We are your best
Companion
We breathe **technology** and love **smart** solutions.
We are NetNordic.
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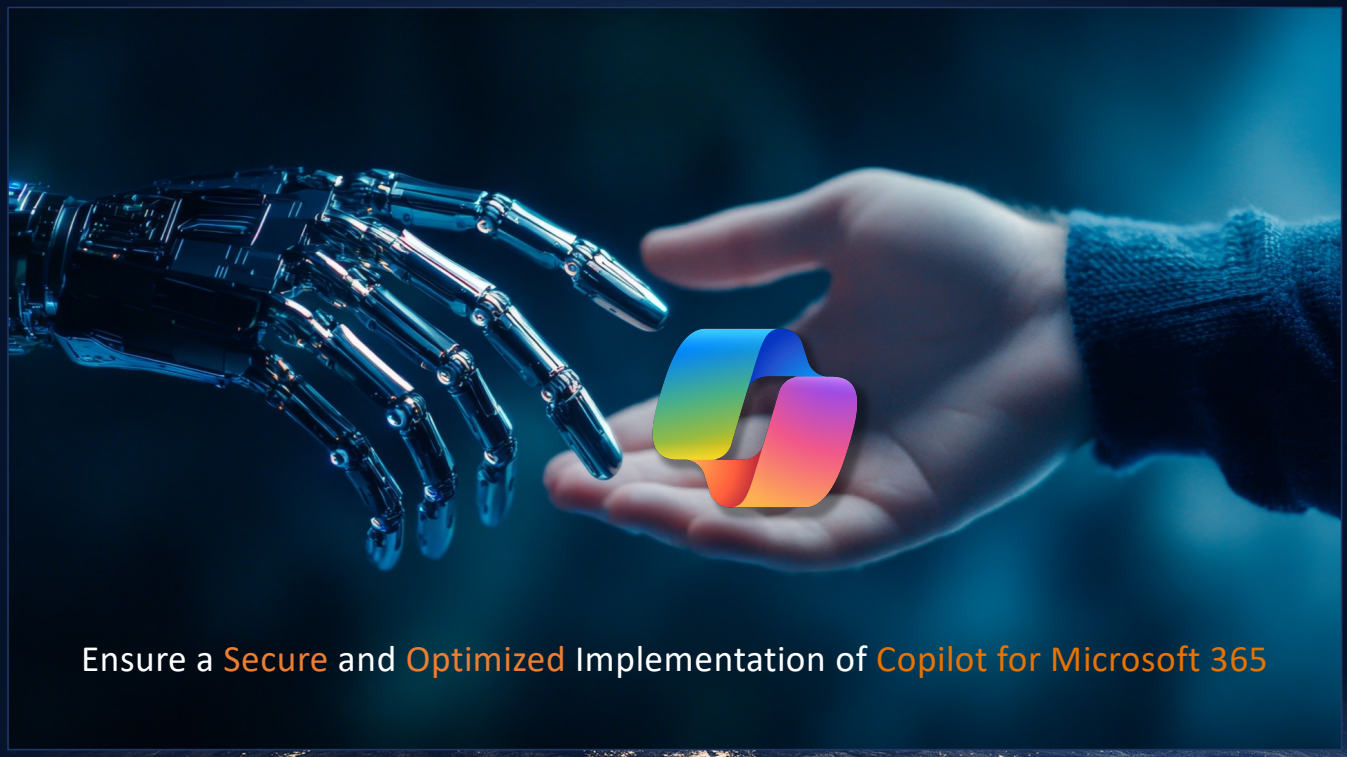
Master Copilot for Microsoft 365



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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

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Henrik Lundberg
Change Management specialist & Copilot Technical Champ

Anton Lövmar
Cloud Architect & Copilot Security Specialist

Prepare your environment

Copilot Ready

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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

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https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-requirements

Prepare your environment

Copilot Ready

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

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https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-setup

Oversharing - Problem summary

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

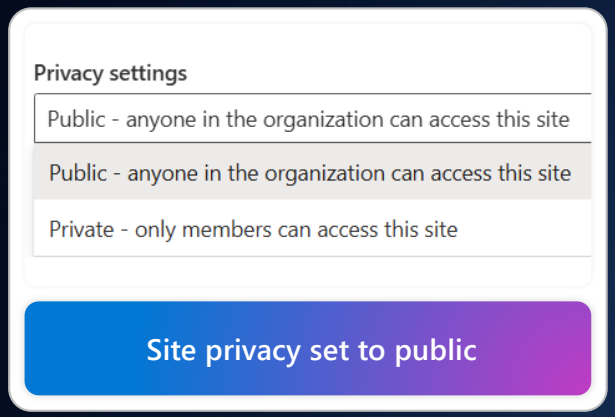
If oversharing risks aren't addressed, they could lead to

- Access to information beyond what the user needs for their role
- Inappropriate sharing of content
- Out of date or irrelevant responses

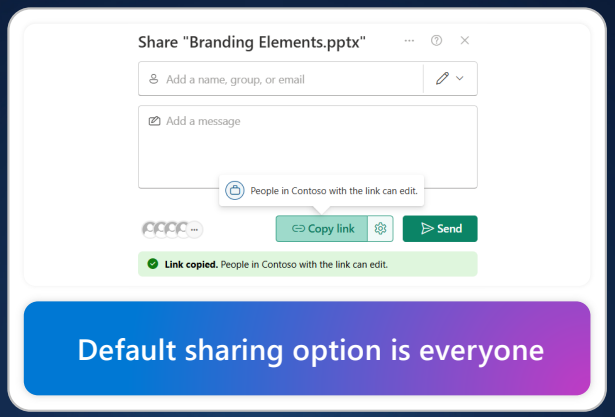
By addressing these risks, organizations can ensure that information is shared appropriately and securely

Deploy and enable Microsoft 365 Copilot

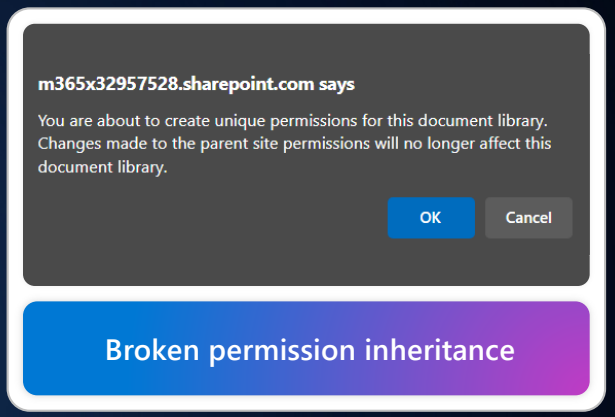
Common causes of Copilot oversharing in SharePoint



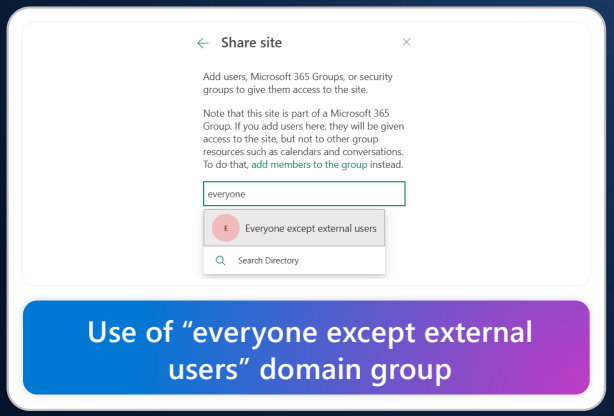
Site privacy set to public



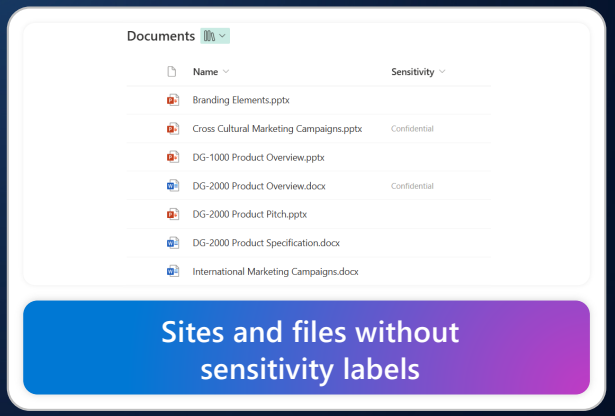
Default sharing option is everyone



Broken permission inheritance



Use of “everyone except external users” domain group



Sites and files without sensitivity labels

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Deploy and enable Microsoft 365 Copilot

Blueprint to prevent oversharing

	Pilot (Optional)	Deploy	Operate
Activities	• Identify most popular sites & assess oversharing • Grant Copilot access to popular, low risk sites • Turn on proactive audit and protection	• Discover oversharing risks • Restrict sensitive info from Copilot access and/or processing • Increase site privacy	• Further reduce risk and simplify oversight • Further secure sensitive data • Improve Copilot responses
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

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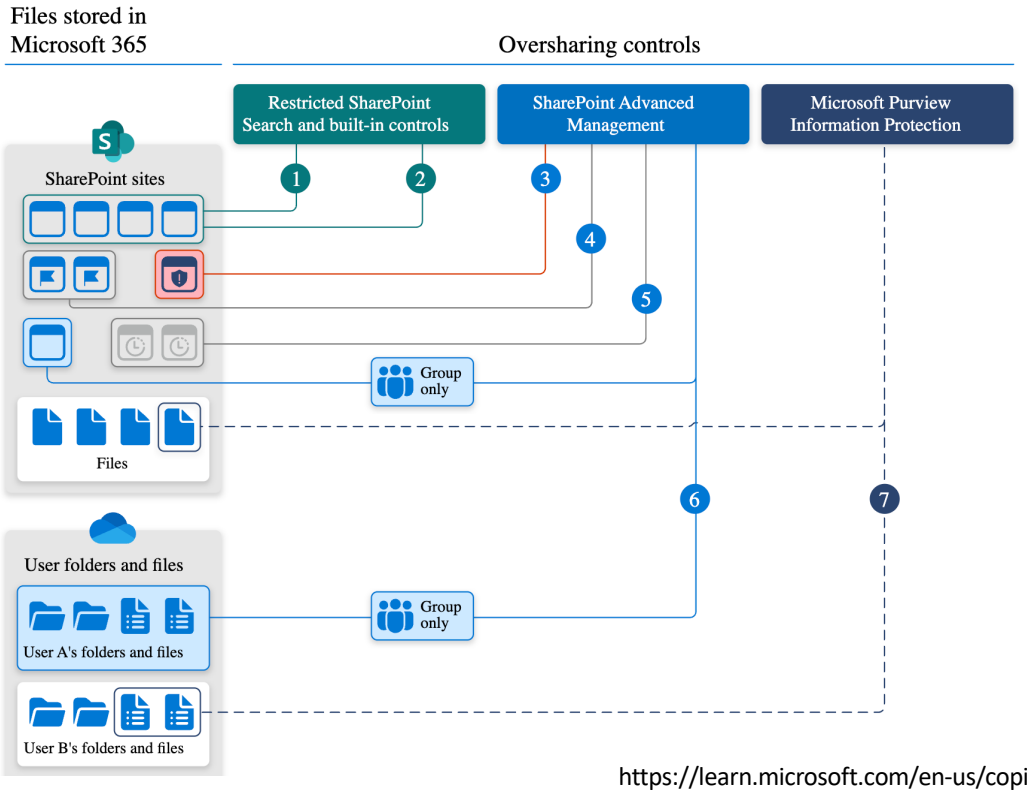
Data Protection and auditing

Oversharing controls



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

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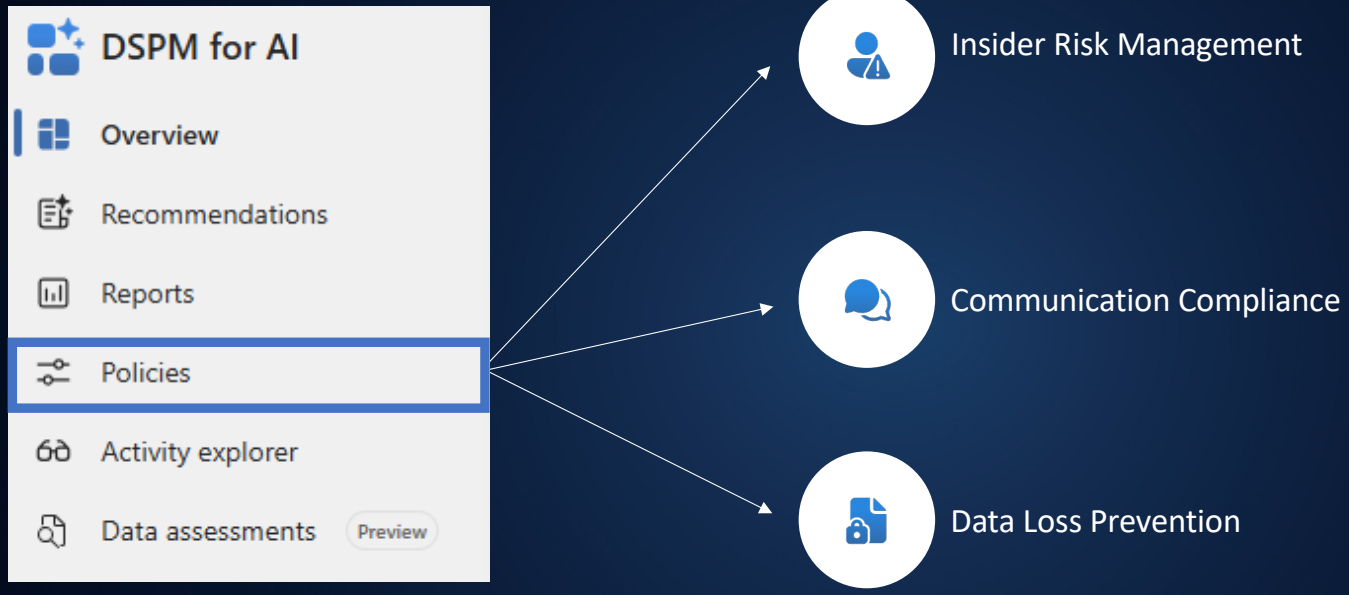
Data Security Posture Management for AI



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Default Policies

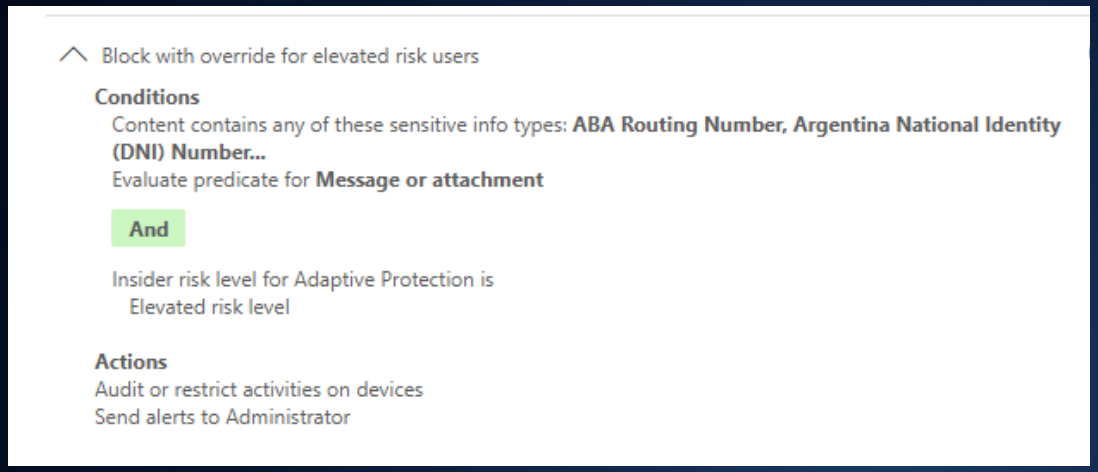
Policies

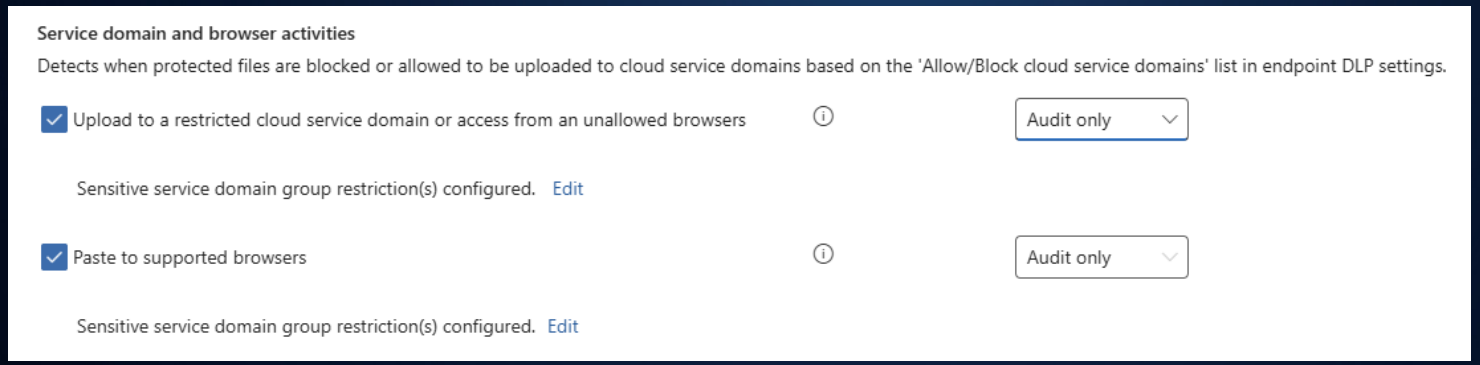
DSPM for AI policies use Microsoft Purview solutions to discover and safeguard AI activity across your organization. Learn more about policies

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

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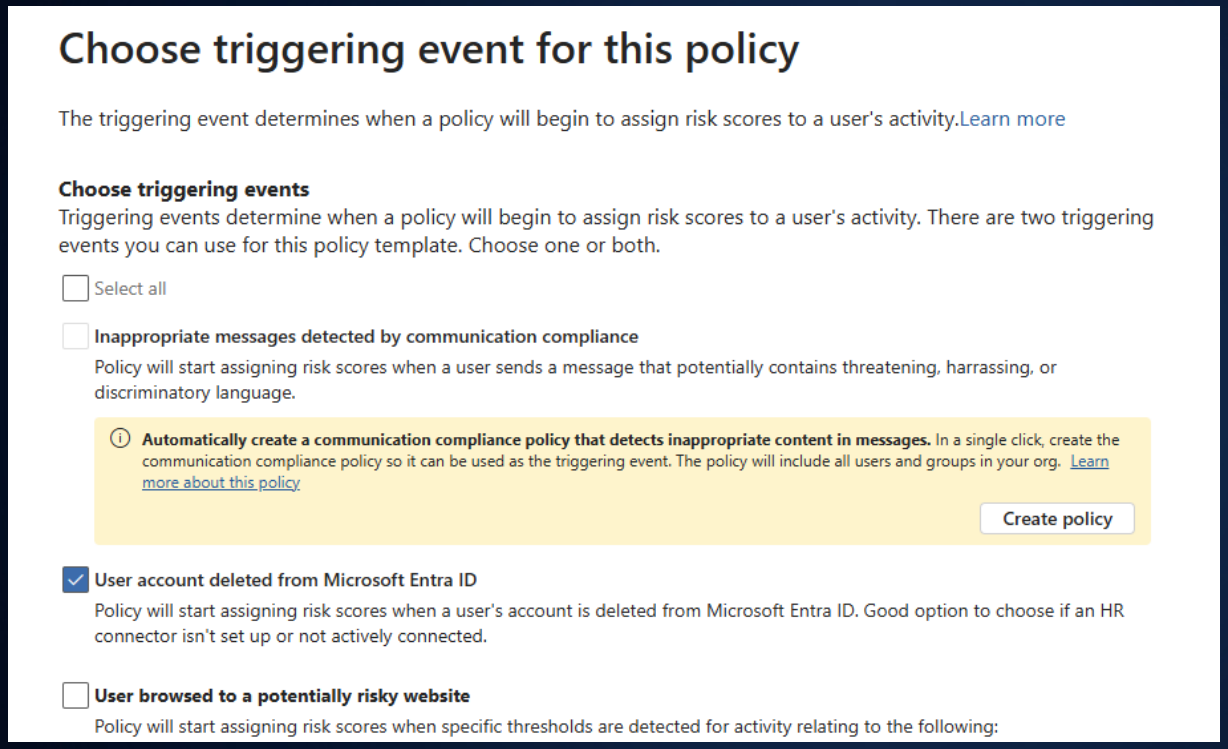
Detect risky AI usage



Part of Insider Risk Management

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

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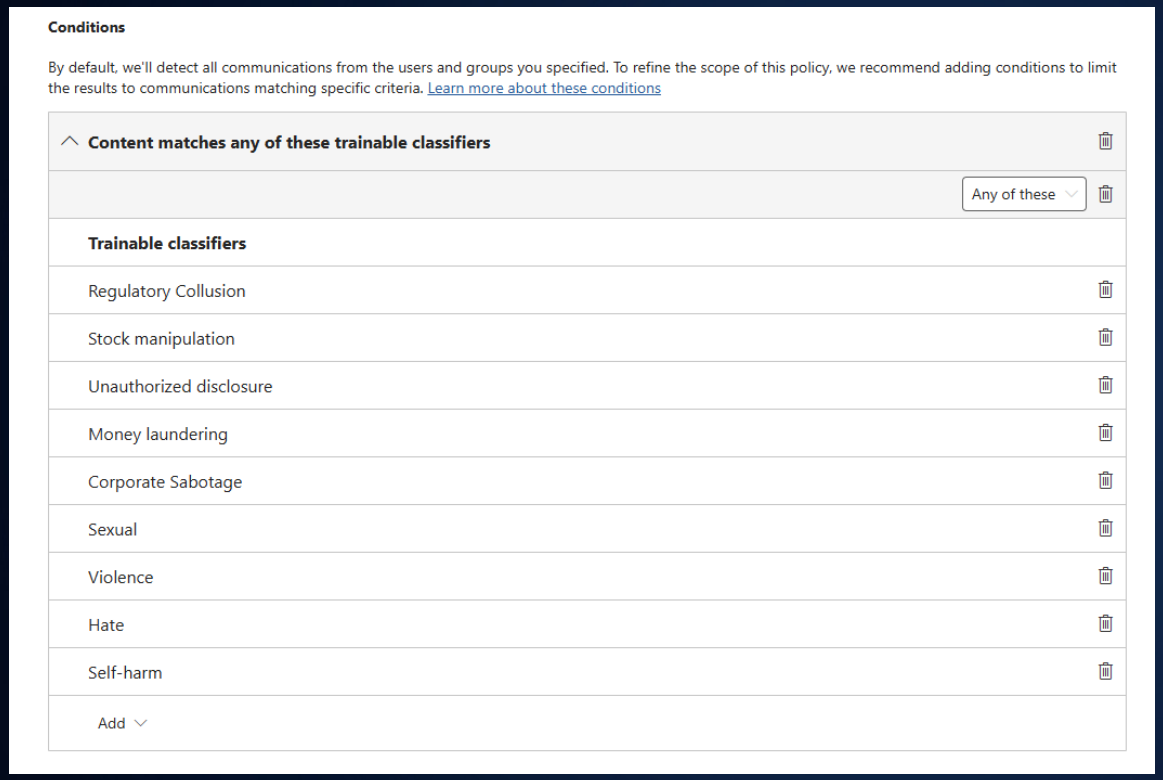
Unethical behavior in AI apps



Part of Communication Compliance

- Monitors communications
- Customizable policies
- Investigation and Remediation Tools

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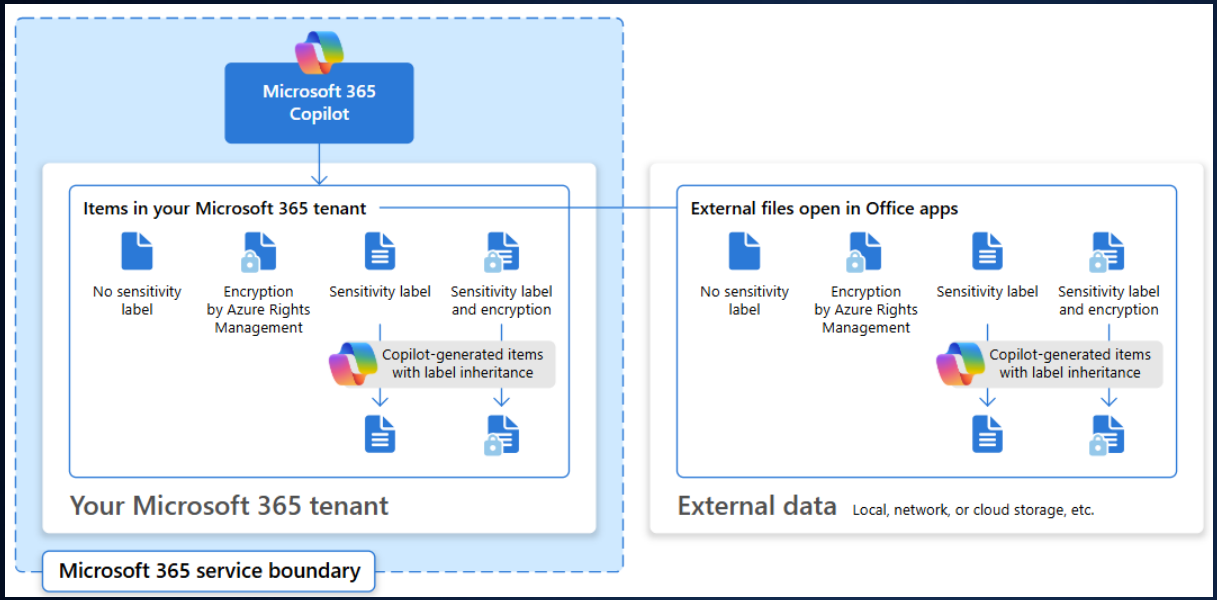
Information Protection: Sensitivity labels



- 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 lableled documents shouldn't be summarized by Copilot

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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

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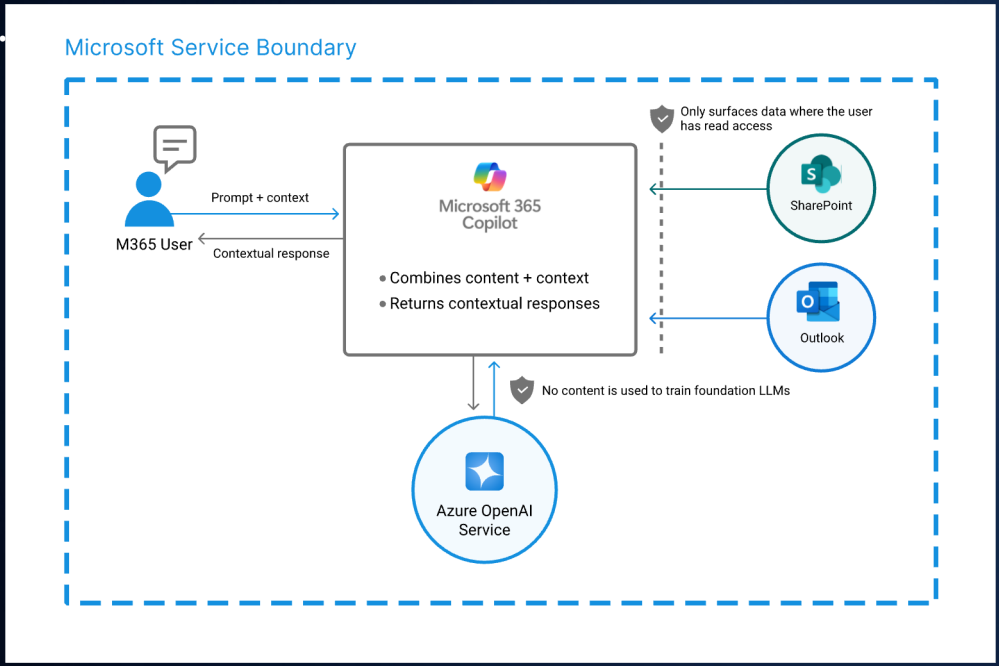
https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-privacy

M365 Copilot - Data, Privacy, and Security

How does Microsoft 365 Copilot use your proprietary organizational data?



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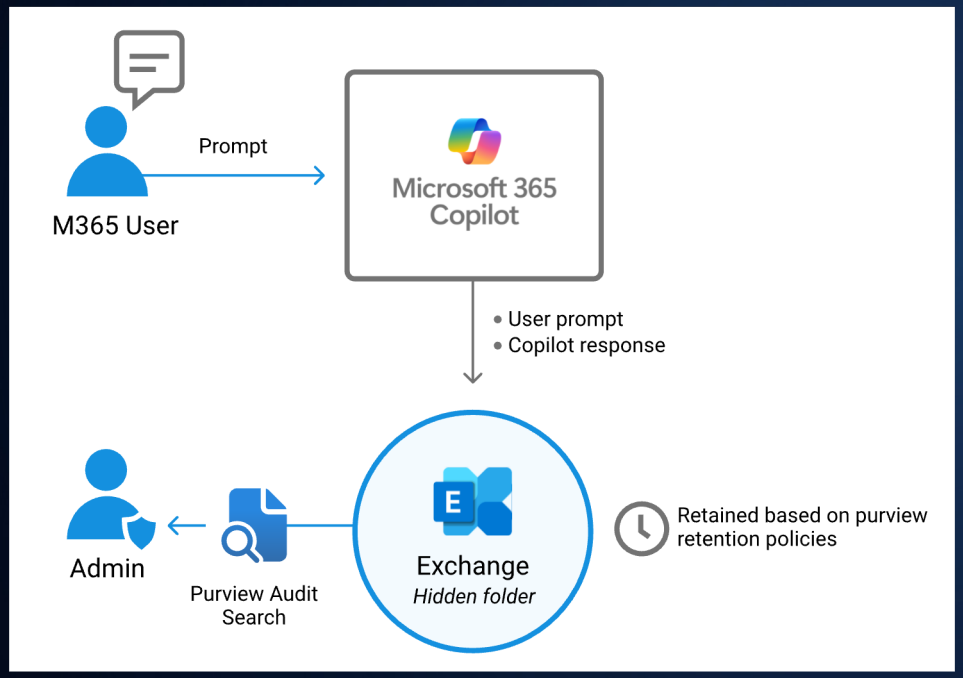
M365 Copilot - Data, Privacy, and Security

Data stored about user interactions with Microsoft 365 Copilot



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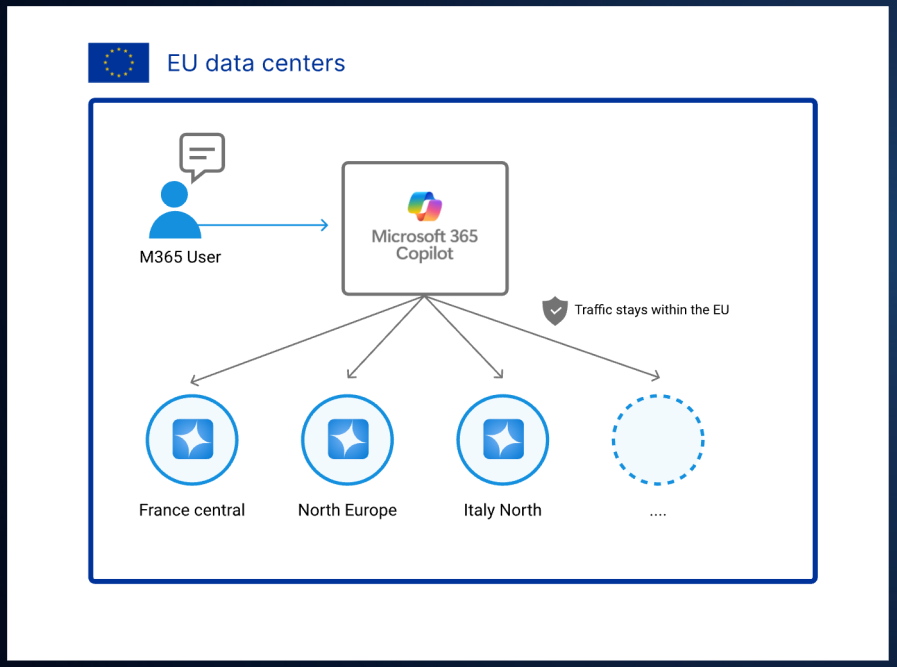
M365 Copilot - Data, Privacy, and Security

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.

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

Copilot Ready

- 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?

Copilot Ready

- ❑ 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

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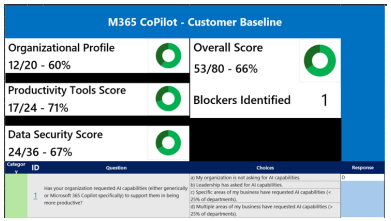
Get ready for Microsoft 365 Copilot

Microsoft 365 Copilot Readiness Workshop

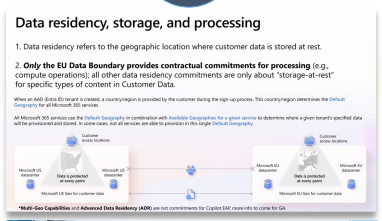
1



REVIEW & PLANNING

Security, Governance, Licensing and Compliance – Deep Dive

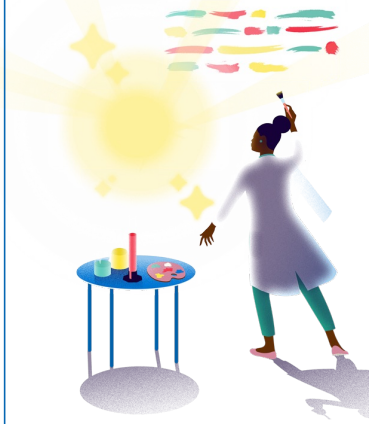
2



VERIFICATION & ADJUSTMENT

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

3



STRATEGY & TRAINING

Copilot ready

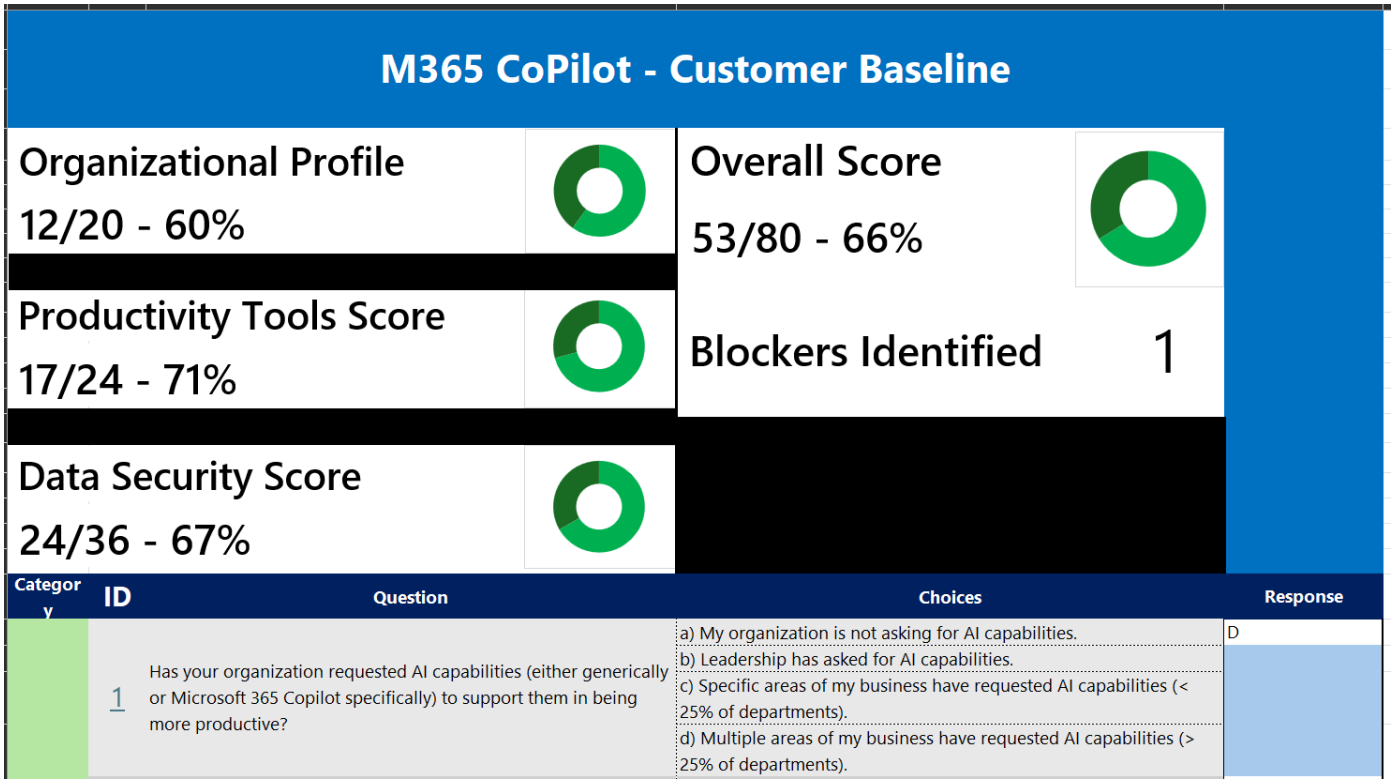
Deploying Copilot

4

Deploy Copilot

LAUNCH

Microsoft 365 Copilot Baseline

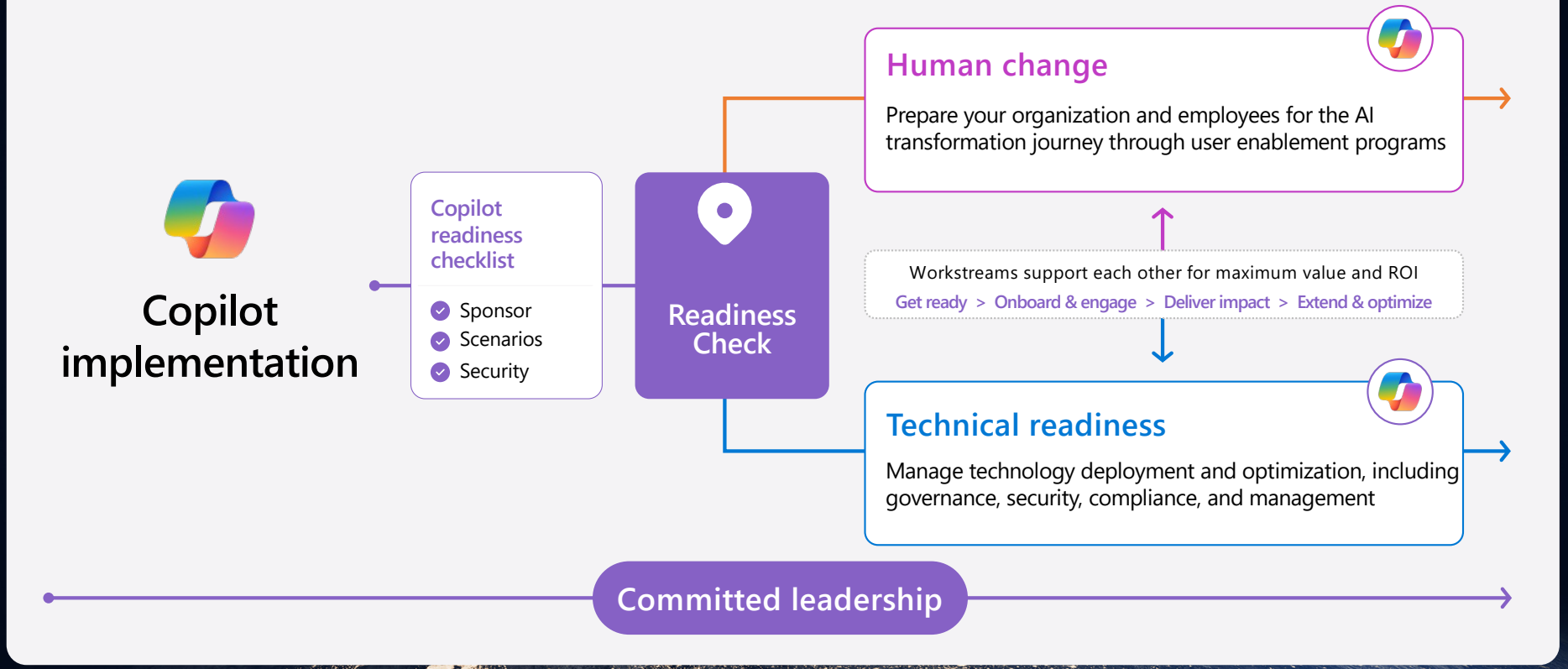


M365 CoPilot - Customer Baseline

Organizational Profile 12/20 - 60%	Overall Score 53/80 - 66%
Productivity Tools Score 17/24 - 71%	Blockers Identified 1
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



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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

Are we here?

Build and iterate technical skills to deliver business outcomes

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

Principles of responsible AI

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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.**

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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.*

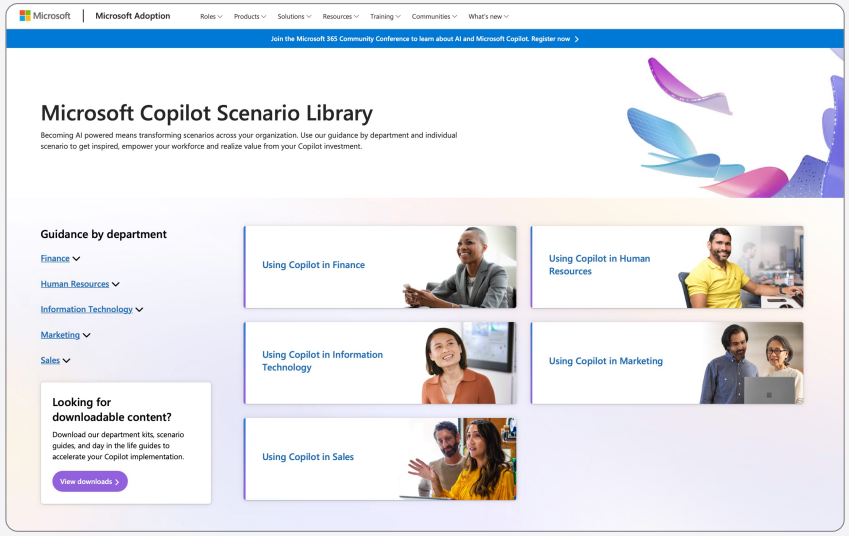
Leadership

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	HR	Marketing	Operations	IT	Sales	Finance
Improve meetings	Cost per hire	Leads created	Customer retention	Outstanding support tickets	Number of opportunities	Accelerate cash flow
Content creation	Employee turnover	Brand value	Product time to market	Application downtime	Close rate	Spend on ERP system
Manage daily agenda	Compliance risk reduction	Cost per lead	Supply chain efficiencies	Departmental spending	Revenue per sale	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

Copilot Mastery Huddle #1

Meet and share findings, tips and tricks

Copilot Mastery Huddle #2

Meet and share findings, tips and tricks

Copilot Mastery Huddle #3

Meet and share findings, tips and tricks

May. **June.** **July.** **Aug.**

MS Teams team
” Copilot Ambassadors”

Active and continuous communication, tips and tricks

May Fri 27
15-15.50 CET
Teams
Meeting

June Fri 23
15-15.50 CET
Teams
Meeting

Aug Fri 25
15-15.50 CET
Teams
Meeting

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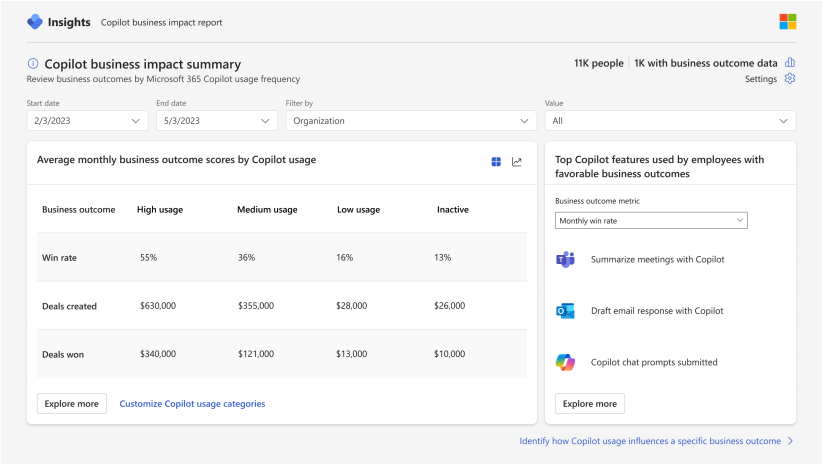
Shared activity

Deliver impact: Access usage reports

Interpret the Microsoft 365 Admin Center Usage Report

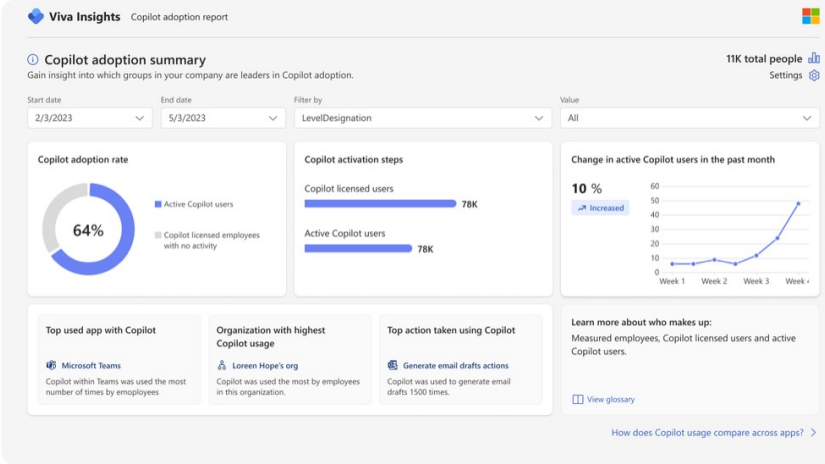
Viva Insights advanced impact reports

Included with Microsoft 365 Copilot



Copilot business impact reports

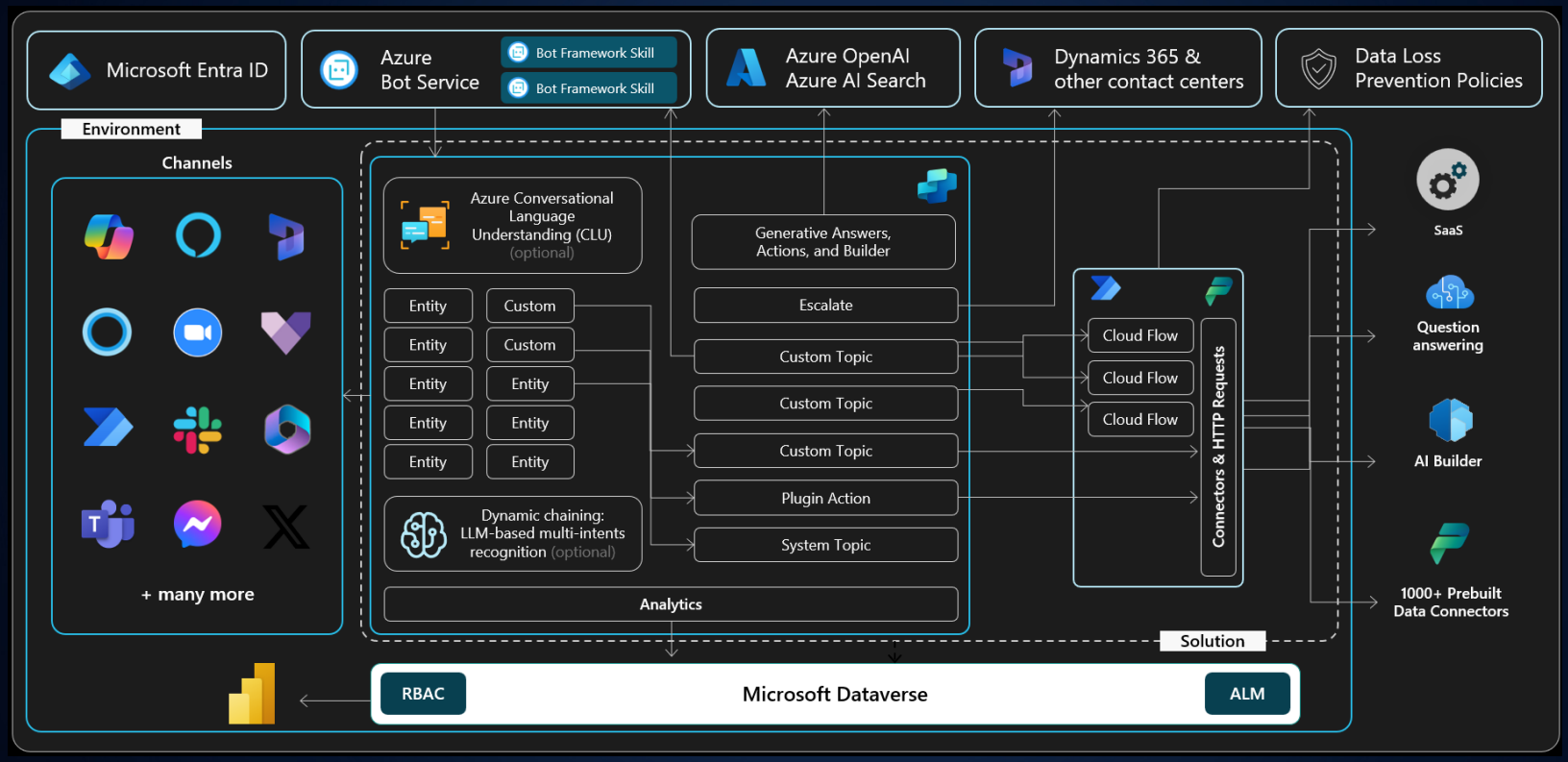
Measure the value of Microsoft 365 Copilot with your key business metrics.



Advanced adoption and impact reports

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

Copilot Studio



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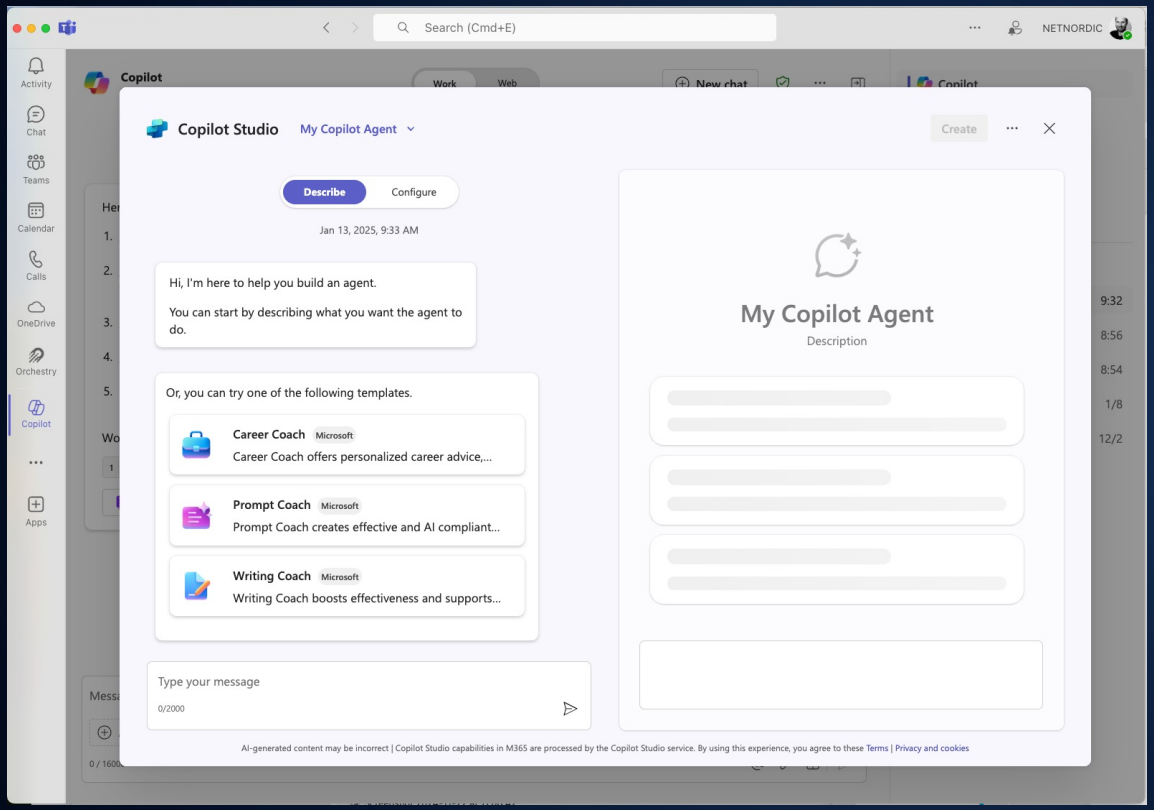
Copilot Studio



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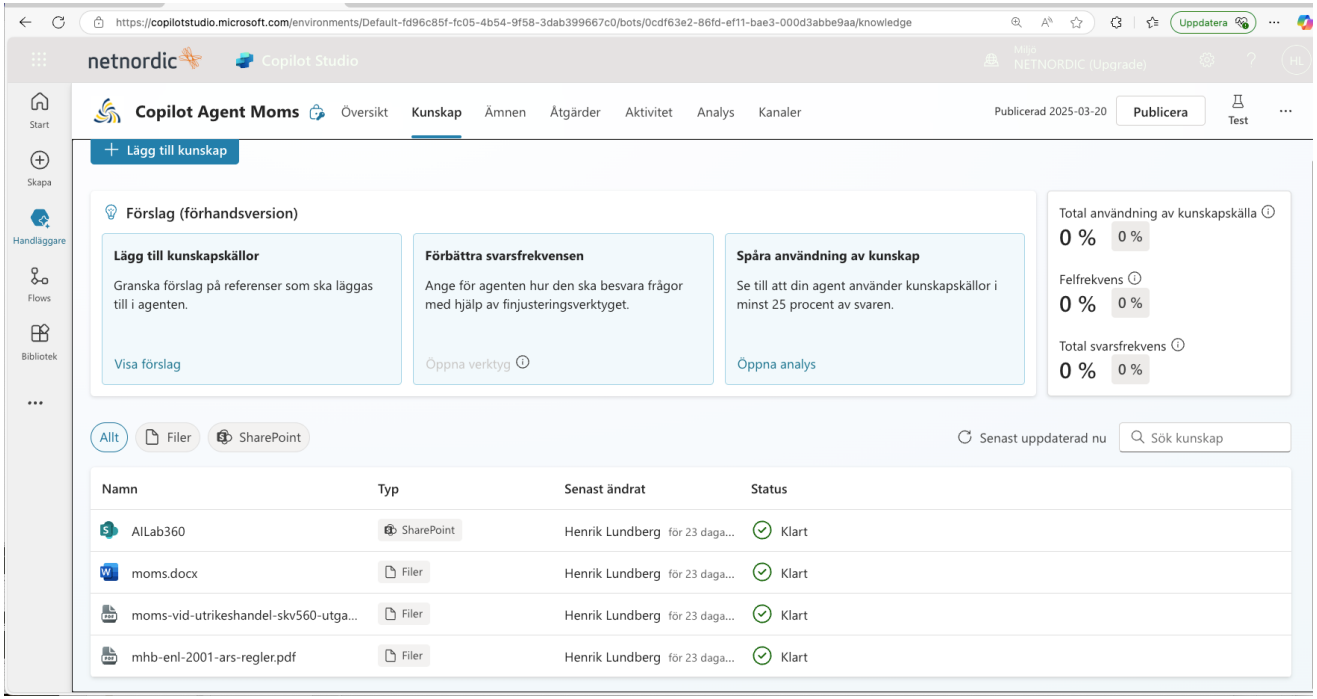
Microsoft 365 Copilot Studio

Building Your Own Agent

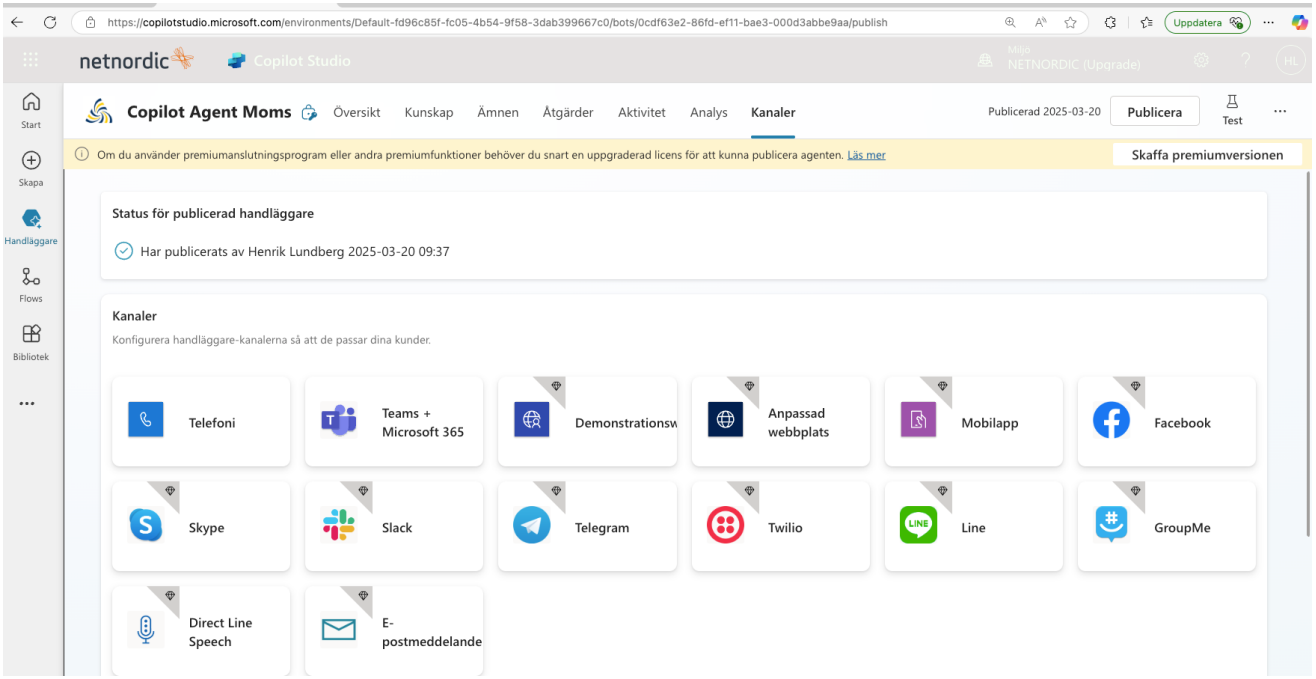
Copilot
CASE



Microsoft 365 Copilot Studio

Build and publish your own Agents to Teams

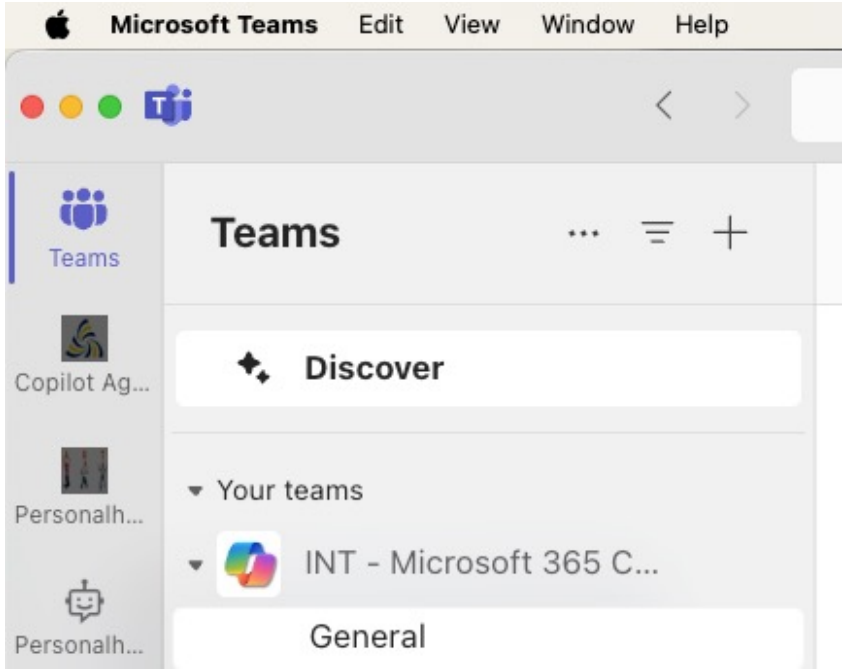
Copilot CASE



Microsoft 365 Copilot Studio

Copilot CASE

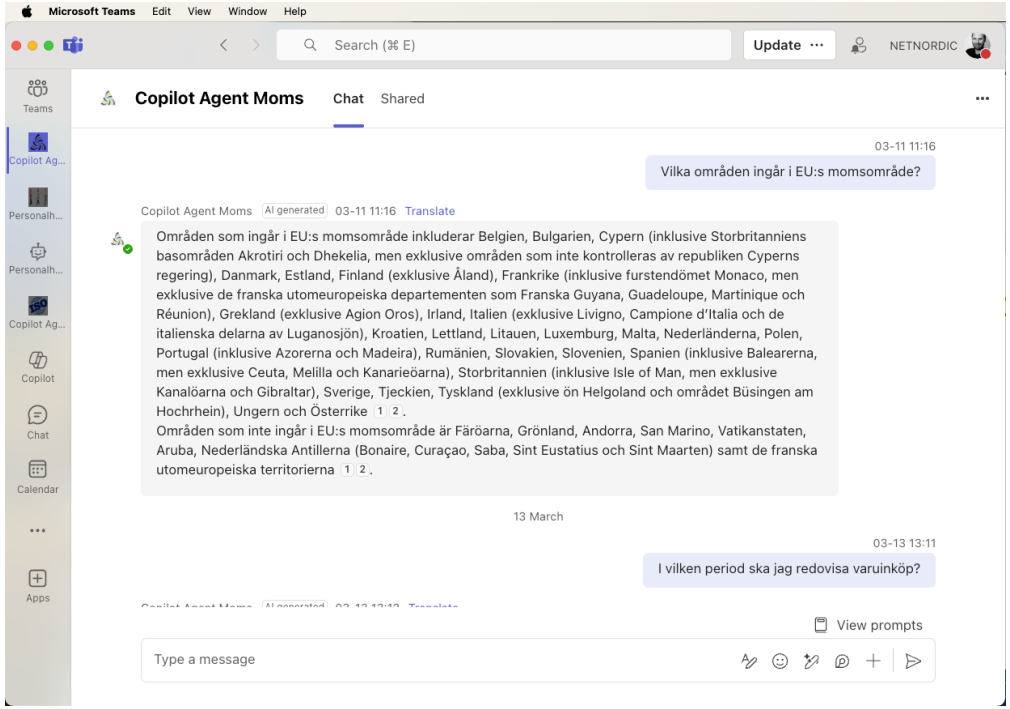
Build and publish your own Agents to Teams



Microsoft 365 Copilot Studio

Copilot CASE

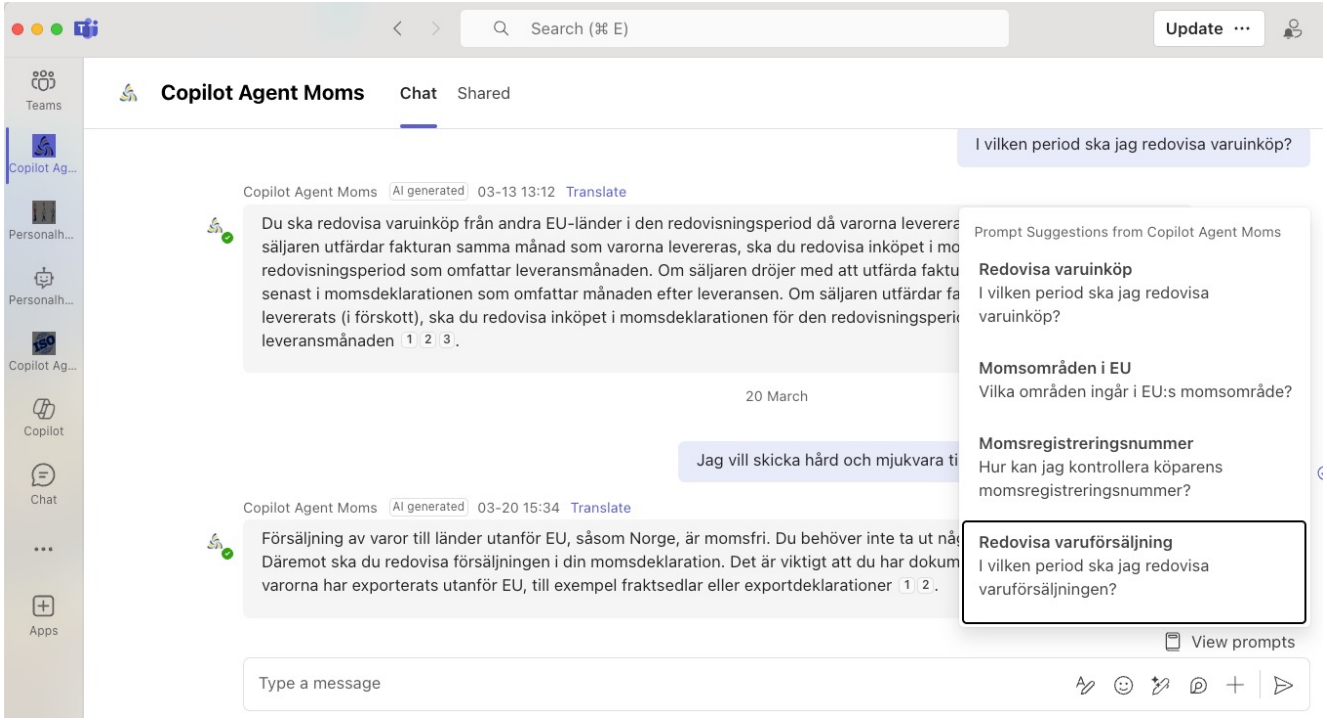
Agent Moms



Microsoft 365 Copilot Studio

Copilot CASE

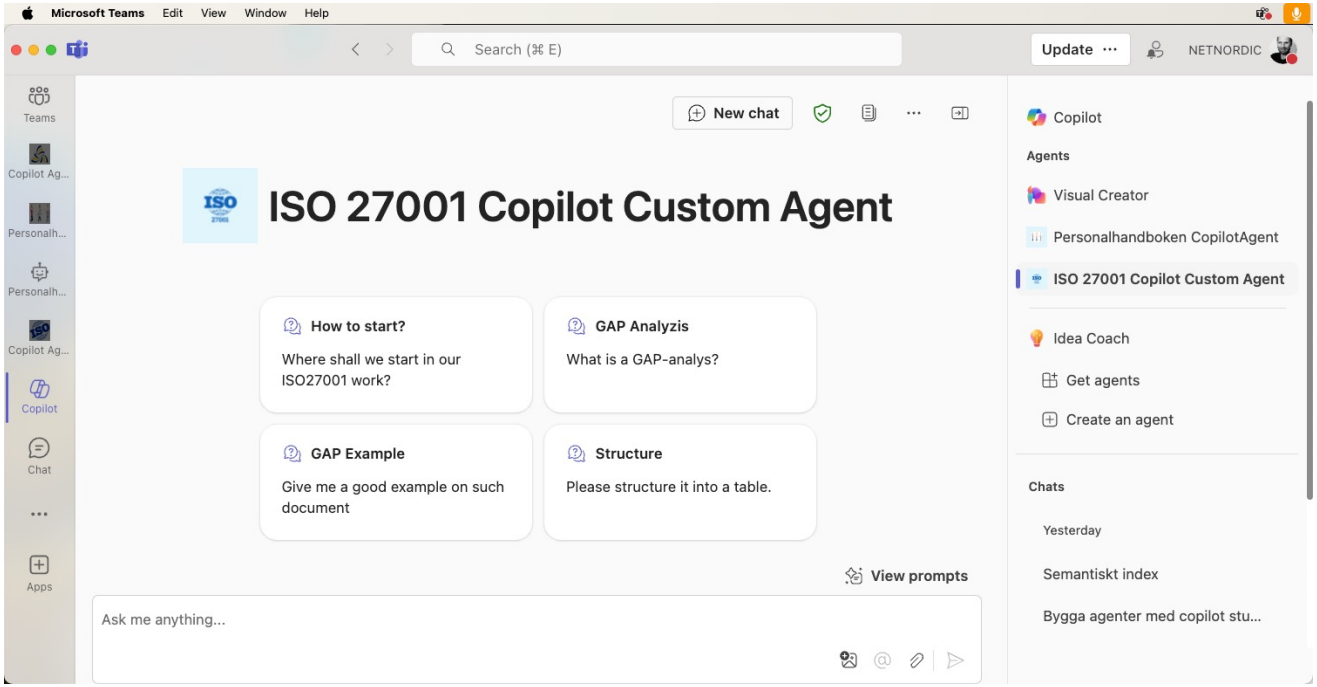
Agent Moms



Microsoft 365 Copilot Studio

Copilot CASE

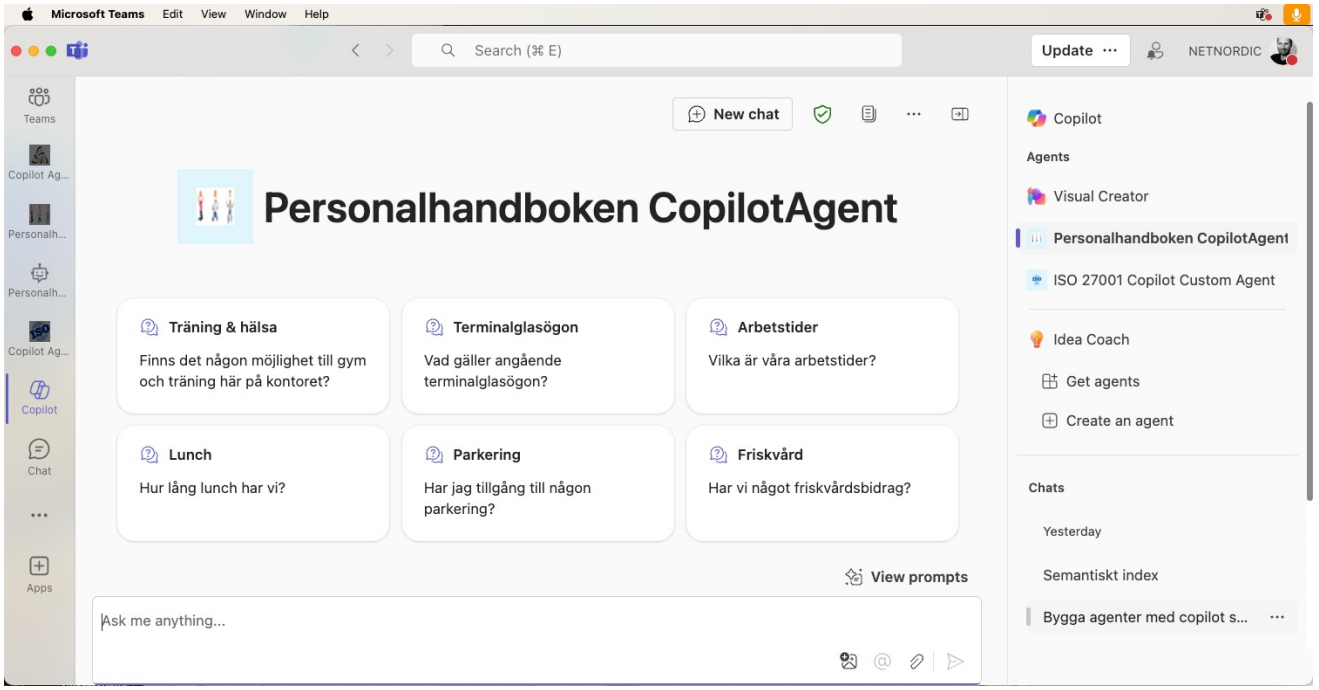
ISO 27001 Agent



Microsoft 365 Copilot Studio

Copilot CASE

Employee Handbook Agent



How do we get there?

Copilot Ready

- ❑ 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

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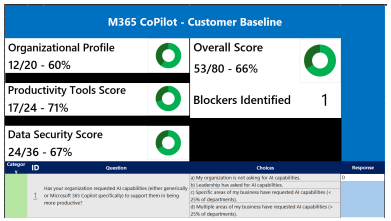
THE BEST COMPANION

Get ready for Microsoft 365 Copilot

Microsoft 365 Copilot Readiness Workshop

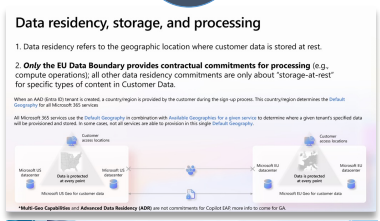
1



REVIEW & PLANNING

Security, Governance, Licensing and Compliance – Deep Dive

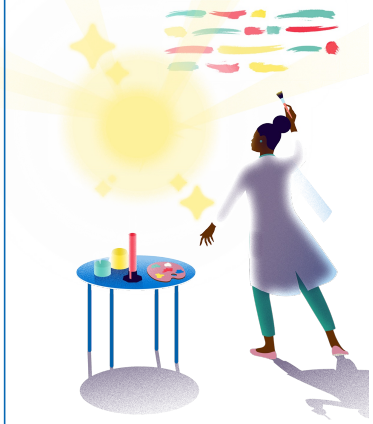
2



VERIFICATION & ADJUSTMENT

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

3



STRATEGY & TRAINING

Copilot ready

Deploying Copilot

4

Deploy Copilot

LAUNCH

We are your best
Companion
We breathe **technology** and love **smart** solutions.
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