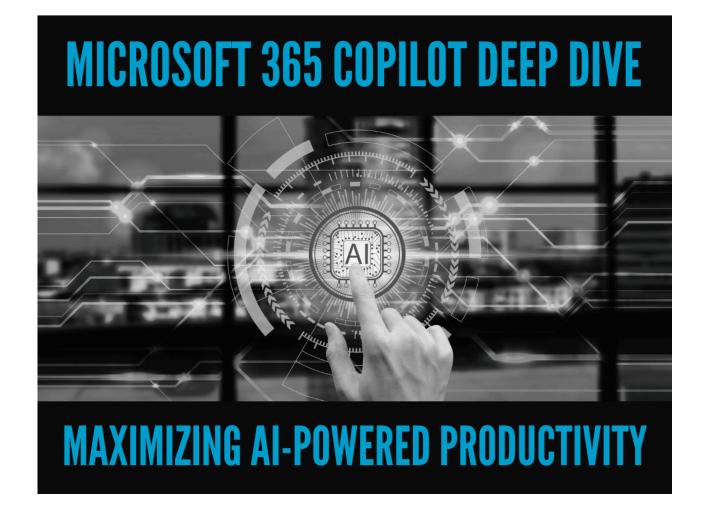


# Microsoft 365 Copilot Deep Dive Workshop

Maximizing AI-Powered Productivity | June 12, 2025







# **Housekeeping Items**



- Let's keep it interactive!

  Please use the chat to ask questions we will respond live or in the chat as appropriate.
- We'd love to hear from you!

  Please participate in the polls when they launch throughout the session.

### **Meet Your Presenters**





Hayley Meese-Cherry
Practice Manager
Organizational Change Management



Stephanie Dykes
OCM Consultant
Organizational Change Management



**Don Booth**OCM Consultant
Organizational Change Management



Tom Papahronis

CIO Advisor
Strategic Advisory Services

### What We Do



#### Microsoft 365

- Exchange Online
- OneDrive
- Microsoft Teams Phone,
   Meetings, Rooms
- Endpoint Management
- SharePoint
- Microsoft 365 Copilot

#### Microsoft Azure

- Azure Migrations
- Entra ID
- Azure Storage
- Azure VMware Solution
   Nutanix Cloud Clusters on
   Azure

# Modern Datacenter Architecture

- Nutanix
- Cohesity
- Cisco
- VMware
- Pure Storage

#### **Security & Compliance**

- Microsoft 365 Security
- Microsoft Intune
- Microsoft Purview
- Azure Security
- Arctic Wolf
- ThreatDefender MXDR

### **Virtual Desktops**

- Azure Virtual Desktop
- Citrix
- Horizon

#### Data, AI, Apps & Automation

- Azure
- Azure Open Al
- Custom Agents
- Microsoft Power Platform
- Microsoft Fabric

#### **Consulting Services**

- Organizational Change Management
- Strategic Advisory Services
- Licensing Optimization Workshop
- Incident Response Tabletop Exercise

#### **Cloud Data Protection**

- Rubrik
- Cohesity

#### **Disaster Recovery**

- Azure Site Recovery
- Nutanix
- Zerto

#### **Networking**

- Cisco
- Meraki

Managed Services to Support All Solutions

# Agenda



- Welcome and Introduction
- Introduction to Microsoft 365 Copilot
- Prompting, Prompting! Strategies for Success
- Demonstrations: M365 Copilot in Action
- Security, Compliance and Readiness
- Change Management, Training, and Adoption
- Closing Remarks

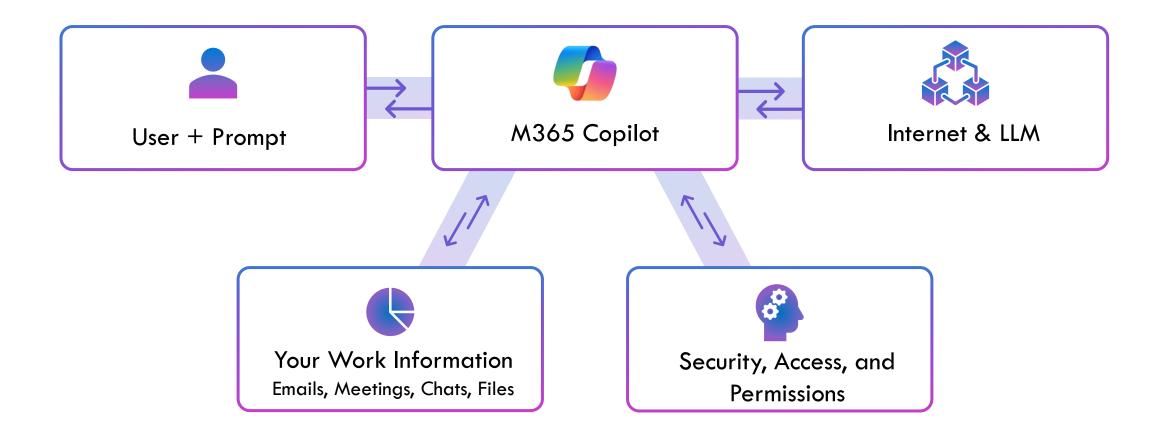
# Microsoft 365 Copilot

# **Introduction to Microsoft 365 Copilot**



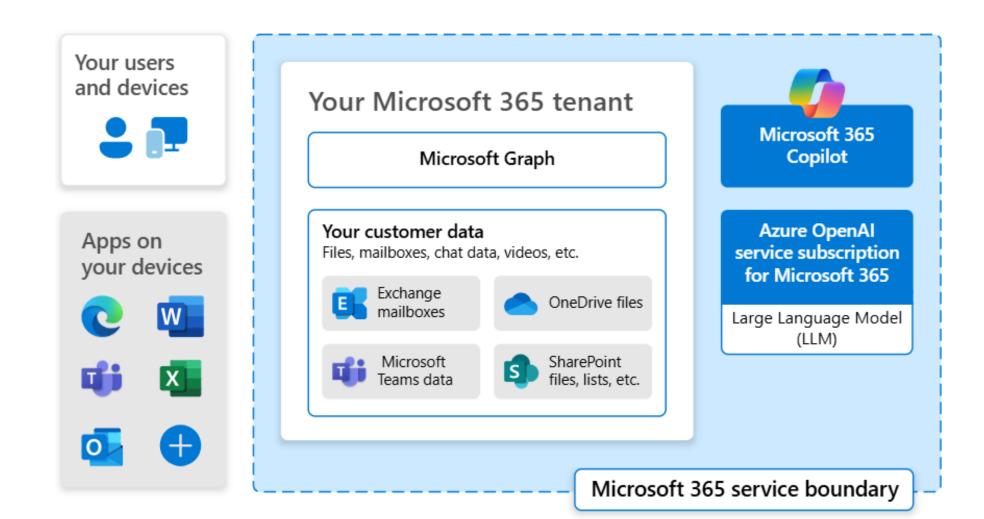
# **How M365 Copilot Works**





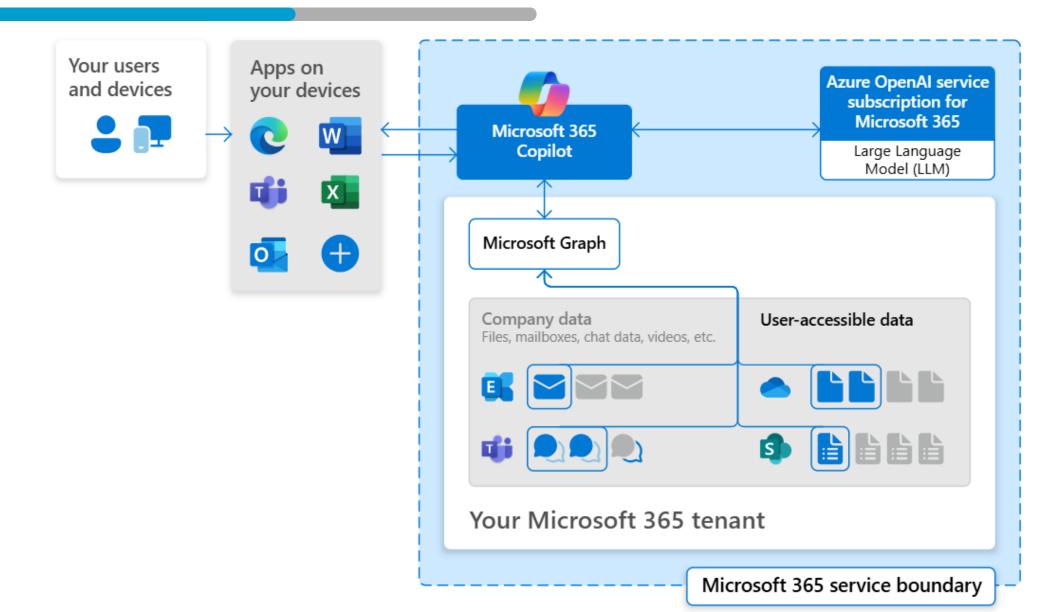
# **How M365 Copilot Works**





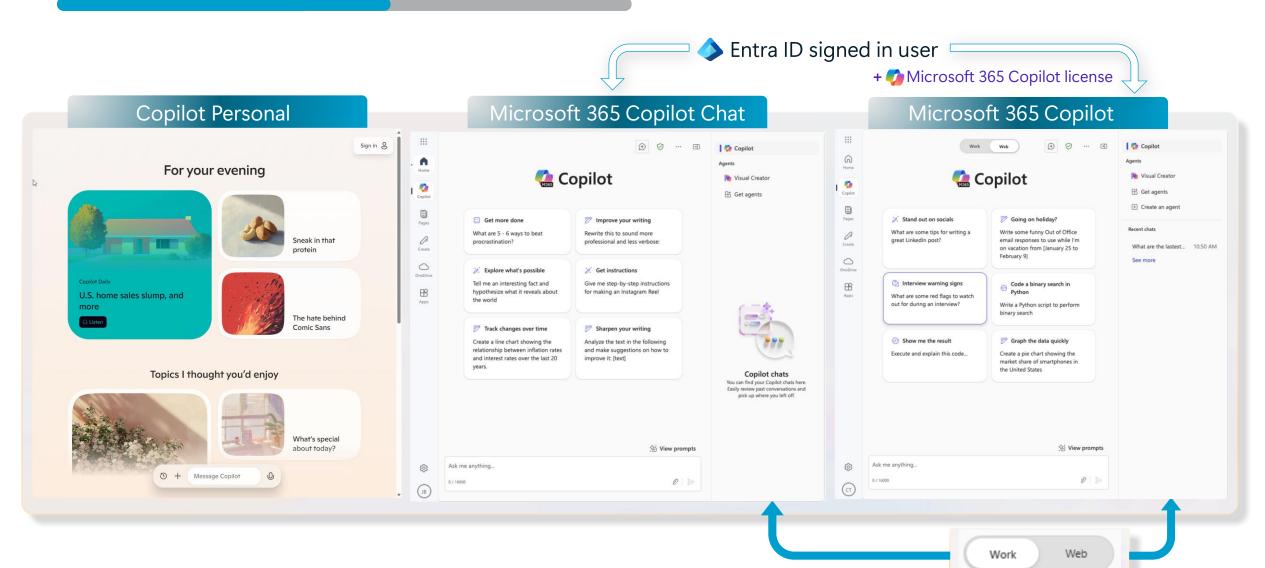
# **How M365 Copilot Works**





# **Different Microsoft Copilots**





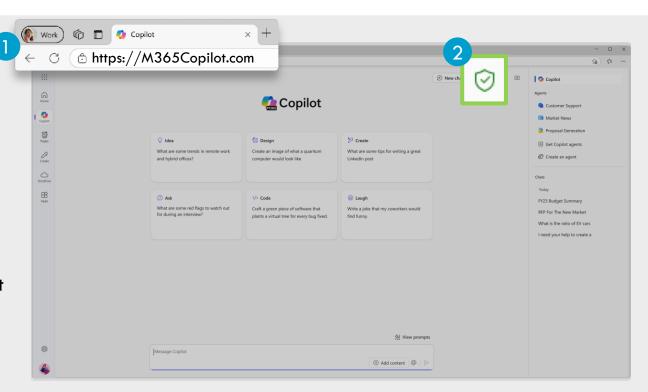
# Sign in with Your Work Account



1 Navigate to M365Copilot.com on your preferred browser on your device to get to Copilot Chat.

2 Ensure you're signed in with your work account.

You will know you are successfully signed in to Copilot Chat when you see the green shield icon next to "New chat" and the Microsoft 365 Copilot icon at the top of the page.



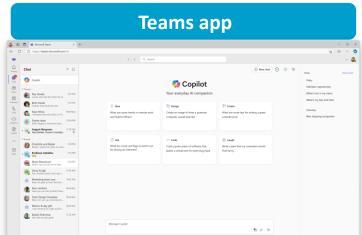


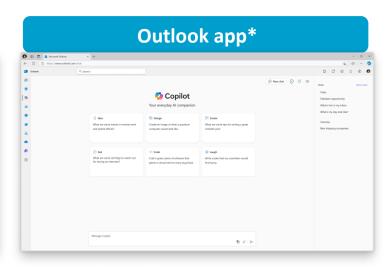
If you are not signed in with your work account, Enterprise Data Protection does not apply.

# Access Copilot Chat from Where You're Working





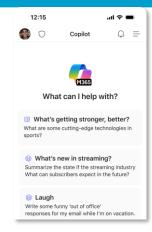




# Microsoft 365 Copilot | C



### Microsoft 365 Copilot mobile app

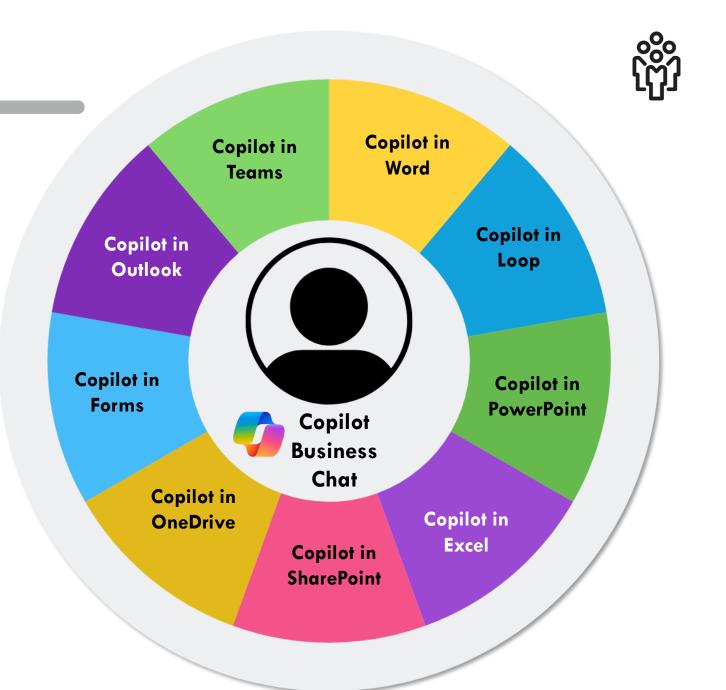


Where Does Copilot Work?

Copilot appears in each of your Microsoft programs and specializes in assisting you with the tasks of that application.

Copilot Business Chat is the unsung hero of the Copilot world. Think of it as a jack of all trades:

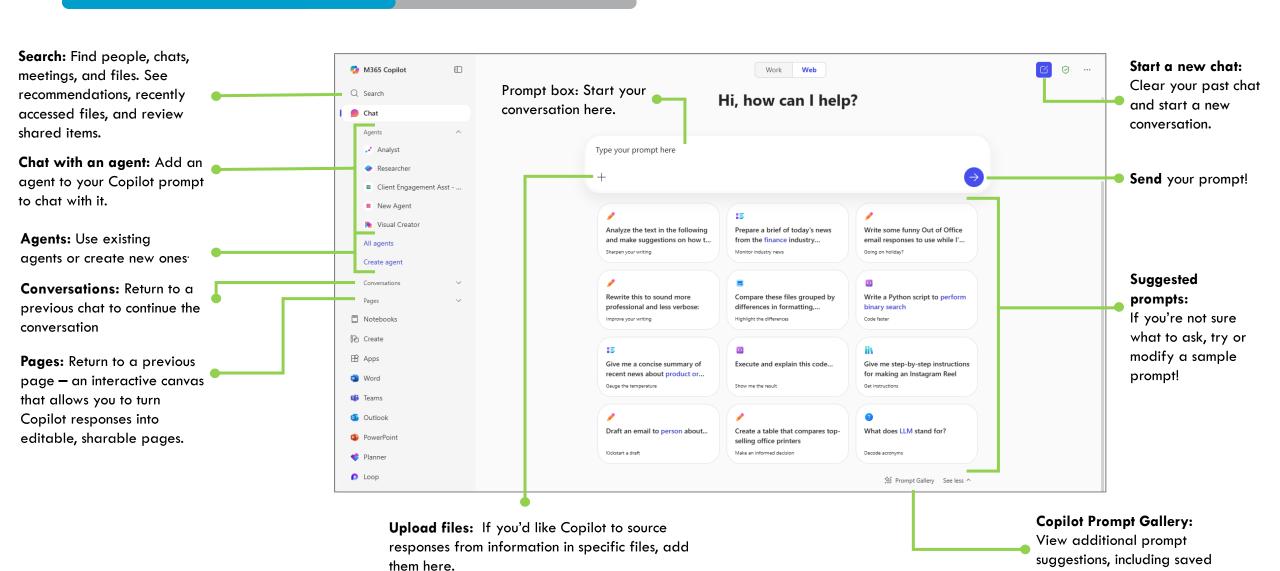
- Goes beyond questions and answers.
- Combs your entire universe of work data: Emails, meetings, chats, documents, along with the web.
- Generates content and ideas, which you can then take into individual applications and create new presentations, new documents or fine tune further.



## **Get to Know Copilot Chat**



prompts.



## What are Agents?



# Agents uses AI to automate and execute business processes, working alongside or on behalf of a person, team or organization



1

# Prompting, Prompting, Prompting!

**Strategies for Success** 



# What is a Prompt?



A prompt is simply the instruction or question you give to Copilot to get the result you want. Prompts are how you have a conversation with Copilot.

Think of it like giving directions to a helpful assistant—you're telling it what you need, how you want it, and sometimes even what to include or avoid.

Use plain but clear language and provide context like you would with an assistant.

#### Goal

What do you want from Copilot?

"I want a list of 3-5 bullet points to prepare me..."

#### Context

Why do you need it and who is involved?

"...for an upcoming meeting with [client], focusing on their current state and what they're looking to achieve."

### **Expectations**

How should Copilot respond to best fulfill your request?

"Respond with a tone that is friendly but authoritative..."

#### Source

What information or samples do you want Copilot to use?

"... and focus on email and Teams chats with [people] over the last two weeks.

Start with an action verb	Be specific about what you want	Add context if needed	Use natural language
Examples: "Summarize," "Draft,"  "Analyze," "Create," "Compare,"  "Explain"	Instead of: "Summarize this"  Try: "Summarize this email thread into  3 bullet points for a project update."	Mention the audience, tone, format, or purpose.	You don't need to be technical—just be clear.

+

# **What Makes an Effective Prompt?**



### Less Effective

- × Vague
- × Just a few words
- × No context on preferred output

**Example:** Summarize news about [company name].

The recap may be more vague than desired, or in a format that you were not seeking.

### **More Effective**

- ✓ Specific and detailed
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

**Example:** I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.

# **Examples of Prompts**



Category	Basic Prompt	Detailed Prompt	
Information Retrieval	Can you provide a summary of the latest sales data?	Can you provide a summary of the latest sales data for Q3 2024, including total revenue, top-performing products, and regional sales breakdown?	
Action Items	What are the action items from the last team meeting?	What are the action items from the marketing team meeting on October 15th, including deadlines and assigned team members?	
Decision Tracking	What decisions were made regarding the new product launch?	What decisions were made regarding the new product launch during the strategy meeting on October 10th, specifically about the launch date, marketing strategy, and budget allocation?	
Feedback and Suggestions	Were there any suggestions for improving the customer service process?	Were there any suggestions for improving the customer service process discussed in the customer feedback review meeting on October 12th, particularly focusing on response times and training programs?	
Follow-Up	Is there a follow-up meeting scheduled for the project review?	Is there a follow-up meeting scheduled for the Q4 project review, including the date, time, and agenda items that need to be addressed?	

### **Prompt Writing - Tips**

Get the most out of Copilot and avoid common pitfalls by learning what to do and what not to do when writing prompts.



### Do's

### Be clear and specific.

Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.

### Keep it conversational.

Give feedback to Copilot based on the quality of its responses to help the Al learn and match your preferences.

### • Give examples.

Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.

#### Ask for feedback.

Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.

### Check for accuracy.

Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.

#### Provide details.

Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.

### Be polite.

Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the Al's responsiveness and performance.

### Write legibly.

Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the Al produce better quality text and responses.

### Don'ts

### Be vague.

When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.

# Assume Copilot knows everything.

While it is powerful, Copilot relies on the information you provide. Ensure your prompts include the relevant details to get the best results.

# Use slang, jargon, or informal language.

This may cause Copilot to give lowquality, inappropriate or unprofessional responses.

### Overload the prompt.

If you want Copilot to take several actions or fulfill several requests, break it down into separate prompts. First draft the email, then find the latest report, then schedule the meeting.

# Interrupt or change topics abruptly.

This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

# Forget to review the output.

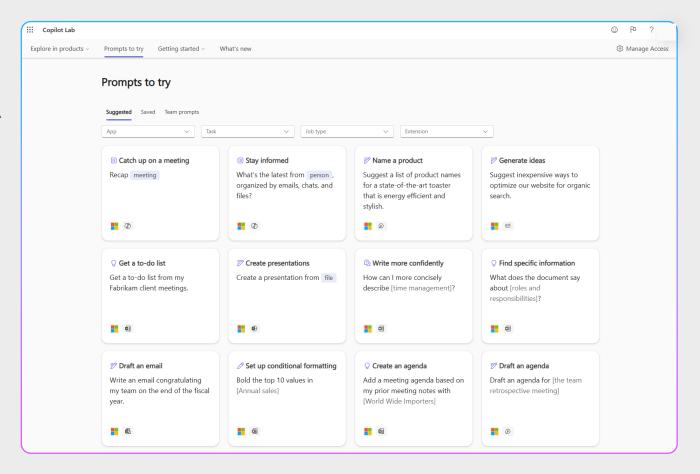
Always review and edit the content to ensure it meets your needs and is accurate.

## **Discover and Share Copilot Prompts**



Copilot Prompt Gallery (formerly known as Copilot Lab) helps you find prompting inspiration so you can take greater advantage of Copilot in your daily work.

- Explore the curated selection of Copilot prompts
- ✓ Save your favorite prompts
- Share your favorite prompts with colleagues
- ✓ Find prompting inspiration from others



# **Writing Effective Prompts – Key Takeaways**



- Copilot is amazing, but it's intentionally called Copilot, not Autopilot. It can't do any of its work without you.
- Have realistic expectations!
  - With effective prompts, Copilot can get you well over halfway there, but your expertise, talent, creativity, and personal touch will carry it from there.
  - Don't expect Copilot to take you across the finish line.
- If you don't include details, background, specifics, and expectations in your prompts, Copilot has to guess.
- The most critical piece to getting the most out of M365 Copilot is your prompting **Practice, Practice!**



# See M365 Copilot in Action



## **Demonstration**



### Showcasing:

- Copilot Chat
- Microsoft Teams Meeting
- Outlook
- Word
- PowerPoint
- Excel

# **Security, Compliance, and Readiness**



### **Purview for Microsoft 365 - Overview**



# Tenant-wide features provide policy-driven content protection, governance, and compliance controls across all your data.

- > Data Classification and Search
- ➤ Information Protection
- > Data Lifecycle Management
- Data Loss Prevention
- ➤ Compliance Manager
- ➤ Insider Risk Management (OE5)

- ➤ Application Governance (OE5)
- **→** Communication Compliance (OE5)
- ➤ Information Barriers (OE5)
- Discovery & Response
- Data Security Posture Mgt (DSPM for AI)
- Privacy Management (Add-on)

### **Prepare Your Data**



### In SharePoint:

- Review SharePoint Permissions and Teams Memberships.
- > Use SharePoint Data Access Governance reports to identify overshared data so your data owners can right-size access.

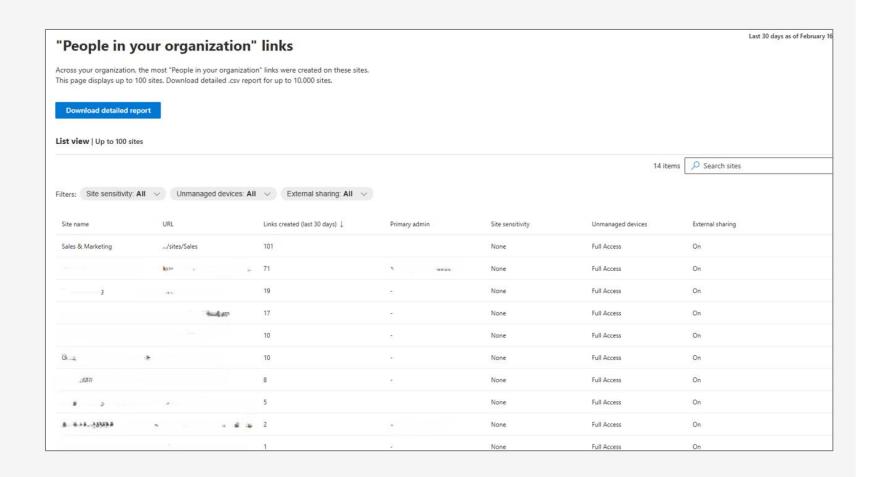
### In Purview:

- > Remove stale or unneeded data with Data Lifecycle Management
- Label sensitive files with Information Protection
- > Set up DLP, Insider Risk, and Communication Compliance policies using DSPM for Al
- Deploy the Purview browser extension

## Remediate SharePoint and Teams Oversharing



Use the **Data Access Governance** reporting in SharePoint to identify overshared files. Ask data owners to remediate.



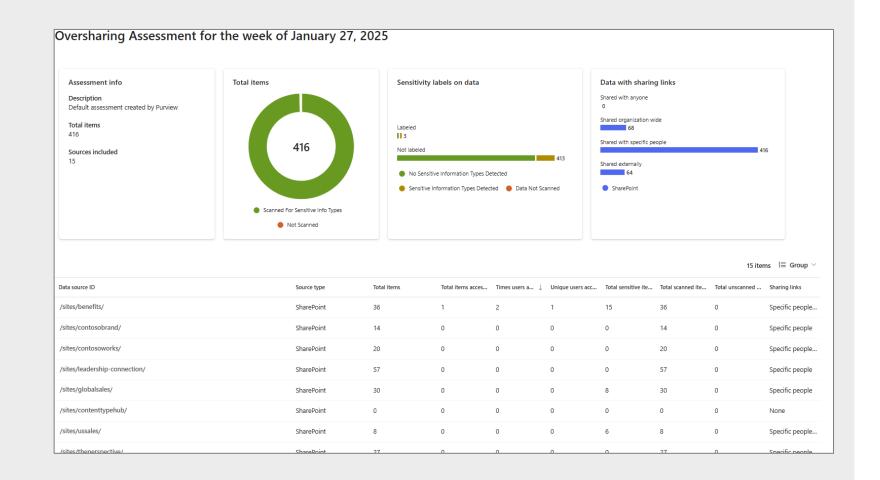
# **DSPM for AI: Oversharing Assessments**



Overview of sensitivity and sharing of the data in your top 100 SharePoint sites.

Discover where overshared data exists so you can remediate.

SharePoint Advanced
Management offers
additional reporting and
overshare remediation
options.



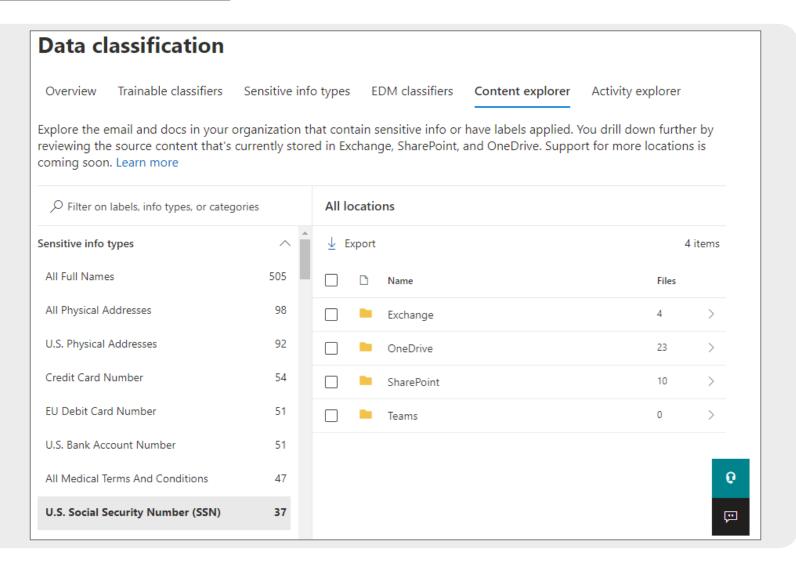
# **Purview Data Classification & Content Explorer**



Use Content Explorer and Content Searches to identify where your sensitive data is and ensure it is in the appropriate and protected locations. Remove or relocate confidential data that should not be in commonly accessible areas.

provide automated data discovery and classification.
Custom classifiers can easily be added.

Included data classifiers



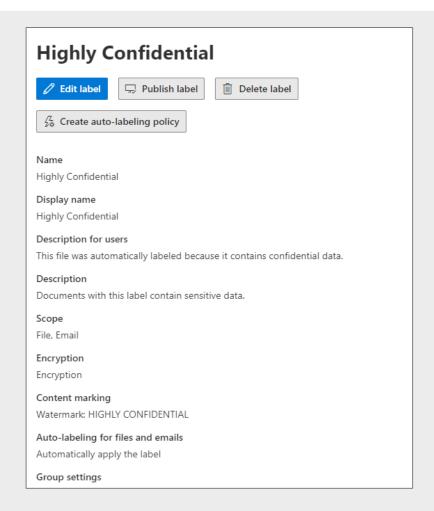
### **Purview Information Protection**



**Sensitivity Labeling** can provide encryption and access controls beyond traditional access control lists or Teams membership.

If an employee is not allowed to see the data, Copilot won't show it. Consider **auto-labeling policies** to find and protect sensitive data automatically.

Microsoft 365 Groups and Teams can also be labeled to granularly restrict membership and content sharing.

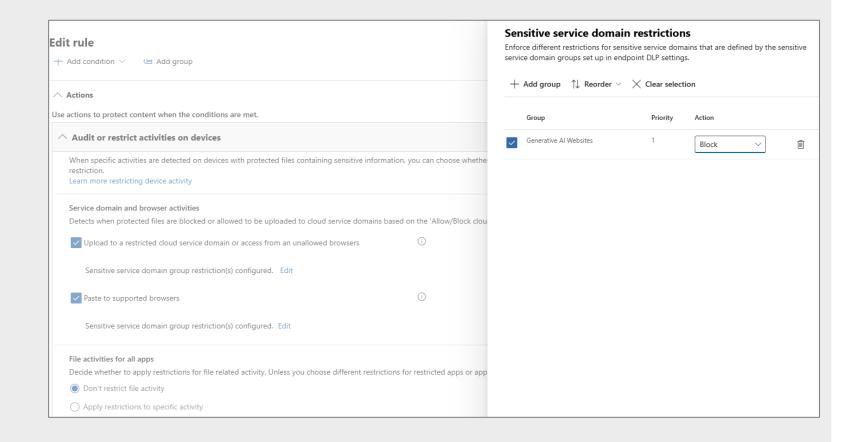


### **Purview Data Loss Prevention**



Access can be restricted to specific external or internal recipients, including workflow approvals and overrides.

Endpoint DLP policies can enforce controls on sensitive data such as uploading sensitive prompts to Copilot or other Al tools.



### **Purview Data Loss Prevention**



Use DLP policies to detect or prevent sensitive data from being used in Copilot prompts depending on the users Insider Risk level (determined by past behavior).

### Info to protect

This policy will protect content that matches these conditions. Review them and make any necessary changes. For example, you can edit the conditions to detect additional sensitive info or content that has specific sensitivity or retention labels applied.

Content contains any of these sensitive info types:

Credit Card Number

U.S. Bank Account Number

U.S. Individual Taxpayer Identification Number (ITIN)

U.S. Social Security Number (SSN)

U.S. Physical Addresses

And

Content contains all of these sensitive info types:

All Full Name

Edit

#### ∧ Insider risk level for Adaptive Protection is

Insider risk levels, defined in Adaptive Protection, are a measure of risk determined by data-related user activities in Insider Risk Management. Adaptive Protection continuously evaluates and updates users' insider risk levels, allowing this policy to dynamically apply protection based on the risk level you specify. Learn more about insider risk levels

Elevated risk level



# Purview Data Lifecycle Management – Files & Email



Retention Policies and Labels can remove stale, out of date, or sensitive data that is no longer needed. This reduces the data set that Al will have access to and gives the organization less to secure and manage overall.

Consider auto-labeling or library-wide policies to find and identify stale data automatically.

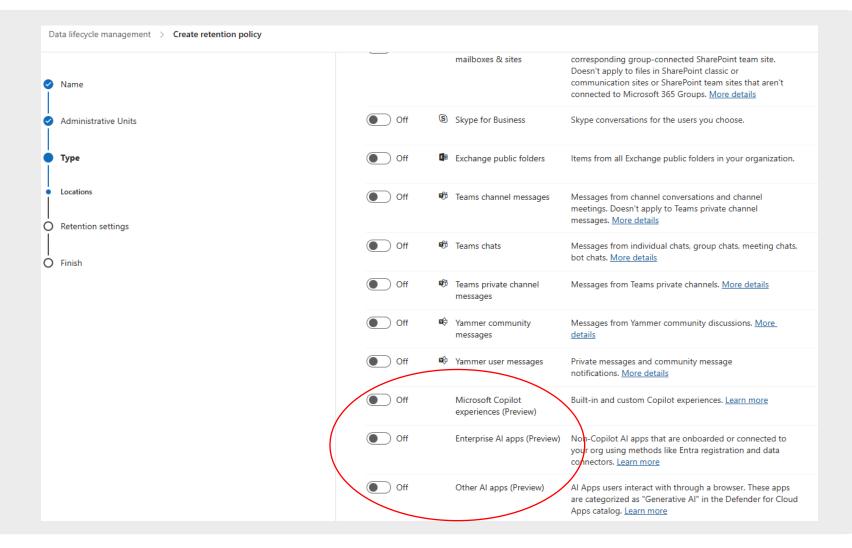
Specific regulatory and legal record compliance rulesets can be created based on labels and policies.

_	oth
•	Retain items for a specific period Items will be retained for the period you choose.
	Retain items for a specific period
	7 years V
	Start the retention period based on
	When items were created $\vee$
	At the end of the retention period
	Delete items automatically
	On nothing
0	Retain items forever Items will be retained forever, even if users delete them.
0	Only delete items when they reach a certain age Items won't be retained, but when they reach the age you choose, we'll delete them from where they're stored.

# Purview Data Lifecycle Management – Copilot & Al



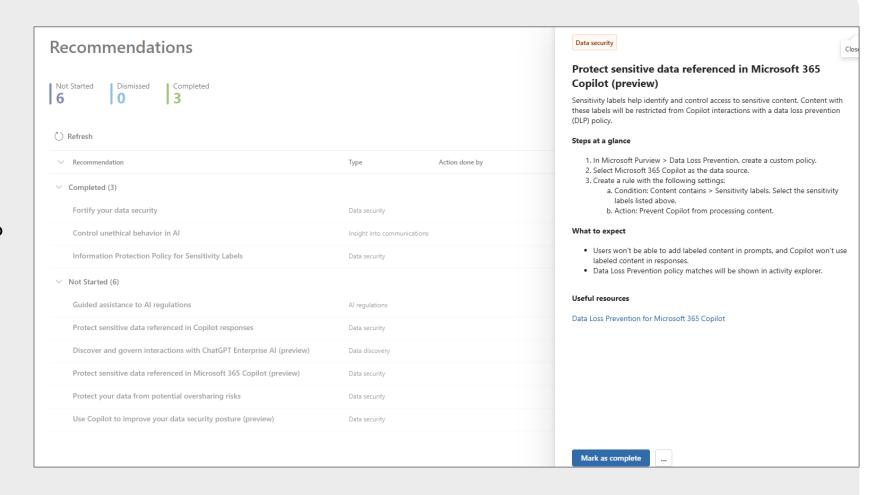
Copilot interactions and Teams chats can now be retained or deleted with a separate retention policy.



### **DSPM for AI: Recommendations**



Best practice recommendations and instructions are provided to configure Purview policies to protect data related to Al usage.



# **DSPM for AI: Policy Summary**



Presents all AI-related policy recommendations and Purview policies in one place.

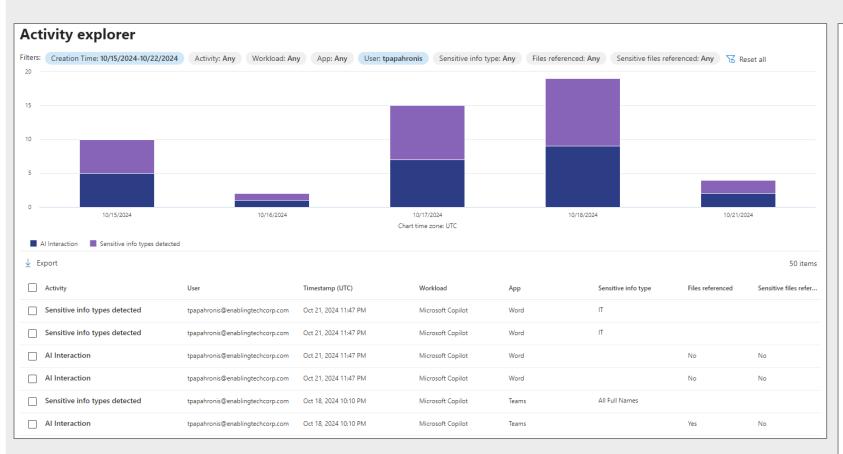
External AI usage can be monitored with the Purview browser extension.

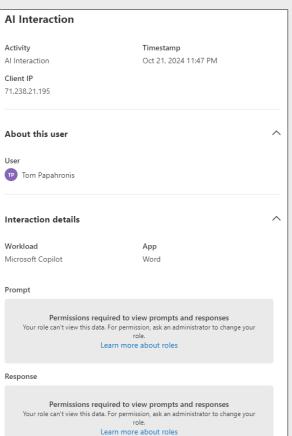
Users with Copilot licenses can be assigned to these policies.

Policies				
DSPM for Al policies use Microsoft Purview solutions to discover and safeguard Al activity across your organization. Learn more about				
☼ Refresh				
∨ Name	Status	Solution		
∨ Data Loss Prevention (2)				
DSPM for AI - Block sensitive info from AI sites	Testing	Data Loss Prevention		
DSPM for Al: Detect sensitive info added to Al sites	On	Data Loss Prevention		
∨ DSPM for Al (1)				
DSPM for AI - Capture interactions for Copilot experiences	On	DSPM for AI		
✓ Insider Risk Management (3)				
DSPM for AI - Detect risky AI usage	On	Insider Risk Management		
Data leaks quick policy - 5/19/2025	On	Insider Risk Management		
DSPM for AI - Detect when users visit AI sites	On	Insider Risk Management		
∨ Communication Compliance (3)				
Insider risk SIT indicator 25-05-20T21.25.37Z	On	Communication Compliance		
Insider risk indicator 25-05-20T21.24.31Z	On	Communication Compliance		
DSPM for AI - Unethical behavior in AI apps	On	Communication Compliance		

# **DSPM for AI: Prompt Activity Explorer**





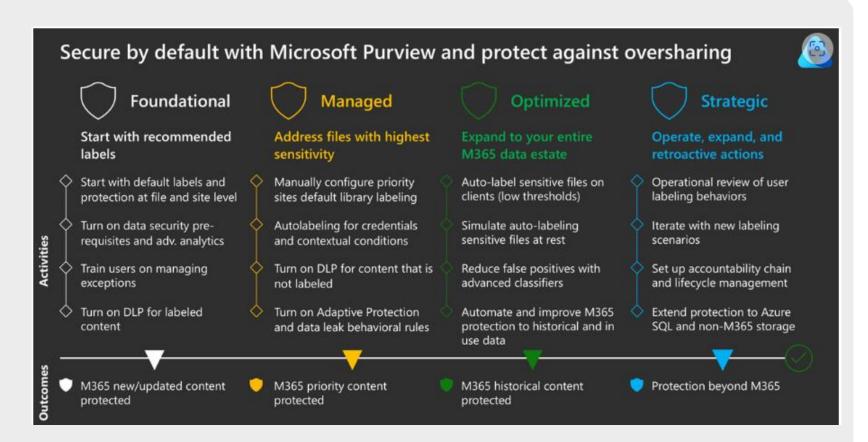


# **Purview Enablement – Secure By Default**



The Secure by Default framework provides immediate steps to take to start securing data with Purview.

Staff communication and training are the key to success.



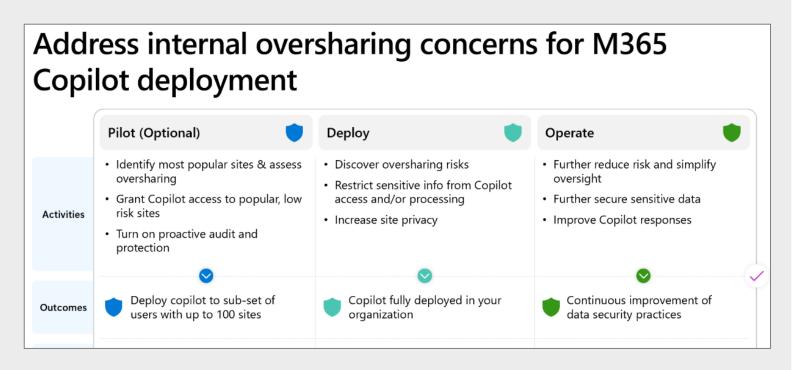
Secure by default with Microsoft Purview and protect against oversharing | Microsoft Learn

# **Purview Enablement – Copilot Blueprints**



Copilot Blueprint frameworks are available that follow a crawl/walk/run approach.

Training, training, training.....the technical deployment is the easy part.



Microsoft 365 Copilot blueprint for oversharing | Microsoft Learn

# **Change Management, Training & Adoption**

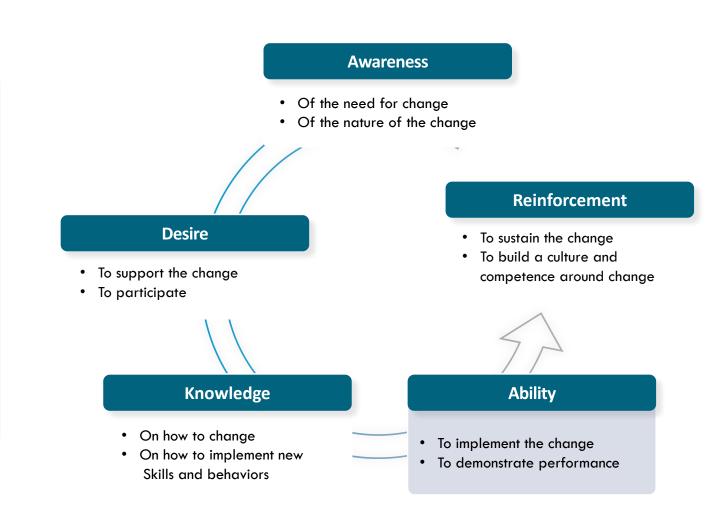


# Launching M365 Copilot in Your Organization



# **Adoption**

- The stage of change that shifts the focus and awareness from the technology itself, to the use of the technology to drive desired outcomes.
- Organizational change requires individual change.
- Organizational outcomes are the collective result of individual change.



# **Strategies for Training and Adoption**



### Initial Seat Assignments:

- Focus initial Copilot seats in areas with heavy M365 app use.
- License large numbers of a team or department to foster greater collaboration.

#### Build a User Community:

• Encourage peer learning by creating a community where users can share tips and experiences.

### Identify Champions:

 Find early adopters who can demonstrate the benefits of Copilot and spark interest among their peers.

### Identify and Prioritize Your Scenarios:

- Align with business goals.
- Maximize impact.
- Enhance user engagement.
- Facilitate targeted training.



# **Strategies for Ongoing Adoption**



### Continuous Training and Support:

- Regular workshops
- On-demand resources
- User Support Channels:
  - Help Desk
  - Peer support
- Engagement and Communication:
  - Newsletters
  - User Feedback Loop (surveys, polls, feedback sessions)
- Recognition and Incentive Programs:
  - User of the Month
  - Competitions and challenges
  - Rewards



### Join Us Next Week!







# **How To Build Structured Prompting for Agents**

Wednesday, June 18<sup>th</sup> 2-3PM EST



Kai Andrews

Practice Manager- Data, Al, Power
Platform Practice Leader

# THANK YOU

