

Executive Summary

The Bottom Line: Copilot Free helps you think faster with general AI assistance. Microsoft 365 Copilot (Licensed) helps you work faster inside your company's data with enterprise security and compliance.

Quick Comparison

Copilot Free

\$0

For personal use & learning

- ✓ Web, Edge sidebar, mobile app access
- ✓ AI chat for drafting & ideation
- ✓ Public web summaries
- ✓ Brainstorming & idea generation
- ✗ No access to company data
- ✗ Not embedded in Microsoft 365 apps
- ✗ Manual copy-paste workflows

Microsoft 365 Copilot

~\$30

per user/month

- ✓ Integrated into Word, Excel, Outlook, Teams, PowerPoint
- ✓ Organization context via Microsoft Graph (permissions-based)
- ✓ Enterprise-grade security & compliance controls (tenant-configured)
- ✓ Excel formulas, Word drafting, Teams summaries (feature availability varies)
- ✓ Respects existing file/mailbox permissions
- ✓ Works with your files, emails, calendars, meetings

Feature-by-Feature Comparison

Feature	Copilot Free	Microsoft 365 Copilot (Licensed)
Access Location	Web, Edge sidebar, mobile app	Integrated into Word, Excel, Outlook, Teams, PowerPoint
AI Experience	General-purpose chat & drafting	In-app assistance + org context (permissions-based)
Image Generation	Limited / plan-dependent	Expanded / plan-dependent
Company Data Access	✗ No	✓ Microsoft Graph (permissions-based)
Security & Compliance	Basic	Enterprise controls (tenant-configured)
Workflow Automation	Limited (manual copy-paste)	In-app productivity actions & prompts
Excel Analysis	Basic public info only	Full analysis of your spreadsheets (permissions-based)
Email Drafting	Generic drafts only	Contextual drafting using mailbox/calendar (permissions-based)
Teams Meeting Summaries	✗ No	✓ Recaps / action items (feature availability varies)
Best For	Casual use, personal learning, public web research	Business workflows, productivity at scale with org data

Maximizing Copilot Free: Role-Specific Use Cases

No-Risk Scenarios for Free Copilot: Ideal for anything NOT involving company data—training, onboarding, upskilling, drafting public-facing content, and learning new skills.

Department	Best Free Copilot Use Cases
Marketing	Brainstorm campaign ideas, draft social posts, summarize public competitor news, rewrite content for clarity, generate presentation images
HR / People	Draft job descriptions, learn about industry trends, rewrite policy drafts, practice interview questions, research benefits benchmarks
Sales & Leasing	Draft generic outreach emails, research market trends, summarize public listings, practice pitch scripts, learn negotiation techniques
IT / BI	Learn Excel, SQL, DAX, Power BI concepts, get code snippets, brainstorm automation ideas, troubleshoot generic errors, learn new frameworks
Accounting & Finance	Learn new formulas, practice modeling concepts, research standards, draft presentation narratives, summarize public reports
Legal	Draft generic templates, research legal concepts, learn compliance frameworks, rewrite language for clarity (non-confidential)
Construction & Logistics	Research best practices, draft safety training materials, learn project management techniques, brainstorm process improvements
Exec / Admin	Summarize public articles, draft memos, prepare meeting agendas, rewrite communications for professionalism

Hidden Gems: What Free Copilot Can Do

Learning & Upskilling

- ▶ Master Excel, SQL, DAX, Power BI
- ▶ Learn new programming languages
- ▶ Understand complex concepts
- ▶ Practice industry skills

Creative Content

- ▶ Generate images for presentations (plan-dependent)
- ▶ Brainstorm creative ideas
- ▶ Draft social media content
- ▶ Rewrite for clarity & tone

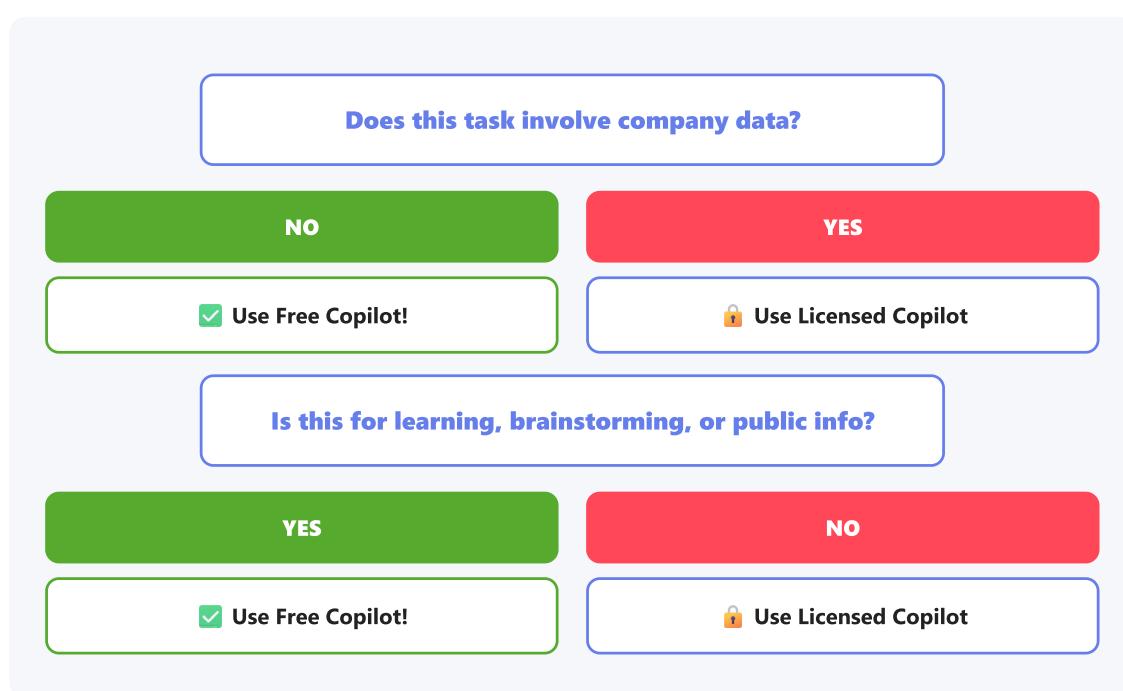
Research & Analysis

- ▶ Summarize public news & articles
- ▶ Research market trends
- ▶ Learn industry best practices
- ▶ Compare public information

Writing & Communication

- ▶ Draft professional emails
- ▶ Improve writing clarity
- ▶ Create presentation outlines
- ▶ Rewrite for different audiences

Should I Use Copilot Free? Decision Flowchart



Building Your Free Copilot Champions Program

Recommendation: Nominate one "Free Copilot Champion" per department to discover creative uses, share tips, and help colleagues get the most value at zero cost.

Champion Responsibilities:

- Test and document department-specific use cases
- Host monthly "Tips & Tricks" sessions
- Collect feedback on when teams need Licensed features
- Share best practices across the organization

How Licensed Copilot Benefits Each Department

Accounting & Finance

- ▶ Automate financial reporting & forecasting
- ▶ Detect spending anomalies
- ▶ Generate dashboards & narratives
- ▶ Speed up audit prep

HR / People Division

- ▶ Draft job descriptions & comms
- ▶ Accelerate onboarding content
- ▶ Summarize policy updates
- ▶ Standardize review templates

Marketing

- ▶ Create campaign copy & social posts
- ▶ Analyze performance trends
- ▶ Summarize brainstorms
- ▶ Draft briefs and decks faster

Sales & Leasing

- ▶ Draft proposals and follow-ups
- ▶ Summarize account history (permissions-based)
- ▶ Prioritize work from meetings
- ▶ Generate sales narratives

Construction & Logistics

- ▶ Create project timelines
- ▶ Summarize site meeting notes
- ▶ Standardize checklists
- ▶ Improve handoffs & reporting

Legal

- ▶ Summarize long documents
- ▶ Extract key clauses (permissions-based)
- ▶ Draft internal templates
- ▶ Speed up review cycles

Development / IT

- ▶ Draft documentation faster
- ▶ Summarize tickets and incidents
- ▶ Accelerate knowledge sharing
- ▶ Standardize runbooks

Executive (CFO/CIO)

- ▶ Summaries across meetings and docs (permissions-based)
- ▶ Faster reporting narratives
- ▶ Decision-ready briefings
- ▶ Governance-aligned usage

Bonus: Additional Capabilities with Licensed Copilot

With Microsoft 365 Copilot, you also unlock access to advanced tooling (additional licensing may apply):

Copilot Studio (Agents)

Build custom agents for specific tasks (e.g., lease abstraction, invoice Q&A). Requires tenant billing/capacity or pay-as-you-go depending on setup.

Power Automate

Orchestrate workflows across apps—approvals, notifications, and data sync. Can integrate with agent endpoints/APIs where appropriate.

Which One Should You Choose?

Choose Copilot Free if:

You want basic AI assistance for personal learning, brainstorming, or public info. You don't need to access company files or sensitive business data.

Choose Microsoft 365 Copilot (Licensed) if:

Your work involves company data, workflows, or reporting. You need AI embedded in Word, Excel, Outlook, and Teams, with enterprise controls.

Recommended Rollout Approach

Phase 1: Free for Everyone → Train organization on Copilot; build AI literacy at zero cost

Phase 2: Licensed Pilot (10–20%) → Finance, BI/IT, Executives, power users in Leasing/Marketing

Phase 3: Expand where ROI is proven → Add advanced tooling as needed; scale licenses intentionally

The Key Decision:

Does your work involve company data, workflows, or business-critical tasks?

YES → **Microsoft 365 Copilot (Licensed)**

NO → **Copilot Free is sufficient**