

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 Clients Include



LAKE WASHINGTON
SYMPHONY
ORCHESTRA



Past Government Customers



Copilot for GCC (M365 Roadmap Aug 1st)

- Copilot will start rolling to early adoption users in GCC Customers in the next few months
- GCC High and DOD late 2024- early 2025
- Windows 11 Copilot / Bing Copilot available today (external only/not encrypted)
- Learn more here: <https://www.microsoft.com/en-us/industry/government>



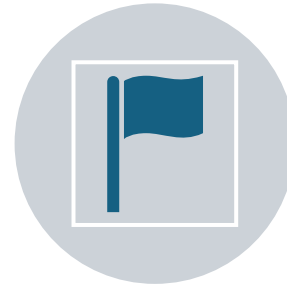
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What Will We Cover Today?

Agenda



What is Copilot and how it works



Understanding The “Microsoft Way”



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



Adoption Tips

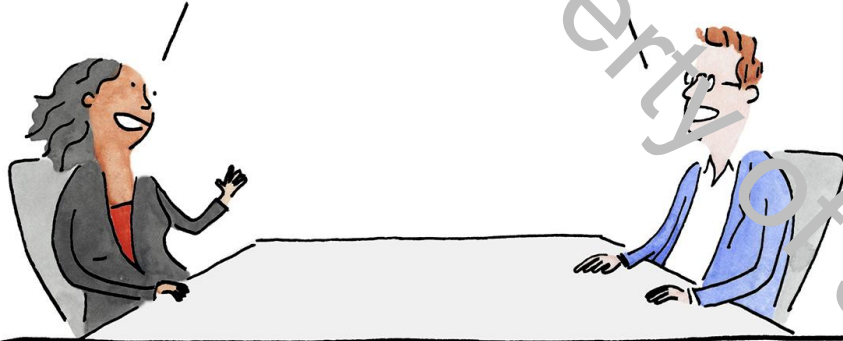


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Expectations

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...



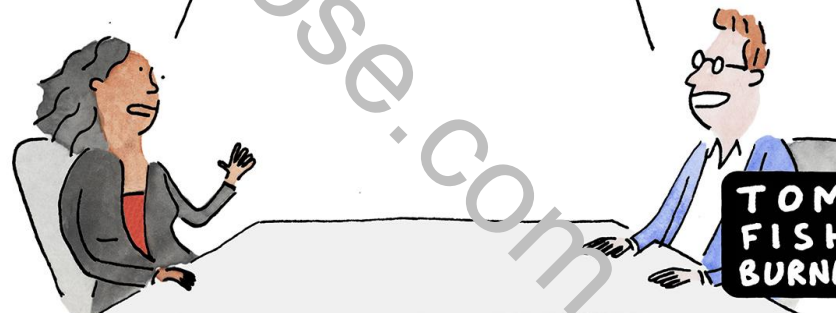
OR IF IT COULD DAMAGE OUR REPUTATION...



WHAT DO WE KNOW FOR SURE?

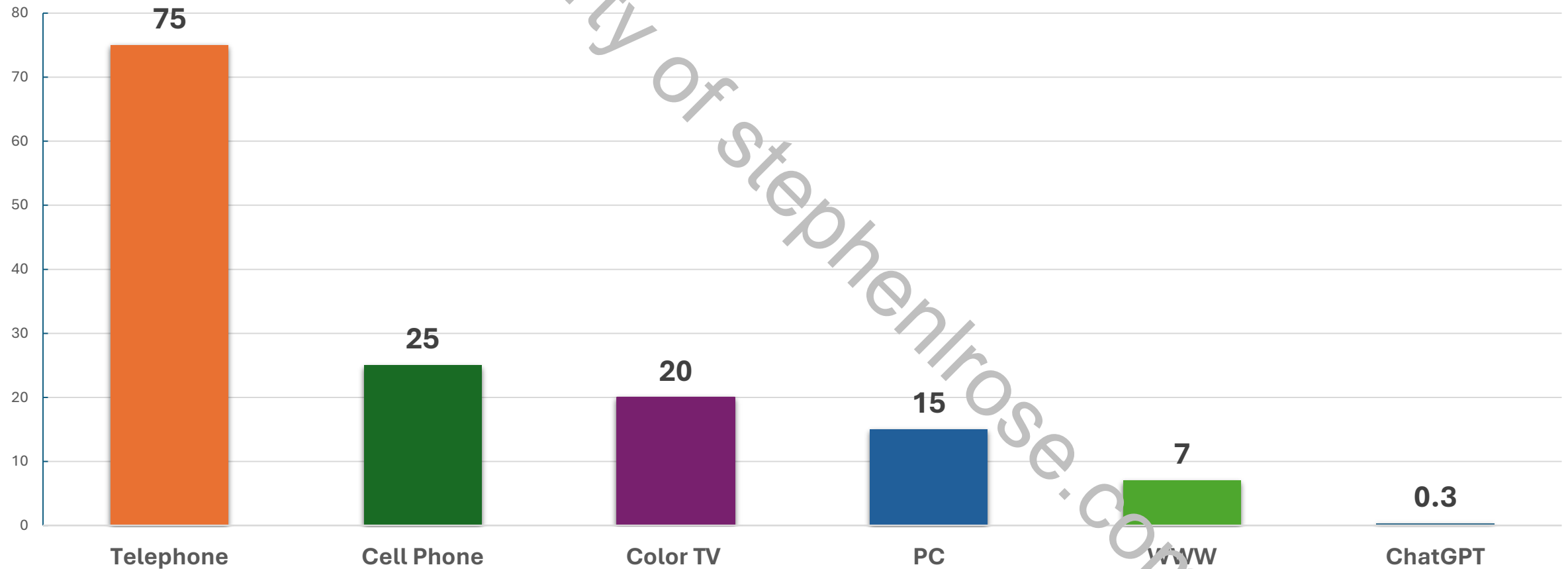


ONLY THAT WE WANT TO ADOPT IT EVERYWHERE AS FAST AS WE CAN.



TOM
FISH
BURNE

Time To Hit 100 Million Users





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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

External Info
Internet/ChatGPT
Encrypted

Response
app commands

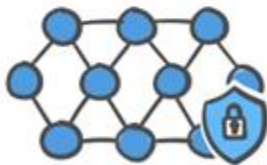
User prompt

Pre-processing

Grounding

Microsoft Graph

Semantic Index



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

Post-processing

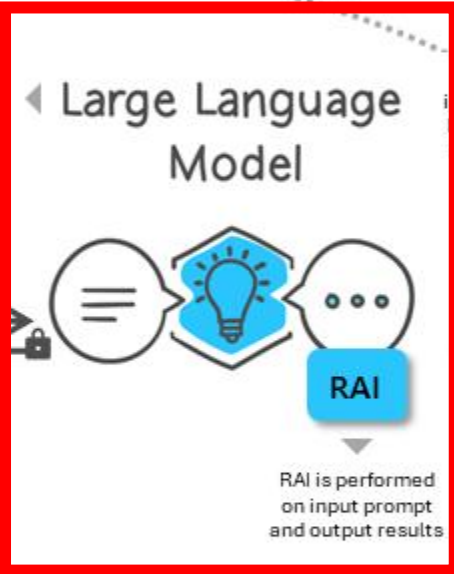
Customer Microsoft 365 Tenant

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



Modified prompt

LLM response



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

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



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



slido



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

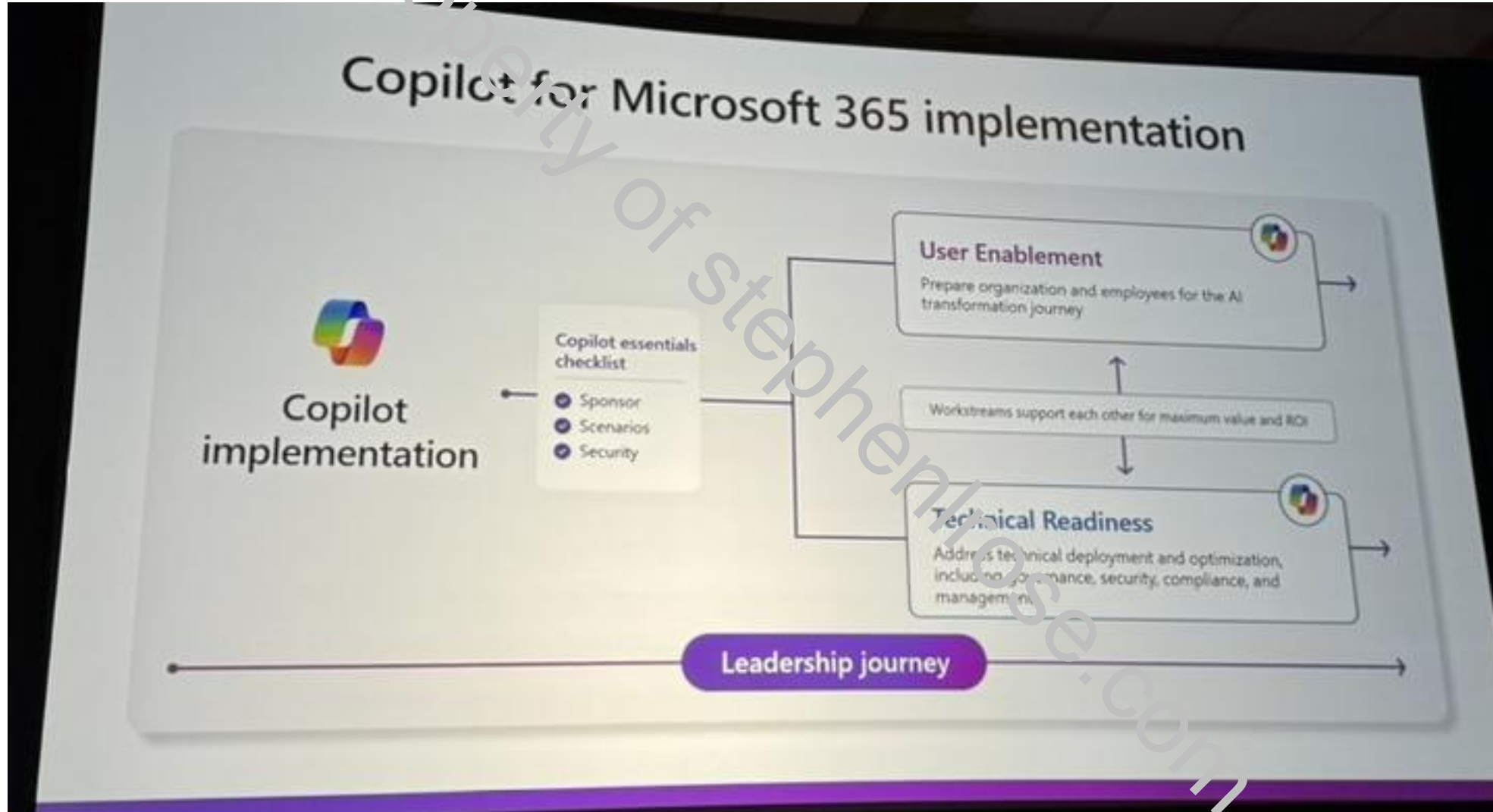
① Start presenting to display the poll results on this slide.



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How Do I Get Started

M365 Spring Community Conference 2024





Why This Approach Won't Work For Most Companies

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 pharmaceutical company stopped using Microsoft's Copilot AI tool, with an executive 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

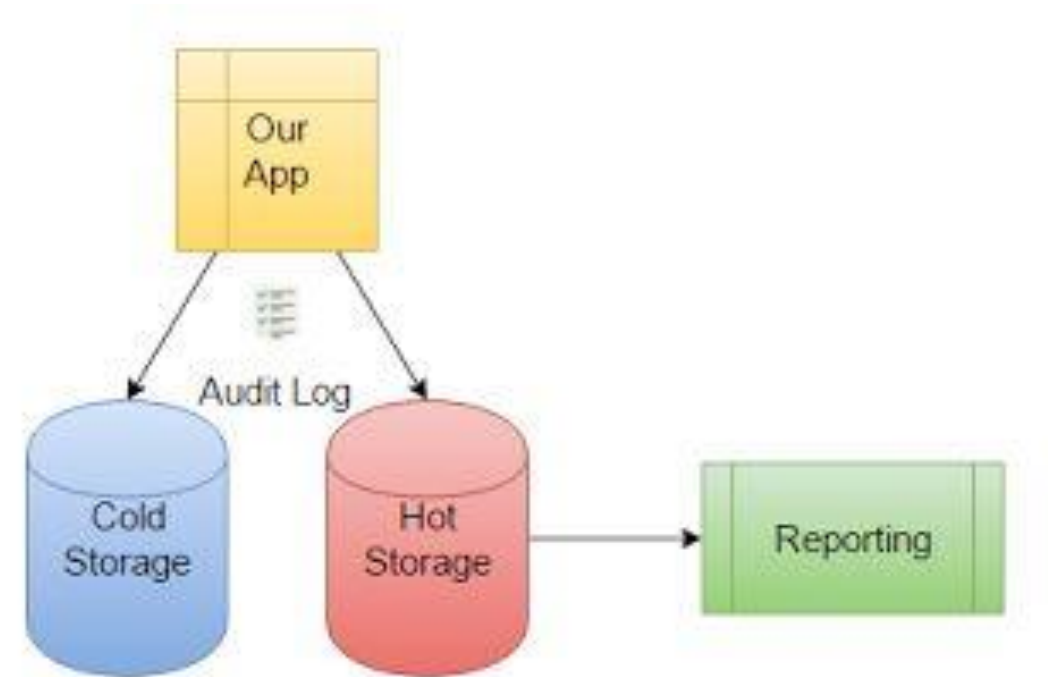
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#10- Too Much Data



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

View a summary of items crawled per content source.

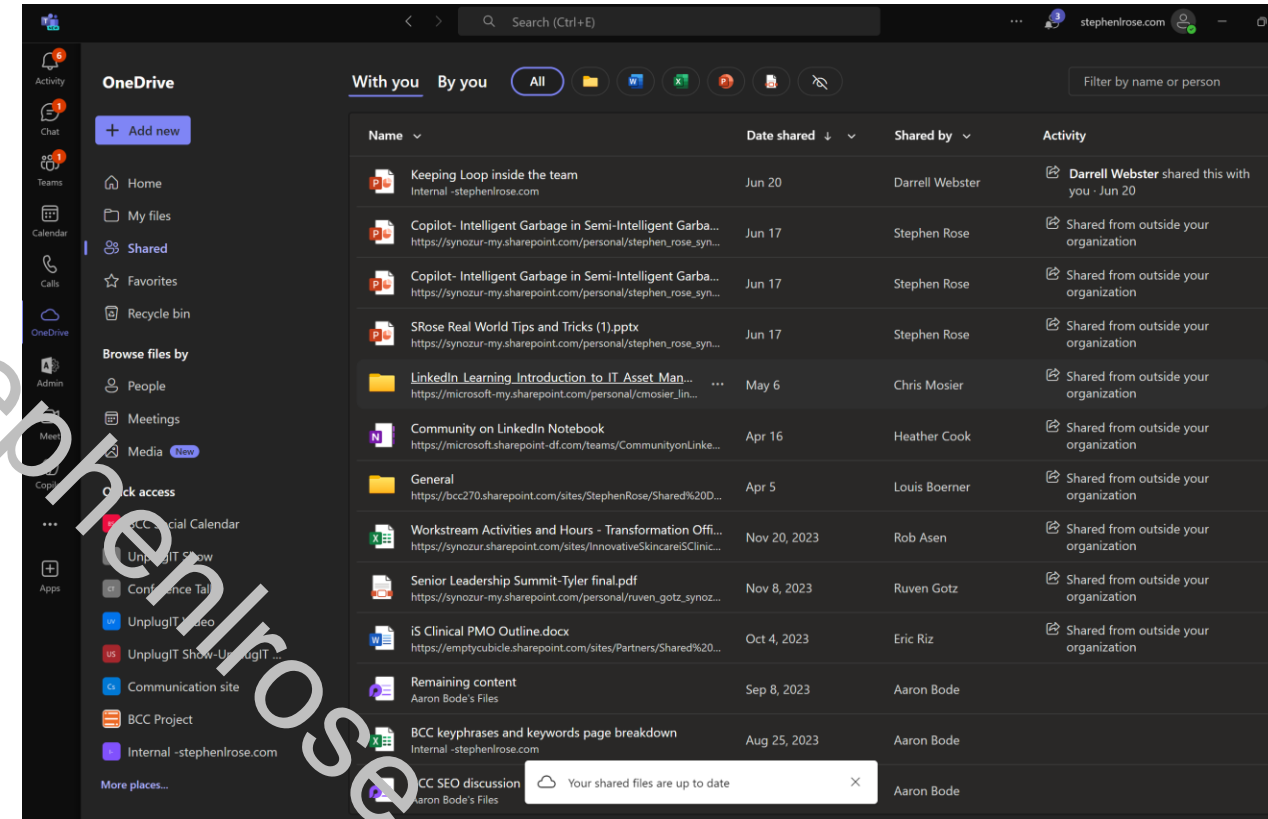
Content Source	Average Crawl Duration				Successes
	Last crawl	Last 24 hours	Last 7 days	Last 30 days	
Local SharePoint sites	00:04:01	00:13:00	00:07:44	00:06:27	157,297

Links 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



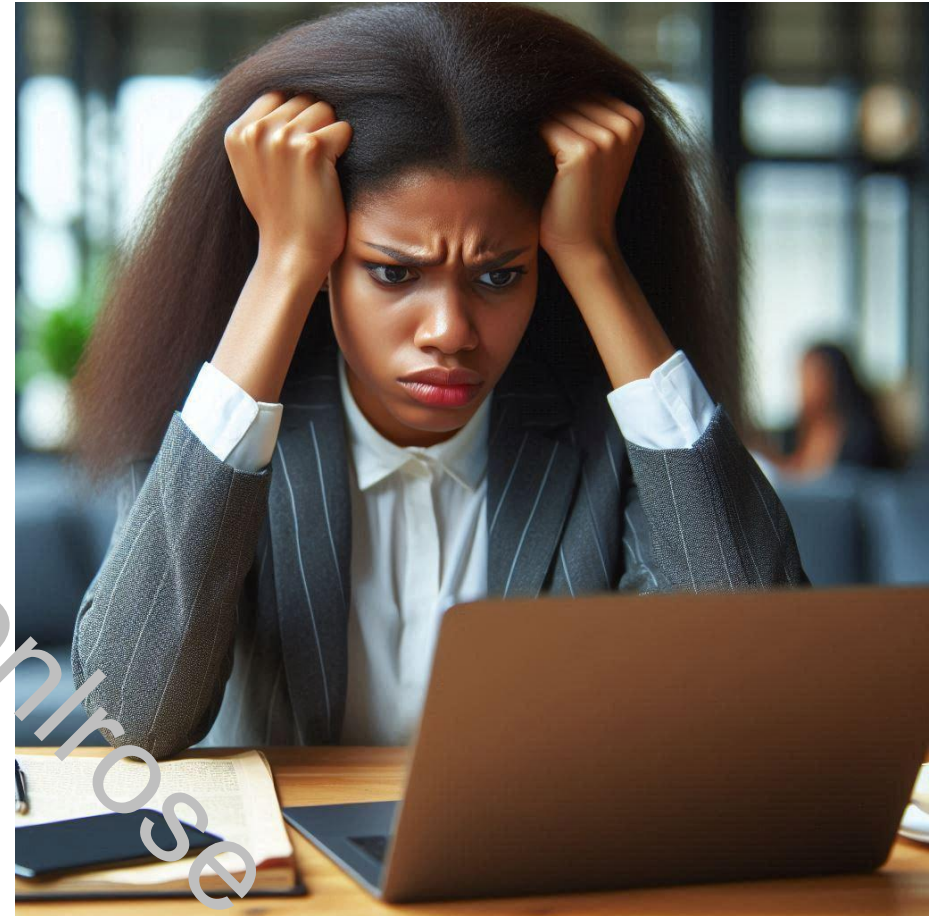
Best Practice

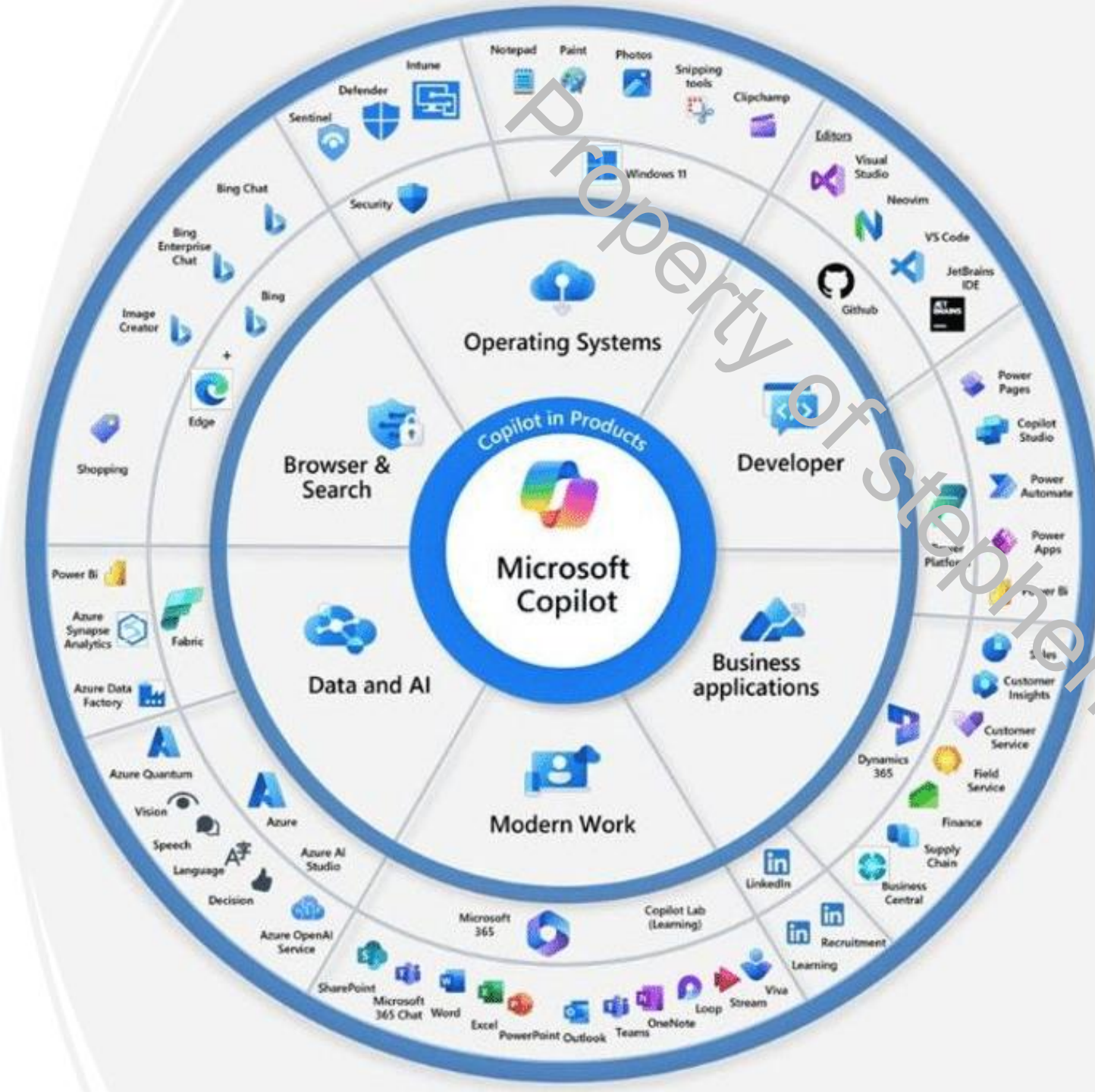
If a user has a bad experience 2-3 times:

- 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)





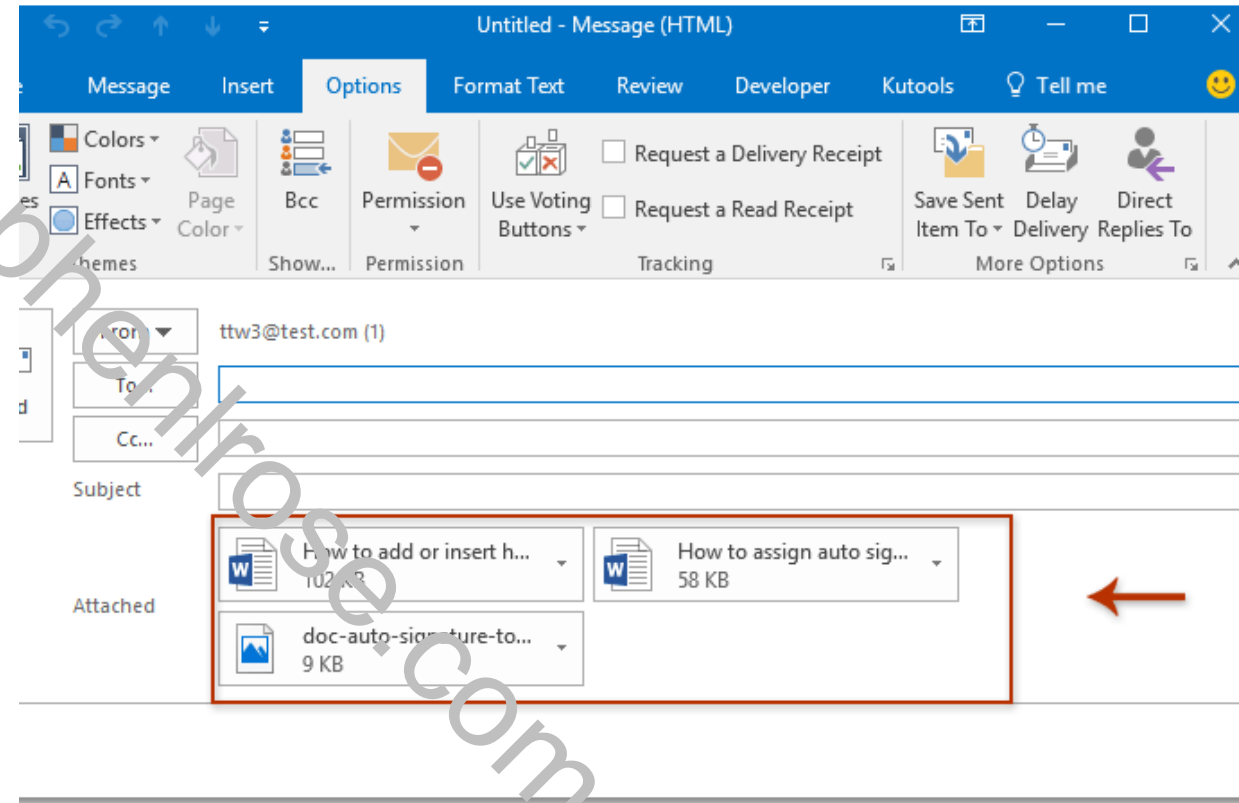
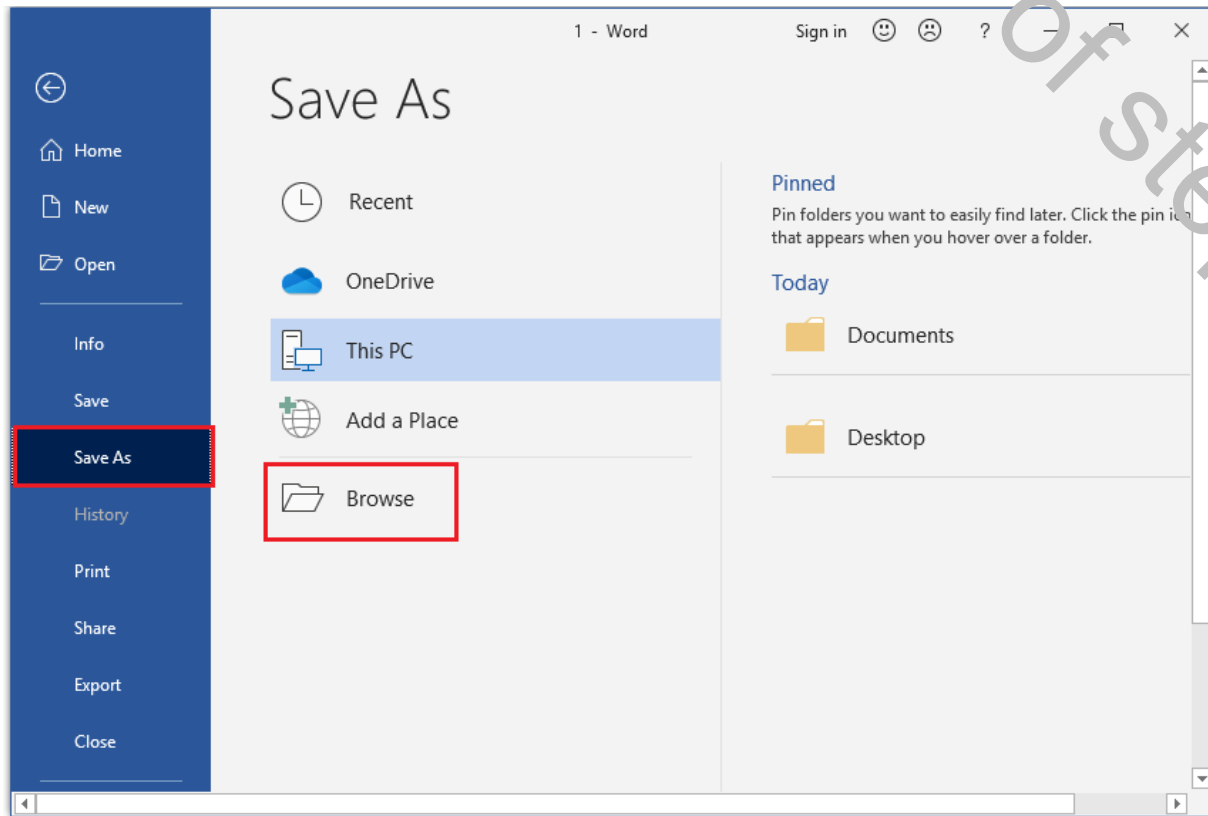
#7- Too Many Copilots

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

The screenshot shows a search interface for a library. At the top is a search bar labeled 'Search this library'. Below it are several filter sections, each with a label and a text input field: 'Keywords', 'File name', 'People', 'Modified date' (with a dropdown arrow), 'File type' (with a dropdown arrow), and 'Content type' (with a dropdown arrow). Below these filters is a link that says '+ Add more options'. A red rectangle highlights a list of suggested filters: 'Aeroplane Manufacturer', 'Airline', 'Classification Date', 'Confidence Score', and 'Flight Number'. To the right of the filters are 'Search' and 'Close' buttons. Below the buttons, there is a summary section showing 'Modified 24/02/2022, 09:29:07' and 'Modified By System Admin'. At the bottom, the title 'Aviation Incident Report - S4-68' is visible, along with some small, partially legible text about the aircraft.



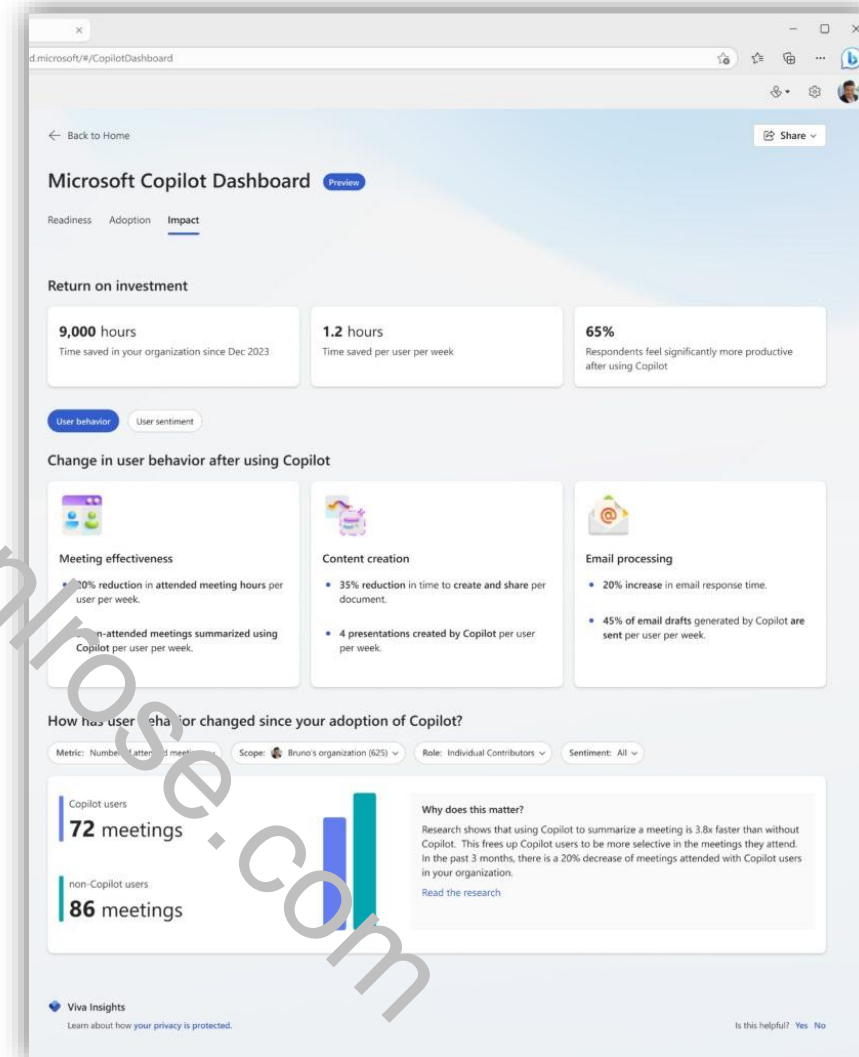
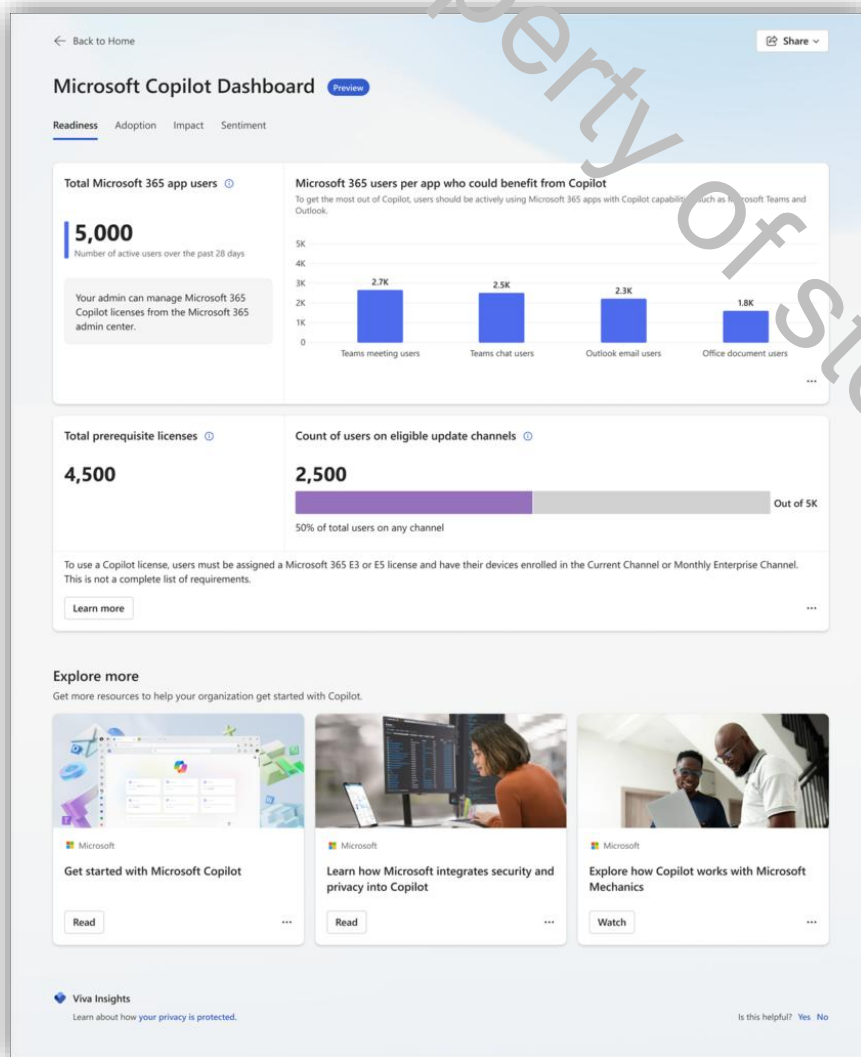
#5- Understand What Success Looks Like

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

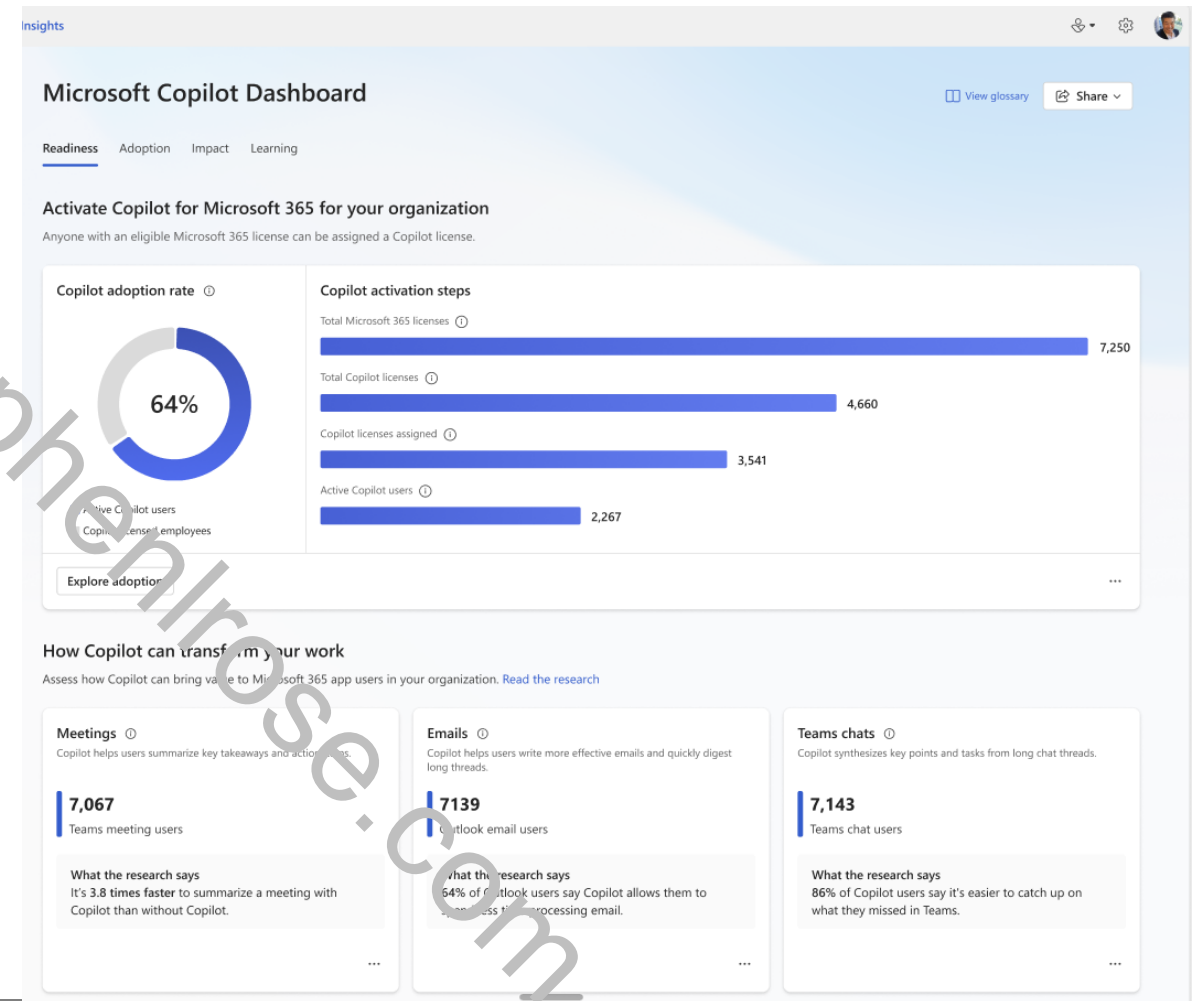


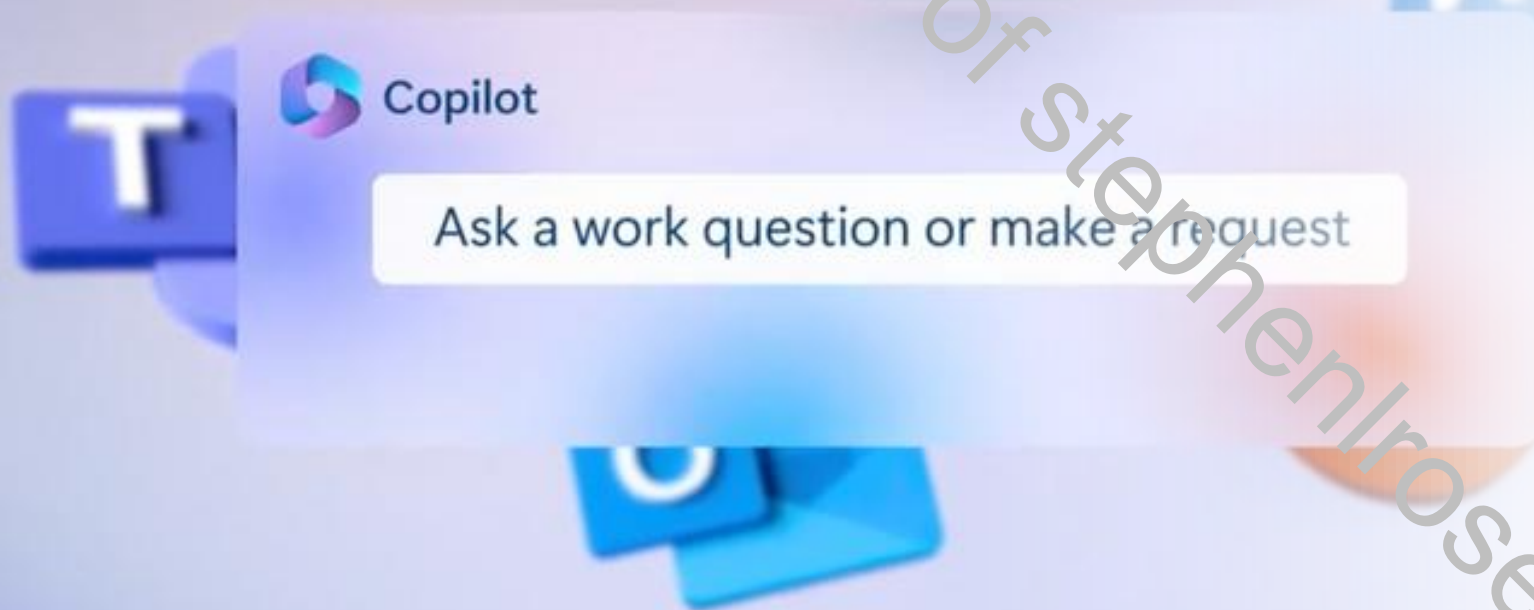


Viva Insights

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

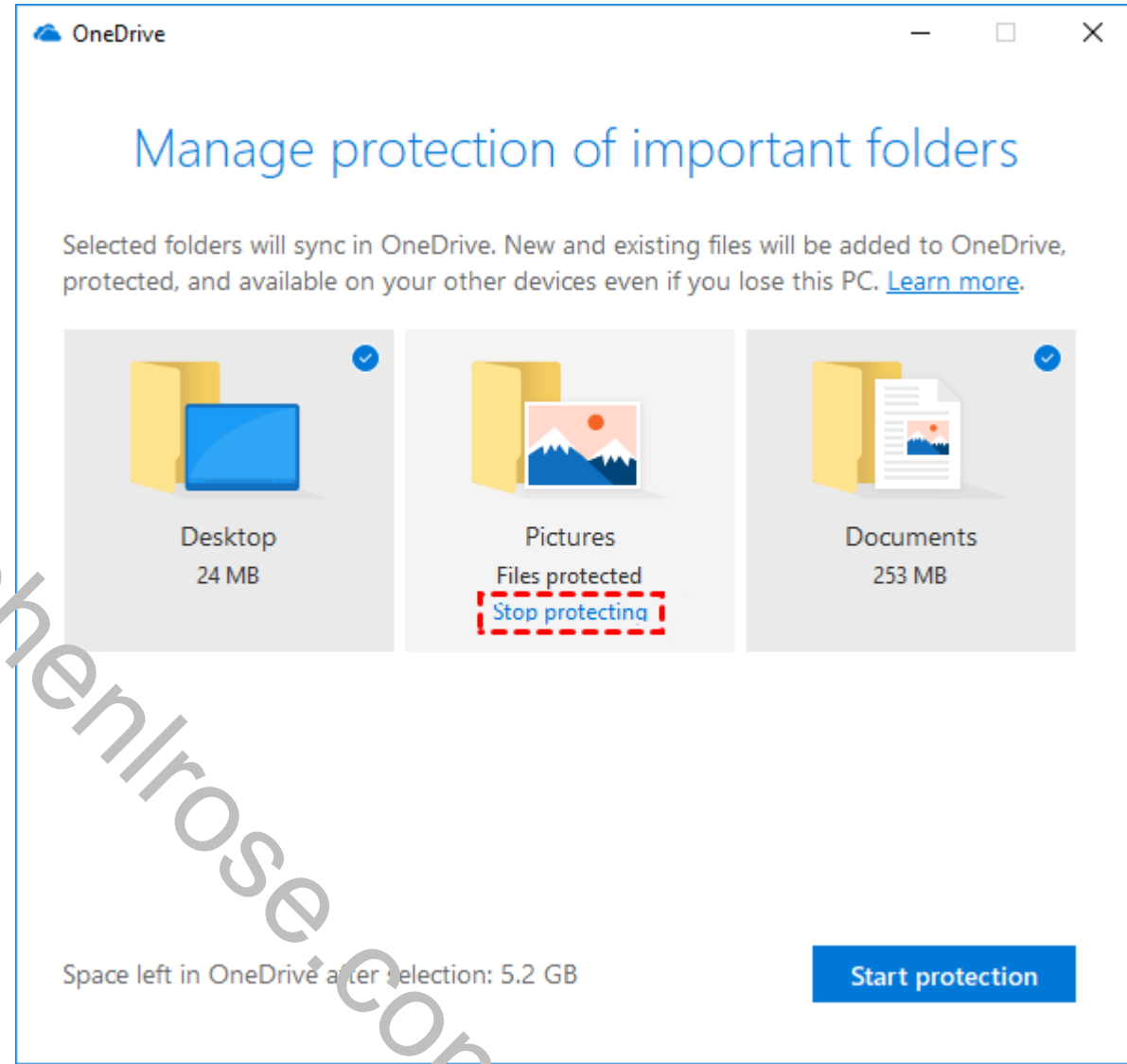


#2- Next Steps After Data Cleansing



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

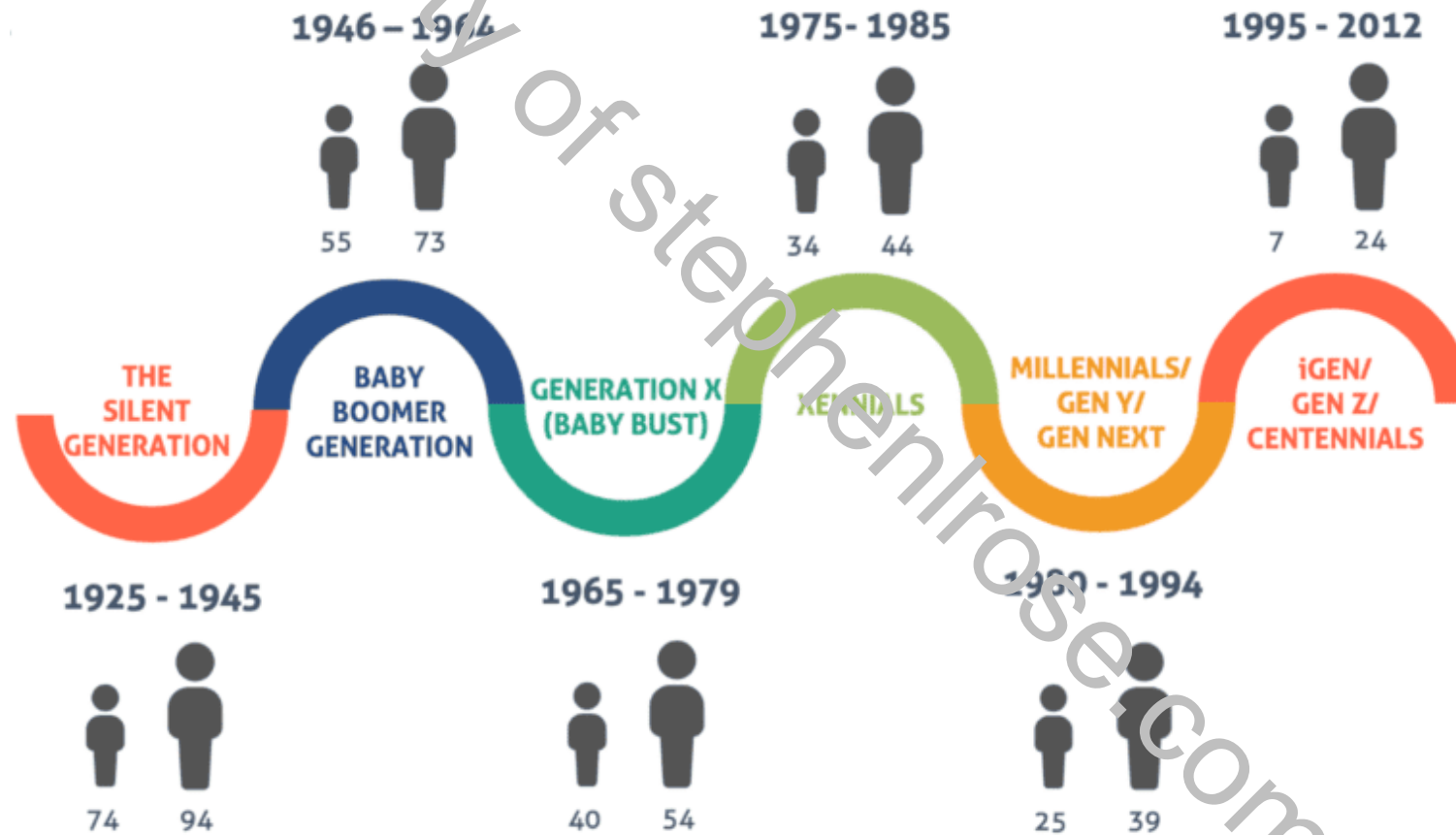
quote fancy

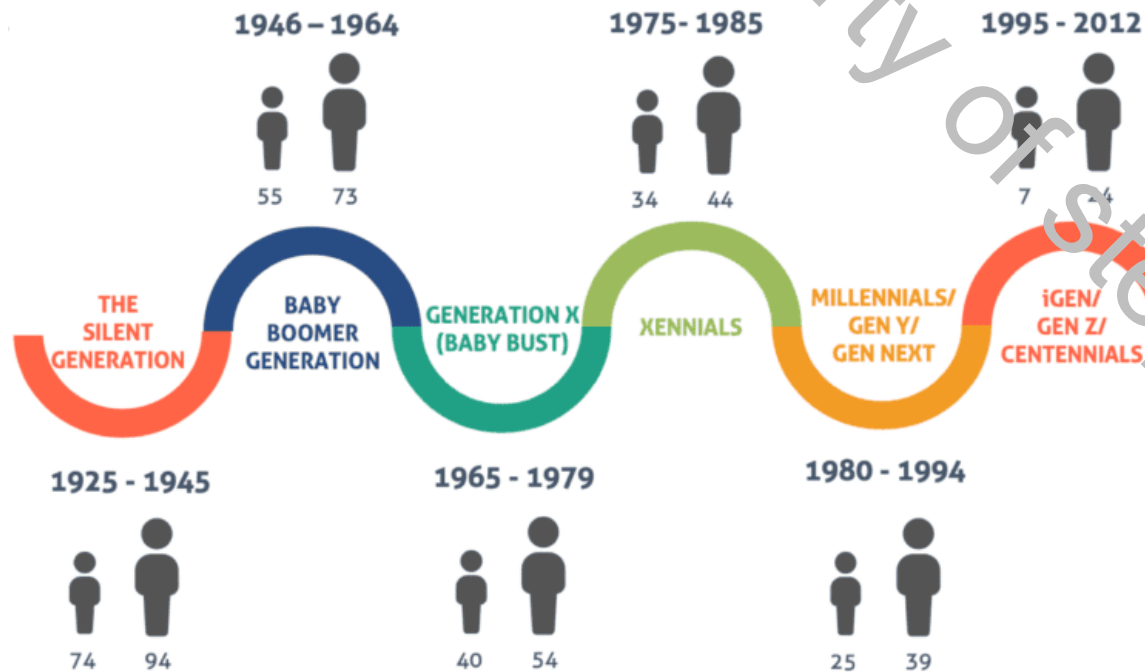
Understand Generational Work Habits to Understand Management

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



Multi-Generational Workplaces



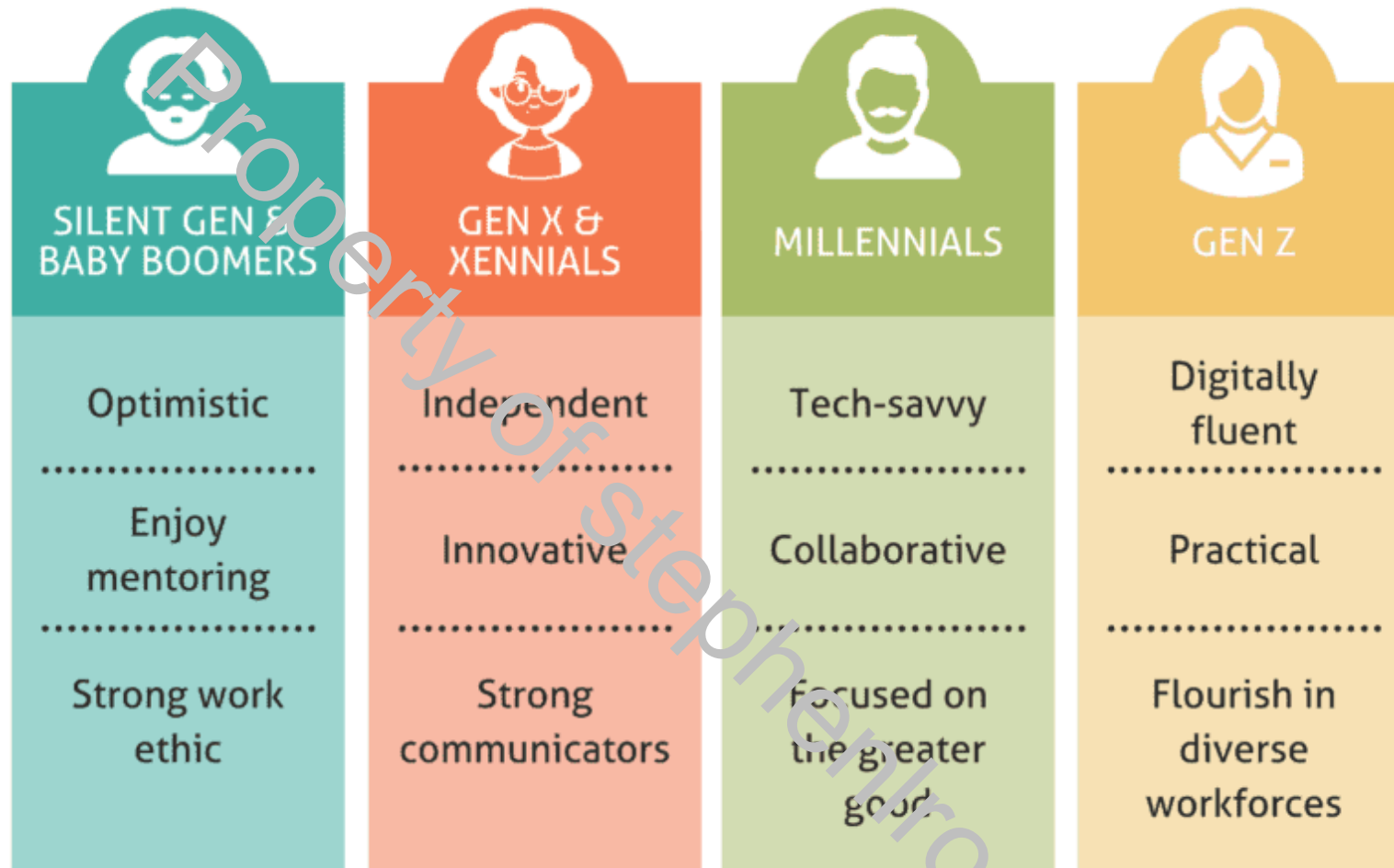


Baby Boomer- 1st Computers

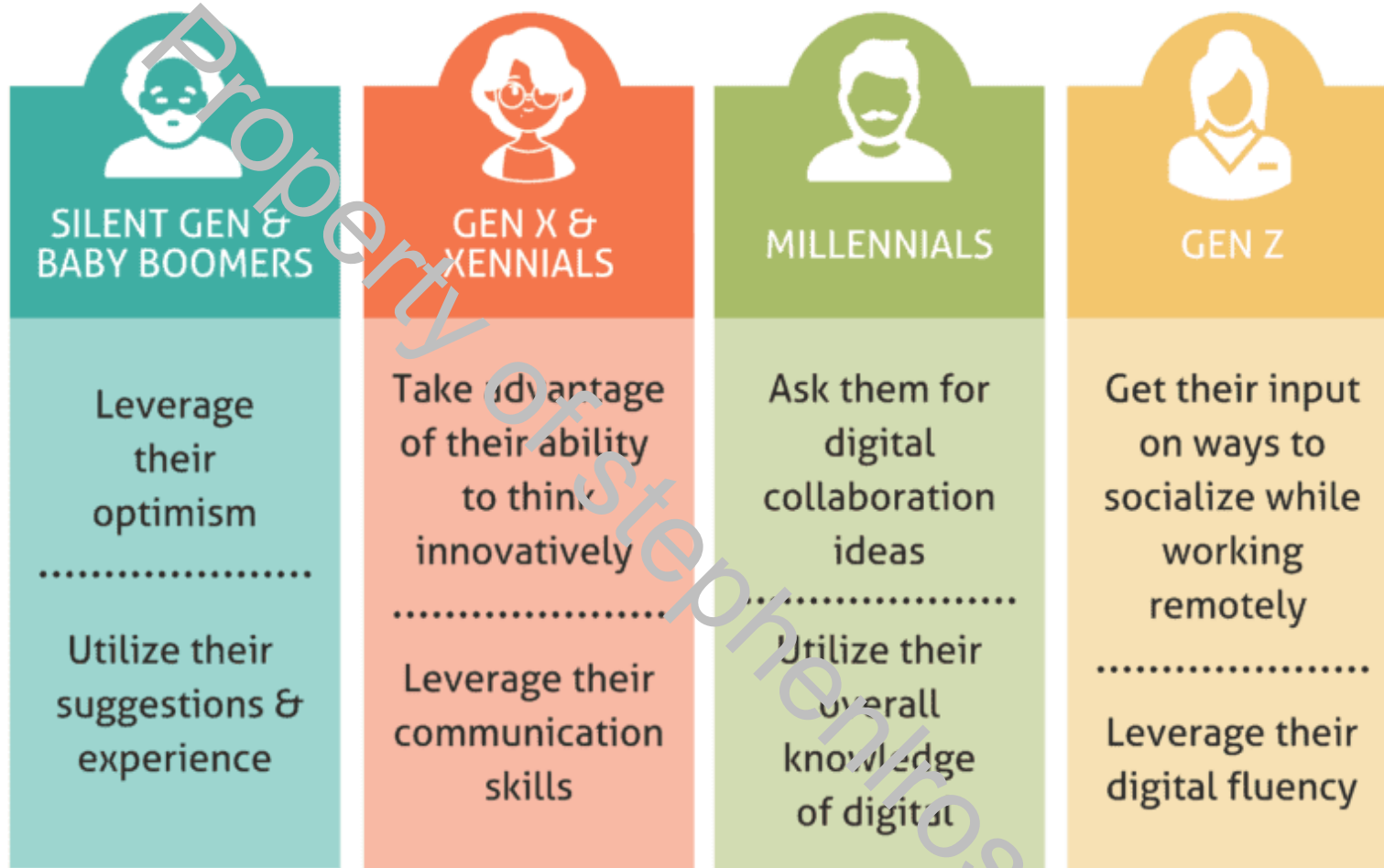
Gen X- First Laptops

Millennials- Fast Internet

Gen Z- 100% Cloud



Traits



Value



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
- Come to my session on Thurs “**Real World Tips and Tricks to Drive Software Adoption**”

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/>

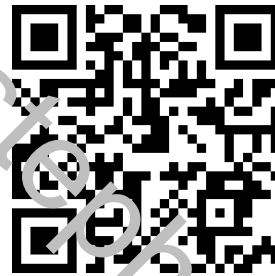
<https://learn.microsoft.com/en-us/training/educator-center/>

LinkedIn Learning

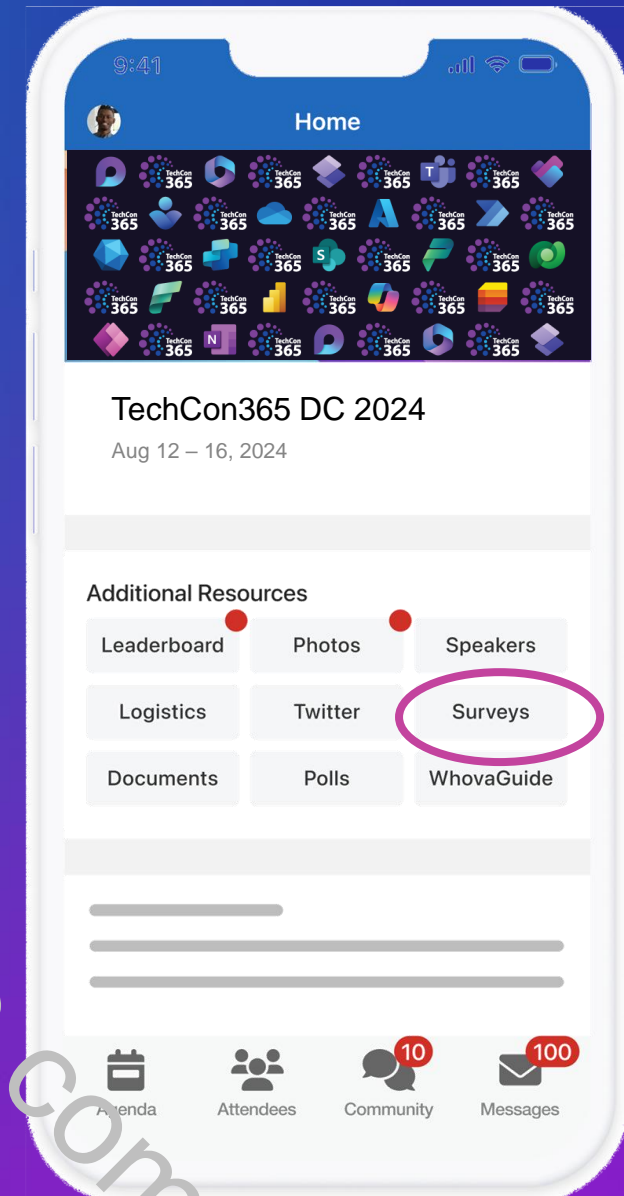
<https://learning.linkedin.com/>

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Thank You



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