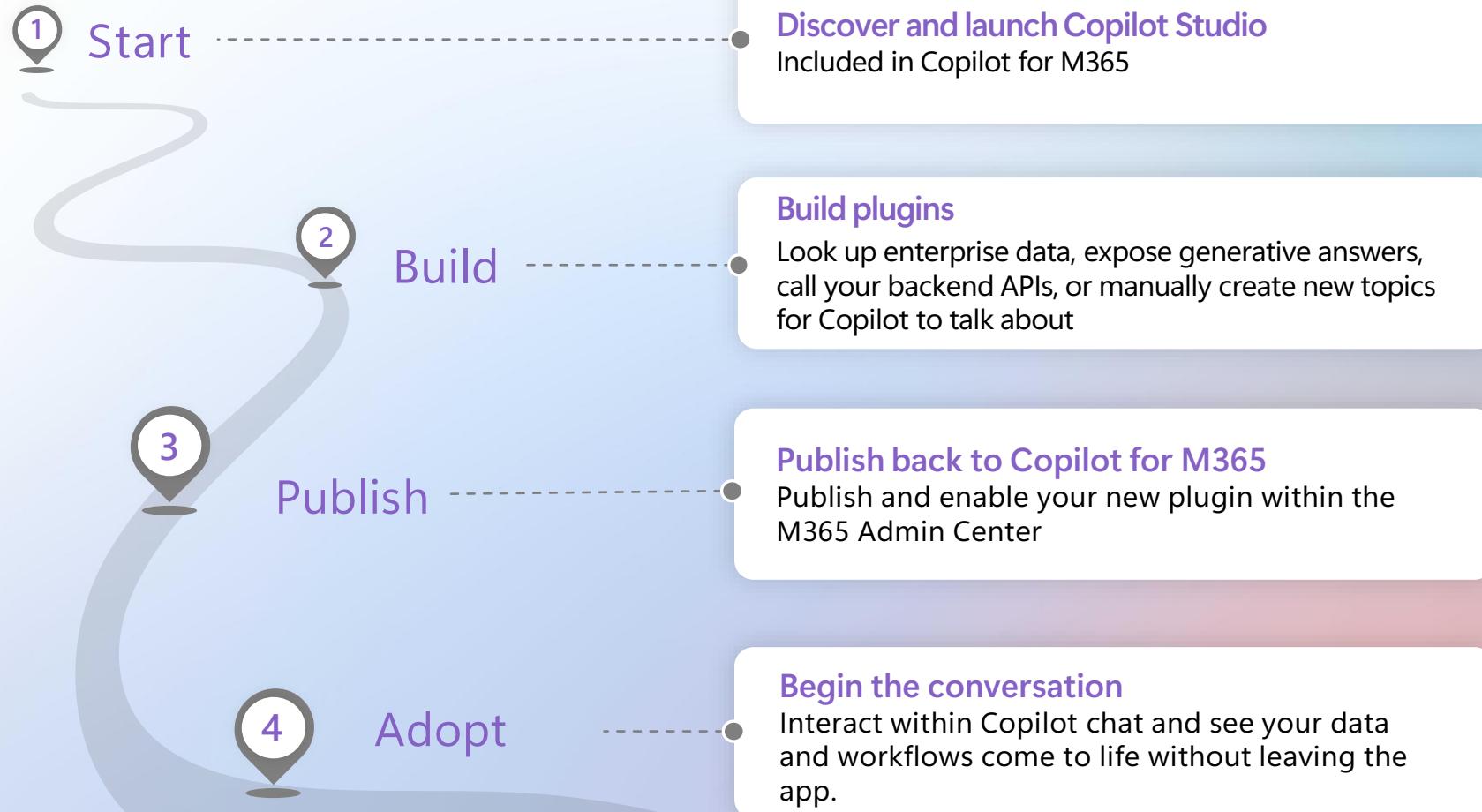
## Configure how Copilot responds

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

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## 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.

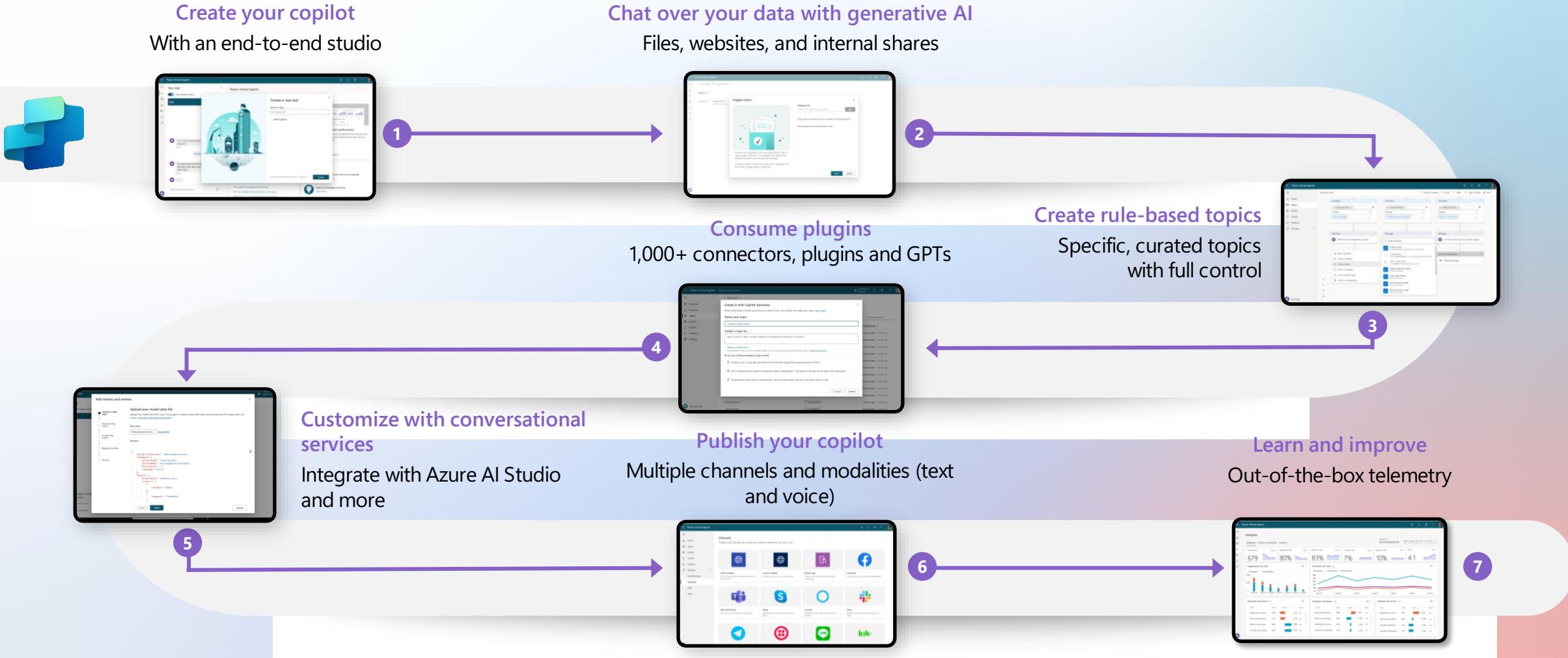
## Handle complex queries with ease

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

## Continuous self-learning and improvement

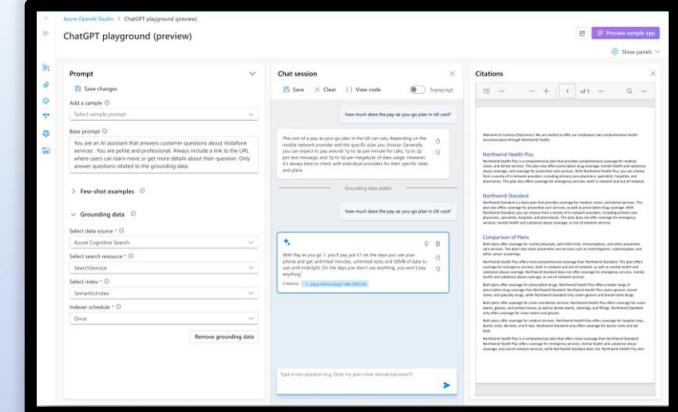
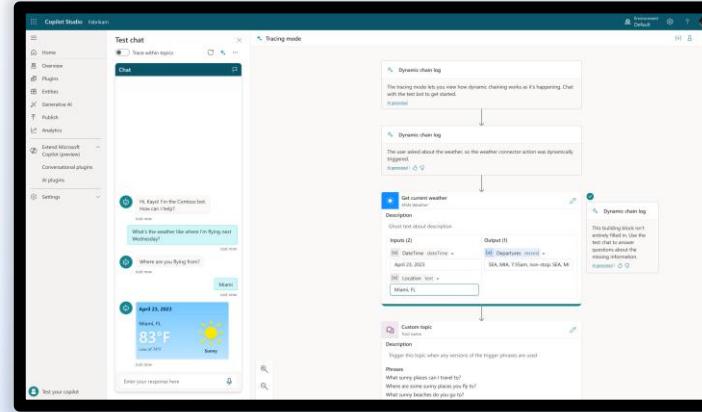
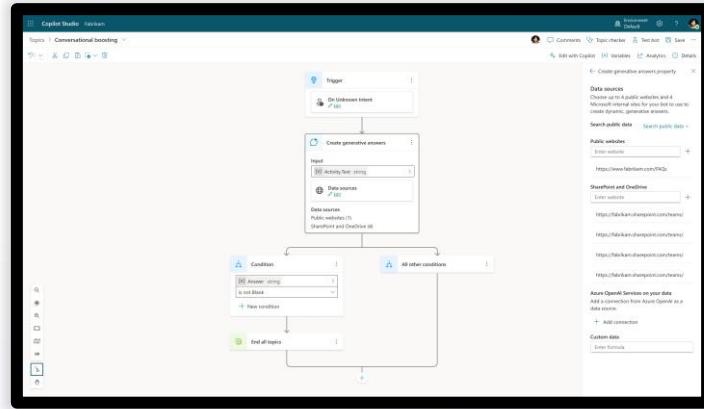
AI-driven features will improve your copilot over time and provide suggestions on how to optimize your conversations.

# 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 1<sup>st</sup> 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 1<sup>st</sup> 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
<b>Use Case</b>	Extend Copilot for Microsoft 365	Copilots for customers and employees
<b>Licensing</b>	Included in the Copilot for Microsoft 365 license	Capacity pack per tenant, \$200 for 25K messages
<b>Value Prop</b>	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
<b>Channels where copilot can be deployed</b>	Copilot for Microsoft 365 only	External channels (Web, mobile, social); Internal channels AAD authenticated (Web, Teams)
<b>Availability</b>	Available in Public Preview	Generally Available
<b>Example Scenarios</b>	Productivity scenarios consumed via Copilot for Microsoft 365 <ul style="list-style-type: none"><li>▪ Specifically designed responses for critical scenarios (e.g., legal requests, HR sensitive topics, Finance requests)</li><li>▪ Horizontal workflows backed with automation (e.g., expense management, vacation requests, reset my passwords)</li></ul>	Customer facing copilot on the web, social media <ul style="list-style-type: none"><li>▪ Account management</li><li>▪ Order management</li><li>▪ Find your product</li><li>▪ Make and manage bookings</li><li>▪ Help customers get started with services</li></ul> Host your own copilot to any channel for employees: <ul style="list-style-type: none"><li>▪ HR Copilot on SharePoint page</li><li>▪ IT services copilot on custom IT employee website</li><li>▪ Internal support</li></ul>

**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



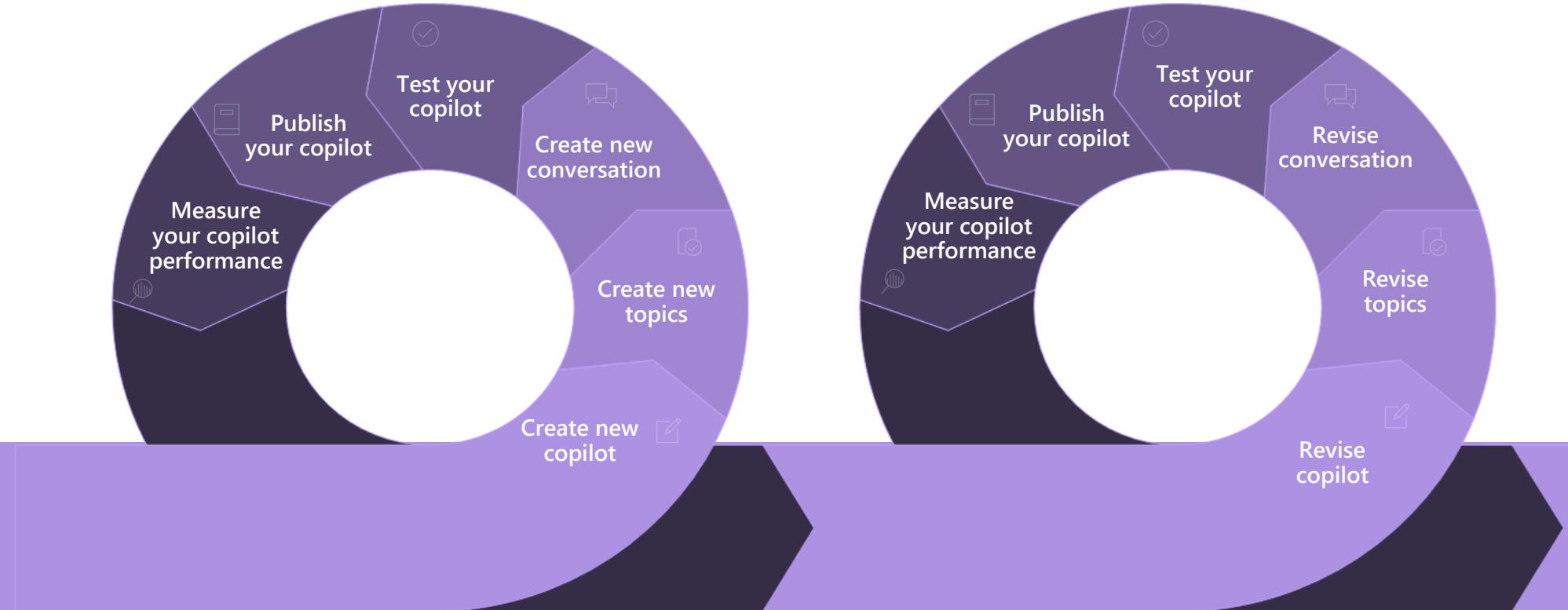
# Deploying Copilot Studio



# Copilot creation process overview



Creating a copilot is an easy step by step process.



# Resources to support Implementation

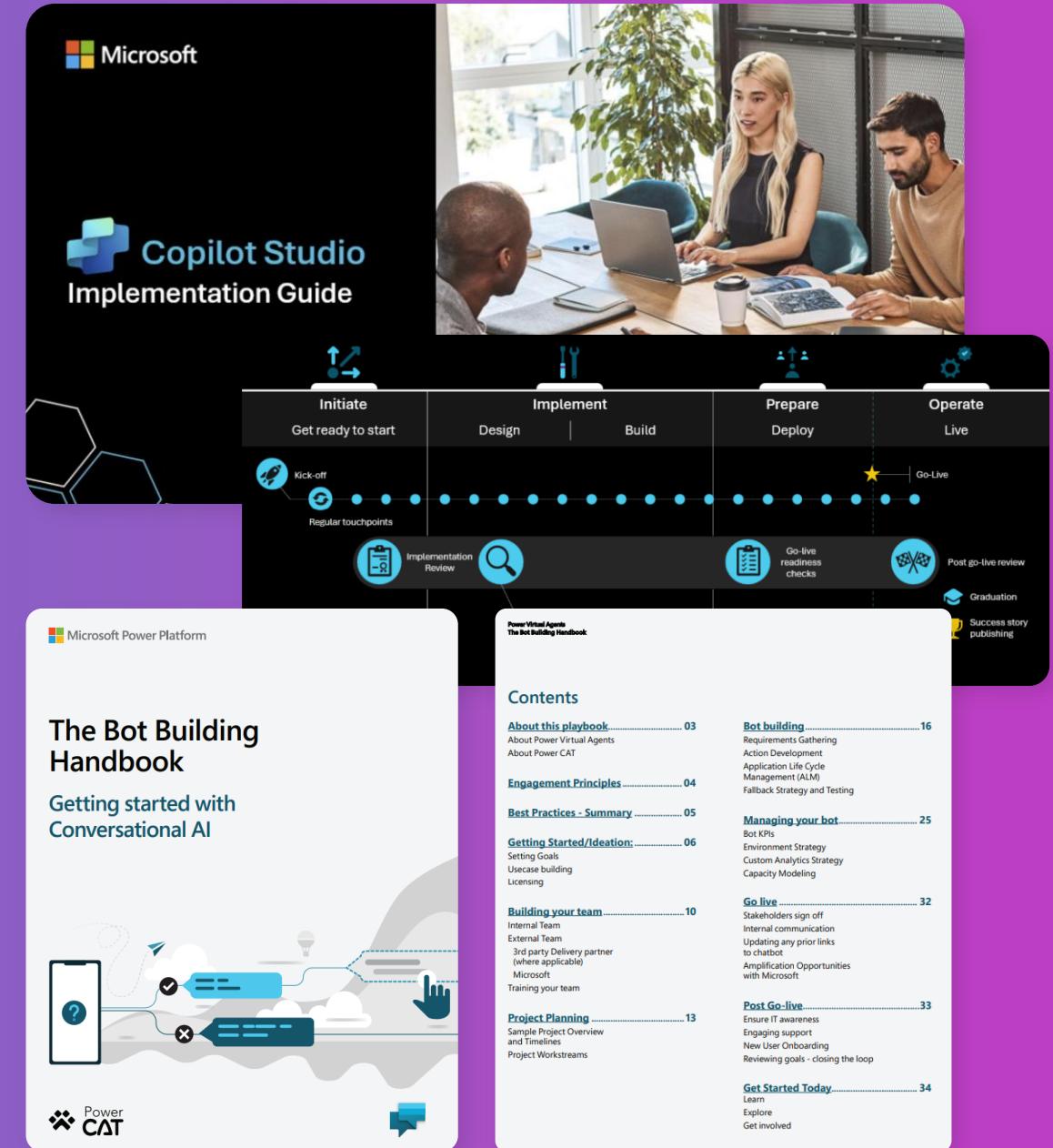
## Copilot Studio Implementation Blueprint Deck (Success by Design)

Use this as part of your blueprint and customer discussions when pitching POCs and projects  
**[aka.ms/copilotstudioimplementationguide](https://aka.ms/copilotstudioimplementationguide)**

## Copilot Studio Guidebook

Use this role-based guide to understand the fundamentals of Conversational AI and Copilot Studio  
**[aka.ms/copilotstudioguidebook](https://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](https://aka.ms/Partner4XIAD)
- Partner overview deck [aka.ms/XIADPartnerOpportunity](https://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](https://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](https://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](http://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](http://aka.ms/copilotstudio/partnergrowthplan)

# Resources



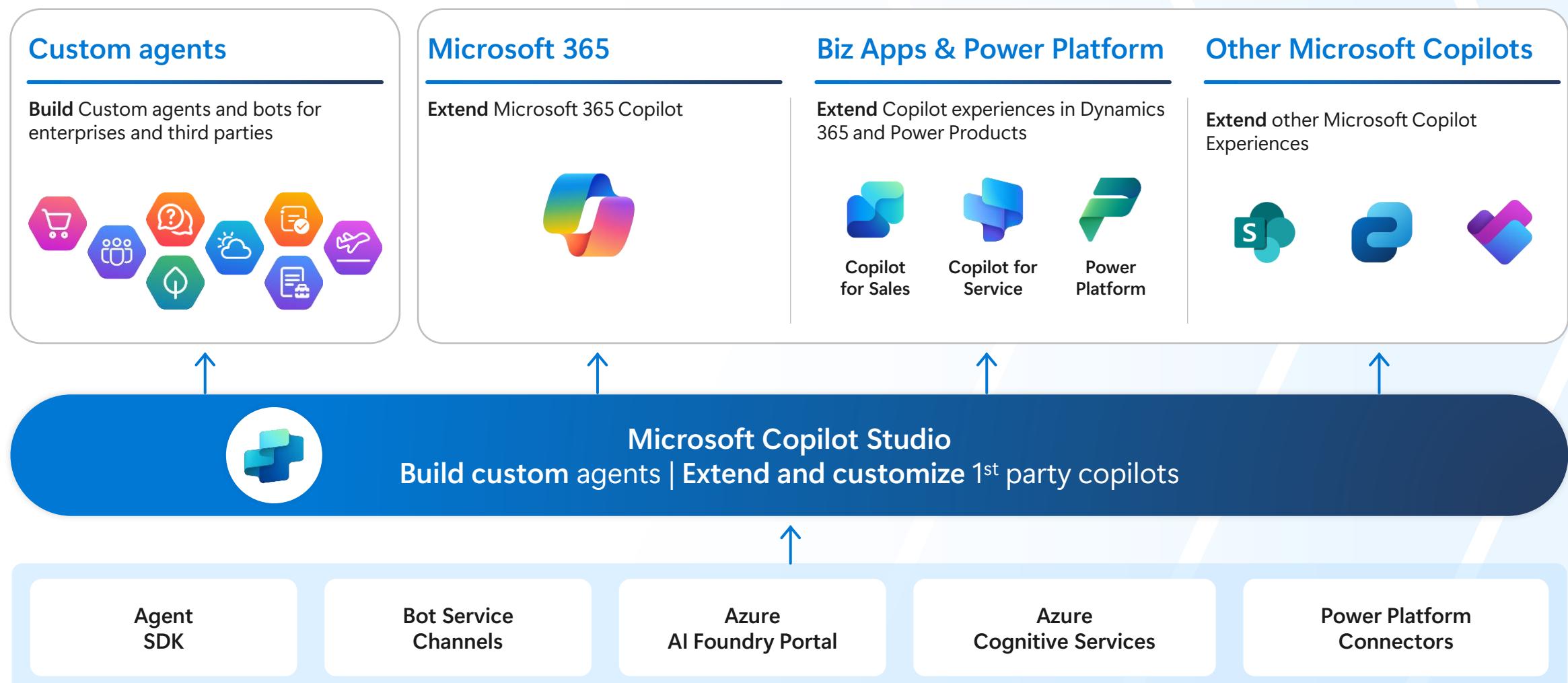
[aka.ms/trycopilotstudio](https://aka.ms/trycopilotstudio)



## Learn more

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

# 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

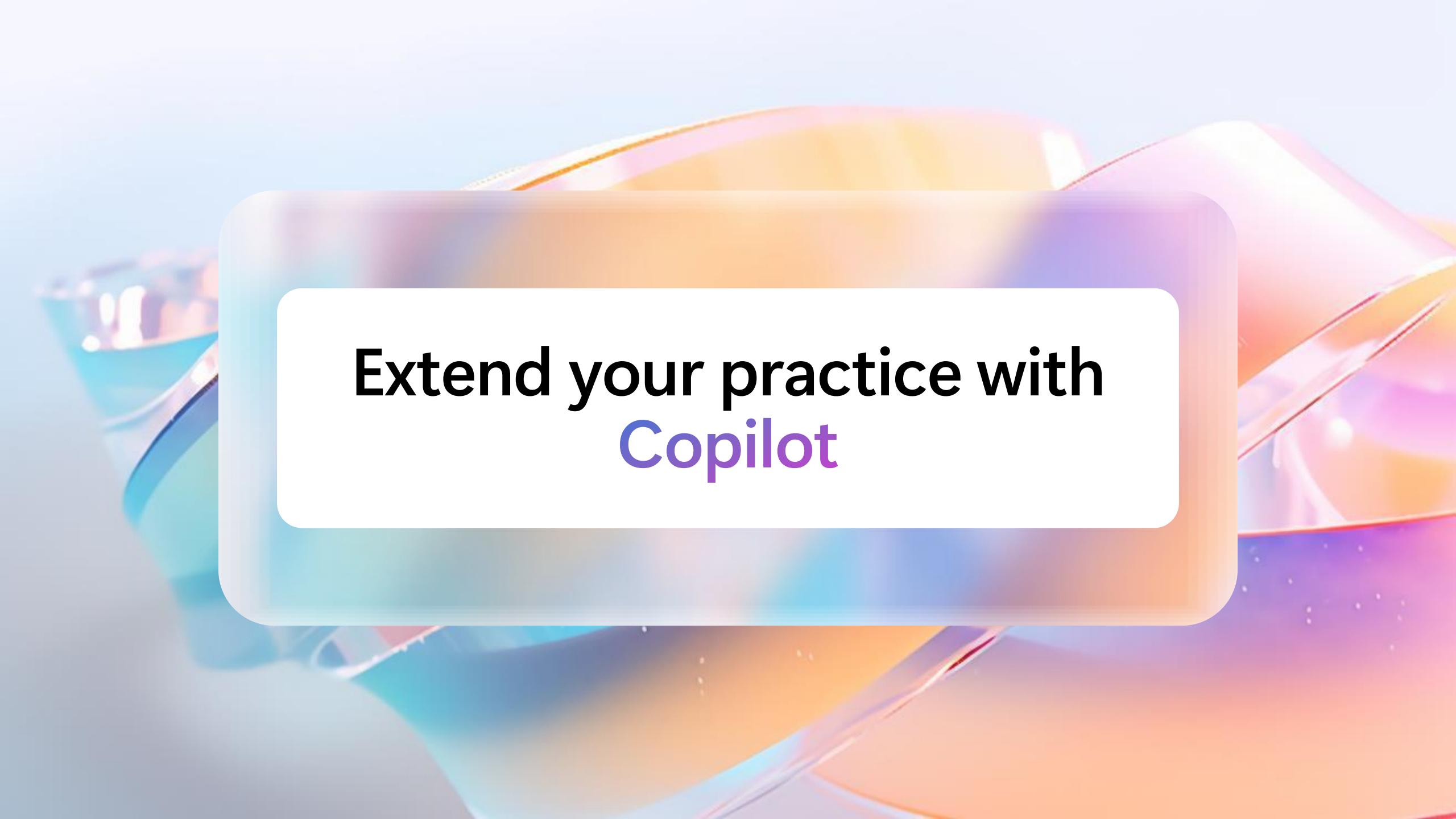


Follows human guard rails and asks for help



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 prompt 'Ask a question or describe what you need'. At the bottom, there's a note about AI-generated content accuracy.



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](https://aka.ms/CopilotGAFeb2024)
- Review practice building content:  
[aka.ms/AIFutureOfWorkPartner](https://aka.ms/AIFutureOfWorkPartner)
- Familiarize yourself with the scenarios, capabilities, and pitch on Partner Hub:  
[aka.ms/CopilotforSales\\_Service](https://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](https://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](https://aka.ms/AIFutureOfWorkPartner)

Share your Copilot wins!

Available Now

# Get customers AI Ready



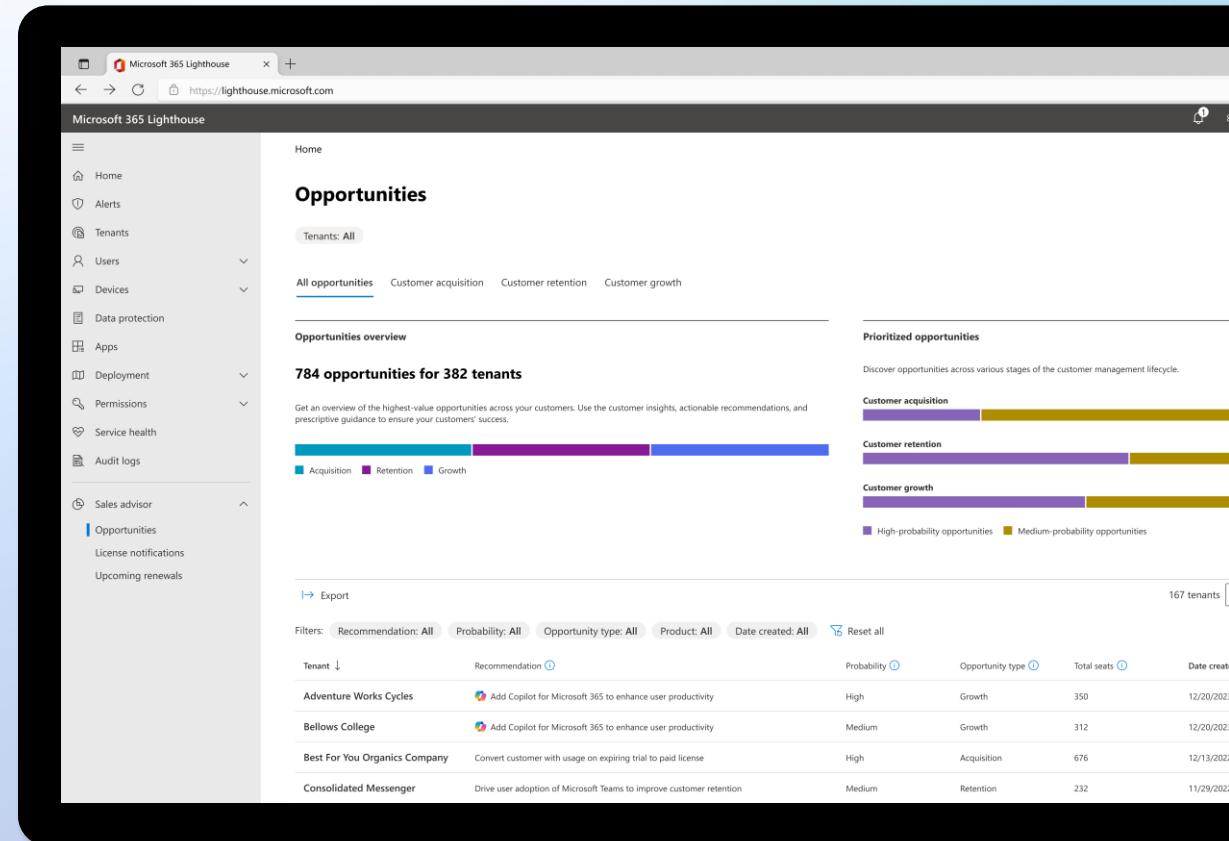
Help your customers get AI-ready to unlock Copilot's full potential for their organization

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

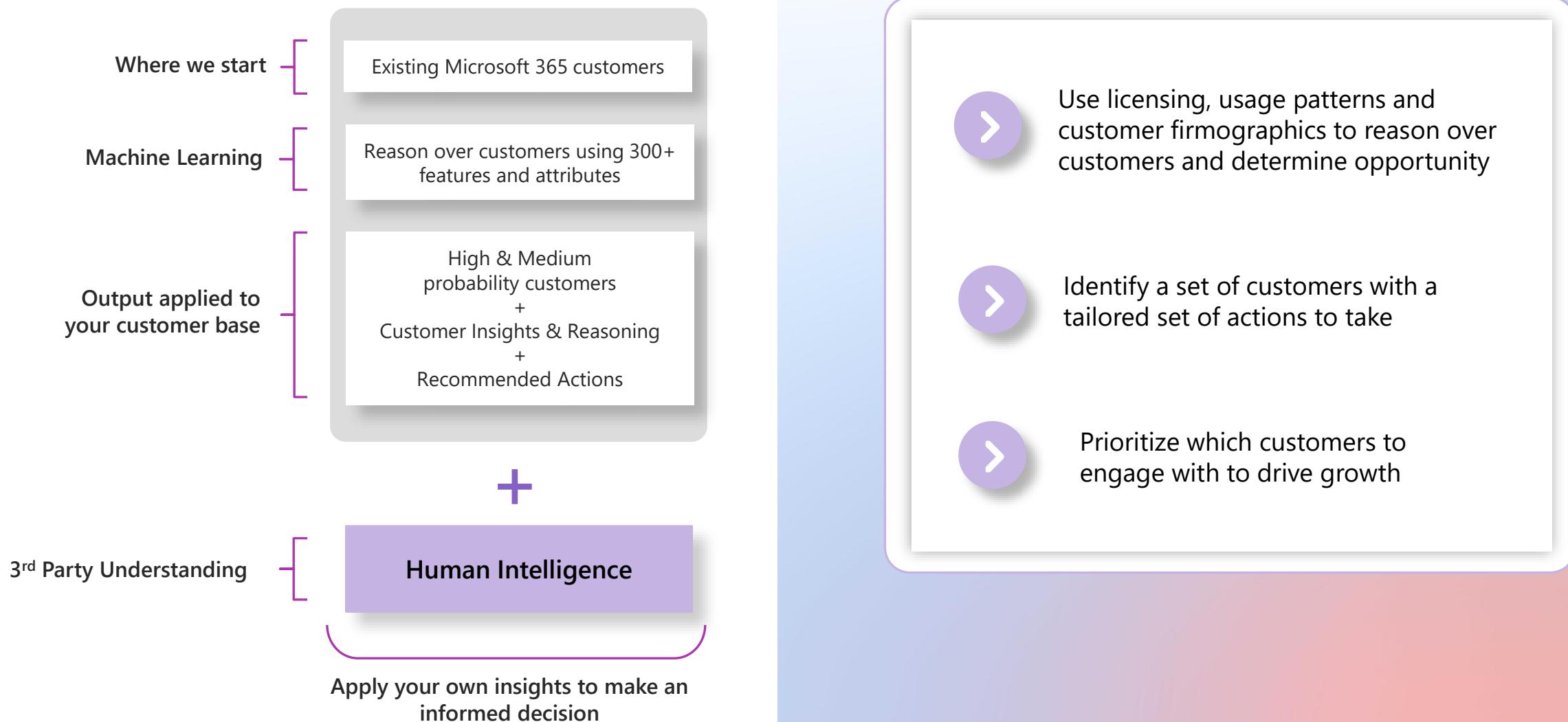
**Optimize customer engagement** with best practice guidance and marketing content



The screenshot shows the Microsoft 365 Lighthouse interface. On the left, there's 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 text says: 'Get an overview of the highest-value opportunities across your customers. Use the customer insights, actionable recommendations, and prescriptive guidance to ensure your customers' success.' To the right, there's a 'Prioritized opportunities' section with three horizontal bars: 'Customer acquisition' (mostly yellow), 'Customer retention' (mostly purple), and 'Customer growth' (mostly purple). At the bottom, there's a table of opportunities with columns for Tenant, Recommendation, Probability, Opportunity type, Total seats, and Date created. The table lists four entries: Adventure Works Cycles, Bellows College, Best For You Organics Company, and Consolidated Messenger, each with a brief description and status.

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>

# Level Up with Microsoft 365

## Copilot - Melbourne

