



Microsoft Copilot Guidebook





How to position Microsoft 365 Copilot with the 7 step program powered by First Distribution

A guide for partners who want to leverage AI and offer value to their customers

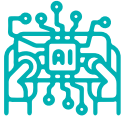
1

Define
intent

DISCOVERY WORKSHOP

Tasks: Assemble stakeholders and business requirements.

Milestones: Business model designed around AI, prioritized use cases, environmental assessment, and strategic roadmap.



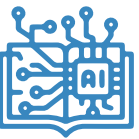
2

Migrate

CLOUD ENABLEMENT

Tasks: Migrate and integrate data into the Microsoft Modern Workplace.

Milestones: Centralized management and search capabilities across Microsoft Teams and SharePoint



3

Secure

DATA PROTECTION

Tasks: Implement Identity & Access Management, Microsoft Defender, Data Loss Prevention, and Collaboration and Sharing Insights.

Milestone: Comprehensive security.



4

Control

DATA GOVERNANCE

Tasks: Apply data policies and requirements with Microsoft Purview and SharePoint Premium.

Milestones: Consistent policy application, data classification, retention, and content management to ensure compliance.



5

Enable
Change

EMPLOYEE EXPERIENCE

Tasks: Implement Microsoft Viva Connections, Topics, and Goals.

Milestones: Employee engagement, knowledge management, and aligned objectives for a high-performance organization.



6

Refine
Intent

COPILOT READINESS

Tasks: Organize champions and test AI business cases.

Milestones: Copilot Center of Excellence, Copilot Dashboard powered by Viva, and success stories.



7

Realize

COPILOT INTEGRATION

Tasks: Apply organizational change framework to integrate humans and their domain expertise.

Milestones: Improved employee productivity, customer satisfaction, and market share.



How to sign up or next steps:

Contact us: Sahil.Kassie@firstdistribution.com



Secure your email and collaboration tools with Microsoft Defender for Office 365 and Business Premium

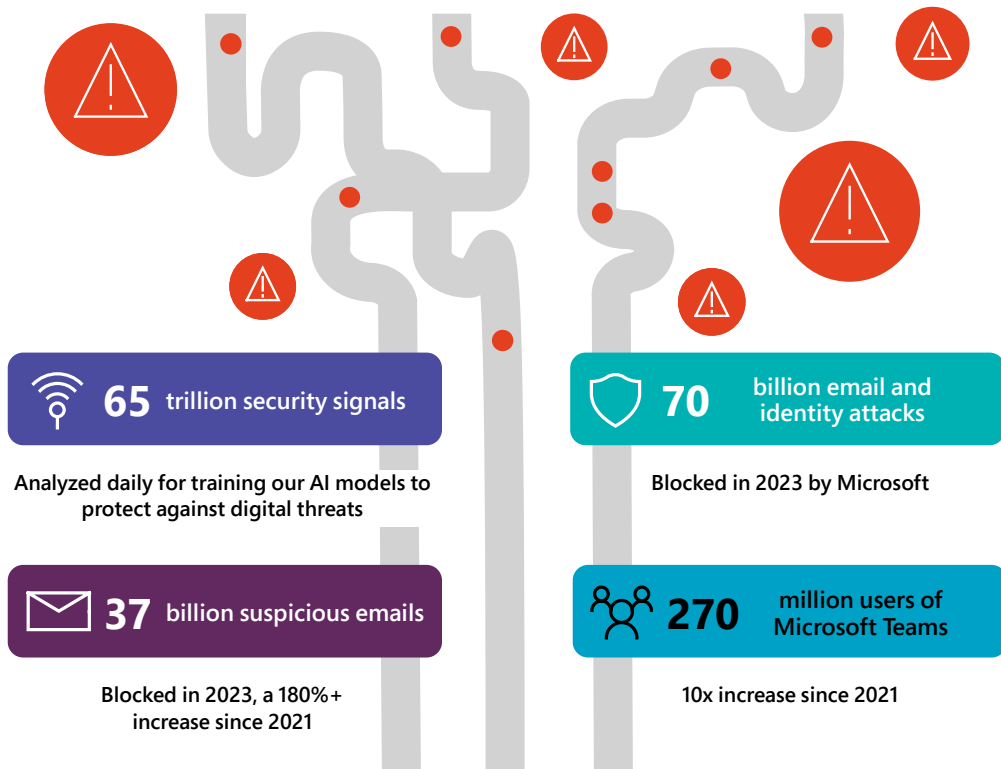
Organizations rely on email and Microsoft Teams now more than ever for productivity... but keeping these tools secure is a constantly evolving challenge:

Email is the top target for cyber attacks

Over 90% of cyber attacks start with email. Defending email is critical to stopping threats throughout your entire organization.

The threat landscape continues to evolve

With hybrid work on the rise, attackers now target other collaboration platforms as entry points to compromise sensitive information.



Nearly 2 billion threats are filtered before they reach the inbox each month.

Prevention

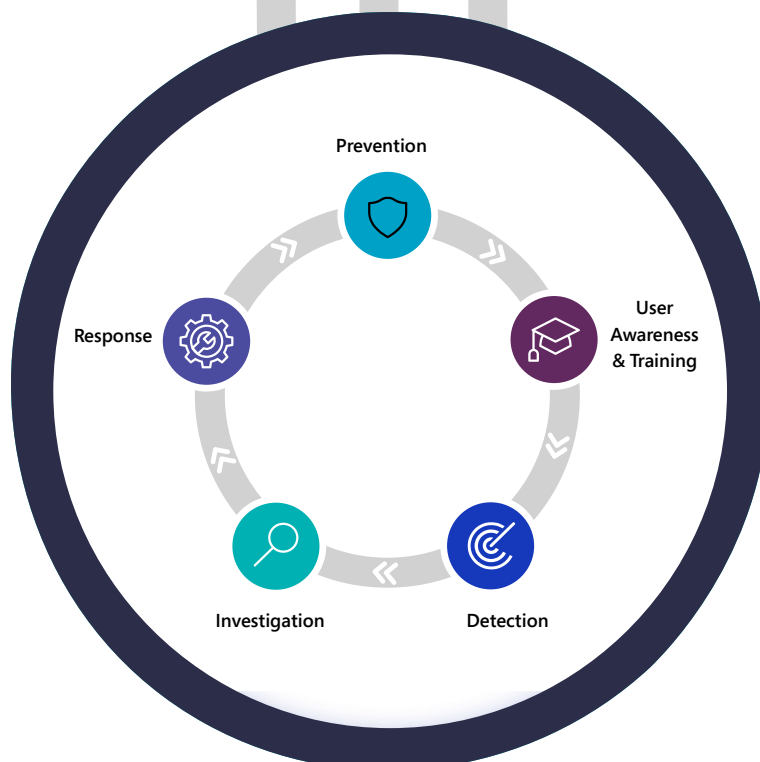
Easily assess, configure and continuously tune your security posture with prioritized recommendations

User Awareness & Training

Educate users with built-in tools to run phishing simulations and manage training assignments based on individual user results.

Detection

Proactively block threats with a comprehensive protection stack, driven by AI and automation based on 65 trillion signals analyzed daily.



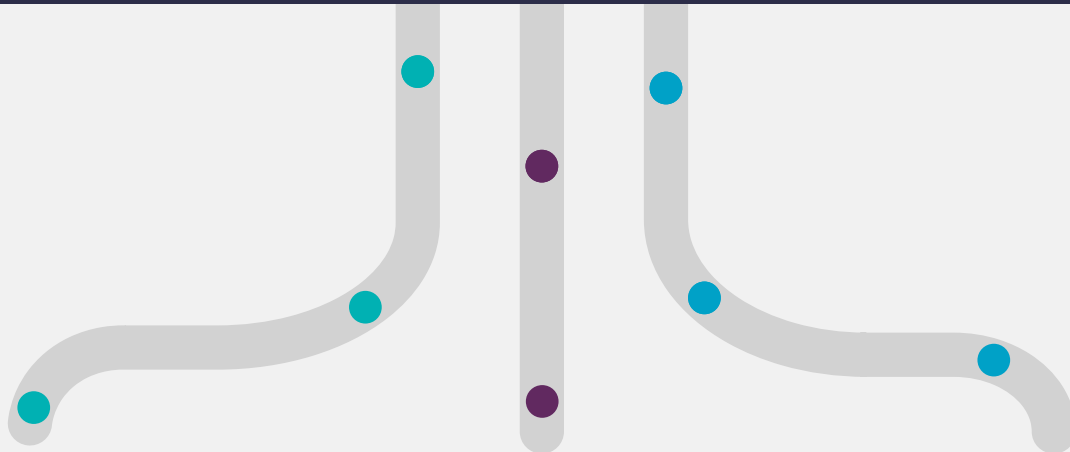
Investigation

Reduce investigation time by 92% with advanced analytics tools for the full spectrum of threats. Extend investigations to endpoints, identity, and more with XDR.

Response

Minimize response time with built-in automation and integrated playbooks that remove malicious emails, even post-delivery. Get further transparency with a comprehensive incidentbased view of threats.

Microsoft Defender for Office 365 includes:



Deeply integrated email protection

Seamlessly integrated threat protection with Microsoft 365 Defender enables email security that automatically stops attack progression and boost SecOps productivity, with lower cost of ownership.

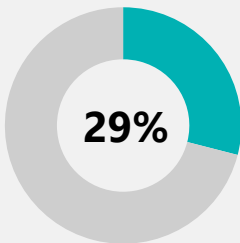
Industry-leading AI and automation

Leveraging the full breadth of our XDR signals database and research, our AI-driven detection capabilities set a new standard in accuracy and automation throughout the security lifecycle.

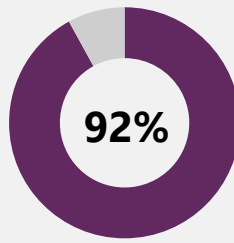
Unified XDR-level investigation and response

Using email and collaboration signals in Microsoft 365 Defender can help combat advanced attacks, while incident-based detection empowers SecOps to hunt across the entire kill chain.

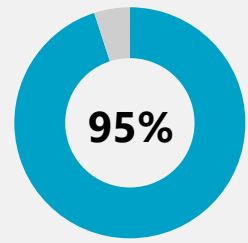
A safer organization and empowered SecOps team



Reduced risk of an email breach when moving from a competitive tool.



Average investigation time reduced from 12 hours to 1 hour.



Time reduced to block malicious links.

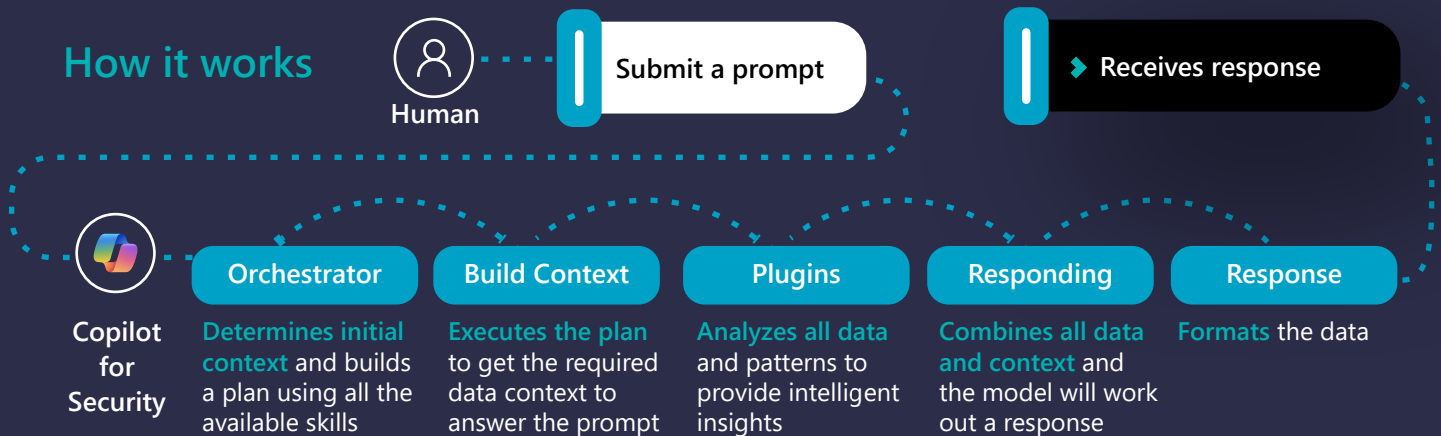
To go beyond email security, Microsoft 365 Defender delivers industry leading XDR, spanning security for multiplatform endpoints, identities, email, and SaaS apps

Ready to learn more?

Contact us: Sahil.Kassie@firstdistribution.com

Copilot and Security Coverage and Capabilities

The first generative AI security product that empowers security and IT teams to protect at the speed and scale of AI, while remaining compliant to responsible AI principles.



Human ingenuity and expertise will always be an irreplaceable component of defense. So we need technology that can augment these unique capabilities with the skill sets, processing speeds, and rapid learning of AI.



For Security Analysts

- ✓ Build hunting queries from natural language
- ✓ Get threat intel insights related to specific incidents
- ✓ Analyze malicious scripts with one button click
- ✓ Get remediation guidance
- ✓ Create comprehensive incident reports for leadership



For IT admins

- ✓ Determine if a device is compliant with company's policies
- ✓ Get advice on configuring and managing new platforms
- ✓ Build new policies and test them to see how they would impact users
- ✓ Proactively identify devices that are not up to date
- ✓ Understand why MFA was triggered for a user

The Microsoft Copilot for Security Advantage

Most advanced
general models

OpenAI

Microsoft
Security

Hyperscale
infrastructure



Security-specific
orchestrator



Evergreen threat
intelligence



Cyber skills and
promptbooks



Copilot works across the Microsoft Security Stack

Microsoft is in a unique position to transform security for our customers, not only because of our investments in AI, but also because we offer end-to-end security, identity, compliance, and more across our portfolio. We can cover more threat vectors and deliver value with a coordinated experience.

Experiences to **meet you** where and how you work

Standalone

Helps teams gain a **broader context** to troubleshoot and remediate incidents faster within Copilot for Security itself, with **all use cases in one place**, enabling **enriched cross-product guidance**.

Embedded

Offers the **intuitive experience** of getting Copilot guidance **natively** within the products that your team members already work from and are familiar with.

Copilot in Microsoft Defender XDR

Investigate and respond to threats in a guided experience

Summarize an incident, assess its impact, provide actionable recommendations for faster investigation and remediation, and, lastly, generate a post-response activity report.

Upskill security talent

Unlock new skills that allow analysts at all levels to complete complex tasks like threat hunting, reverse engineering of malware, and more.

Assess risks with AI-driven threat intelligence

Inquire in natural language about emerging threats and your organization's exposure and gain contextualized insights for rapid response to new and evolving threats.

Copilot in Unified SOC Platform

Intelligent context for alerts and incidents

Quickly assess emerging threats and your organization's exposure. Respond with enriched, AI-driven insights.

Rapid investigation and response

Security Copilot provides end-to-end support of analysts. From summaries of incidents and response, to assessment of incident impact, to actionable recommendations for faster investigation and remediation.

Unlock advanced SOC skills

Unlock new skills that allow analysts at all levels to complete complex tasks translating natural language to KQL or analyzing malicious scripts.



Copilot in Microsoft Purview

Scaled visibility

Gain comprehensive, integrated visibility across solutions and insight into relevant compliance regulatory requirements.

Summarization for speed

Quickly summarize alerts containing a breadth of signals and lengthy content to review in the lens of data security and compliance policies.

Unlock expert skills

Receive step-by-step guidance, conduct searches in natural language, and conduct advanced investigations without keyword query language.



Copilot in Microsoft Entra

Rapid identity risk investigation

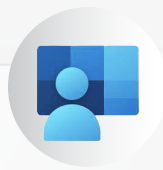
Explore sign-ins and risky users, understand the why and get contextualized insights on what to do to protect the accounts, all in natural language.

Faster troubleshooting

With context at your fingertips, find gaps in access policies, generate identity workflows, and get to the root of the problem faster.

New levels of efficiency

Guided recommendations allow admins at all levels to complete complex tasks such as incident investigations. Sign-in log analysis eliminates the need for manual inspection.



Copilot in Microsoft Intune

Faster response

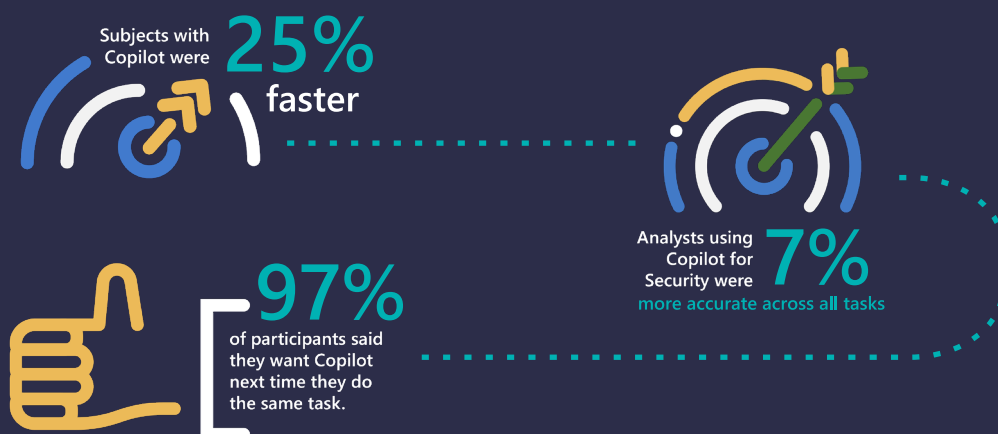
Swiftly respond to threats, incidents and vulnerabilities with full device context and AI assisted insights and actions.

More informed outcomes

Proactively apply targeted policies and remediate endpoint issues with what-if analysis, actionable guidance and deep understanding of device, user and app status.

Simplified posture management

Quickly translate business intent into recommended and compliant configurations and policies using natural language.



Ideas on how to measure your own ROI

Measure your team metrics for the 6 months prior to using Copilot against the metrics for your first 6 months of full team usage. **Top metrics to Compare would be:**

- Mean time to respond (MTTR)
- Incidents worked per day
- Average incident resolution time

Do a **side by side challenge** with your two best analysts. Give one of them Copilot and compare results for time and accuracy to get a quick snapshot of Copilot gains.

Ask a new hire to use copilot and your integrated knowledge base to ramp up and provide an assessment of value at 90 days on the job.

Measuring the quality of work is hard. Are you finding more attack details and documenting them more accurately in the incident? You can **sample work output on similar cases with/without Copilot and score them for quality**. If the sample size is big enough, you can start to look at trends.

Measure the joy Copilot gives your analysts and admins. It won't have an immediate effect on your ROI, but if they like using Copilot better and are more satisfied with their work experience, the long-term benefits to your team can be considerable (Happy analysts=better work environment=less attrition and better long-term success)."

Ready to learn more?

Contact us: Sahil.Kassie@firstdistribution.com



Welcome to Copilot for Microsoft 365

Organisations across industries have gone from talking about AI to deploying it at scale. After just three months of using Copilot, 70% of users said they were more productive and 68% felt it improved the quality of their work. And the best Copilot users? They saved more than 10 hours per month.

This playbook, informed by insights from the Copilot for Microsoft 365 Early Access Program, gives you actionable steps to become an AI-powered organisation quickly, accelerate usage and engagement, and track progress and impact.

It answers key questions, including:

Who do I give the first Copilot seats to?

Where can my organisation get the most productivity gains?

How do I get employees up and running quickly?

Why is it important to build early momentum with Copilot?

When will I start seeing business results?

What are the ways to measure impact?

Your Copilot adoption roadmap

PHASE 1:

Get ready

Preparing your business for AI

Step 1
Review your security and data settings.

Step 2
Be intentional with seat assignments.

Step 3
Create an AI council.

Step 4
Help people build new work habits.

PHASE 2:

Onboard and engage

Accelerating usage and engagement

Step 5
Create a Copilot user community.

Step 7
Make ongoing training the standard.

Step 6
Identify Copilot champions and early adopters.

PHASE 3:

Deliver impact

Tracking progress and business results

Step 8
Quantify impact with the Microsoft Copilot Dashboard.

Step 9
Meet with your AI council regularly.

Step 10
Publicly celebrate successes.

PHASE 4:

Extend and optimise

Building copilots into your business

Step 11
Tailor Copilot to your business.

Step 12
Build your own copilots.

PHASE 1:

Get ready

Preparing your business for AI

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Prepare employees for a new way of working.

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Extend and optimise

Step 1

Review your security and data settings.

Copilot for Microsoft 365 is built on a comprehensive approach to enterprise-grade security, compliance, privacy, identity, and responsible AI. Because Copilot automatically inherits your existing Microsoft 365 data and security permissions, it makes setup straightforward. It also highlights the importance of having established content management practices and data governance in place before rollout begins.

For secure collaboration with Copilot, work with your IT leads to review current policies. It's also important to reassure employees that their private content and data remain protected.

In this respect, Copilot is very similar to cloud-connected services like email and search that they use today. Encourage teams to continue following your organization's existing best practices, established by your IT department. This includes using SharePoint sites, managing permissions, and using sensitivity labels.

For more information on security and data for Copilot, see our technical documentation site.

Frequently asked questions about data, privacy, and security.

Keeping your proprietary data confidential is important, and Copilot has built-in safeguards to help ensure it stays that way. Here are some common questions customers are asking about data security in an era of AI-powered work.

How can I control access to data and prevent oversharing?

Because Copilot inherits all your existing Microsoft 365 security and compliance requirements, only people with the right permissions can access the content it generates. Before rolling out Copilot, it's important to audit the data access conditions, retention controls, and sensitivity labels you already have set up. These policies and settings can be managed centrally and applied across all your apps.

Are there other safeguards to consider for meeting transcripts?

The meeting owner controls who has access to transcripts. Everyone in a meeting will see an alert that the meeting is being recorded, and the transcript is subject to retention policies your admins set and enforce. If you want to use Copilot in a meeting but not create a recording, you now have the option to enable it without a transcription. When you enable Copilot without a transcription, Copilot can answer questions and provide information during the meeting, but no record of those interactions will be retained afterward.

Where is Copilot data stored and processed?

Because Copilot is a core Microsoft 365 service, the data it uses resides in your geographical region. That means it complies with Microsoft processing commitments for that region. For example, if your organization is in Europe, be assured that Copilot complies with our processing commitments under the EU Data Boundary.

What about eDiscovery and legal holds?

Copilot prompts and responses are considered your data. You can query with eDiscovery or apply legal hold just like any other content. Copilot activities are always available in your audit log should you need to refer to them.

Are there copyright risks in using content generated by Copilot?

The Microsoft Copilot Copyright Commitment protects your intellectual property, as well as the intellectual property of others. If you use Copilot to generate content for your business and a third party sues your organization for copyright infringement, Microsoft will defend you and pay the amount of any adverse judgments or settlements as long as you used the guardrails and content filters built into Copilot.

Step 2

Be intentional with seat assignments.

To maximize business impact, you'll need to determine your overall licensing deployment strategy, concentrating seats in two or three key areas of the business. Consider the following factors as you decide on an approach.

Look at current usage trends

Your heaviest users of Microsoft 365 products will be well positioned to reap the benefits of a Copilot license. One way to evaluate who uses them the most is with the Microsoft Copilot Dashboard—powered by Microsoft Viva. Navigate to the Readiness tab to see technical eligibility and your total number of Microsoft 365 users.

Define use cases for each business function or team

Each team should have a clearly defined goal or specific use case for how they'll implement Copilot. This extra layer of specificity ensures it's effectively integrated into workflows across various roles and levels.

Microsoft, for example, reimagined the tiered support model to improve customer service. We defined the use case metrics as:

- Reducing onboarding time for new agents.
- Streamlining access to knowledge.
- Eliminating repetitive administrative tasks.
- Reducing ticket volume.

By focusing on specific use cases and high-impact areas first, you'll maximize the ROI of Copilot and prepare your organization to scale up its adoption.

Allocate Copilot to entire teams within a specific business function

Avoid distributing licenses thinly. When entire teams have access, they can share insights and learn from each other. And as more employees use Copilot consistently and effectively, the impact that Copilot brings to your organization multiplies.

To choose what business area to start in, think about your biggest opportunities or pain points. Many early access customers started in customer service and sales—but there's not a one-size-fits-all approach to determine where Copilot will add the most value.

Microsoft, for example, began in Marketing, Sales, and Customer Service; Human Resources; and Finance—the business functions where teams spent a lot of time in meetings, writing emails, doing repetitive tasks, and searching through large amounts of data and information.

Lumen Technologies, a customer in the Early Access Program, began with their customer service, sales, and customer experience teams. The service team is using Copilot to surface relevant policies, summarize tickets, and access step-by-step repair instructions from manuals. The sales and customer experience teams are using Copilot to enrich customer interactions with additional depth and context, and summarize actions and next steps.

PRO TIP

Show the value of Copilot in specific roles to drive greater usage. For example:

Impact by function

Human Resources



Create a more efficient hiring process

Create a job description by asking Copilot in Word to suggest skills, qualifications, and responsibilities.

Conduct a group interview in Microsoft Teams and ask Copilot to summarize the contributions of each candidate.

Discover the best candidates for a position by having Copilot extract skills, experience, and qualifications from a set of resumes.

Marketing



Create a marketing pitch in record time

Discover trends and outliers in the latest market research with Copilot in Excel to identify which markets to target with promotions.

Draft a targeted promotion plan with suggested taglines using Copilot in Word.

Transform the engineering team's design documentation from a Word doc into a pitch deck in PowerPoint with Copilot.

Sales



Drive better sales presentations with an AI assistant

Create a bulleted list of notes using recent email threads before the meeting with the customer to understand the asks that need to be addressed.

Give the customer your full attention in a meeting by relying on Copilot to handle the meeting notes.

Draft the final proposal using Copilot to take content from your emails, meeting notes, and presentations.

IT



Deploy a critical update with the help of Copilot

Create a project plan for the upcoming rollout based on a previous project plan and product documentation.

Meet on Teams to discuss the plan and use Copilot to keep track of unanswered questions.

Create a presentation on the rollout by using Copilot to create slides based on the project plan Word doc.

Finance



Focus on the high-value tasks to complete an acquisition

Summarize the due-diligence information from the operations and legal team.

Use Copilot to add a section to the offer sheet discussing some conditions for the deal based on a previous meeting transcript.

Use Copilot in Excel to refine the deal analysis based on negotiations and changes in the economic environment.

Step 3

Create an AI council.

Recruiting a deployment team of influential advocates is a crucial step, as they'll be key feedback sources and drivers of adoption. While your AI council will be unique to your company needs, it should include representatives from the following teams:

IT enablement team: Ensures your organization implements Copilot seamlessly from a technical standpoint. This team is responsible for preparedness and rollout, providing onboarding support, as well as managing feedback and compliance.

Change management team: Acts as a bridge between the AI council and employees, helping to monitor adoption progress, gather feedback, and foster a collaborative environment where Copilot becomes an integral part of how people work every day.

Executive sponsor: Drives adoption and infuses confidence in the technology among employees. An executive sponsor that's an active champion (showing how they're using Copilot and talking about its benefits) signals that embracing and integrating generative AI into day-to-day processes isn't just accepted, it's encouraged.

Risk management: Represents the company's best interests by ensuring overall compliance to relevant AI regulations and ethical standards. They also help ensure your organization's AI initiatives are transparent, accountable, and trustworthy.



Step 4

Help people build new work habits.

Effective change management is vital for implementing an AI tool like Copilot, as it ensures your organization views it as not just new technology, but a new way of working. It requires leaders to measure attitudes and manage expectations.

Measure attitudes and interest

A key part of change management is simply recognizing that diverse perspectives around AI exist—and knowing that you'll likely see a combination of enthusiasm and skepticism. An effective adoption strategy must cater to these diverse attitudes, providing support, training, and clear communication to transition workflows and mindsets into an AI-powered future of work.

Manage expectations

As part of this training and communication, it's important users have a clear understanding of what Copilot can and can't do. Equally important is knowing when to use AI capabilities and when to rely on human expertise. Emphasizing that the user is in the driver's seat—or the pilot, if you will—is a great way to communicate the limitations and strengths of AI overall.

PRO TIP

Highlight the capabilities of Copilot to help promote transparency and user satisfaction, while minimizing potential misconceptions. For example:

Copilot is not like a search bar. Don't ask it how many miles the earth is from the sun (it knows, but Bing is faster). Instead, use it to search across your content and prepare for meetings.

Ask Copilot: What's the latest from [person], organized by emails, chats, and files?

Copilot is not about delivering highly standardized, repeatable outputs. Instead, use it to create a first draft—and regenerate the content until you find the text you want to work with.

Ask Copilot: Write an intro paragraph for this document and make it sound [professional].

Copilot is not prescriptive where you have to get exactly the right words in exactly the right order to get exactly the right result. Instead, guide the response using cue words and context—then revise your prompt if you're not happy with the initial results.

Ask Copilot: Write an article about [cybersecurity tips]. Include: [secure home networks, multifactor authentication].

Copilot is not always right—and it's good to embrace how it's usefully wrong. Instead, use it to generate ideas to jump-start creativity.

Ask Copilot: Create a list of titles for [this presentation].

PHASE 1:

Get Ready

PHASE 2:

Onboard and engage

Accelerating usage and engagement

Step 5

Create a Copilot user community.

Step 7

Make ongoing training the standard.

Step 6

Identify Copilot champions and early adopters.

PHASE 3:

Deliver impact

PHASE 4:

Extend and optimise

Step 5

Create a Copilot user community.

One of the best ways to drive AI adoption is through peer learning, which creates a dynamic knowledge-sharing ecosystem. It creates buzz for this new way of working, allows individuals to learn from those who've successfully implemented Copilot, and surfaces practical tips for specific roles.

Creating virtual spaces for people to connect and discuss their experiences is a great place to start building this momentum. Any means of sharing is worthwhile, as it gives users a sense of ownership in the learning process.

To build your organization's Copilot user community:

- ✓ Create a Teams group chat for your AI council to discuss goals and best practices.
- ✓ Use Viva Engage to give employees a place to share tips, ask questions, and upvote answers.
- ✓ Use Microsoft Forms to log what's working well (or even what isn't). Your AI council can use these insights to improve your rollout, inform training sessions, and find the best use cases for your business.
- ✓ Download our onboarding toolkit for prepopulated and designed posts that encourage usage across apps.

Step 6

Identify champions to lead the way.

Similar to your AI council, your Copilot champions and early adopters are a key team in driving wider adoption. This group will lead by example, helping showcase the practical benefits of Copilot in their daily work. Plus, their positive experiences will naturally inspire curiosity and interest among their colleagues—encouraging broader usage.

To identify Copilot champions and early adopters:

- ✓ **Lean on your AI council** to help determine your power users.
- ✓ **Look at your Copilot user community** to see who's sharing tips or giving feedback.
- ✓ **Reach out to managers** and ask them to identify a team representative.
- ✓ **Use the Copilot Dashboard** to measure usage (more on this in a moment).

Step 7

Make ongoing training the standard.

Employees will see productivity gains immediately with Copilot. But how each user personalizes their Copilot usage will evolve dramatically over a 6 to 12-month period, so providing ongoing training is critical to optimizing that journey.

Prompting—the process of giving clear commands to get the right results with an AI tool—is likely a new skill for many employees. Better inputs lead to better outputs, and this requires consistent practice so Copilot becomes a natural extension of the work process.

Business leaders should publicize a variety of resources and guidance, and promote collaborative sharing of best practices. This way, Copilot users can stay updated on new features, troubleshoot issues, and learn from each other's experiences. A culture of continuous learning can also increase user engagement, satisfaction, and productivity with Copilot.

Here are some top training resources to help your organization get started:

- ✓ **Prompt guidance:** Understand the ingredients for a great prompt.
- ✓ **Copilot adoption:** Get resources for deploying, using, and scaling Copilot at your organization.
- ✓ **Copilot capabilities:** Discover learning materials for users, admins, and business leaders.
- ✓ **Copilot Lab:** Find tips for better prompts, and explore prompts to try in different apps.
- ✓ **Copilot for Work:** Discover work scenarios and how Copilot can become your AI assistant.
- ✓ **Viva Learning:** Use the course catalog to learn new skills for the world of AI.

PRO TIP

Those who view Copilot as a way to amplify what they're already doing - not just as a search engine - will gain value the fastest. Encourage employees to:

Build a daily habit.

Regular use with Copilot helps employees quickly learn how to get better responses - and take full advantage of the AI capabilities in their everyday routine.

Think like a manager.

Knowing how to delegate tasks to Copilot as if it's an eager intern is essential. To do this, users must be able to create clear, concise prompts with defined parameters, evaluate the results, and decide what to do next with the content Copilot generates.

Make the most of reclaimed time.

Guide employees to be intentional with the time they save with Copilot. Remind teams it's not about doing more - it's doing more of the things that drive value at both the individual and organizational level.

Provide feedback.

Encourage employees to give feedback when Copilot prompts them to. This will continue to improve and refine their experience.

PHASE 1:

**Get
Ready**

PHASE 2:

**Onboard
and
Engage**

PHASE 3:

**Deliver
impact**

**Tracking progress and
business results**

Step 8

Quantify impact with the
Microsoft Copilot Dashboard.

Step 9

Meet with your
AI council regularly.

Step 10

Publicly celebrate
successes.

PHASE 4:

**Extend and
optimise**

Step 8

Quantify impact with the Microsoft Copilot Dashboard.

The Microsoft Copilot Dashboard helps organizations measure usage and adoption at every phase of the rollout with real-time data and insights. The dashboard provides insights to help leaders understand where Copilot is adding value and where enablement strategies could see even greater benefits, including the number of active Copilot users per app and the number of times key Copilot features have been used in those apps.

With a Microsoft Viva subscription, you can get additional reporting and deeper functionality.

Step 9

Meet with your AI council regularly.

Meeting regularly with your AI council will help you understand how you can support their efforts. Based on the experiences of Early Access Program users, change happens quickly with a Copilot implementation. Discuss what's working well, potential areas of opportunity, and any challenges related to the new way of working.

To maximize your organization's experience with Copilot, make AI council meetings an ongoing priority well after the initial two-month period has elapsed. You're likely to see significant gains in productivity and business value by that time. You'll probably be ready to shift your focus to longer-term goals for using generative AI.

Step 10

Publicly celebrate successes.

Implementing any new tool takes coordinated effort across multiple disciplines, so be sure to take a step back and celebrate milestones you've reached in your Copilot adoption strategy. Acknowledge the efforts of teams who've contributed to the rollout's success and identify your power users, as these stories serve as strong sources of inspiration and showcase how Copilot can deliver tangible benefits within your organization.

Success stories also play a pivotal role in driving adoption, engaging stakeholders, and ensuring that your organization maximizes the impact of Copilot while maintaining transparency and realistic expectations.

PHASE 1:

**Get
Ready**

PHASE 2:

**Onboard
and
Engage**

PHASE 3:

**Deliver
Impact**

PHASE 3:

**Extend and
optimize**

**Building copilots into
your business**

Step 11

Tailor Copilot
to your business.

Step 12

Build your
own copilots.

Step 11

Tailor Copilot to your business.

As your teams begin to master using Copilot, they'll likely see opportunities to refine what it generates and find new ways to reengineer processes across your business. Copilot can help you explore those possibilities with a built-in extensibility tool: Microsoft Copilot Studio.

It's included with your subscription to help you to customize Copilot to your organization's unique needs with plugins.

Copilot Studio is a low-code tool that enables you to:

Connect Copilot to your data everywhere. Copilot Studio comes with more than 1,200 connectors, which can be used to build plugins for Copilot. This allows it to tap into data outside Microsoft 365 and the Microsoft Graph. Connect Copilot to your other systems of record—including databases, custom backends, and even on-premises legacy systems. Consider those that are core to your business, such as customer.

Relationship management, enterprise resource planning, finance, or human resources. It can also connect to your custom line-of-business solutions and non-Microsoft systems such as Adobe, SAP, SharePoint, Google Cloud Platform, Oracle, Salesforce, SQL, Slack, or Zendesk—plus all Azure data services.

Customize Copilot to your unique business needs and workflows. Once Copilot is connected to your data and apps, extend it to your business processes and the systems you use every day. With Microsoft Power Automate capabilities in Copilot Studio, you can create ways for Copilot to help with functions such as expense management, HR onboarding, and IT management.

Copilot Studio is also where you can design plugins for tailored responses within Copilot. These custom copilot chats could be for nuanced topics such as legal requests, sensitive

HR subjects, or finance and compliance inquiries. For example, if you were to give Copilot access to your travel policy in SharePoint and your ongoing expense budgets in SAP, it could give an accurate, self-service answer to an employee question such as, "How much of my team's travel budget is left in this quarter?"

Control and manage customizations easily. Your organization only needs to build customizations once. Once built, plugins can be centrally managed by IT and secured with the right access, user controls, and analytics. IT remains in control.

Step 12

Build your own copilots.

If you're interested in building your own custom copilots to provide generative AI experiences that Copilot for Microsoft 365 isn't designed for, there is a separate Copilot Studio license available. With it, you can embed a conversational copilot into your website to serve customers, build a copilot to assist employees with HR or IT inquiries on a SharePoint page, or even create copilots for frontline workers who don't use Microsoft 365. And those are just a few possibilities.

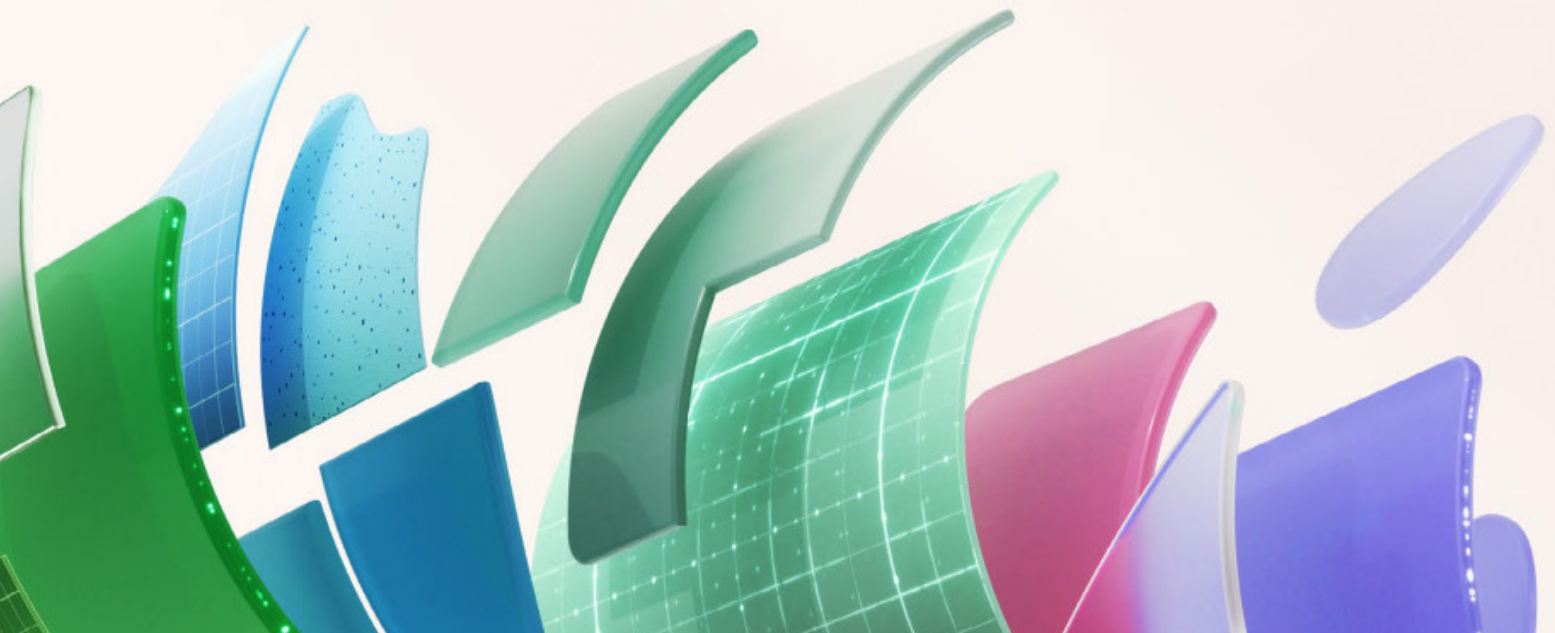


The road ahead with Copilot

By embracing this momentous shift to AI, you're empowering more than productivity. You've opened the door to tremendous potential for business transformation. And the pace of innovation with copilots is only going to accelerate.

If you follow the steps in this playbook, you'll ensure your organization adopts its path to AI transformation intentionally. You'll have a framework to invest in the most impactful areas upfront, maximize your time to value, manage change, and scale when the time is right. This will also help you generate buy-in at every level of your organization so you can build an AI-centric culture—which is the true secret to gaining a competitive edge with this technology.

You can expect new Copilot tools to continue rolling out from Microsoft, providing invaluable capabilities for people across industries. Copilot for Microsoft 365 is designed to operate seamlessly with other copilots, such as Copilot for Microsoft Dynamics 365—so consider extending the efficiencies you gain across business processes. We'll also be releasing more role-based copilots tailored to specific tasks and functions. As the people in your organization learn new skills to use generative AI and you chart a path forward for your business, we're here to support you.



Ready to learn more?

Contact us: microsoft.leads@firstdistribution.com

