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# Master Copilot for Microsoft 365



Ensure a **Secure** and **Optimized** Implementation of **Copilot for Microsoft 365**



# Master Copilot for Microsoft 365

Ensure a *Secure and Optimized* Implementation of Copilot for Microsoft 365



Copilot  
Ready

1. Prepare your environment & optimize data security
2. Implementation in your organization
3. Next Level: Build Agents in Copilot Studio
4. Summary & Next Steps



**Espen Aas-Monsrud**  
Cloud Lead

**netnordic**  
THE BEST COMPANION



**Henrik Lundberg**  
Change Management specialist  
& Copilot Technical Champ



**Anton Lövmär**  
Cloud Architect &  
Copilot Security Specialist



# Prepare your environment



Copilot  
Ready





# Microsoft 365 Copilot requirements

- ✓ Base license assigned
- ✓ Microsoft 365 Apps
- ✓ Microsoft Entra ID
- ✓ Microsoft OneDrive
- ✓ Microsoft Outlook
- ✓ Microsoft Teams
- ✓ Microsoft Loop
- ✓ Microsoft Whiteboard
- ✓ Office Feature Updates task
- ✓ Update channels
- ✓ Network requirements



# Prepare your environment

- ☑ Test environment
- ☑ Pilot testing
- ☑ Communication plan
- ☑ Review Conditional Access policies
- ☑ Review SharePoint Search and Advanced Management Policies
- ☑ Ensure network compliance



Copilot  
Ready





## Oversharing - Problem summary

Microsoft 365 Copilot (Copilot)'s ability to leverage information available to employees has raised concerns for organizations about overshared permissions

If oversharing risks aren't addressed, they could lead to



Access to information  
beyond what the user  
needs for their role



Inappropriate sharing  
of content



Out of date or  
irrelevant responses

By addressing these risks, organizations can ensure that information is shared appropriately and securely

# Common causes of Copilot oversharing in SharePoint



## Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public

## Share "Branding Elements.pptx"

Add a name, group, or email

Add a message

People in Contoso with the link can edit.

Copy link

Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

## m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK

Cancel

Broken permission inheritance

## Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

everyone

Everyone except external users

Search Directory

Use of "everyone except external users" domain group

## Documents










Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels





# Blueprint to prevent oversharing

	Pilot (Optional) 	Deploy 	Operate 
Activities	<ul style="list-style-type: none"><li>Identify most popular sites &amp; assess oversharing</li><li>Grant Copilot access to popular, low risk sites</li><li>Turn on proactive audit and protection</li></ul>	<ul style="list-style-type: none"><li>Discover oversharing risks</li><li>Restrict sensitive info from Copilot access and/or processing</li><li>Increase site privacy</li></ul>	<ul style="list-style-type: none"><li>Further reduce risk and simplify oversight</li><li>Further secure sensitive data</li><li>Improve Copilot responses</li></ul>
Outcomes	 Deploy copilot to sub-set of users with up to 100 sites	 Copilot fully deployed in your organization	 Continuous improvement of data security practices
Effort*	 2–4 days	 2–4 weeks	 More than one month

\*Suggested efforts should be reviewed into timelines based on your tenant size and organizational complexity

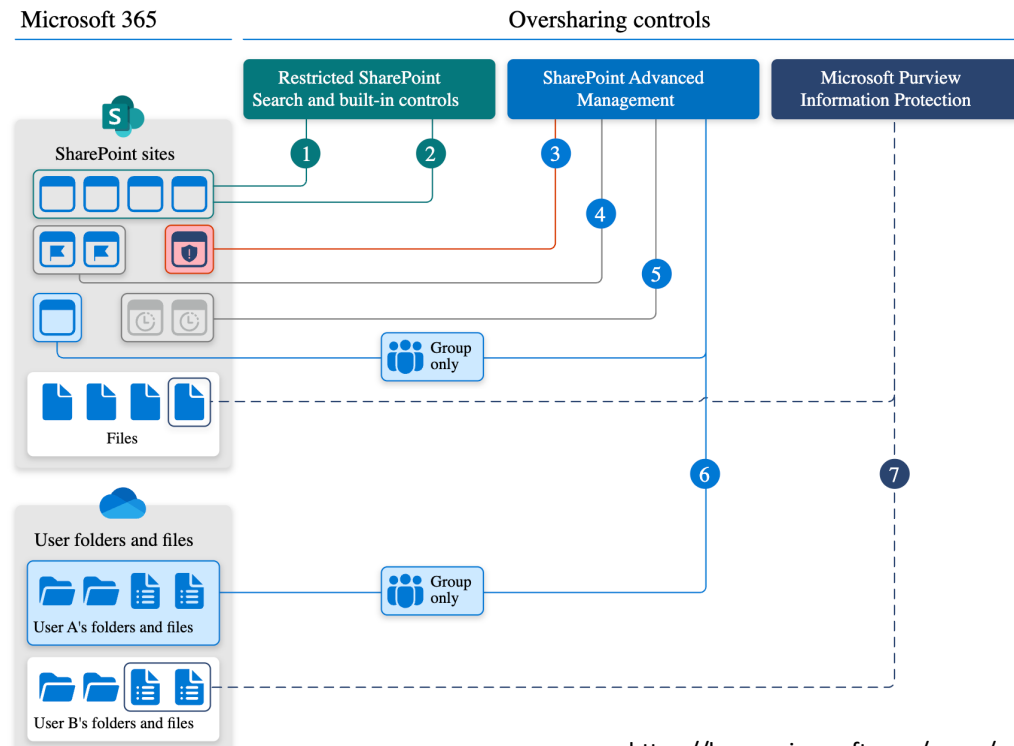
Last updated December 10, 2024

# Oversharing controls

## Data Protection and auditing



Files stored in  
Microsoft 365



The following diagram provides a visual representation of some of the features in your Microsoft 365 E3+ and SharePoint Advanced Management licenses that help you prevent oversharing.

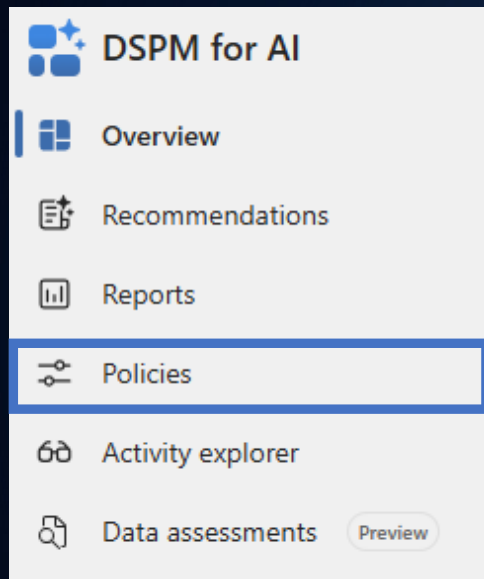
<https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-architecture-data-protection-auditing>



# Microsoft Purview



# Data Security Posture Management for AI



Insider Risk Management



Communication Compliance




Data Loss Prevention



# Default Policies

## Policies

DSPM for AI policies use Microsoft Purview solutions to discover and safeguard AI activity across your organization. [Learn more about policies](#)

 Refresh

▼ Name	Status	Solution	Last Modified
▼ Data Loss Prevention (1)			
DSPM for AI - Block sensitive info from AI sites	Testing	Data Loss Prevention	22 Apr 2025 08:53
▼ DSPM for AI (1)			
DSPM for AI - Capture interactions for Copilot experiences	On	DSPM for AI	22 Apr 2025 08:54
▼ Insider Risk Management (1)			
DSPM for AI - Detect risky AI usage	On	Insider Risk Management	22 Apr 2025 08:54
▼ Communication Compliance (1)			
DSPM for AI - Unethical behavior in AI apps	On	Communication Compliance	22 Apr 2025 10:47

# Block Sensitive info from AI Sites

## Part of Data Loss Prevention

- Protects sensitive data
- Policy-based control
- Real-Time Alerts and reports

^ Block with override for elevated risk users

**Conditions**  
Content contains any of these sensitive info types: **ABA Routing Number, Argentina National Identity (DNI) Number...**  
Evaluate predicate for **Message or attachment**

**And**

Insider risk level for Adaptive Protection is  
Elevated risk level

**Actions**  
Audit or restrict activities on devices  
Send alerts to Administrator

**Service domain and browser activities**  
Detects when protected files are blocked or allowed to be uploaded to cloud service domains based on the 'Allow/Block cloud service domains' list in endpoint DLP settings.

☒ Upload to a restricted cloud service domain or access from an unallowed browsers ⓘ Audit only ▾

Sensitive service domain group restriction(s) configured. [Edit](#)

☒ Paste to supported browsers ⓘ Audit only ▾

Sensitive service domain group restriction(s) configured. [Edit](#)

# Detect risky AI usage

## Choose triggering event for this policy

The triggering event determines when a policy will begin to assign risk scores to a user's activity. [Learn more](#)

### Choose triggering events

Triggering events determine when a policy will begin to assign risk scores to a user's activity. There are two triggering events you can use for this policy template. Choose one or both.

☐ Select all

☐ Inappropriate messages detected by communication compliance

Policy will start assigning risk scores when a user sends a message that potentially contains threatening, harrassing, or discriminatory language.

① **Automatically create a communication compliance policy that detects inappropriate content in messages.** In a single click, create the communication compliance policy so it can be used as the triggering event. The policy will include all users and groups in your org. [Learn more about this policy](#)

Create policy

☒ User account deleted from Microsoft Entra ID

Policy will start assigning risk scores when a user's account is deleted from Microsoft Entra ID. Good option to choose if an HR connector isn't set up or not actively connected.

☐ User browsed to a potentially risky website

Policy will start assigning risk scores when specific thresholds are detected for activity relating to the following:

## Part of Insider Risk Management

- Leaks of sensitive data
- Confidentiality violations
- Intellectual property theft
- Fraud
- Insider trading



# Unethical behavior in AI apps

## Conditions

By default, we'll detect all communications from the users and groups you specified. To refine the scope of this policy, we recommend adding conditions to limit the results to communications matching specific criteria. [Learn more about these conditions](#)

### ^ Content matches any of these trainable classifiers

Any of these

#### Trainable classifiers

Regulatory Collusion

Stock manipulation

Unauthorized disclosure

Money laundering

Corporate Sabotage

Sexual

Violence

Hate

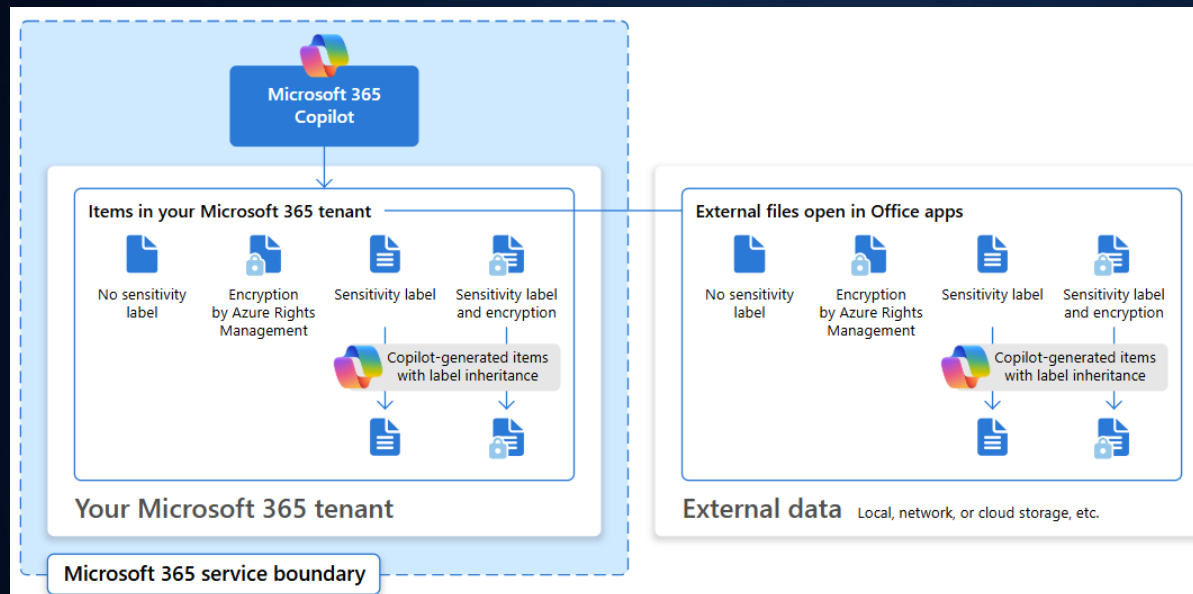
Self-harm

Add

## Part of Communication Compliance

- Monitors communications
- Customizable policies
- Investigation and Remediation Tools

# Information Protection: Sensitivity labels



- Copilot respects encryption applied by labels
- Labels can be used to mark content as not searchable in Copilot, or
- Use DLP policies to specify which labeled documents shouldn't be summarized by Copilot

# M365 Copilot - Data, Privacy, and Security

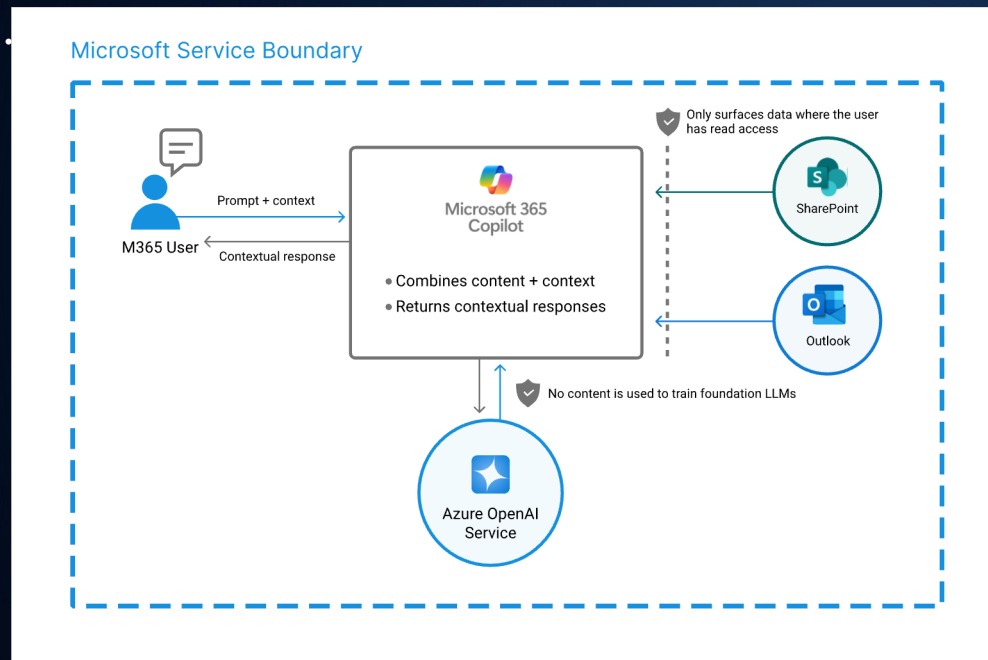


- How does Microsoft 365 Copilot use your proprietary organizational data?
- Data stored about user interactions with Microsoft 365 Copilot Microsoft 365
- Copilot and the EU Data Boundary
- Microsoft 365 Copilot and data residency

# M365 Copilot - Data, Privacy, and Security



How does Microsoft 365 Copilot use your proprietary organizational data?

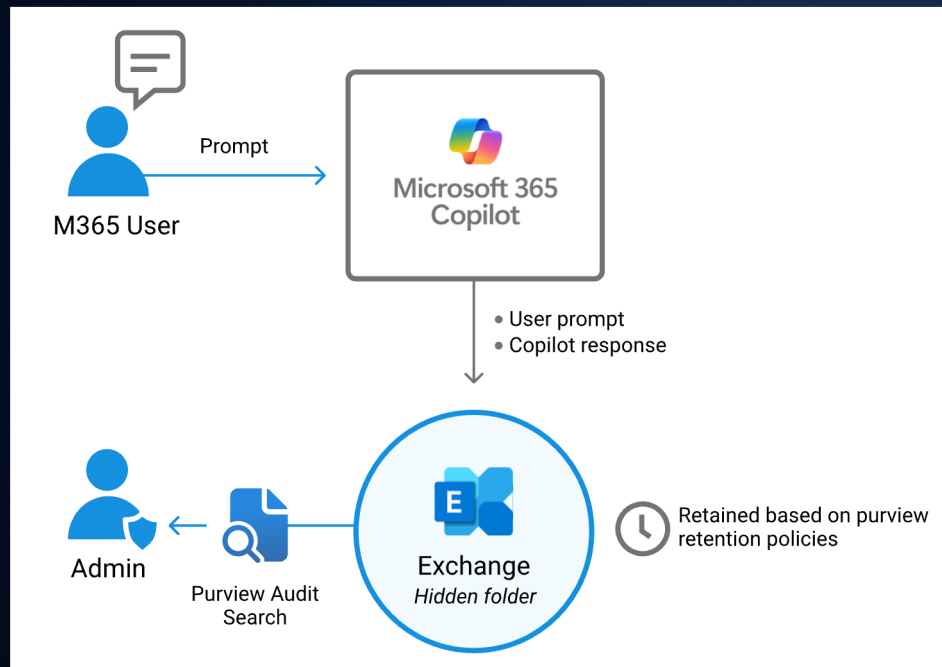




# M365 Copilot - Data, Privacy, and Security



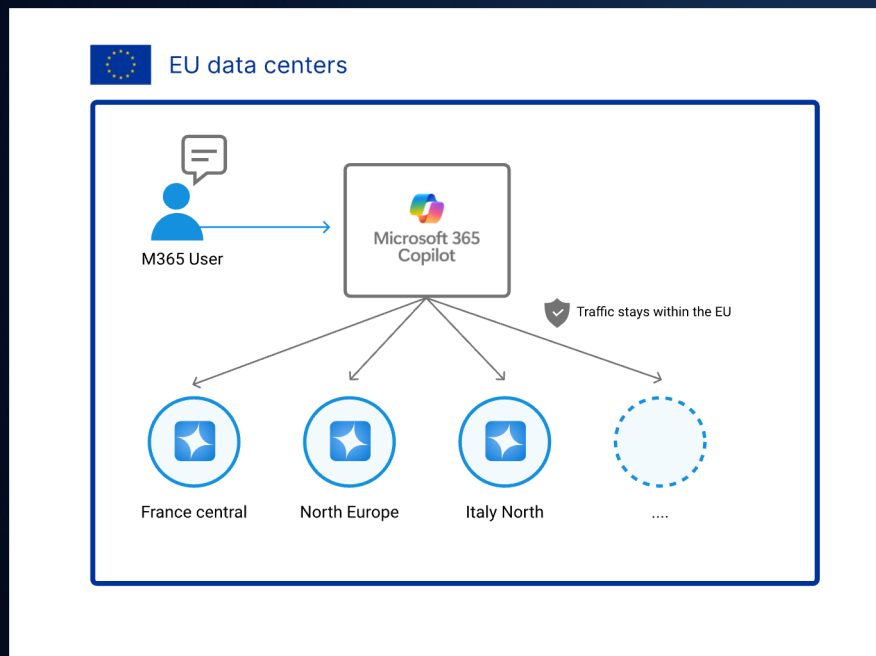
## Data stored about user interactions with Microsoft 365 Copilot



# M365 Copilot - Data, Privacy, and Security



## Microsoft 365 Copilot and the EU Data Boundary



For EU customers, Microsoft 365 Copilot is an EU Data Boundary service.

GDPR Compliance according to existing commitments.

# Why can't you just assign copilot licenses and speed ahead?



- Large and irreversible risks if you launch too early and incorrectly
- Can ruin the entire organization if you do it in the wrong way
- Copilot's answers are not guaranteed to be 100% factual or certain
- We humans need to take responsibility for reviewing AI-generated content
- Optimize ROI



# How do we get there?

- ☐ Business case
- ☐ Management team decision
- ☐ Analyze technical setup and prerequisites
- ☐ Meet any special legal requirements
- ☐ Information Security and Classification
- ☐ Mapping of ways of work
  - ☐ How are documents shared today?
  - ☐ How do users have access to Sharepoint
  - ☐ How to work with Mail vs Teams + other M365
  - ☐ Processes & Data in other systems outside of Microsoft?
- ☐ Start with Top management
  - ☐ But also the staff involved (Inspire, educate + take care of any concerns)
- ☐ Prompt-school
- ☐ Start with an M365 Copilot Readiness Workshop and set the strategy



Copilot  
Ready

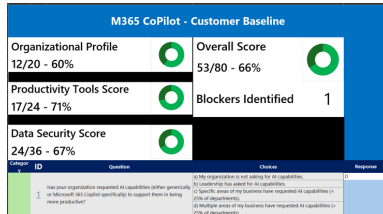




# Get ready for Microsoft 365 Copilot

## Microsoft 365 Copilot Readiness Workshop

1



REVIEW & PLANNING

## Security, Governance, Licensing and Compliance – Deep Dive

2

### Data residency, storage, and processing

1. Data residency refers to the geographic location where customer data is stored at rest.

2. **Only the EU Data Boundary provides contractual commitments for processing** (e.g., compute operations); all other data residency commitments are only about "storage-at-rest" for specific types of content in Customer Data.

When an AAD-B2B ID is created, a country/region is provided by the customer during the sign-up process. This country/region determines the **Default Geography** for all Microsoft 365 data.

All Microsoft 365 services use the **Default Geography** in compliance with **Available Geographies** for a given service. To determine where a given tenant's specified data will be processed and stored. In some cases, not all services are able to process in this **Default Geography**.



VERIFICATION & ADJUSTMENT

## Copilot advisory, Business case, Way of Work, Champions, AI Council & Governance

3



STRATEGY & TRAINING

## Deploying Copilot

4

Copilot ready



Deploy Copilot

LAUNCH

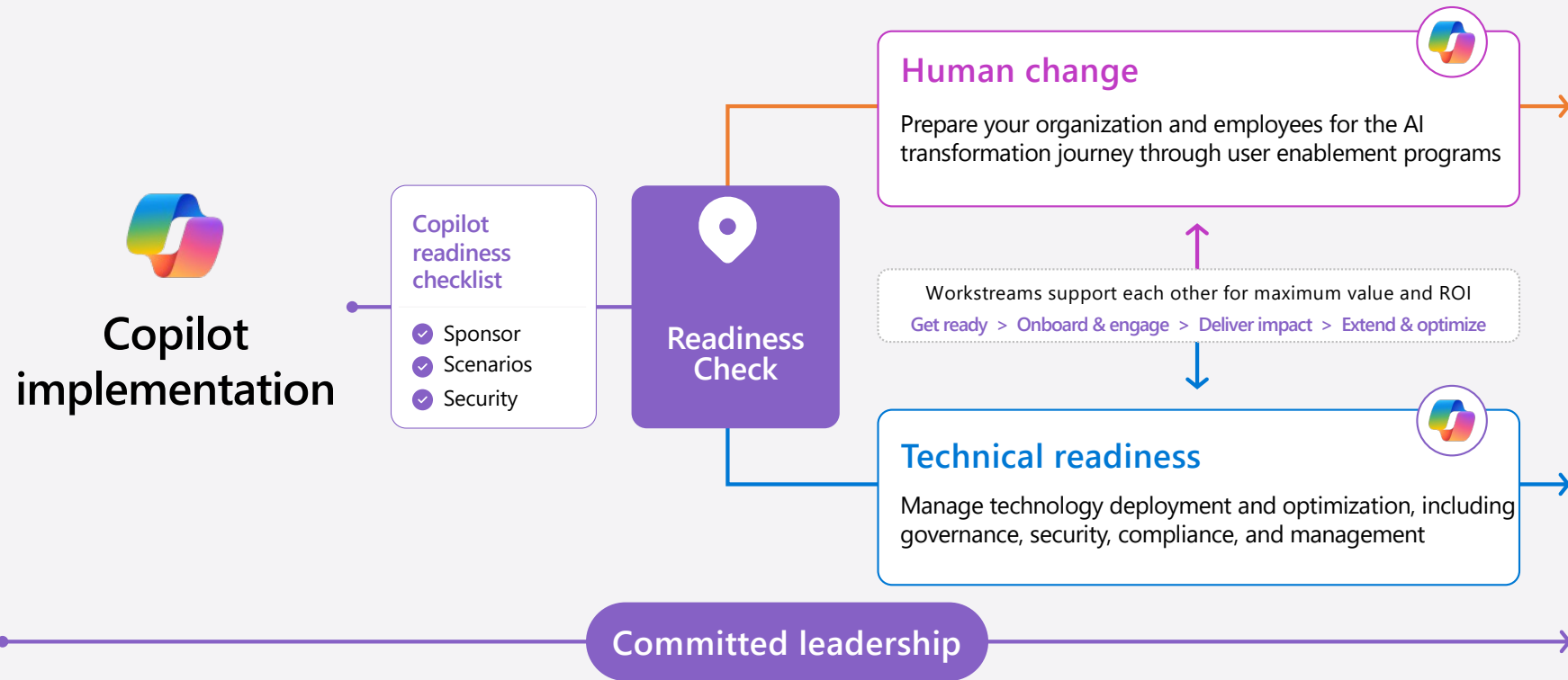


# Microsoft 365 Copilot Baseline

M365 CoPilot - Customer Baseline				
Organizational Profile			Overall Score	
12/20 - 60%			53/80 - 66%	
Productivity Tools Score			Blockers Identified	1
17/24 - 71%				
Data Security Score				
24/36 - 67%				
Category	ID	Question	Choices	Response
	1	Has your organization requested AI capabilities (either generically or Microsoft 365 Copilot specifically) to support them in being more productive?	a) My organization is not asking for AI capabilities. b) Leadership has asked for AI capabilities. c) Specific areas of my business have requested AI capabilities (< 25% of departments). d) Multiple areas of my business have requested AI capabilities (> 25% of departments).	D



# Microsoft 365 Copilot implementation





# The journey to becoming AI-powered



## Leadership

Develop model for leadership to leverage AI for real business outcomes

- ✓ Basic education
- ✓ Business strategy
- ✓ "AI Council / Ai-Råd"
- ✓ Create clarity and prioritization



## Human change

Manage the change through user enablement initiatives

- ✓ Focus on user experience
- ✓ Improving culture
- ✓ Integrate feedback



## Technical skills

Build and iterate technical skills to deliver business outcomes

- ✓ Provide access to training and expertise
- ✓ Manage and mitigate risk
- ✓ Improve the service management process



Are we here?

Principles of responsible AI





# Important for Copilot to succeed



Designate and activate  
**Copilot sponsors** in  
partnership with an AI  
Council.



Define & prioritize  
**scenarios** with the  
highest business value



Implement strategy  
to secure data for  
both **compliance** and  
self-peace **of mind**.



# How to use Microsoft 365 Copilot?

*"Working with AI is more than just pushing buttons. It's about asking the right questions."*

Jaime Teevan  
Chief Scientist & Technical Fellow - Microsoft





# The Prompt School

Prompt Engineering



Prompt

Please give me the history of humans.

Prompt

Please give me the history of humans in 3 sentences.

[Prompt engineering overview | Microsoft Learn](#)

[How to write prompts in Semantic Kernel | Microsoft Learn](#)



# The Prompt School

Prompt Engineering



**Jared Spataro**  
Microsoft CVP, Modern  
Work & Business  
Applications

*"What makes Copilot feel almost magical is the fact that it has a **deep understanding of me, my job, my priorities and my organization**. It knows my entire context of work data. I can write:"*

- *Summarize the meeting I had at 11 yesterday.*
- *Who participated?*
- *What decisions were made?*
- *Give me a sense of what you think the next step should be.*
- *Write that summary in an email to Julie and suggest a time when we are both free next week to discuss.*
- *Write it in Japanese.*





Leadership

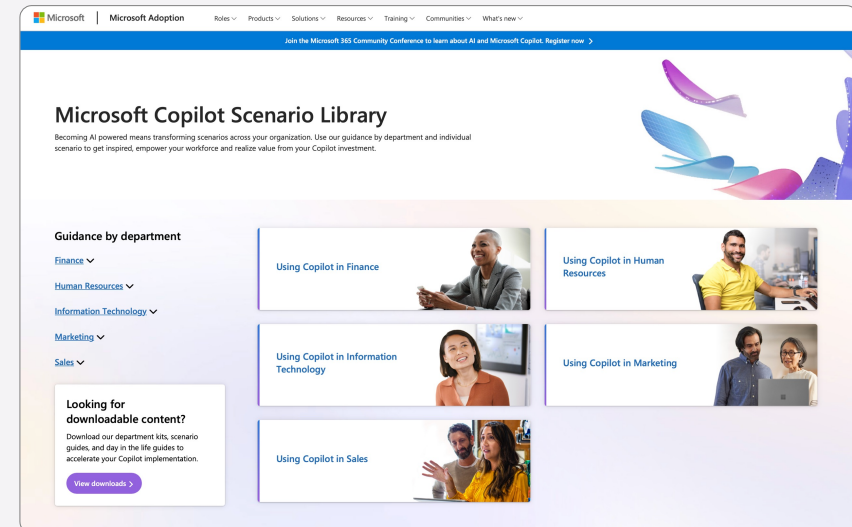
# Copilot Scenario Library



Copilot brings AI value  
across **lines of business**

Use the [Scenario Library](#) to identify top use cases and business metrics you would like to improve in that functional area.

Library PPT deck: <https://aka.ms/CopilotScenarioLibrarySlides>



## All roles & execs

Improve meetings  
Content creation  
Manage daily agenda

## HR

Cost per hire  
Employee turnover  
Compliance risk reduction

## Marketing

Leads created  
Brand value  
Cost per lead

## Operations

Customer retention  
Product time to market  
Supply chain efficiencies

## IT

Outstanding support tickets  
Application downtime  
Departmental spending

## Sales

Number of opportunities  
Close rate  
Revenue per sale

## Finance

Accelerate cash flow  
Spend on ERP system  
Risk reduction

<https://aka.ms/Copilot/ScenarioLibrary>



# Changed behaviour and new way of working

- Reflexive AI Usage
- Create a habit of using AI tools like Copilot.
- The "11-by-11" concept is about creating a habit of using AI tools like Copilot.
- Research shows that 11 is the "magic number" if users save 11 minutes per day and use the tool for 11 weeks, we start to see big improvements in productivity



## AI Data Drop: The 11-by-11 Tipping Point

Our new research reveals how to build an AI habit.

<https://www.microsoft.com/en-us/worklab/ai-data-drop-the-11-by-11-tipping-point>



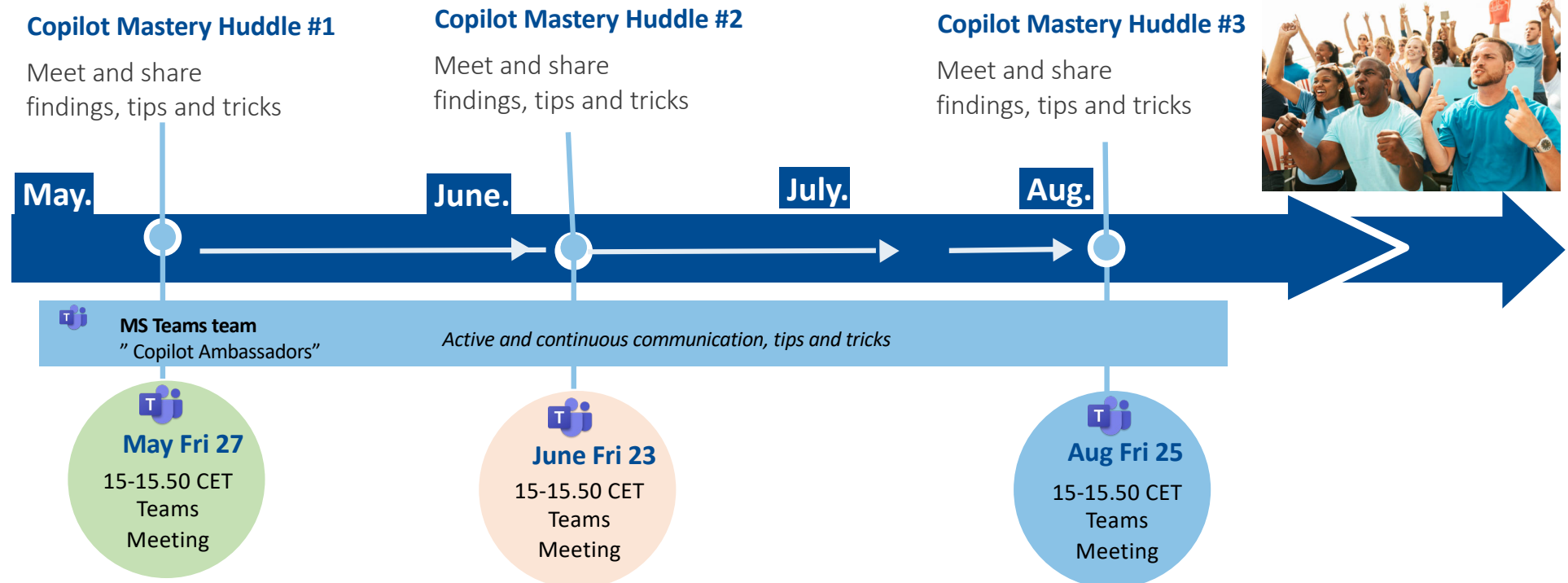


# Make it happen

## M365 Copilot Ambassador program “Agents of Change”

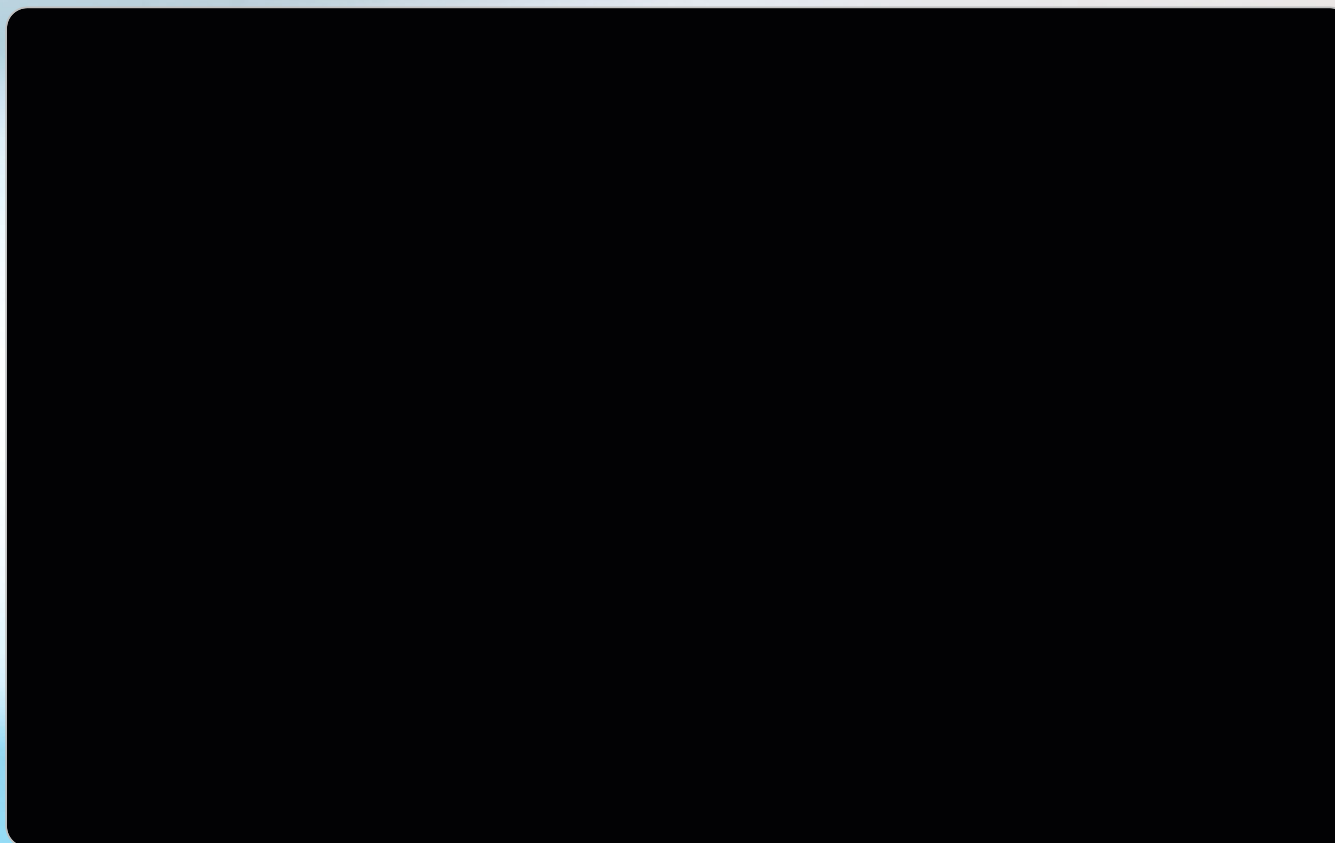
PHASE 1 - Ambassador Managers

PHASE 2 – EXTEND WITH MORE USERS



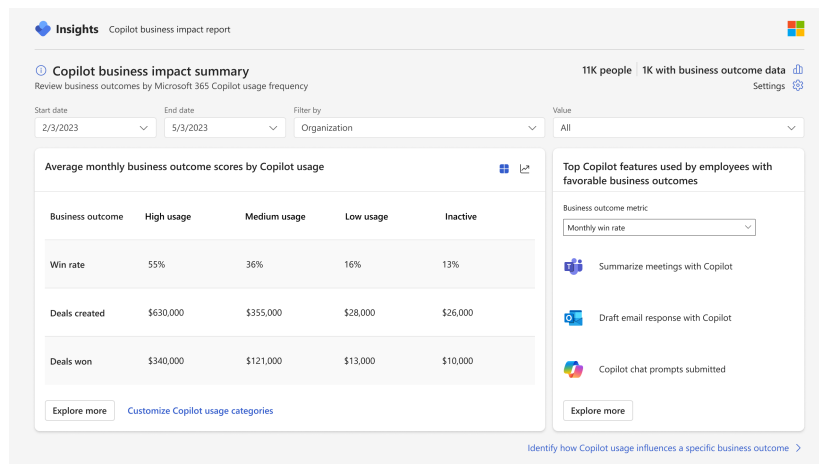
# Deliver impact: Access usage reports

Interpret the Microsoft 365 Admin Center Usage Report



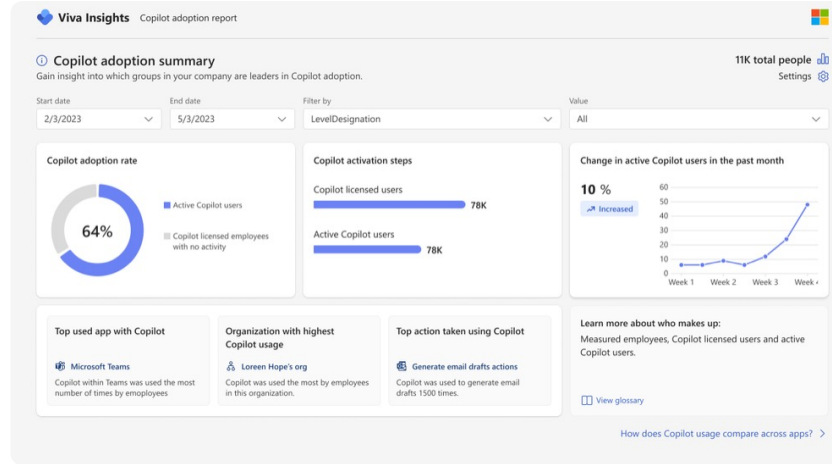
# Viva Insights advanced impact reports

Included with Microsoft 365 Copilot



## Copilot business impact reports

Measure the value of Microsoft 365 Copilot with your key business metrics.

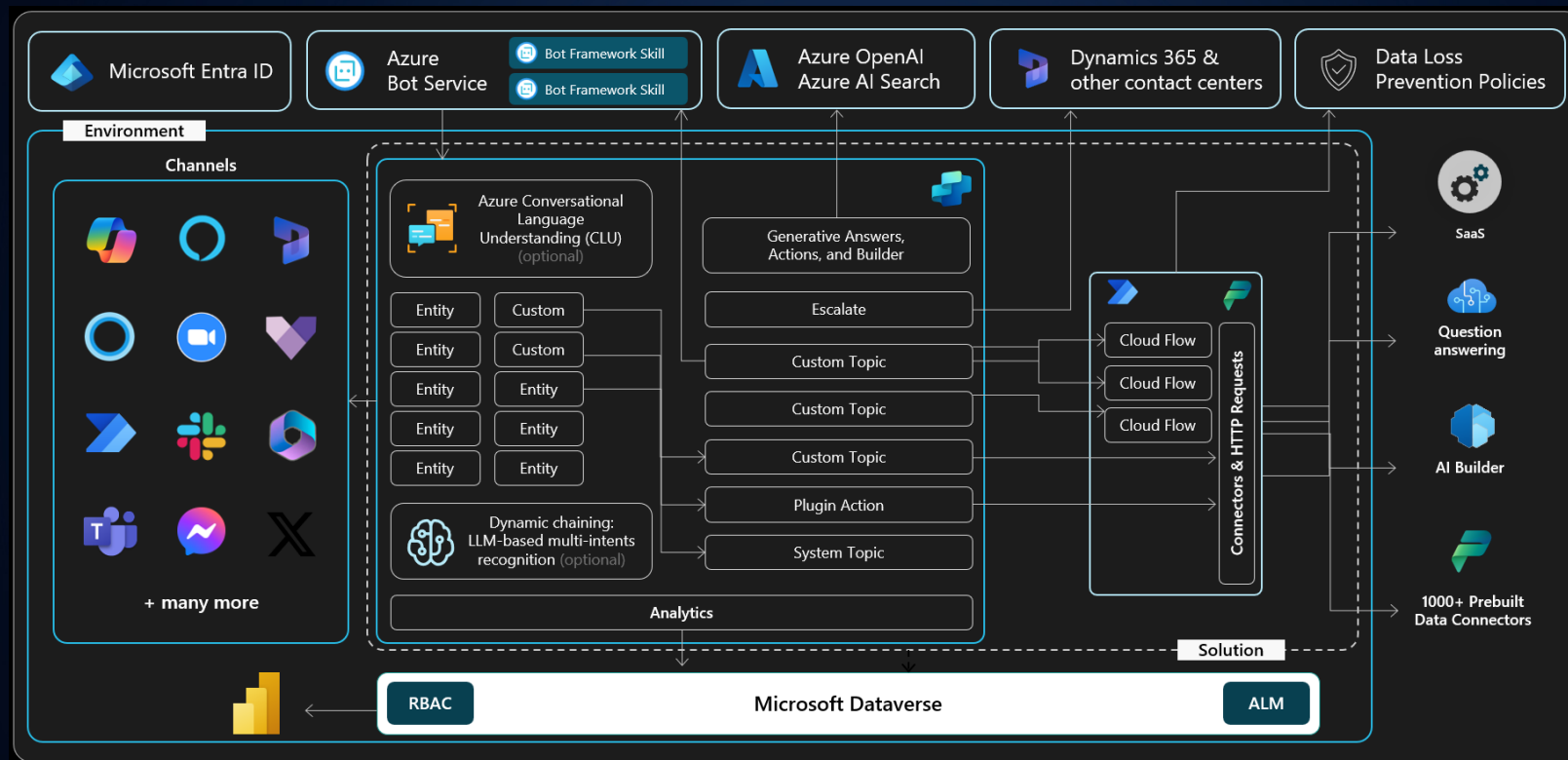


## Advanced adoption and impact reports

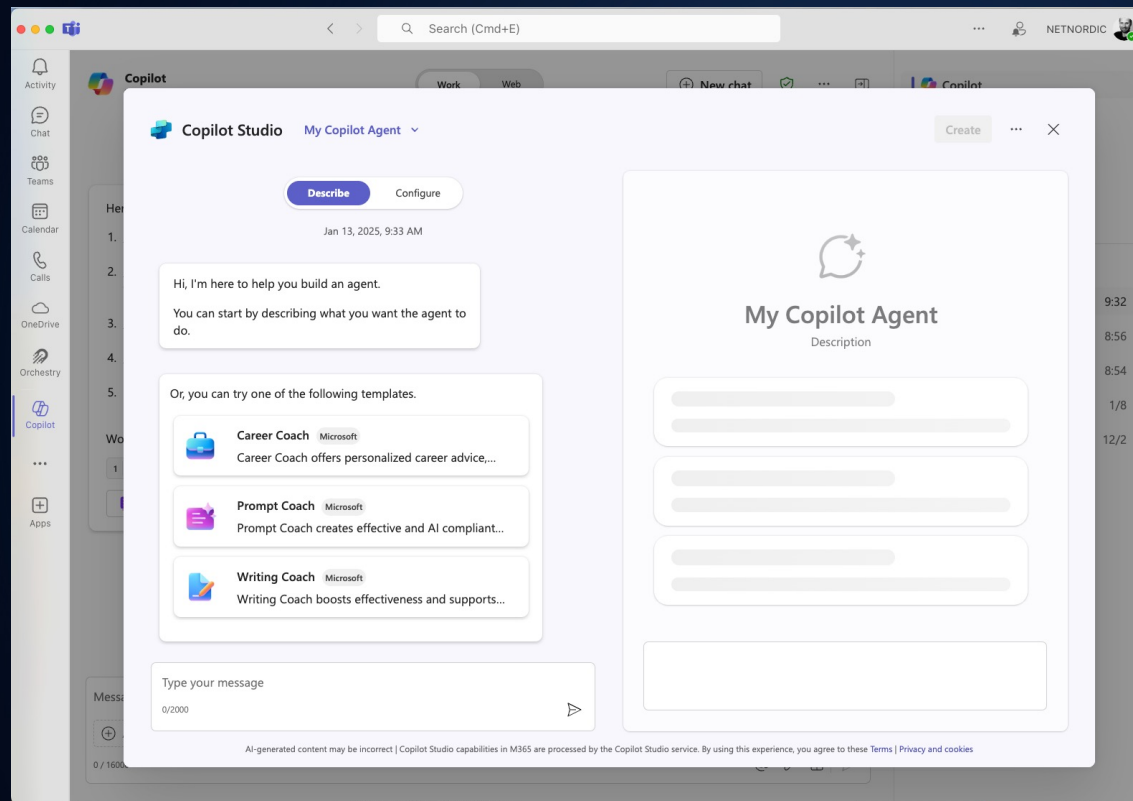
Get a deeper look into Microsoft 365 Copilot adoption and impact trends with a customizable, prebuilt report.



# Copilot Studio



# Copilot Studio



# Microsoft 365 Copilot Studio

## Building Your Own Agent



netnordic Copilot Studio

NETNORDIC (Upgrade)

Copilot Agent Moms

Översikt Kunskap Ämnen Åtgärder Aktivitet Analys Kanaler

Publicerad 2025-03-20 Publicera Test

+ Lägg till kunskap

Förslag (förhandsversion)

Lägg till kunskapskällor

Granska förslag på referenser som ska läggas till i agenten.

Visa förslag

Förbättra svarsfrekvensen

Ange för agenten hur den ska besvara frågor med hjälp av finjusteringsverktyget.

Öppna verktyg

Spåra användning av kunskap

Se till att din agent använder kunskapskällor i minst 25 procent av svaren.

Öppna analys

Total användning av kunskapskälla 0 % 0 %

Felfrekvens 0 % 0 %

Total svarsfrekvens 0 % 0 %

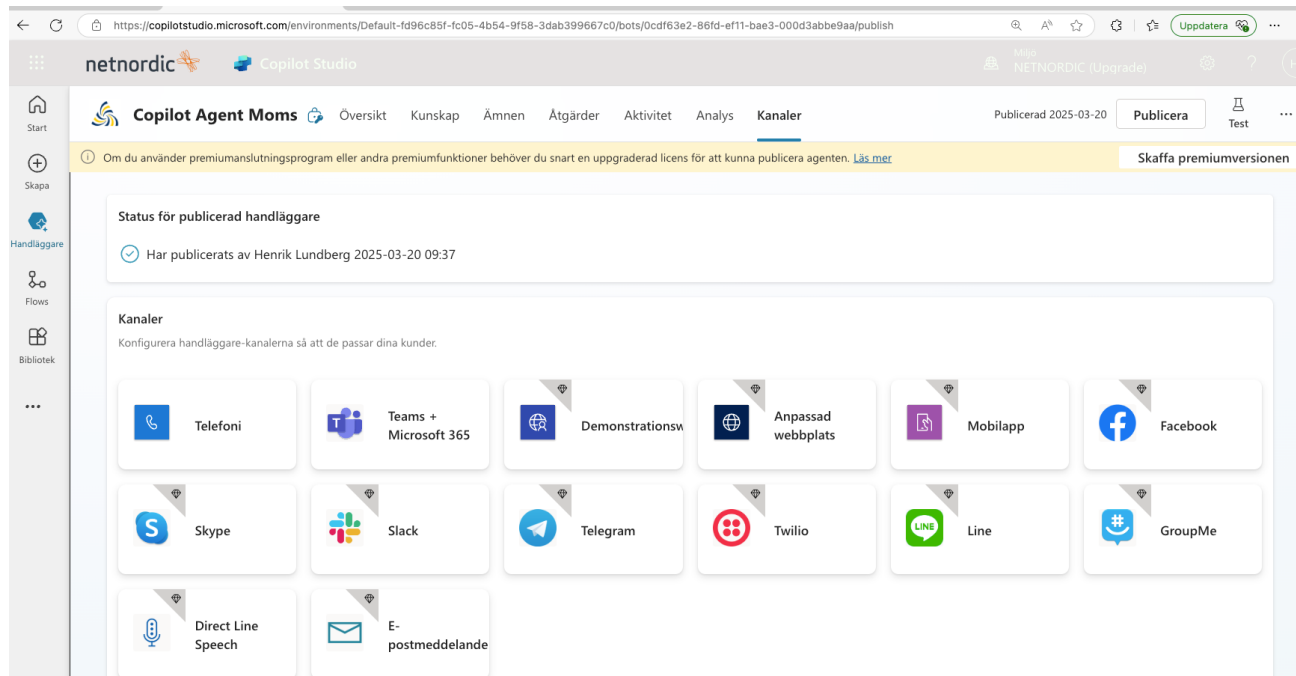
Alt Filer SharePoint

Senast uppdaterad nu Sök kunskap

Namn	Typ	Senast ändrat	Status
AILab360	SharePoint	Henrik Lundberg för 23 daga...	Klart
moms.docx	Filer	Henrik Lundberg för 23 daga...	Klart
moms-vid-utrikeshandel-skv560-utga...	Filer	Henrik Lundberg för 23 daga...	Klart
mhb-enl-2001-ars-regler.pdf	Filer	Henrik Lundberg för 23 daga...	Klart

# Microsoft 365 Copilot Studio

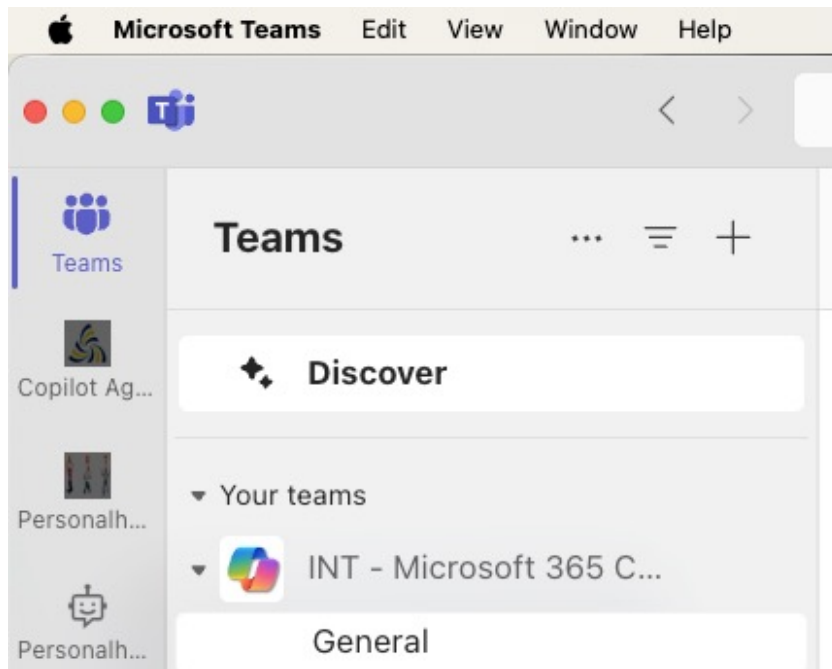
Build and publish your own Agents to Teams





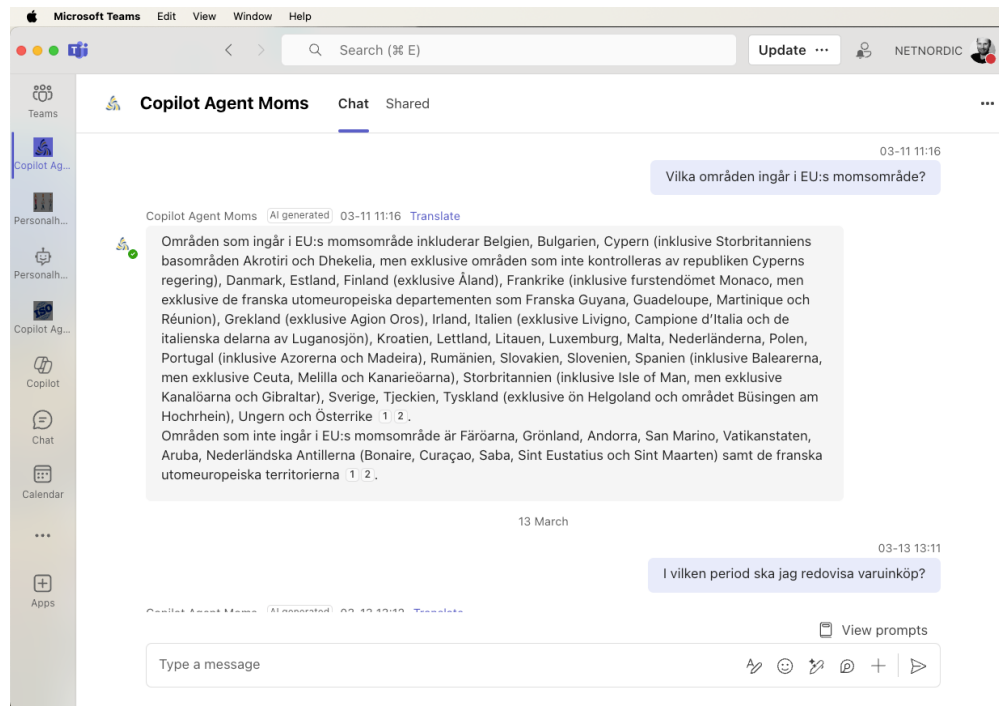
# Microsoft 365 Copilot Studio

Build and publish your own Agents to Teams



# Microsoft 365 Copilot Studio

## Agent Moms



# Microsoft 365 Copilot Studio

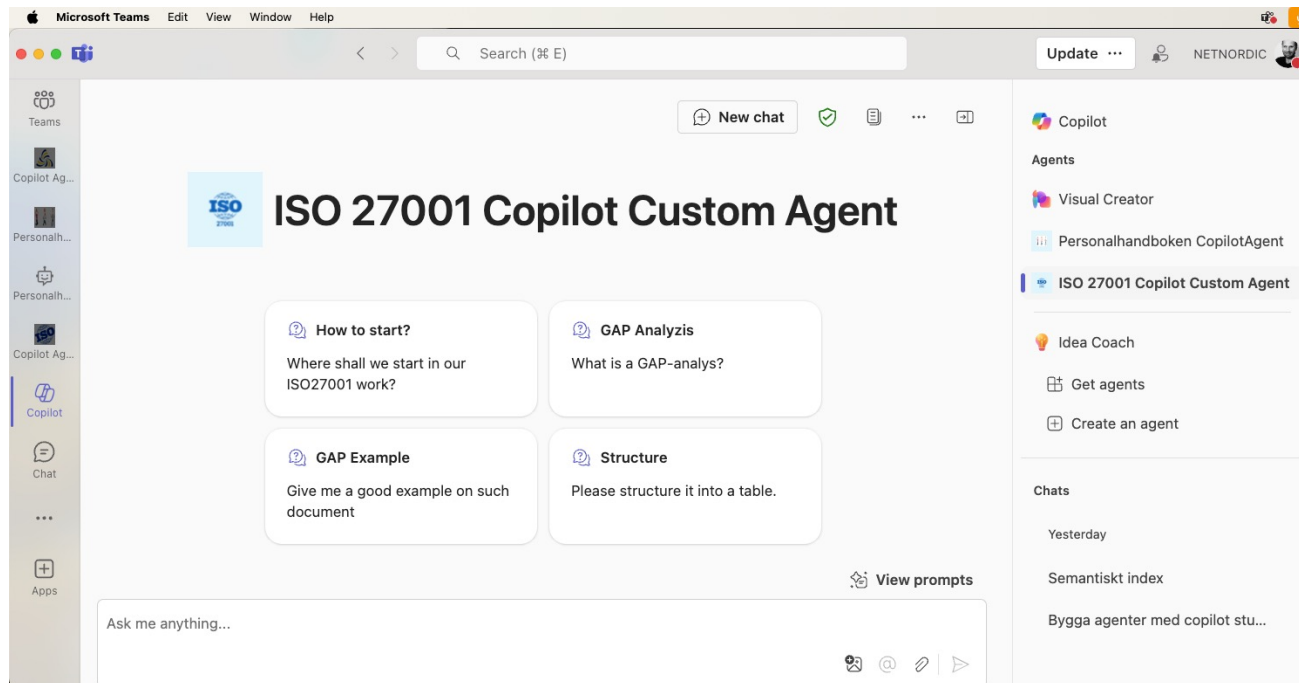
## Agent Moms



The screenshot displays the Microsoft 365 Copilot Studio interface. On the left is a sidebar with icons for Teams, Copilot Agent Moms, Personalh..., and Apps. The main area shows a chat window titled 'Copilot Agent Moms' with tabs for 'Chat' and 'Shared'. The chat history includes a message from 'Copilot Agent Moms' dated 03-13 13:12, which discusses VAT rules for EU countries. Below this is a date separator '20 March'. Another message from 'Copilot Agent Moms' dated 03-20 15:34 discusses VAT rules for Norway. A prompt suggestions panel on the right lists several prompts: 'Redovisa varuinköp', 'Momsområden i EU', 'Momsregistreringsnummer', and 'Redovisa varuförsäljning'. The bottom of the interface features a 'Type a message' input field and a 'View prompts' button.

# Microsoft 365 Copilot Studio

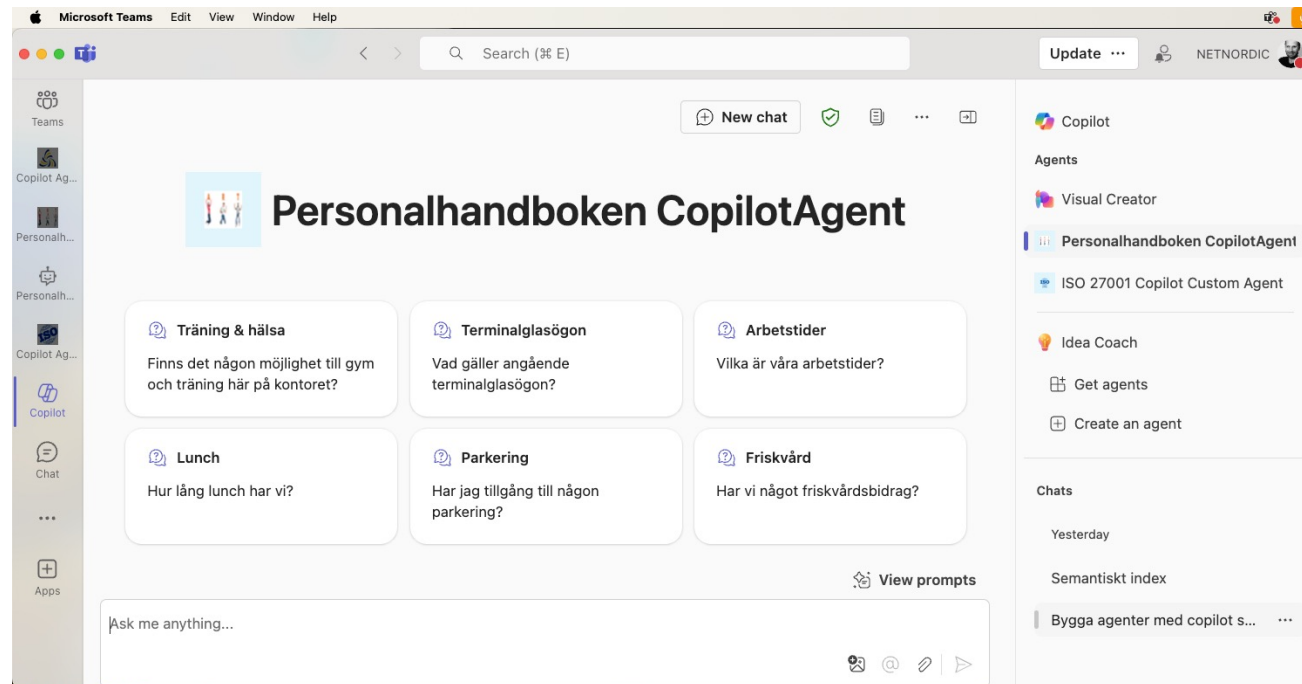
## ISO 27001 Agent





# Microsoft 365 Copilot Studio

## Employee Handbook Agent



# How do we get there?

- ☐ Business case
- ☐ Management team decision
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- ☐ Meet any special legal requirements
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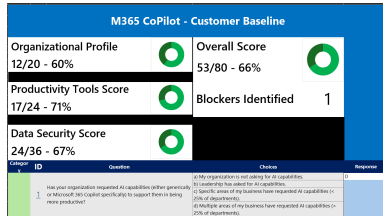
Copilot  
Ready



# Get ready for Microsoft 365 Copilot

## Microsoft 365 Copilot Readiness Workshop

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REVIEW & PLANNING

## Security, Governance, Licensing and Compliance – Deep Dive

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### Data residency, storage, and processing

1. Data residency refers to the geographic location where customer data is stored at rest.

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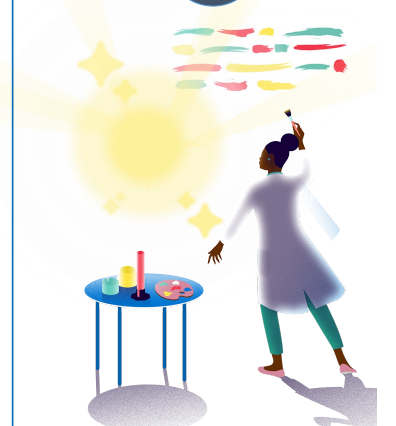
All Microsoft 365 services use the **Default Geography** in compliance with **Available Geographies** for a given service. To determine where a given tenant's specified data will be processed and stored, in some cases, not all services are able to provision in this **Default Geography**.

\*Multi-Geo Capabilities and Advanced Data Residency (ADR) are not commitments for Copilot. See more info to come for GA.

VERIFICATION & ADJUSTMENT

## Copilot advisory, Business case, Way of Work, Champions, AI Council & Governance

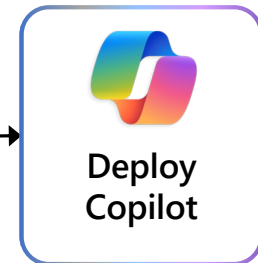
3



STRATEGY & TRAINING

## Deploying Copilot

4



LAUNCH



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