



STEPHENLROSE.COM

Copilot Intelligent Garbage In Semi-Intelligent Garbage Out

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About Me

- 15 years at Microsoft
- Over 20 certifications
- Consulting since 2023
- Host of UnplugIT
- Supporting Microsoft Community
- LinkedIn Learning
- Volunteer at CMZ



My Current Clients Include





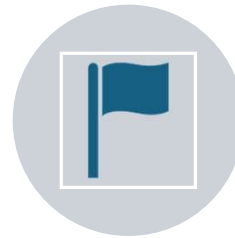
**What Will We Cover
Today?**

Agenda



What is Copilot and how it works

What is Copilot 2.0



Understanding The
“Microsoft Way”



Real World - Top Ten
Blockers to Copilot
Adoption, Governance and
Security



Adoption Tips



Expectations

WHAT WILL BE
THE IMPACT OF
CHATGPT ON
OUR BUSINESS?



THERE'S
A LOT WE
DON'T KNOW
FOR SURE...



LIKE HOW
MUCH OF
WHAT IT SAYS
IS MADE UP...



OR IF IT WILL
TAKE AWAY
OUR JOBS...



OR THE
SECURITY
RISKS...



OR IF IT COULD
DAMAGE OUR
REPUTATION...



WHAT DO
WE KNOW
FOR SURE?

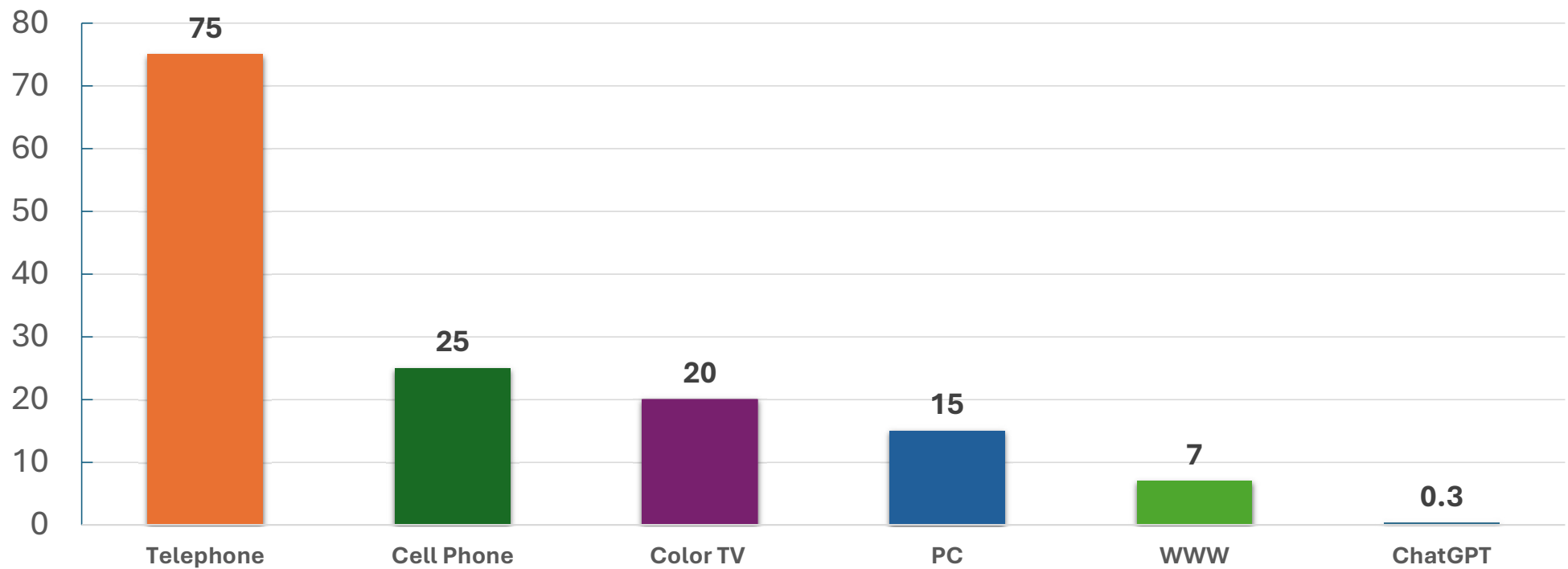


ONLY THAT WE
WANT TO ADOPT IT
EVERYWHERE AS
FAST AS WE CAN.



TOM
FISH
BURNE

Years To Hit 100 Million Users





What is Copilot



AI tools like Microsoft Copilot,
allow employees to focus on work that
leverages their hired skill sets by
automating/executing time consuming or
redundant tasks.

What is the difference between ChatGPT and Copilot?



ChatGPT

Microsoft 365 Apps



Microsoft 365 Copilot

Microsoft 365 Service Boundary

M365 Cloud Content Encrypted

Response + app commands

User prompt

Pre-processing

Grounding

Microsoft Graph

Semantic Index

Your context and content
emails, files, meetings, chats,
calendars, and contacts

Post-processing

Grounding

Customer Microsoft 365 Tenant

Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation models

Modified prompt

LLM response

Large Language Model

Azure OpenAI instance is maintained by Microsoft. OpenAI has no access to the data or the model.

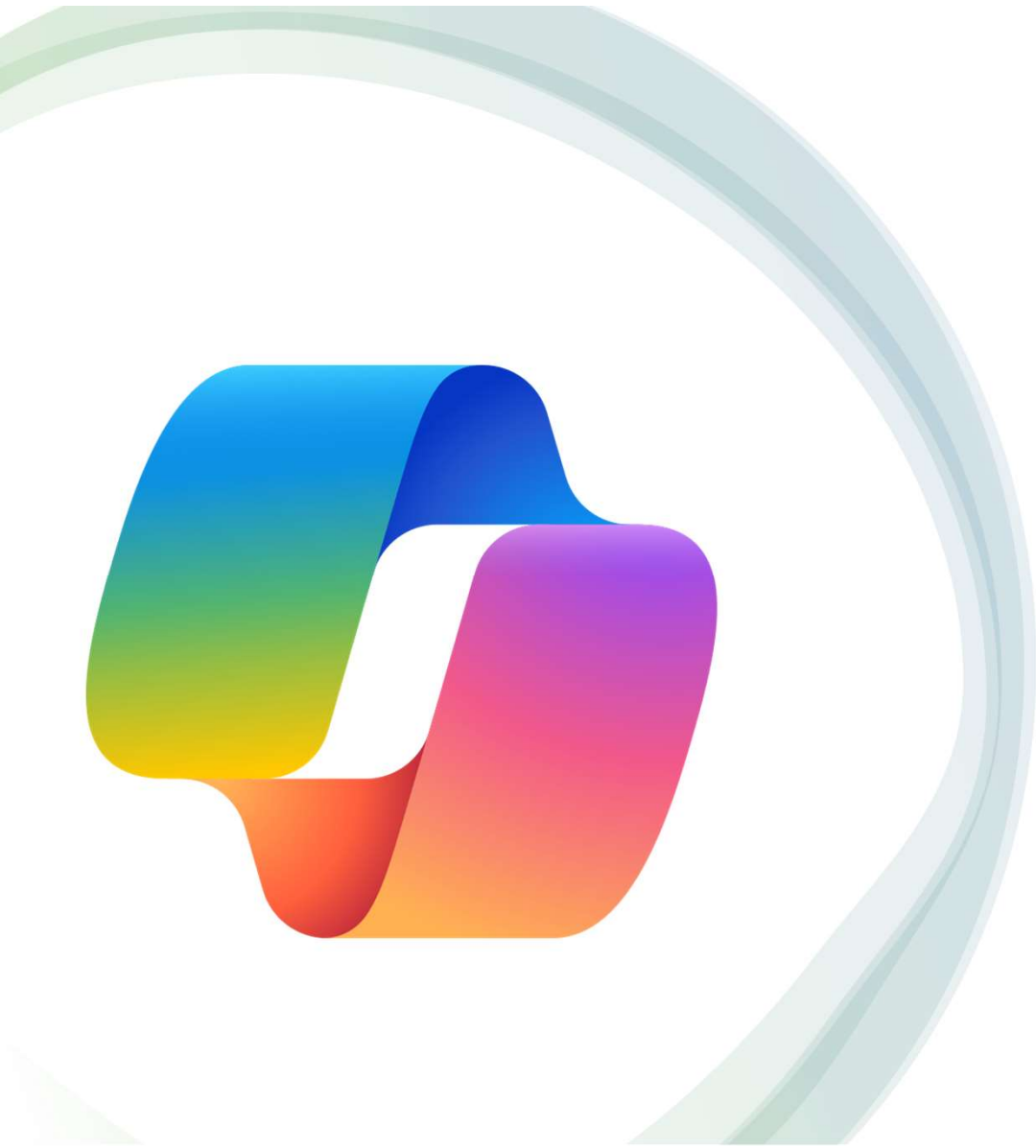
Azure OpenAI

RAI is performed on input prompt and output results

External Info
Internet/ChatGPT
Encrypted

Data flow (🔒 = all requests are encrypted via HTTPS and wss://)

- 1 User prompts from Microsoft 365 Apps are sent to Copilot
- 2 Copilot accesses Graph and Semantic Index for pre-processing
- 3 Copilot sends modified prompt to Large Language Model
- 4 Copilot receives LLM response
- 5 Copilot accesses Graph and Semantic Index for post-processing
- 6 Copilot sends the response, and app command back to Microsoft 365 Apps



What is Copilot 2.0

Copilot 2.0

- Copilot Pages
- Excel Insights: Generates data insights, trends, and visualizations
- Enhanced PowerPoint Design Capabilities
- Python Support in Excel Copilot
- Enhanced Capabilities in:
 - Outlook – Email Prioritization
 - OneDrive- Search and Compare Files
 - Teams- More Meeting Insights
- Copilot Agents

The screenshot displays the Microsoft Copilot 2.0 interface. At the top, there is a search bar and navigation tabs for 'Web' and 'Work'. A prompt box asks to 'Create a table with the key project milestones from SoutheastRegion-Pitch.doc, and include a column for workback schedule using the lead times from that project, and a column for who owned each workstream'. Below this, a Copilot message states: 'Here's a table of key project milestones and a workback schedule based on the lead times in the document: 1'. The generated table is as follows:

Project Milestones	Workback Schedule	Owner
Identify the working team	Week 1	Kayo Miwa
Kickoff meeting	Week 1	Lydia Bauer
Customer research	Week 2-4	Aadi Kapoor
Proposal outline	Week 2-3	Lydia Bauer
Write the proposal	Week 3	Aadi Kapoor
Obtain internal approvals	Week 4	Cecil Folk
Submit the proposal	Week 5	Kat Larsson

Below the table, a message says: 'Please let me know if you need any additional information or adjustments to this table!'. At the bottom, there are buttons for 'Edit in Pages', 'Copy', and other actions. On the right sidebar, there are news articles, including 'EV charging opportunity' and 'Gatwick Airport electric vehicle charging station opens'. Below the news, there is a table summarizing the project milestones:

	Project Milestones	Workback Schedule	Owner
1	Identify the working team	Week 1	Cecil Folk
2	Kickoff meeting	Week 1	Lydia Bauer
3	Customer research	Week 2-4	Aadi Kapoor
4	Proposal outline	Week 2-3	Lydia Bauer



**We asked 200 IT
professionals what
they thought about AI**

very interested but weary
stalled implementation
mysterious
useful
costly
data organization
data privacy concerns
security concern
great for some things
want to know more
concerning
data leveraging
cross team-collaboration
efficiency
usecase
investment
save time
scared
very cool
fast pace
overwhelming
heavy-governance
exploring
compliance
limited
required
complex
data
help
paranoid
privacy
dangerous
weary
uses
integration
not perfect
push
automations
terrifying
unknown
efficiency
new
skills
hesitant
inevitable
data consumption
over hyped
time saver
waste of money
excellent
processing
safety
ease of use
skeptical
management
pricey
saves time
governance
awesome
intriguing
excitement
legal
caution
great
productivity
smb
fun
risk
excited
helpful
cost
scary
security
interesting
cautious
fear
messy
security concerns
the future
effective
curious
okay
potential
love it
enabling
education
productivity enhancer
disappointing for others
insecure data storage
risky for security
more work
opportunity
real world

slido



**What are your
thoughts/concerns around
adopting AI tools like Copilot?**

① Start presenting to display the poll results on this slide.



How Do I Get Started

M365 Spring Community Conference 2024





Why This Approach Won't Work For Most Companies

TECHNOLOGY

Take This Huge Lesson From Microsoft Copilot's Struggles

Don't launch a product unless it creates value for customers. 

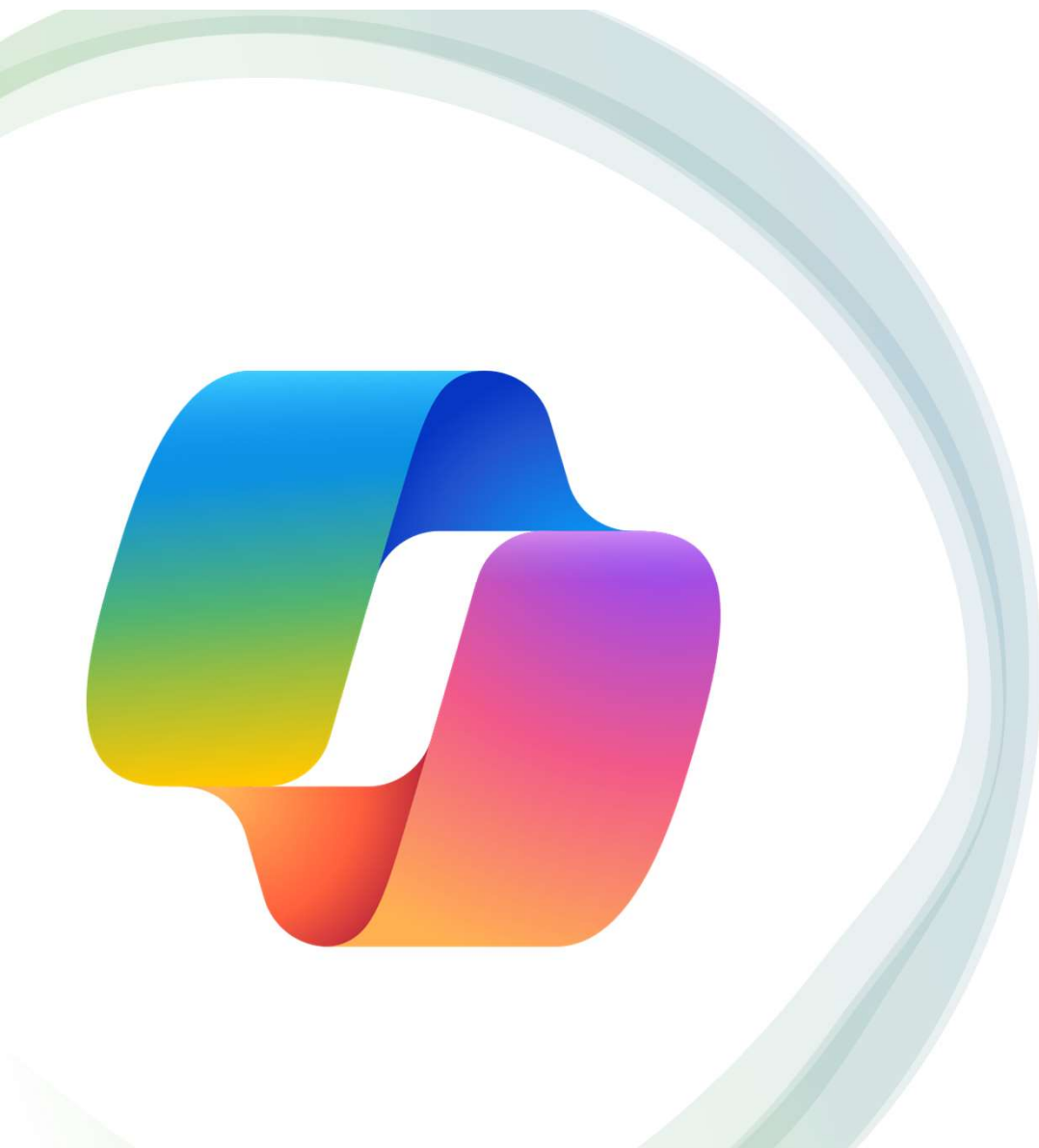
Inc. Magazine:
August 8, 2024

EXPERT OPINION BY PETER COHAN, FOUNDER, PETER S. COHAN & ASSOCIATES @PETERCOHAN

AUG 8, 2024

While Nadella sounds optimistic, most of the customer case studies in my book did not find Copilot worth the money. A recent case study highlights the less optimistic view of Copilot's prospects "A pharma company stopped using Microsoft's Copilot AI tool, with an exec citing high cost and low value," reported Business Insider.

The executive was unimpressed by what Copilot could do and decided to cancel a trial of the service for 500 employees that would have cost the company \$180,000 annually. "He compared the slide-generation capability of Microsoft's AI tools to middle school presentations, according to a transcript of a call with the Morgan Stanley analysts that was included in their research note," *Business Insider* reported.



**1 in 3 companies pause
or abandon their
Copilot role out after
90 days ***

Why?

*Inc Magazine March 2024



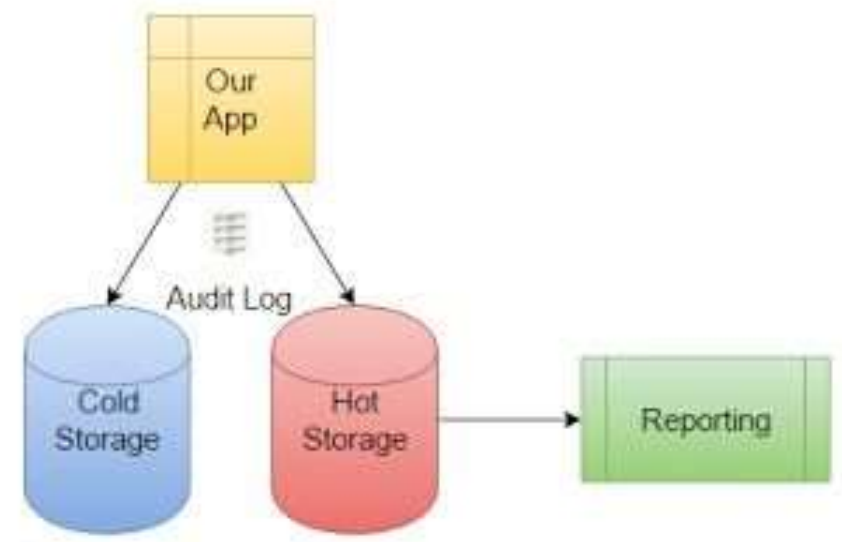
Top 10 issues that stall Copilot deployment and adoption

#10- Too Much Data




Best Practice

- Archive any email older than 12-18 months
- Archive OneDrive documents that are more than 3 yrs old and have not been used in 90 days
- Choose which SharePoint site data is crawled and which are not
- Have E5? Turn on labeling!



SharePoint



Search Service Application: Crawl Log - Content Source

[Content Source](#) | [Host Name](#) | [Crawl History](#) | [Error Breakdown](#) | [Databases](#) | [URL View](#)

[Central Administration](#)

[Farm Search Administration](#)

[Search Administration](#)

[Phonetics](#)

[Crawl Log](#)

[Crawl Health Reports](#)

[Query Health Reports](#)

[Unpublish](#)

View a summary of items crawled per content source.

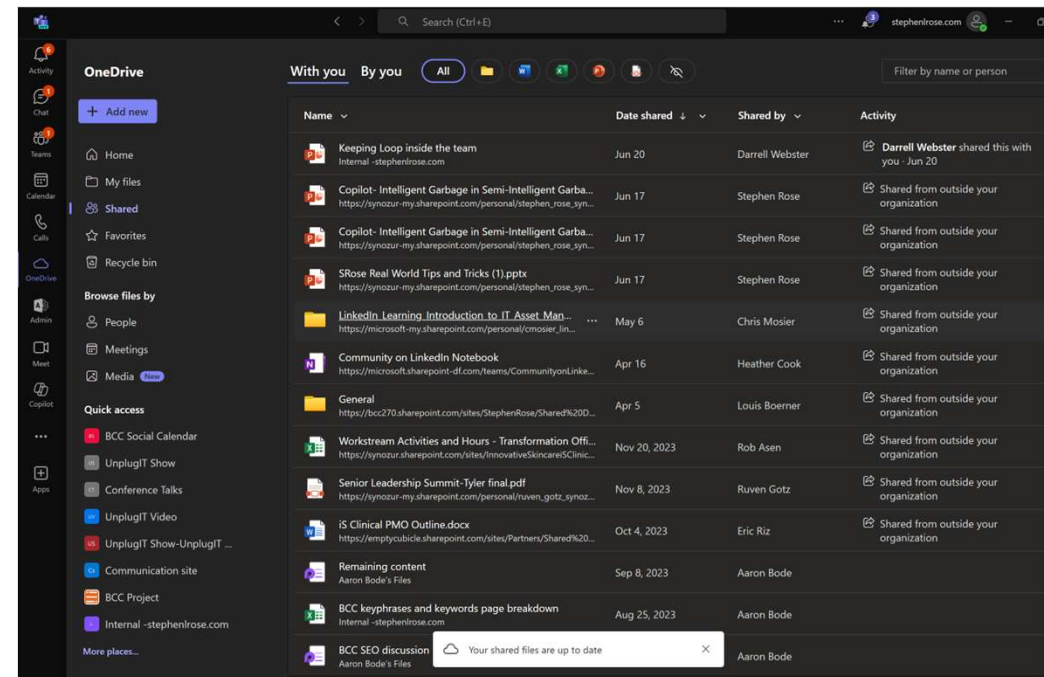
Content Source	Average Crawl Duration				Successes
	Last crawl	Last 24 hours	Last 7 days	Last 30 days	
Local SharePoint sites	00:04:01	00:13:00	00:07:44	00:06:27	157,297

[Link to more about crawl log](#)



Best Practice

- Teach the difference between **my** files (OD) and **our** files (SP)
- Teach Share vs Copy vs Move
- Move conversations out of Group Chats and into channels.
- Use web apps in Tabs or integrated web apps when possible
- Teach how to use the OneDrive or Files view for a single look at all cloud files



#8- Bad end user experience



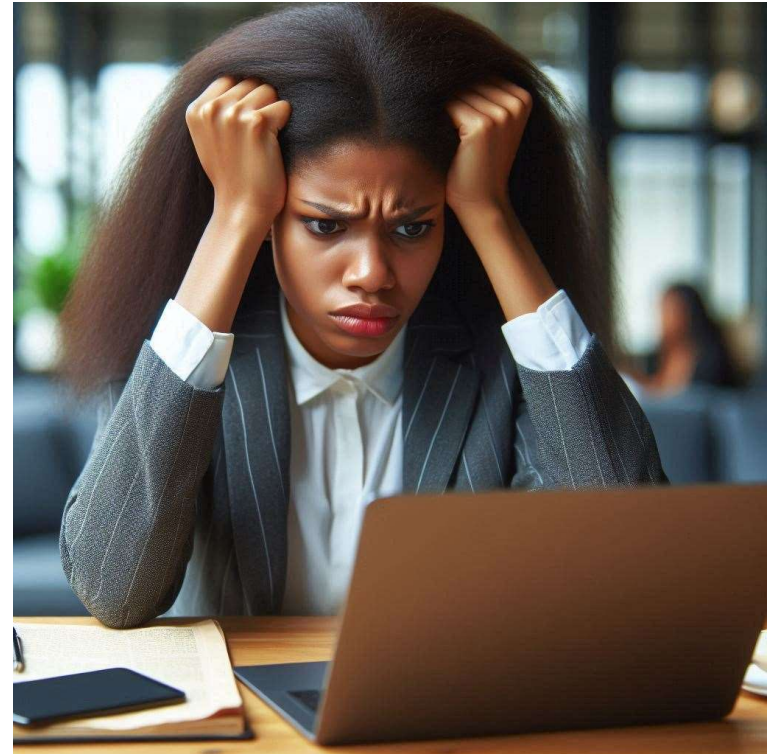
Best Practice

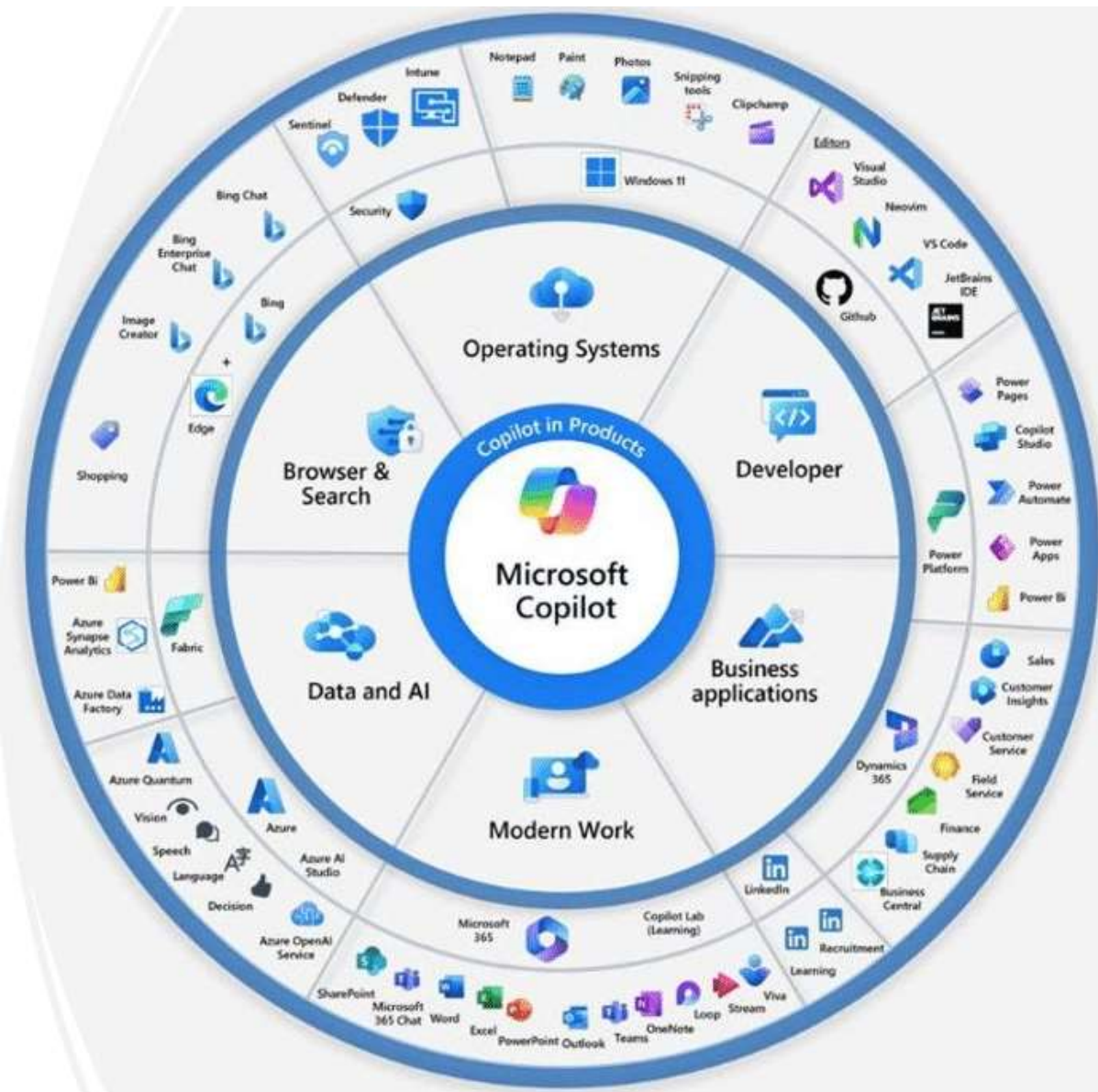
If a user has a bad experience 2-3 times:

- They will wait 90 days to try again or
- Will need to see a co-worker having success before they will try again.

Understand why and when users dropped out.

Track positive and negative experiences and look for trends (Viva Insights)





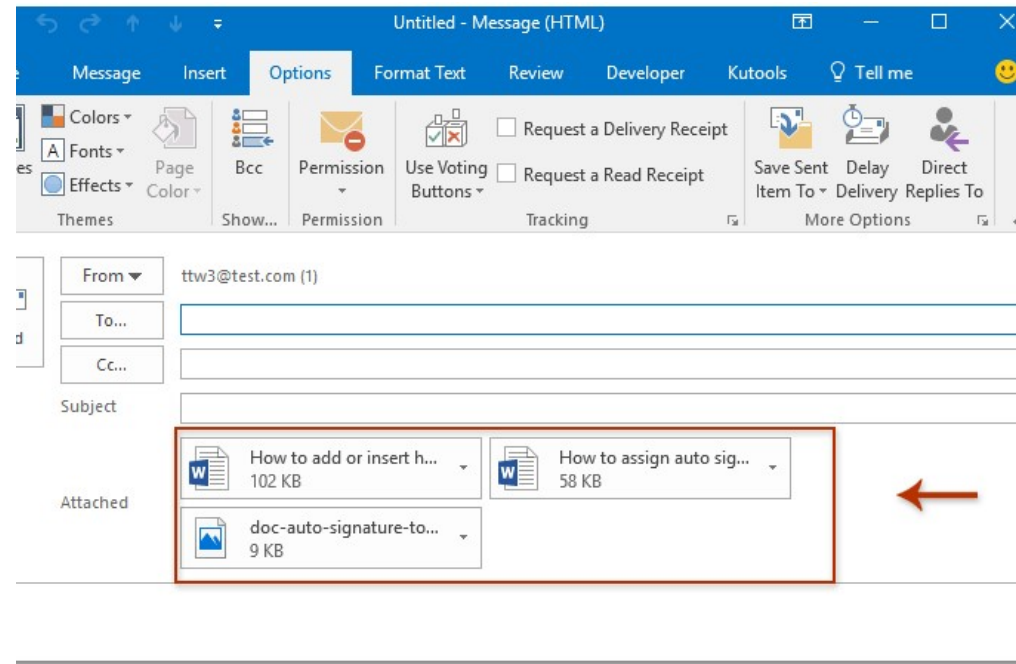
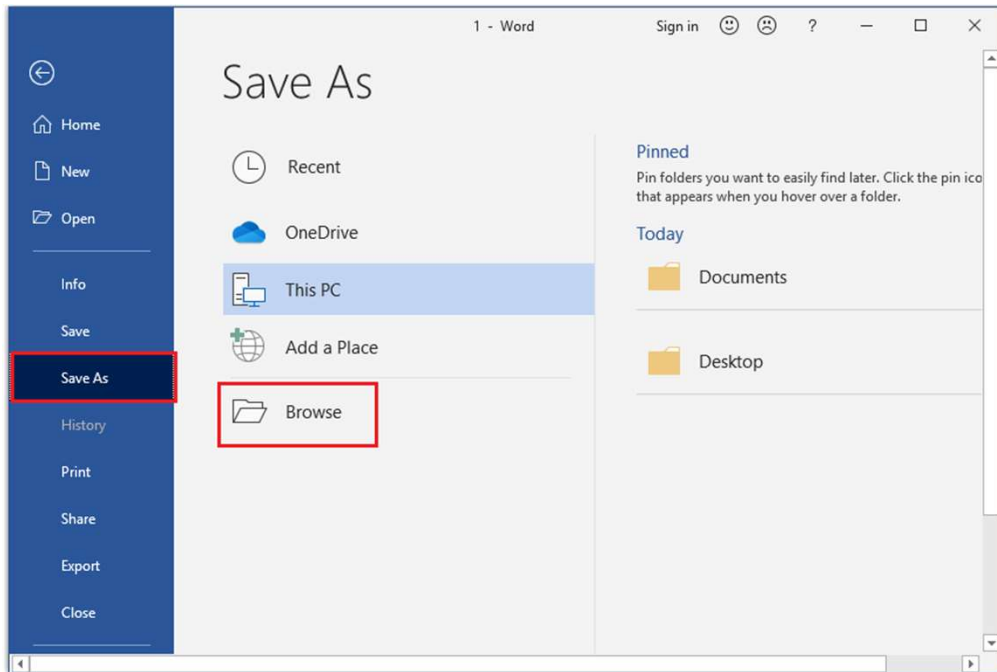
#7- Too Many Copilots

Best Practice

- Understand the different Copilots.
- One size does not fit all: **Teams Premium vs Copilot**
- Understand the difference between
 - Windows Copilot
 - Bing Copilot
 - Copilot for Work
 - What is encrypted and what is not.
- Check the references in Copilot to ensure they are timely and accurate



#6- Work Towards One Truth



Best Practice

- Turn off email attachments
- Turn on Known Folder Move in OD
- Teach everyone to save to OD/SP or Teams
- Turn on Only save to Cloud
- Turn on:
 - DLP
 - Auto-labeling
 - Viva Insights
- Add/Edit Microsoft Syntax

Search this library

Keywords

File name

People

Modified date

Any

File type

Content type ⓘ

+ Add more options ▾

- Aeroplane Manufacturer
- Airline
- Classification Date
- Confidence Score
- Flight Number

Search Close

Modified 24/02/2022, 09:29:07 Modified By System Admin

Aviation Incident Report - S4-68

Libraries where the user searched for files that might have been modified by the user. The user can click on the library name to view the library's contents.

A SATA International Airbus A320-200 registration CS-TX performing flight SA



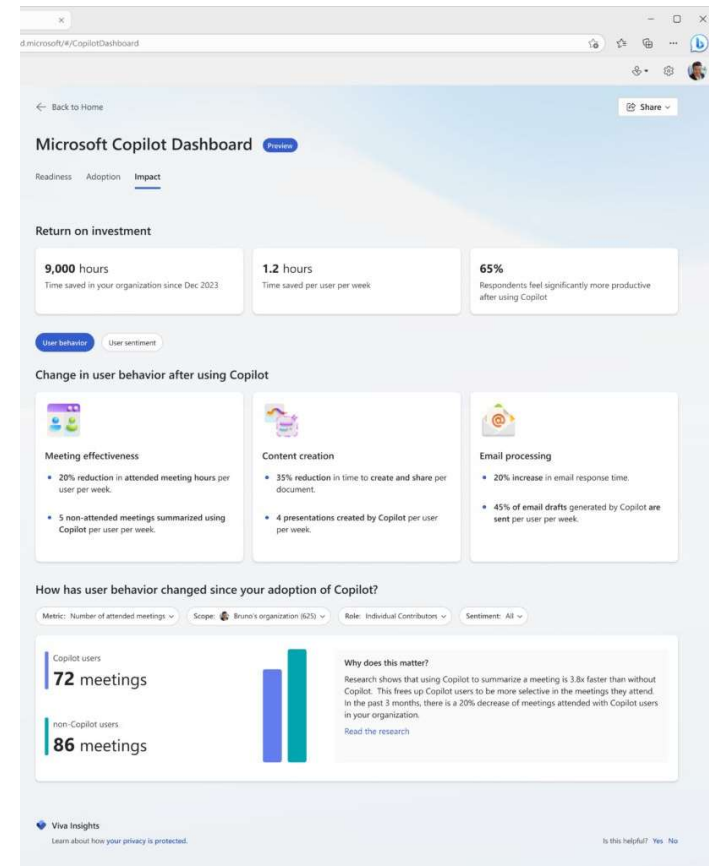
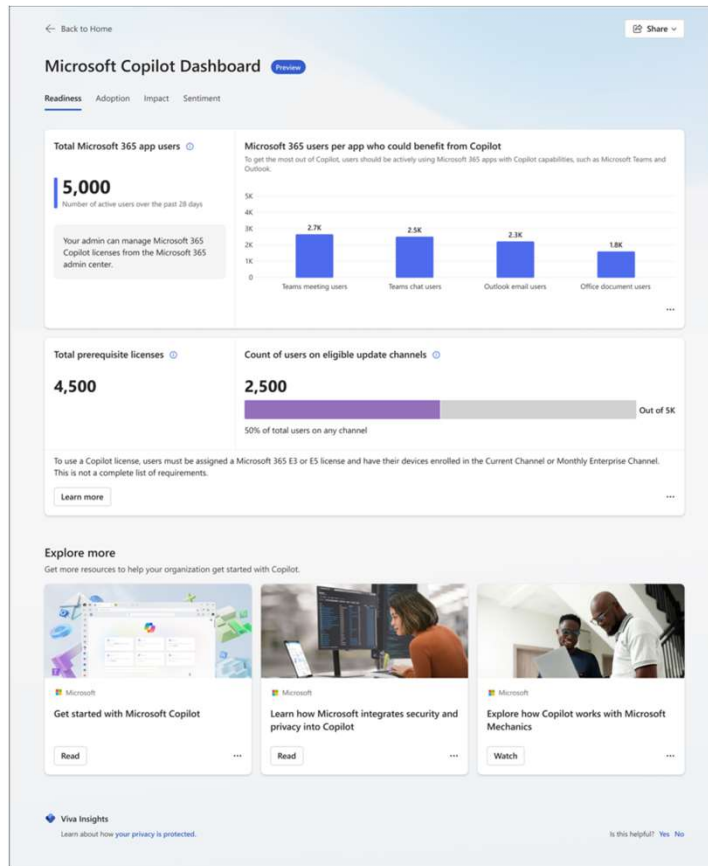
#5- Understand What Success Looks Like

What does success look like?

- Only about 40% of all companies using Microsoft Teams use it for collaboration. 60% are chat and calling on
- You must define what will success look like:
 - Better work life balance
 - More time doing the work your paid for
 - Faster onboarding times
 - More effective meetings
 - Faster time to market
 - Reduction in staff
- What tools will you use to provide data to management?
 - Viva Insights/Copilot Dashboard



Viva Insights

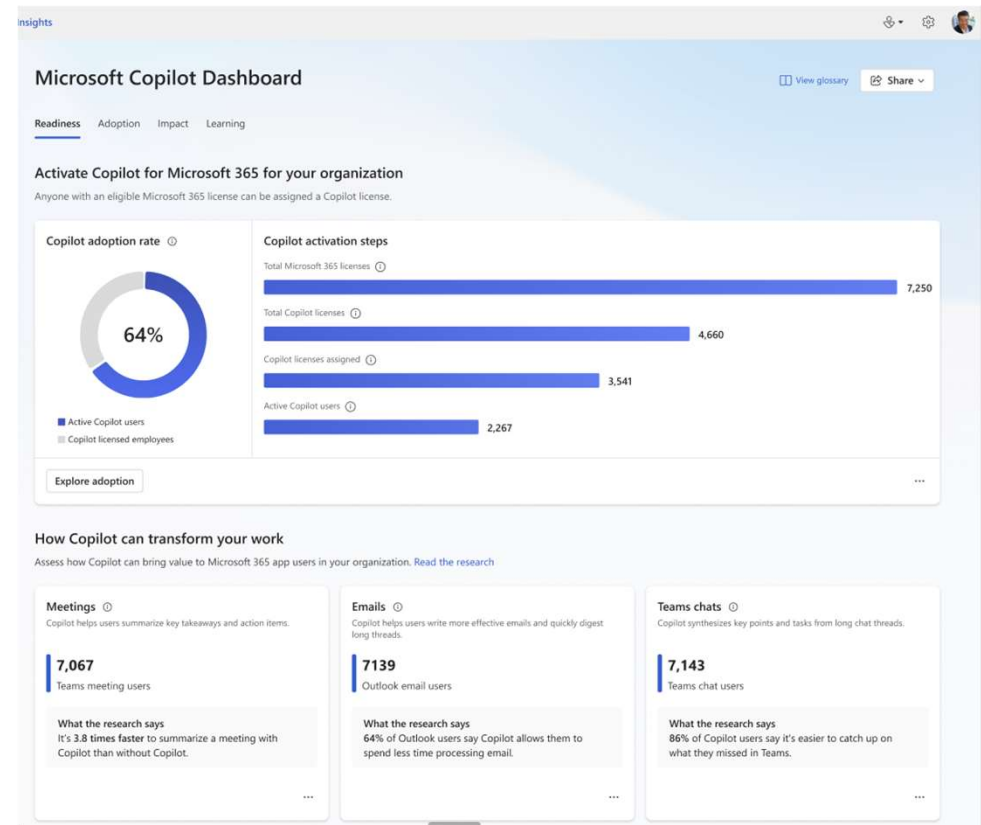


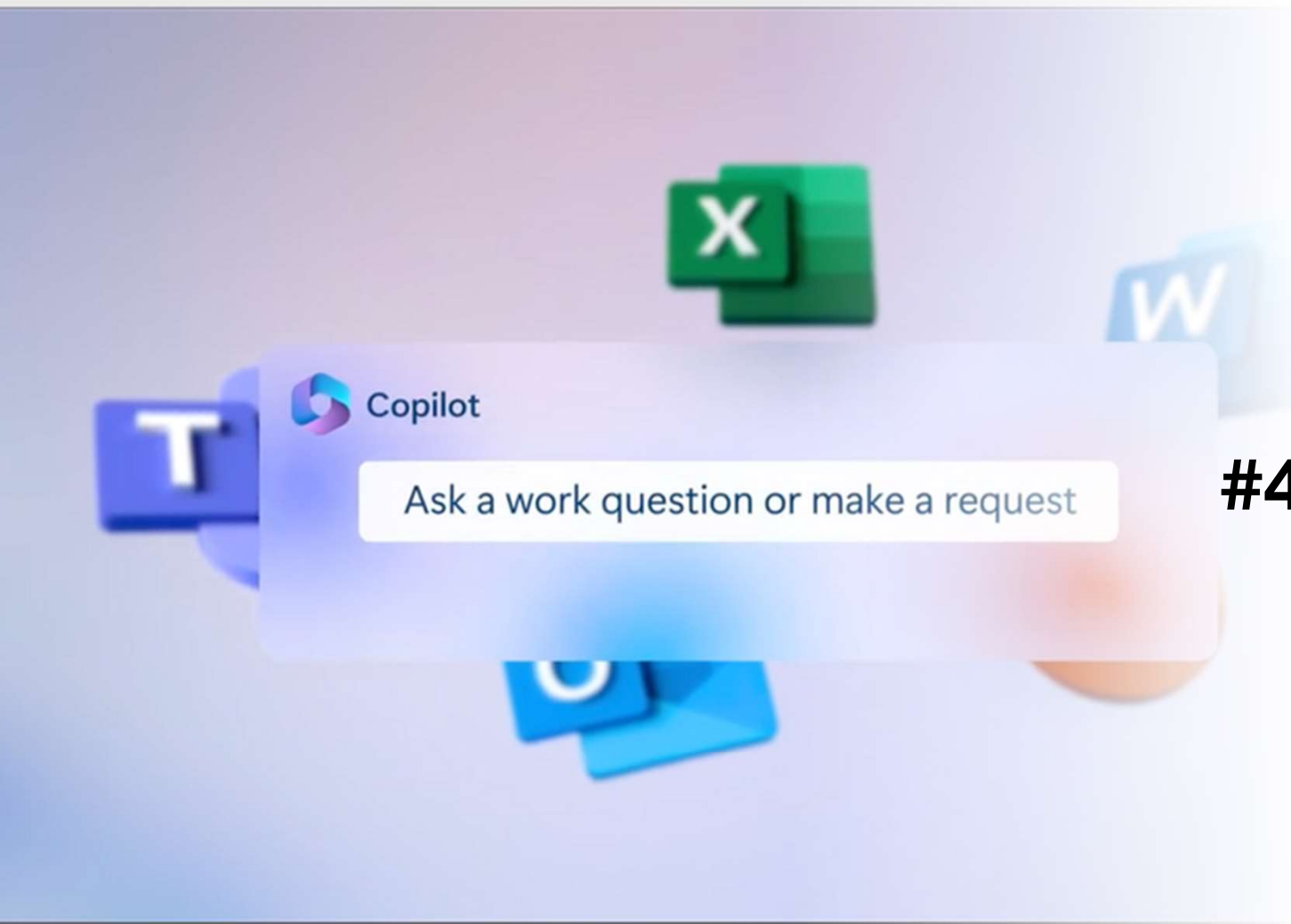


Viva Insights

Actions per user Including user counts of:

- *Teams meetings and conversation,*
- *Outlook email threads*
- *Summarization of a Word doc*
- *Draft, create or re-write*
 - *An Email*
 - *Word Doc*
 - *PowerPoint*
- *Rewrite a word or email.*





#4- Start simple

Top 5 Copilot Scenarios

- Meeting wrap-up and action items / Meeting brief and prep
 - Multiple document or email summaries
 - Email creation and response.
 - Time Off recap and actions
 - Turning a doc into a ppt



**#3- Use This As
An Opportunity
To Clean House**

Best Practices

Data:

Incomplete / Inconsistent
Incorrect / Duplicate

Teams:

Sprawl
Duplicate / Similar
Old, Orphan, or Out of Date Teams

Security:

Microsoft Purview
Azure B2B
Guest and External User Policies
Windows 365/AVD

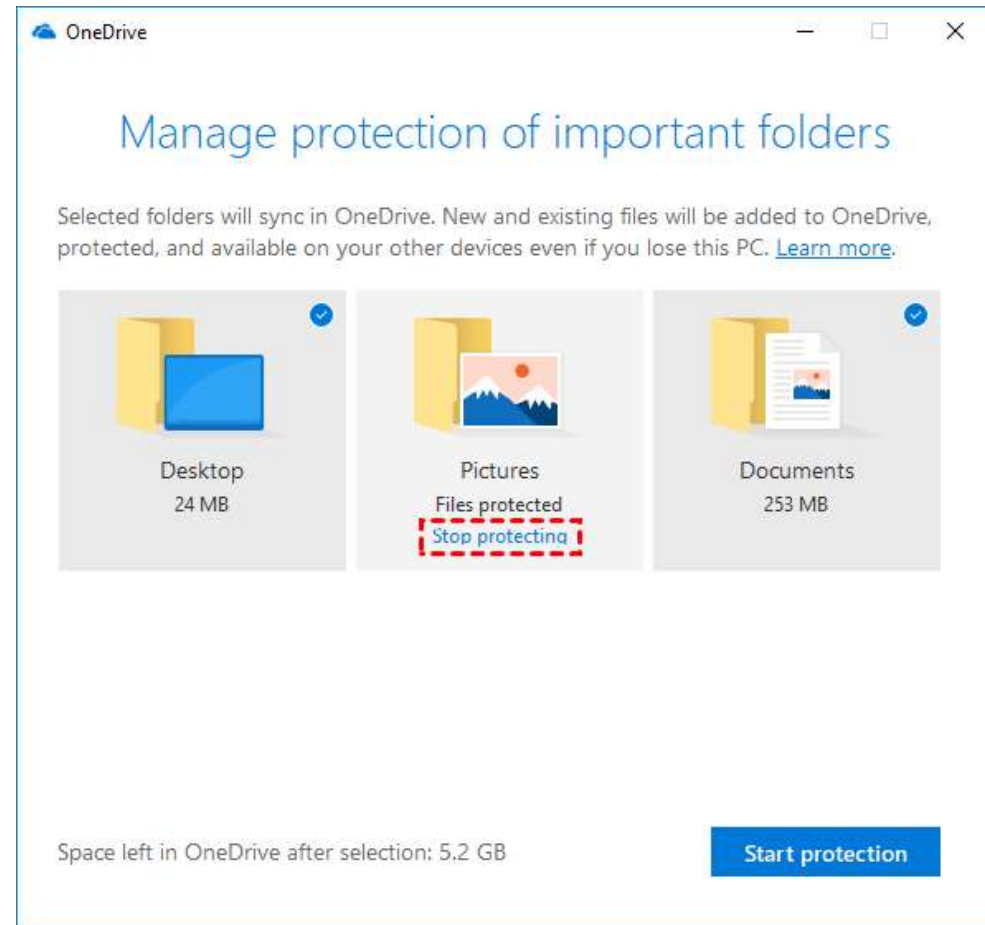


#2- Next Steps After Data Cleansing



Best Practice

- Migrate drives into SharePoint
- Turn on File Backup in OneDrive
- Remove duplicate or similar Teams
- Archive old teams/Make Read Only
- Create templates for new teams based on OU, Security Groups or Global Groups in Entra (AAD)



#1- Change is Hard

To change is difficult.
Not to change is fatal.

William Pollard

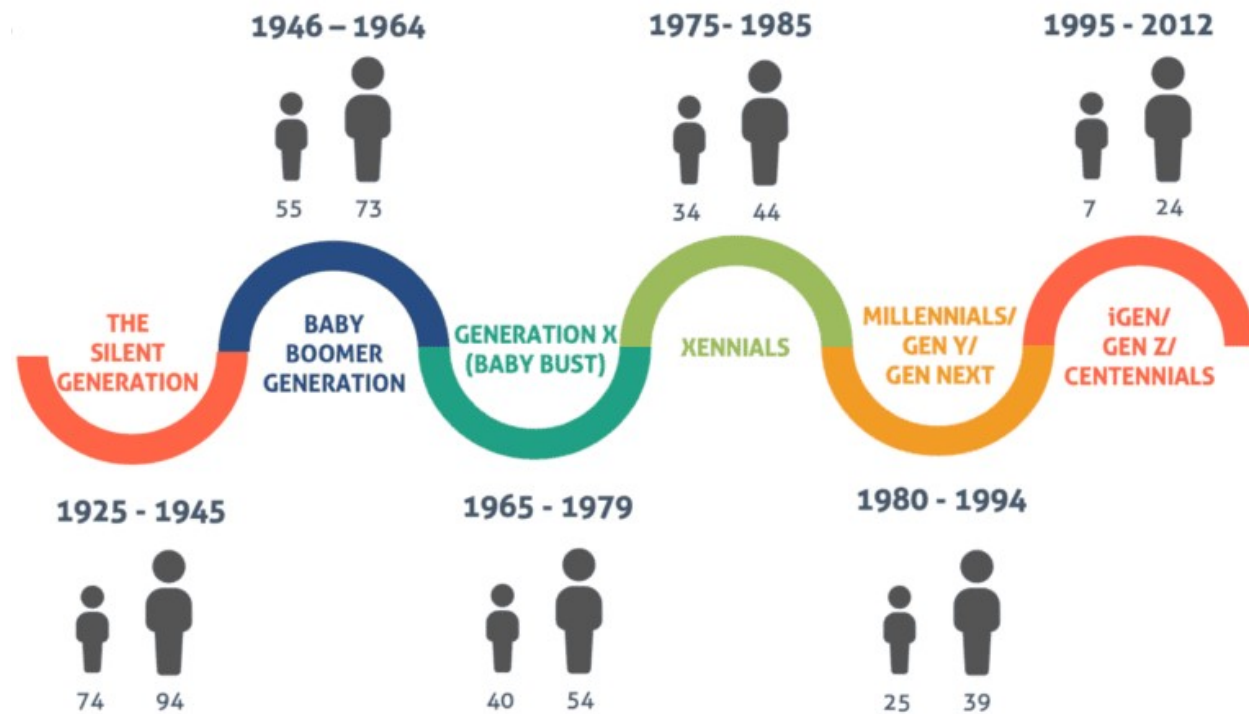
 quote fancy

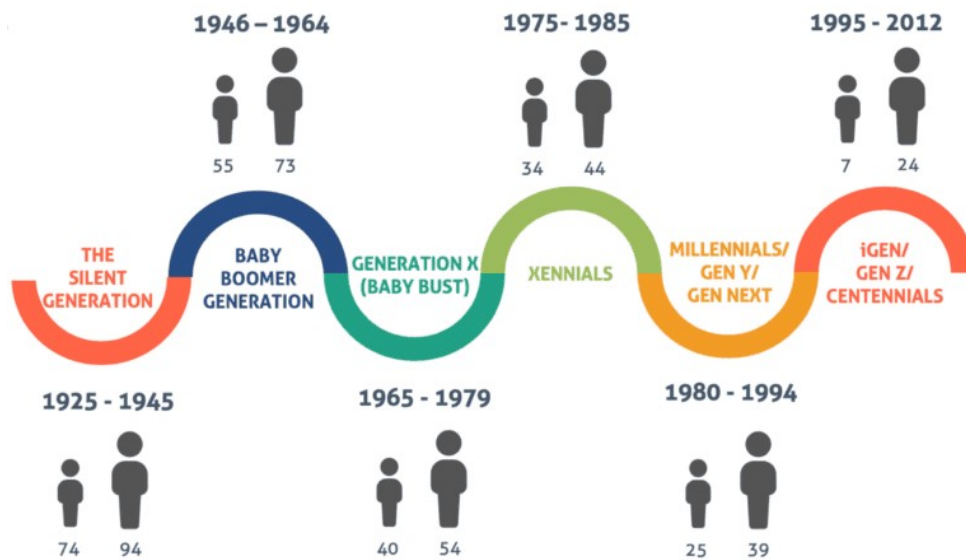
Understand Generational Work Habits to Understand Management

1995-1998 when they try to relate to the rest of gen Z



Multi-Generational Workplaces





Baby Boomer- 1st Computers

Gen X- First Laptops

Millennials- Fast Internet

Gen Z- 100% Cloud



Best Practices

- Change starts at the top. You must have C-Suite buy in.
- Understand the pain your users have and where Copilot or PowerApps could solve those issues

Resources

Microsoft Adoption

<http://adoption.microsoft.com>

<https://adoption.microsoft.com/en-us/roles/business-user/>

<https://adoption.microsoft.com/en-us/guides/>

Microsoft Learn

<https://learn.microsoft.com/en-us/training/>

<https://learn.microsoft.com/en-us/training/educator-center/>

LinkedIn Learning

<https://learning.linkedin.com/>



Thank You



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