



# Copilot for Microsoft 365 Step-by-step Guide

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# Artificial Intelligence and its role in business

**Copilot for Microsoft 365** is an AI-powered assistant designed to support the daily operations of businesses using Microsoft 365 solutions without significantly disrupting their existing workflows.

According to [Gartner](#), by 2026, 80% of companies will use AI, and the economic potential of AI, as estimated in a [McKinsey](#) report for 2030, could reach up to \$4.4 trillion annually, accounting for about 5% of the global economy.

Additionally, [Accenture](#) data shows that 75% of executives believe their businesses could fail if they do not adopt AI on a large scale within the next five years.

## Boost employee productivity with Copilot

- ✓ Streamline routine tasks
- ✓ Enhance employee skills
- ✓ Foster innovation and creativity



# Artificial Intelligence - Strategy



A [McKinsey](#) study reveals that the biggest obstacle to AI adoption and implementation is the lack of a clear AI strategy.

Simply introducing AI is not enough - the key to maximizing its benefits lies in proper organizational preparation, which can be broken down into two main steps:

- Data preparation
- Data security

## Maximize your Return on Investment

*"Companies that scale successfully see 3X the return on their AI investments compared to those who are stuck in the pilot stage"\**

\*What is Artificial Intelligence (AI) & Why is it Important? | Accenture

## Why implement Copilot for Microsoft 365?

Copilot for Microsoft 365 leverages advanced machine learning and natural language processing to:

- Provide real-time support based on context, improving documentation, communication, and data analysis quality.
- Perform comprehensive data analysis in Excel, identify trends, and generate visual data representations.
- Automate content creation in Word and PowerPoint - generating high-quality texts, designs, and layouts.
- Streamline communication in Outlook and Teams - suggesting emails, messages, responses, and summaries of long email threads or chats.
- Enhance teamwork in Microsoft Teams - automating meeting scheduling and assisting in brainstorming sessions with reminders and suggestions.



# Key steps for implementing Copilot for Microsoft 365

## 1. Prepare Your Data

Copilot performs best when it has access to high-quality, well-organized data.

- **Migrate data to Microsoft 365 Cloud** - Copilot bases its recommendations and results on data available in the Microsoft 365 tenant.
- **Clean your data** - remove duplicates and outdated information.
- **Organize data** - label data with metadata.

**Data quality drives AI accuracy**

**Copilot delivers results as good as the data it receives!**

## 2. Secure Your Data

Security should be a priority, especially when AI gains access to sensitive information.

- **Conduct a risk assessment** - identify over-shared or sensitive data.
- **Implement the least privilege access model** - restrict access to critical data.

**Prioritize security from the outset**

*“60% of AI-related security incidents stem from internal errors, not external attacks.”\**

\*Gartner Survey Reveals 80% of Executives Think Automation Can Be Applied to Any Business Decision

## Plan for the future

To fully leverage Copilot, align your data management processes with the tool's requirements.

- **Define Governance Frameworks** - specify who has access to data and how it is used.
- **Maintain a Proper Content Lifecycle** - archive or delete unnecessary data to improve AI results.

### NOTICE

Without a proper management strategy, AI may generate inconsistent or incorrect results.



# Preparing data for Copilot

## Bad data leads to bad results

If Copilot for Microsoft 365 processes data containing errors, it may generate inaccurate results, leading to poor business decisions and outcomes.

Decentralized data across multiple applications



Centralize your data using Microsoft 365

Unorganized data without labels



Organize, catalog, and describe your files

Files with errors, duplicates, and drafts



Correct errors, remove duplicates and drafts to ensure Copilot does not access them

## Optimize Your Operations!

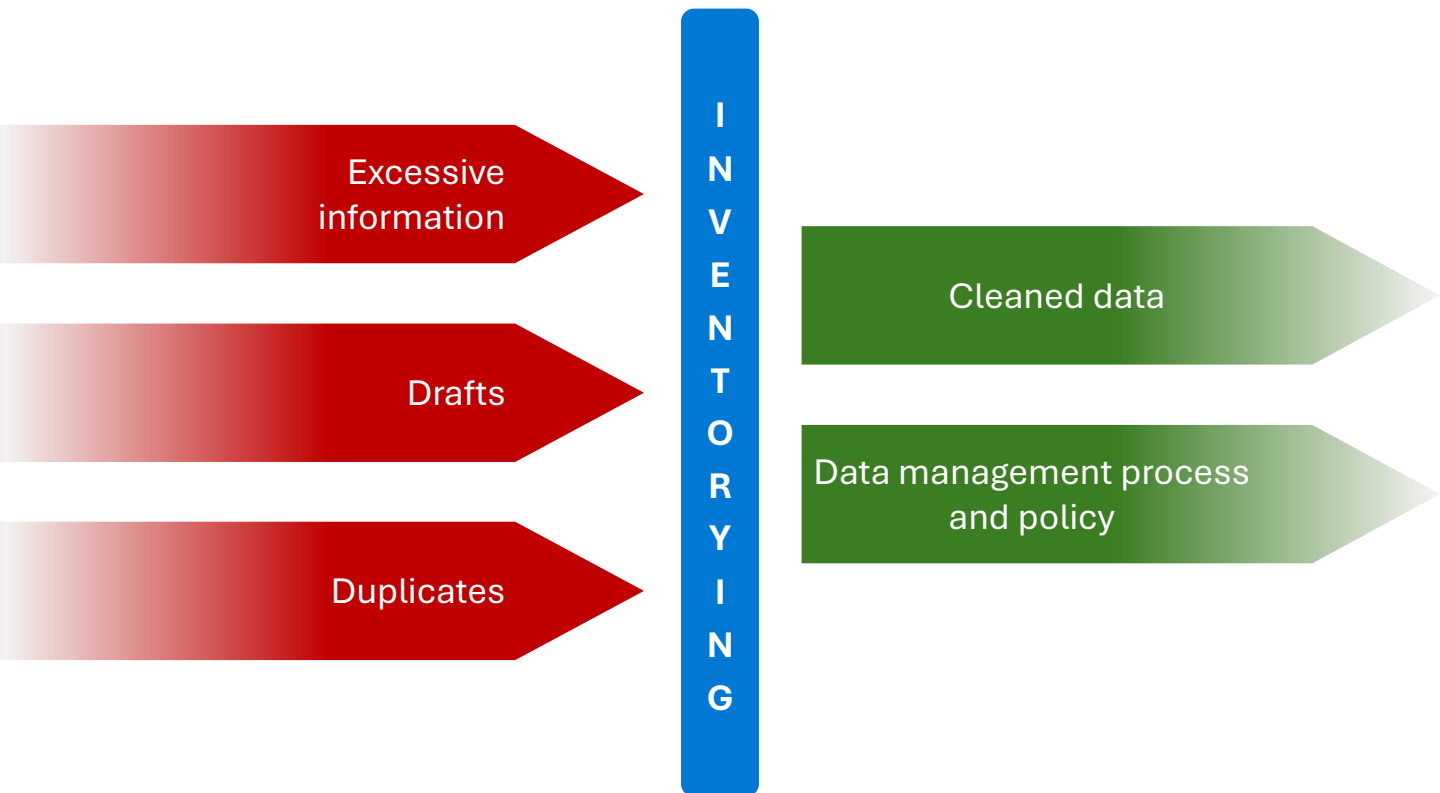
- Define sustainable AI usage policies
- Enforce policies to maximize benefits
- Continuously improve data management practices

# Organizing data

## Cataloging and inventorying data



- ✓ Identify and analyze the data you possess
- ✓ Understand your current organizational structure
- ✓ Locate and eliminate redundant, outdated, or trivia data, which can compromise your environment



## Classifying data in Microsoft 365

### Metadata (SharePoint or OneDrive)

Provides descriptive information about your data using custom columns. Enhances understanding of files for both Copilot and users.

### Sensitivity Labels (Microsoft Purview)

Allow for data identification and classification. They also link to access restrictions to clearly determine whether a user should see a specific file.

These steps are essential for improving AI outcomes.

# Securing data

## Security - The challenge

A [Deloitte](#) study highlights security as the primary concern related to AI tools.

## Access control - The solution

Although Copilot is designed with privacy, compliance, and security in mind, it provides quick and direct access to information from any location where a user has permissions. Therefore, controlling and managing **user access to content** is crucial when working with AI.

## Access management - The need

Given the vast variations in permissions available for users, services, and devices in cloud environments - where up to 50% are considered high-risk and only 1% are regularly used - maintaining control over who can access what data across different cloud platforms is becoming increasingly difficult.

## Securing data – Risk assessment



### Identify:

- > Sensitive data (e.g., personal or financial data that is not properly secured)
- > Over-shared data (e.g., content shared via anonymous links)

### Analysis

To perform this analysis manually, review the content of each workspace and its corresponding site permissions.

### Warning!

Skipping this step will make sensitive content much easier to discover via Copilot! Implement security measures to protect it.

# Securing data - Permissions

## Permissions

- Address concerning permissions
- Consider a least-privilege access model for sensitive data to exclude it from AI results

## Privacy Policy

- Start by implementing secure practices
  - ✓ Limit Microsoft Teams membership
  - ✓ Control access to pages with sensitive data
  - ✓ Train users on secure handling of sensitive data

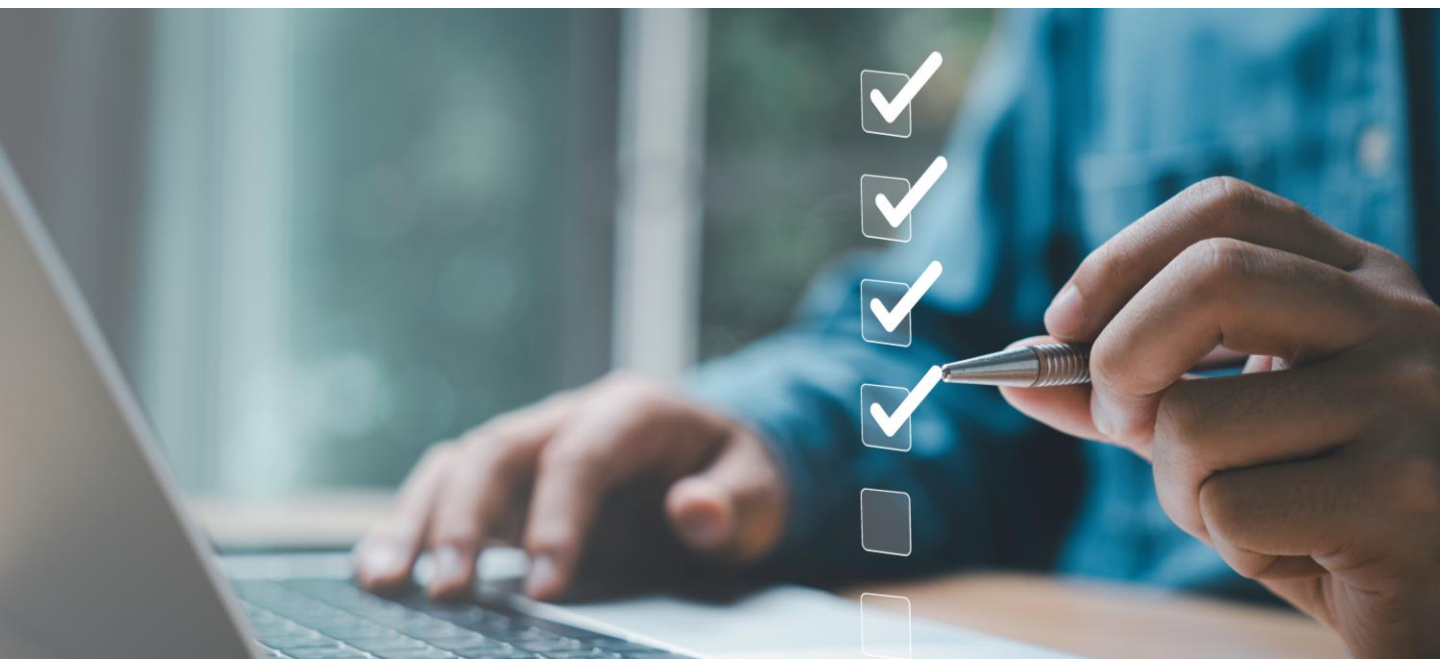
## Compliance

- Regularly review and update security policies
  - ✓ Monitor user activity
  - ✓ Update permissions and access controls
  - ✓ Implement new policies to address emerging risks

## Securing data - Summary

As AI usage grows, so does the volume of generated data - making proper data management essential. Achieve this by:

- Implementing security best practices
- Identifying and restricting access to sensitive data
- Locating and organizing over-shared data
- Verifying access permissions in the Microsoft 365 tenant
- Training employees
- Updating strategies to address new challenges



## Key steps - Summary

### Prepare high-quality, organized data

- ✓ Migrate data to Microsoft 365
- ✓ Remove redundant, outdated, and draft data
- ✓ Ensure proper use of labels and metadata

### Secure your data with access definitions

- ✓ Conduct a risk assessment
- ✓ Identify and fix security gaps related to access
- ✓ Enforce robust security policies
- ✓ Monitor deviations from established policies



### Results

- Increased productivity through task automation
- Enhanced employee skills
- Greater innovation and creativity
- Higher ROI
- Competitive edge in the AI era

## Implementation and adaptation within reach

Implementing **Copilot for Microsoft 365** can be a time-consuming and complex task. For many companies, the best solution is to rely on specialists.



### At KTBnet, we offer:

- Analysis of the current situation
- License selection assistance
- Data preparation
- Copilot implementation
- Adaptation of existing solutions to emerging needs
- And much more...



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