

# Copilot for Microsoft 365 Playbook

---



CYBERSPHERE



# Table of Contents

<b>COPILOT FOR MICROSOFT 365 PLAYBOOK</b>	<b>2</b>
Era of AI _____	2
What Is Copilot for Microsoft 365? _____	3
Why Do I Need Copilot for Microsoft 365? _____	4
Getting Ready for Copilot for Microsoft 365? _____	5
Copilot for Microsoft 365 Feature Breakdown _____	6
How to Get Started _____	8

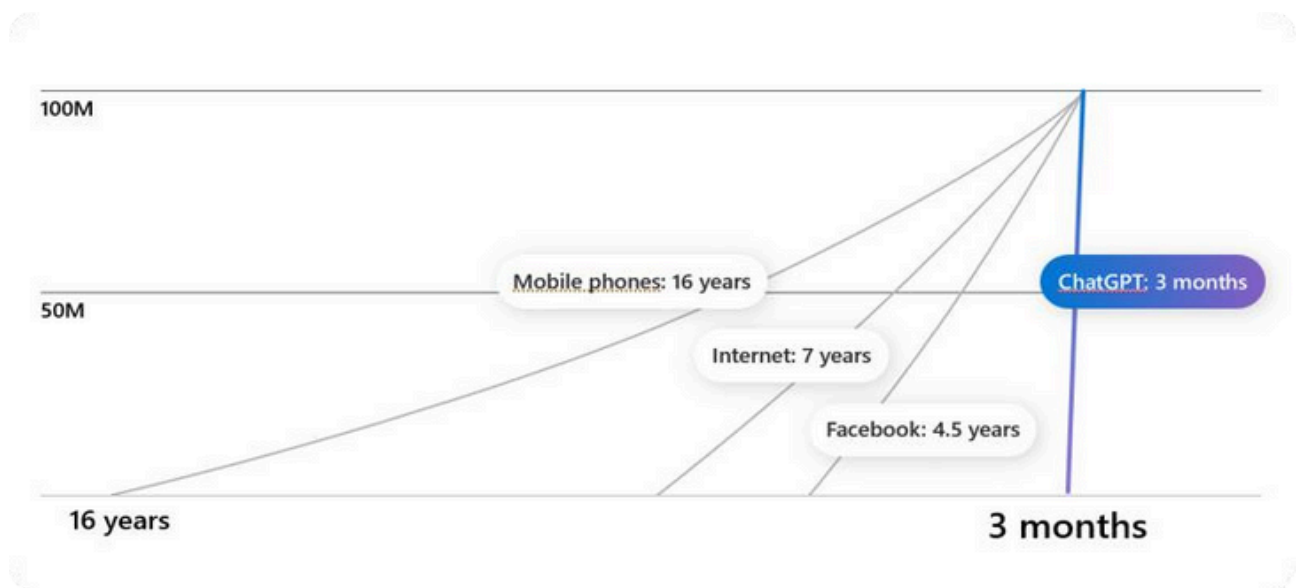


# Copilot for Microsoft 365 Playbook

## Era of AI

One of the most talked-about topics in the industry this year is Artificial Intelligence (AI). There is a lot of hype and excitement around the possibilities and benefits of AI and AI-powered software, but also a lot of confusion and uncertainty about how to get ready for AI transformation – how can organisations find the best way to begin?

Generative AI is a game-changer for the tech industry. Just 18 months ago, we could not imagine that we would be here today discussing its impact and potential. Chat GPT, a generative AI model, reached 100M users in only 3 months, while the internet took 7 years to achieve the same feat. We are witnessing a new era of AI. Therefore, every leader needs to ask themselves: How can I leverage AI to gain a competitive advantage, while protecting my employees, business, and data?



Time to reach 100M users

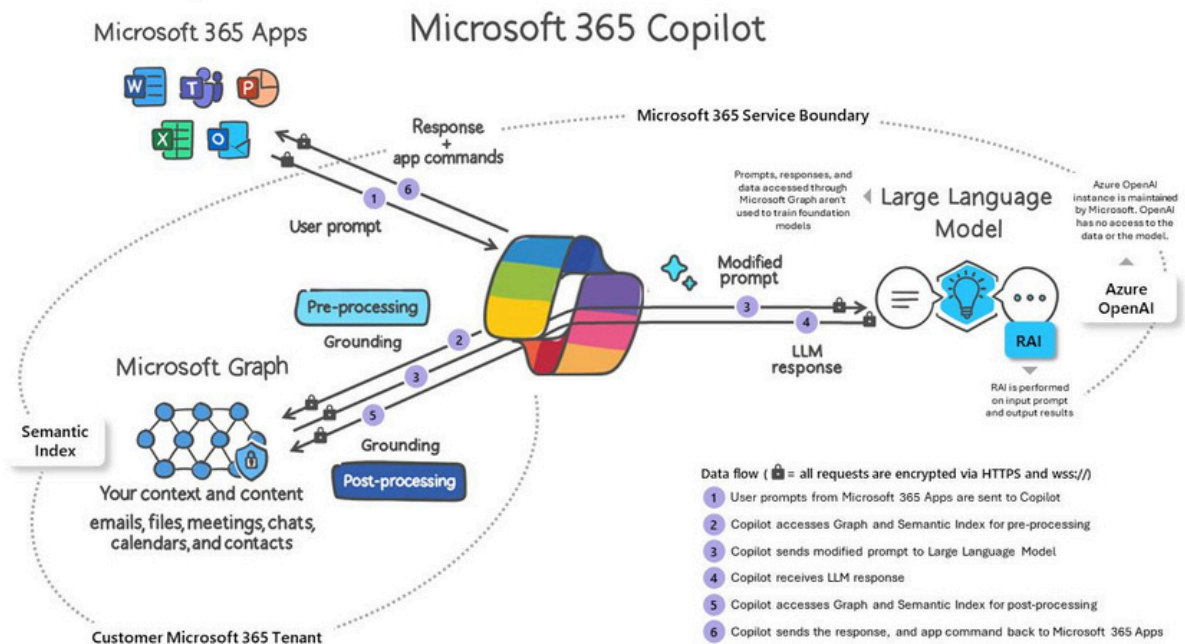
With the announcement of expanding Copilot for Microsoft 365 to businesses of all sizes. The time to prepare for the next generation of AI is now. With that in mind we've put together a guide to give you an overview of Copilot for Microsoft 365. We'll dive into the features and uses of the solution so you can make an informed decision when providing the power of AI to your customers.



# What Is Copilot for Microsoft 365?

Copilot for Microsoft 365 has been touted as "the most powerful productivity tool on the planet", but what exactly is it? Taking out all the excitement and buzz, it's a tool that leverages the power of large language models (like Chat GPT) to work with your existing Microsoft 365 data. Instead of spending time trying to dig through your SharePoint site to find and collate information on a particular topic, just ask Copilot to collate *and* summarise it for you (in a format of your choosing!). Miss a meeting? Ask Copilot to summarise it and highlight the action items assigned to you (and maybe set some tasks with reminders as well).

Think of Copilot for Microsoft 365 as **your super assistant**. It isn't here to do everything for you, and it won't know where you want it to go unless you direct it. The key word is Copilot, you are still the pilot.



How Copilot for Microsoft 365 works



# Why Do I Need Copilot for Microsoft 365?

Think of some of the most menial tasks you have to do. Things that you probably consider are a waste of your skillset, but they ultimately need to be done for other tasks to be completed. Maybe it's going through a client data folder and creating a summary, tidying up a PowerPoint presentation so all the formatting is standardised to your organisations branding, or maybe you went on leave and came back to 1,000 e-mails and don't know where to start. This is where Copilot for Microsoft 365 can help. We will go into some of these scenarios further below, but in short, Copilot for Microsoft 365 can improve your productivity by taking on some of these tasks to allow you to focus on the more difficult and more creative tasks.

**Data from the Github Copilot** preview reported some interesting data from the developers that got to use it. 88% said they were more productive, 74% said that they can focus on more satisfying work, and 77% said it helped them spend less time searching for information or examples.

Think of how much time your staff could save with an effective, personalised assistant. It might not be for everyone, but those that use it will see an improvement of their productivity, but also likely an improvement in their job satisfaction as well.

Some may ask, "why would you need Copilot for Microsoft 365 though, when other similar AI tools are available online already (some for much cheaper!)?". Which is a fair question, however there are two key points missing when you are using other tools.

Firstly (and most importantly), security. There have already been **incidents where large organisations have been accidentally leaking data, due to employees inadvertently sharing confidential information on ChatGPT**. Think of how many times this has likely happened to smaller organisations and we just don't know about it yet. There is also no way for organisations to check if ChatGPT has stored any confidential information surrounding people or organisations (which has other **legal ramifications**), and their **Privacy Policy is also questionable at best**. Copilot for Microsoft 365 is compliant with Microsoft's **existing privacy, security and compliance commitments**. It also **does not use your proprietary data outside of your organisation** to teach others, unlike public services.

Secondly, current and relevant information. Many other platforms, such as ChatGPT, only have recently started to use **up to date information in some fashion**, while still leveraging Bing Chat search functionality. For most users though, the data it can search is still out of date. More importantly, it doesn't use information from within your organisation, so it can only work with what you give it. Copilot for Microsoft 365 can use both live external data, as well as live internal data, based on **administrative controls**.





## Getting Ready for Copilot for Microsoft 365?

Integrating Copilot into your Microsoft 365 setup is a strategic decision that requires careful consideration, especially regarding data security and permissions. Here are key points to consider:

- **Access and Permissions:** Copilot will have the same access level as the assigned user across your entire Microsoft 365 tenant. It's vital to ensure that these permissions align with your data security policies.
- **Data Security in OneDrive and SharePoint:** Assess whether your OneDrive and SharePoint data is securely managed and accessible only to appropriate staff. Avoid the common pitfall of assuming 'invisibility' equals security.
- **Comprehensive Integration Strategy:** Beyond just adding a new tool, integrating Copilot should be part of a broader IT strategy that enhances efficiency without compromising security.

If you're poised to upgrade and want to ensure that your transition to Copilot is smooth, secure, and strategically sound, Red IT is here to help. Contact us for expert guidance and support.

We'll work with you to integrate Copilot into your Microsoft 365 setup effectively, ensuring that your business leverages the full potential of this technology while maintaining stringent data security standards.



# Copilot for Microsoft 365 Feature Breakdown

FEATURE	DESCRIPTION
<b><u>Copilot in Word</u></b>	<ul style="list-style-type: none"><li>• Write faster and better with AI-powered suggestions.</li><li>• Summarise, comprehend, refine, and elevate your documents.</li><li>• Visualise and transform text into a table.</li><li>• Add onto existing prompts, draft a document by referencing up to 3 documents and discover information about your document.</li></ul>
<b><u>Copilot in PowerPoint</u></b>	<ul style="list-style-type: none"><li>• Create stunning presentations with AI-powered storytelling.</li><li>• Transform written documents into decks with speaker notes and sources.</li><li>• Start a new presentation from a prompt or outline.</li><li>• Condense lengthy presentations with one click.</li><li>• Use natural language commands to adjust layouts, reformat text, and time animations.</li></ul>
<b><u>Copilot in Excel</u></b>	<ul style="list-style-type: none"><li>• Analyse and explore your data with AI-powered insights.</li><li>• Explore and understand your data better.</li><li>• Analyse and visualise your data.</li><li>• Highlight, filter, and sort your data.</li><li>• Identify individuals for follow-ups, and schedule the next check-in.</li></ul>
<b><u>Copilot in Outlook</u></b>	<ul style="list-style-type: none"><li>• Recap conversations, organise key discussion points, and summarise key actions.</li><li>• Get answers to specific questions, catch up on anything you've missed.</li><li>• Create meeting agendas based on chat history.</li><li>• Identify individuals for follow-ups, and schedule the next check-in.</li></ul>
<b><u>Copilot in Teams</u></b>	<ul style="list-style-type: none"><li>• Recap conversations, organise key discussion points, and summarise key actions.</li><li>• Get answers to specific questions, catch up on anything you've missed.</li><li>• Create meeting agendas based on chat history.</li><li>• Identify individuals for follow-ups, and schedule the next check-in.</li></ul>



<b>Copilot in Loop</b>	<ul style="list-style-type: none"><li>• Co-create prompts with your teammates.</li><li>• Generate tables to organise team projects.</li><li>• Catch up with your teammates' progress.</li><li>• Summarise page content for quick reference.</li><li>• Generate a recap for handoff to another teammate.</li></ul>
<b><u>Copilot Whiteboard</u></b>	<ul style="list-style-type: none"><li>• Generate ideas based on your topic or goal.</li><li>• Categorise ideas into themes or groups.</li><li>• Summarise ideas into key points or insights.</li></ul>
<b>Copilot OneNote</b>	<ul style="list-style-type: none"><li>• Ask questions: get answers based on your notes and external sources.</li><li>• Generate summaries: get concise overviews of your notes.</li><li>• Generate content: fill in gaps or expand on topics in your notes.</li><li>• Improve writing: get suggestions to make your writing clearer and more effective.</li></ul>







# How to Get Started

Microsoft have provided a setup guide to get you started:

**Microsoft Copilot for Microsoft 365 setup guide**

## Prerequisites:

To purchase Copilot for Microsoft 365, customers must have one of the prerequisite base SKUs:

- Office 365 E3/E5,
- Microsoft 365 E3/E5,
- Microsoft 365 Business Standard, and Business Premium.
- *There are no minimum license purchase size requirements.*
- Users must have Entra ID based accounts (**Learn More**).
- **Important! Prepare your data for Copilot searches**
- Several features require users to have a OneDrive account (**Deploy OneDrive**).
- **Copilot in Outlook:** Users will need to be using the new Outlook for Windows (which is publicly called “the new Outlook for Windows.” This version is currently in public preview. Users can load the new Outlook by toggling or use Outlook Mobile (**Getting Started with the New Outlook for Windows – Microsoft Support**).
- **Copilot in Teams:** Users will need to enable the Teams desktop client (**Deploy Teams**) as well as transcription (**Configure Transcription**).
- **Copilot in Loop:** Tenants must have Loop enabled (**Learn How to Enable Loop**).
- **Cross-app intelligence:** The richness of the experience will depend on the data sources indexed by Microsoft 365. Tenants with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, and Teams) will get the best results.





If you're ready to take the next step and upgrade, the team at Cybersphere is here to assist. Contact us for expert guidance and support to seamlessly integrate Copilot into your Microsoft 365 experience.  
Let's unlock the full potential of your technology together.

[Register Your Interest](#)