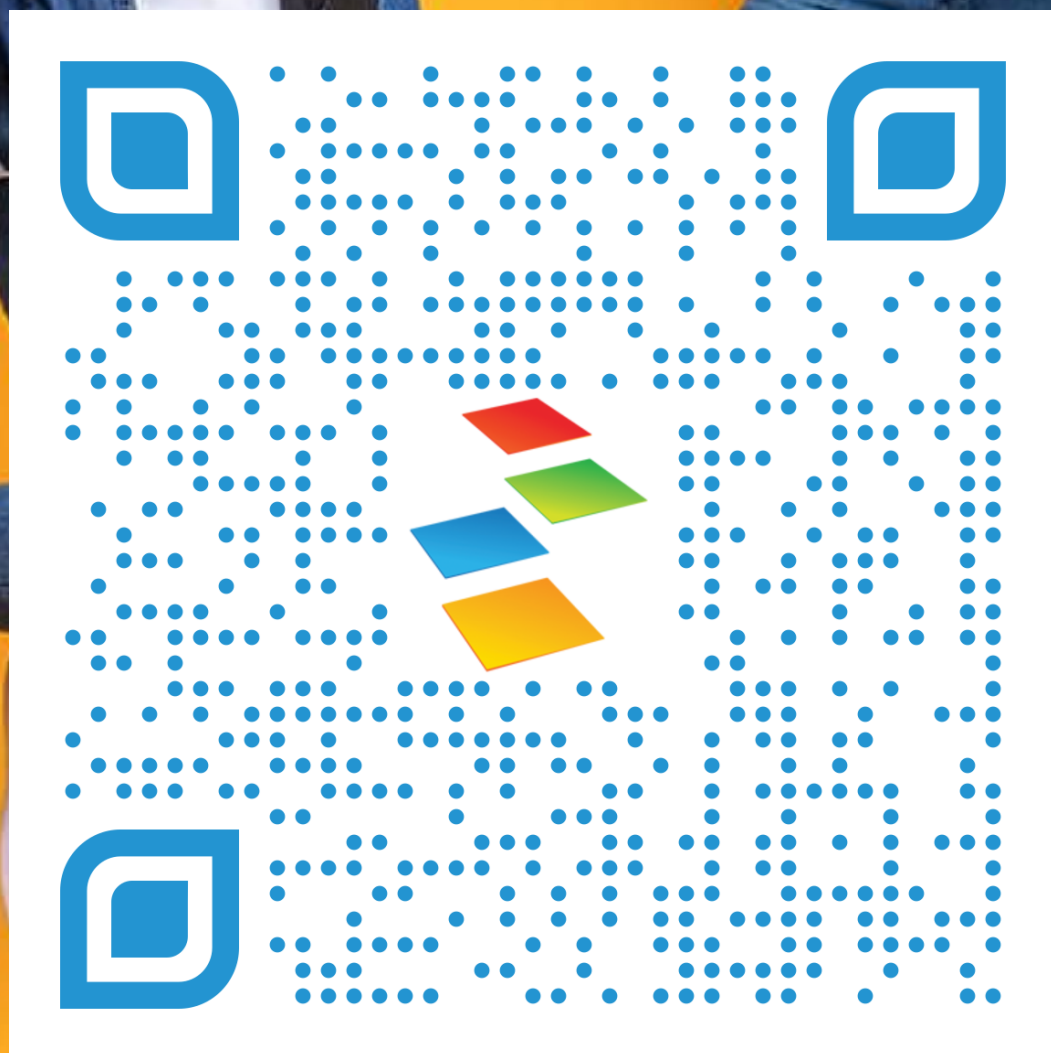




Taking the Leap to Business Brilliance: Elevate Your Journey with Microsoft 365 Copilot





Housekeeping

- Please silence your phones. If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please use this QR code to take the session survey before heading to the next session.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included Surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit
Password: journeyteam!



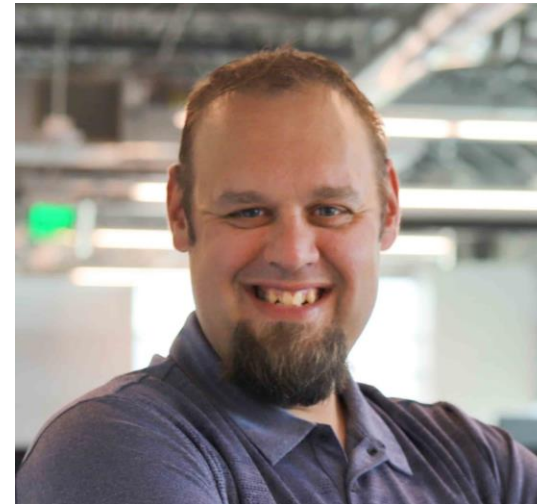
The Four “Whats” of Copilot

- What exactly is Copilot?
- What can it do for me?
- What do I do to get ready?
- What does my launch plan look like?





Presenters

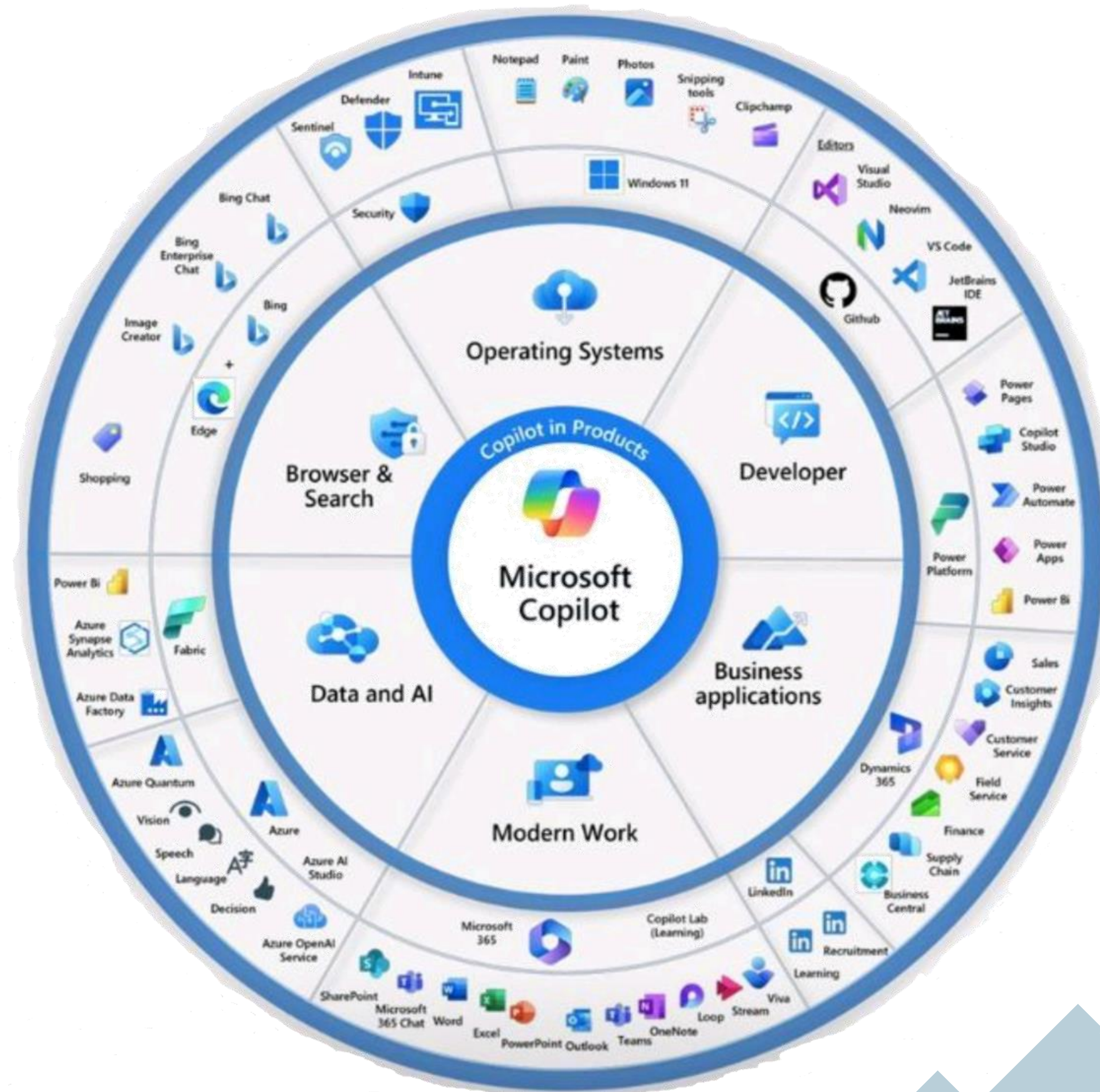


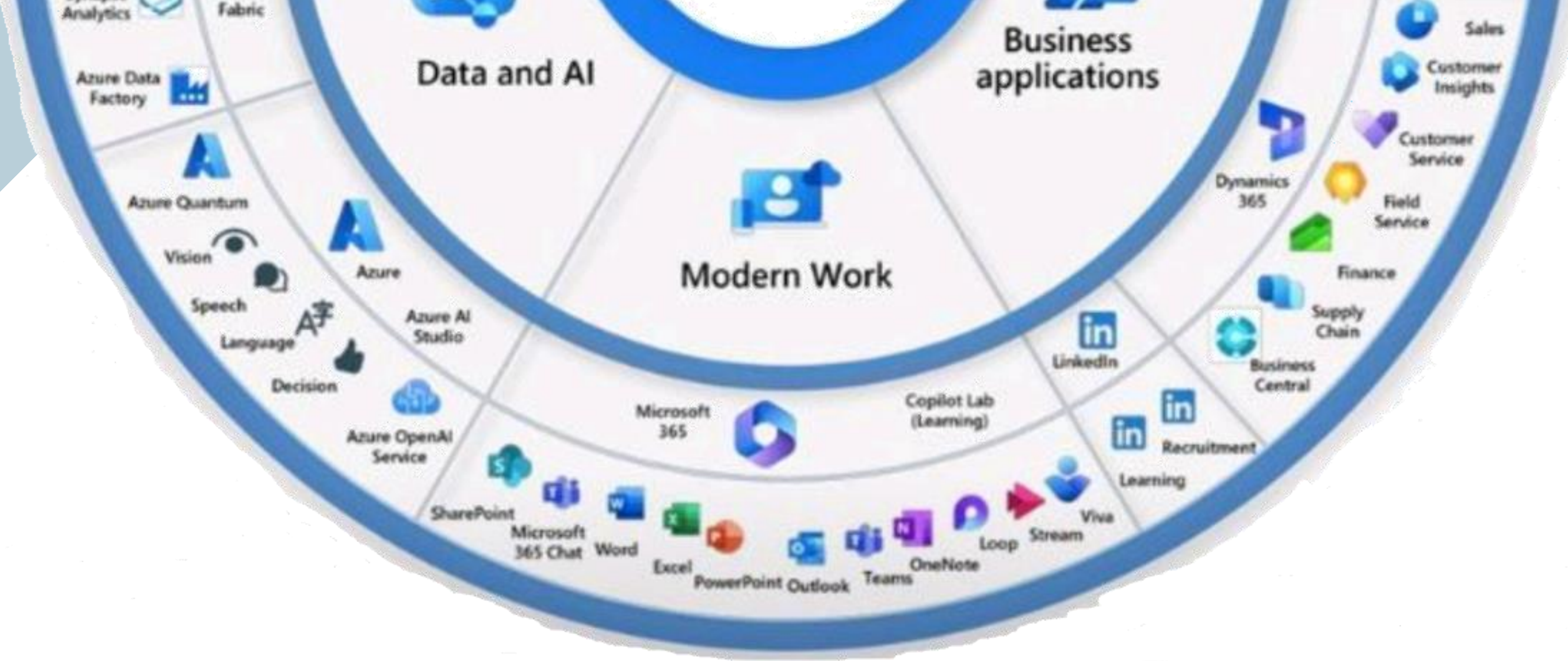
JARED FOLEY
MODERN WORK AND SECURITY
SOLUTION SPECIALIST



KEVIN ZOLLINGER
MODERN WORK AND SECURITY
SOLUTION SPECIALIST

All the Flavors of





Data and AI

Business applications

Modern Work

Analytics
Azure Data Factory

Fabric

Azure Quantum

Vision
Speech

Language
Decision

Azure AI Studio

Azure OpenAI Service

SharePoint

Microsoft 365 Chat

Word

Excel

PowerPoint

Outlook

Teams

OneNote

Loop

Stream

Viva

Microsoft 365

Copilot Lab (Learning)

LinkedIn

Recruitment

Learning

Business Central

Supply Chain

Finance

Field Service

Customer Service

Customer Insights

Sales

All the Flavors of Copilots in M365



Microsoft 365 Chat

Combine the power of AI with your work data to unlock productivity and uplevel skills.



Copilot in Teams

Have more effective meetings, easily catch up on chats, and find information faster.



Copilot in Outlook

Start emails quickly, generate a summary, and catch up on long emails easily.



Copilot in Word

Start a draft, add to an existing document, rewrite text, or generate a summary.



Copilot in PowerPoint

Create beautiful presentations, organize and summarize presentations, and more.



Copilot in Excel

Go deeper with data, identify insights, generate formulas, and more.



Copilot in OneNote

Summarize your notes, create a to-do list, design a plan, and more.



Copilot in Loop

Plan, brainstorm, create, and collaborate easier to stay in sync.



Copilot in Whiteboard

Creating, organizing, and understanding ideas has never been easier.

Copilot Feature Comparison

For Individuals

For Organizations

	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
	Free	\$20	Free	\$30
Foundational Capabilities	●	●	●	●
Web Grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Priority Model Access		●		●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		●		●
Copilot in Teams				●
Microsoft Graph Grounding				●
Enterprise-Grade Data Protection				●
Customization		Copilot GPT Builder		Copilot Studio

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.

Copilot for Microsoft 365 Basic Architecture

Microsoft 365 Apps



Microsoft 365 Service Boundary

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

Large Language Model

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

Azure OpenAI

RAI

RAI is performed on input prompt and output results

Response + app commands

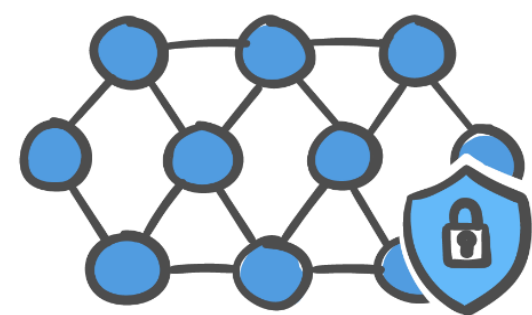
User prompt

Pre-processing

Grounding

Microsoft Graph

Semantic Index



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

Customer Microsoft 365 Tenant

Grounding

Post-processing

Modified prompt

LLM response

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

Sure! Here's an introduction for Jared Foley and Kevin Zollinger based on the "Taking the Leap to Business Brilliance: Elevate Your Journey with Microsoft 365 Copilot" presentation:

Good morning/afternoon everyone, and welcome to our presentation on "Taking the Leap to Business Brilliance: Elevate Your Journey with Microsoft 365 Copilot". Today, we have two distinguished speakers with us, Jared Foley and Kevin Zollinger, both of whom are Solution Specialists in the Modern Work & Security department at JourneyTEAM. Jared is based in South Jordan and reports to Brent Tenney, Senior Solution Architect I. He is skilled in Microsoft 365 and has worked on projects such as Redacted Kevin is based in Herriman and reports to Hector Perez, Senior Solution Architect I. He is skilled in SharePoint, OneDrive, Teams, Adoption, Communication, Training, and Leadership. Both Jared and Kevin have extensive experience in helping organizations elevate their journey with Microsoft 365 Copilot. Please join me in welcoming Jared Foley and Kevin Zollinger.

Sure! Here's an introduction for Jared Foley and Kevin Zollinger with some added pizzazz and sparkle:

Good morning/afternoon everyone, and welcome to our presentation on "Taking the Leap to Business Brilliance: Elevate Your Journey with Microsoft 365 Copilot". Today, we have two rockstars with us, Jared Foley and Kevin Zollinger, both of whom are Solution Specialists in the Modern Work & Security department at JourneyTEAM. Jared is based in South Jordan and reports to Brent Tenney, Senior Solution Architect I. He is a wizard in Microsoft 365 and has worked on projects such as Redacted Also redacted based in Herriman and reports to Hector Perez, Senior Solution Architect I. He is a master in SharePoint, OneDrive, Teams, Adoption, Communication, Training, and Leadership. Both Jared and Kevin have extensive experience in helping organizations elevate their journey with Microsoft 365 Copilot. Please join me in welcoming Jared Foley and Kevin Zollinger.

And now, for a little joke to start us off on the right foot: Why don't scientists trust atoms? Because they make up everything!



What can I do with Copilot?



Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

of people have struggled with finding time and energy to get their work done

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

Copilot in Excel

Copilot works alongside you to help analyze and explore your data.

Some example prompts you can ask copilot:

- Give a breakdown of the sales by type and channel. Insert a table.
- Project the impact of [variable] and generate a chart to help visualize.
- Model how a change to the growth rate for [variable] would impact my gross margin.

MICROSOFT 365

Copilot in Excel

Q1 Performance • Saved

File Home Insert Formulas Data Review View Automate Help

Aptos (Body) 11 B

Search

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19

A B C D E F G H I J

12% 10% 8% 6% 4% 2% 0% 0% 2% 4% 6% 8% 10% 12%

8% 12% 10% 8% 1%

Q1-22 Q2-22 Q3-22 Q4-22 Q1-23

Projected Sales growth over time

12% 10% 8% 6% 4% 2% 0% 0% 2% 4% 6% 8% 10% 12%

8% 12% 10%

Q1-22 Q2-22 Q3-22

Proseware Sales growth by Product

Product	Q1-22	Q2-22	Q3-22	Q4-22	Q1-23
Biodegradable Cleaning Products	3%	4%	6%	10%	5%
Compostable Food Packaging	9%	11%	15%	5%	13%
Reusable Containers	7%	10%	11%	6%	-9%
Reusable Water Bottles	15%	18%	18%	10%	17%
Natural Personal Care Products	10%	14%	9%	5%	33%

Model: 'Reusable Containers' with Q1-22

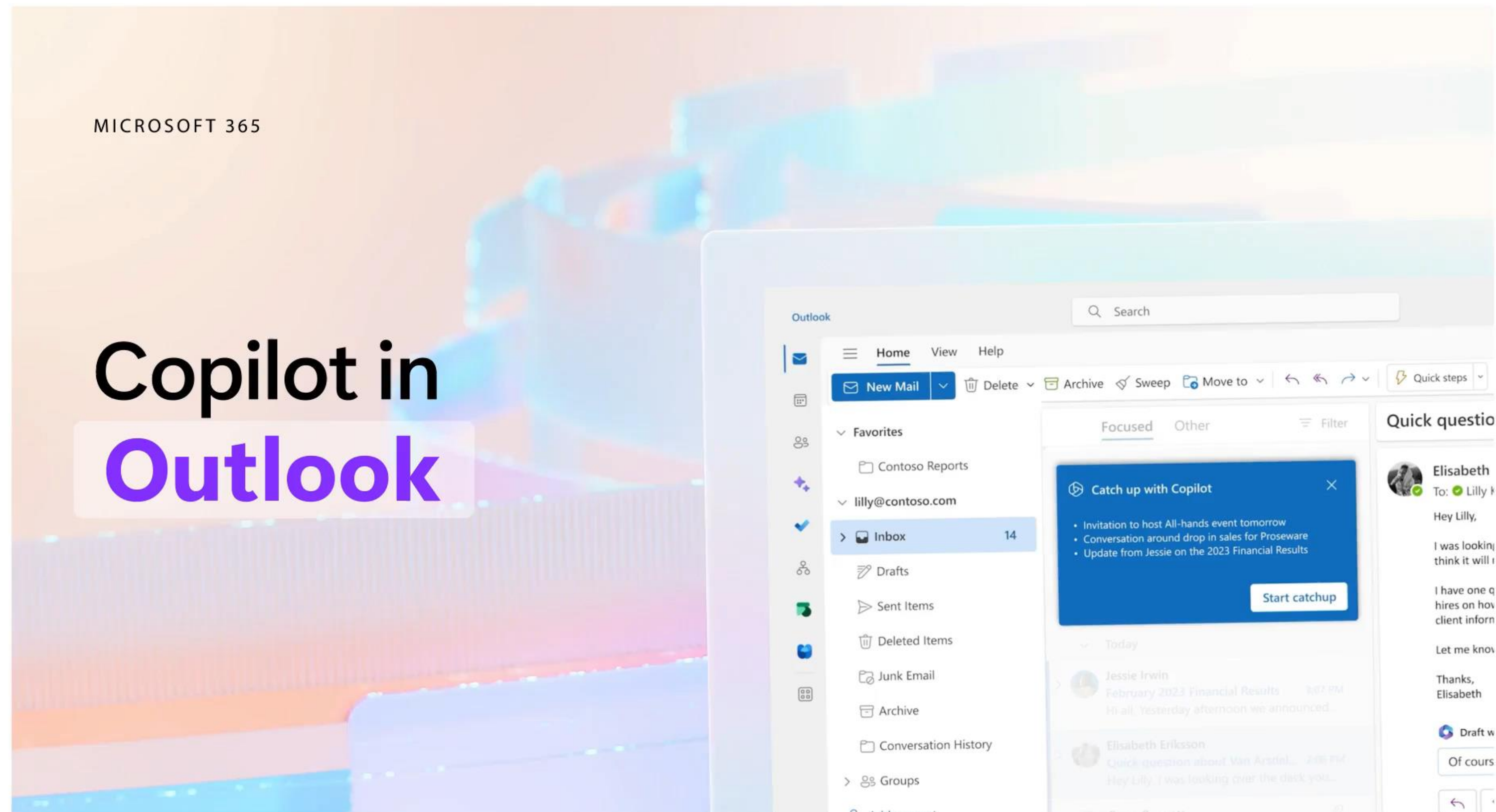
Product	Q1-22
Biodegradable Cleaning Products	3
Compostable Food Packaging	9
Reusable Containers	7
Reusable Water Bottles	15
Natural Personal Care Products	10

Copilot in Outlook

Copilot works with you in cleaning your inbox and messages.

Some example prompts you can ask copilot:

- Summarize the emails I missed while I was out. Flag important items.
- Draft a response thanking them and asking for more details; shorten this draft and make the tone professional.
- Invite everyone to a “lunch and learn” about new product launches next thursday at noon.

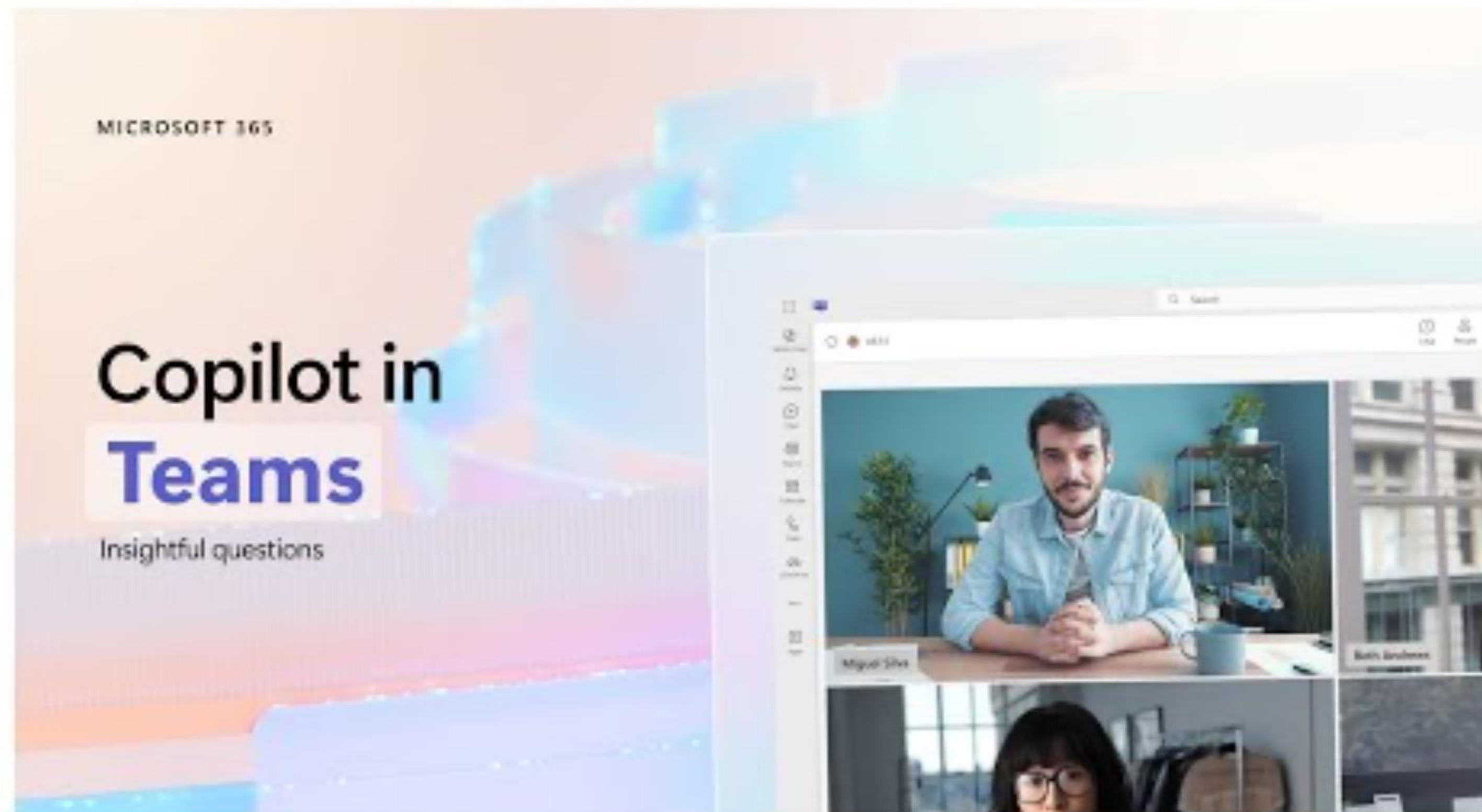


Copilot in Teams

Copilot helps you run effective meetings, get up to speed, organize key discussion points, and summarize actions.

Some example prompts you can ask copilot:

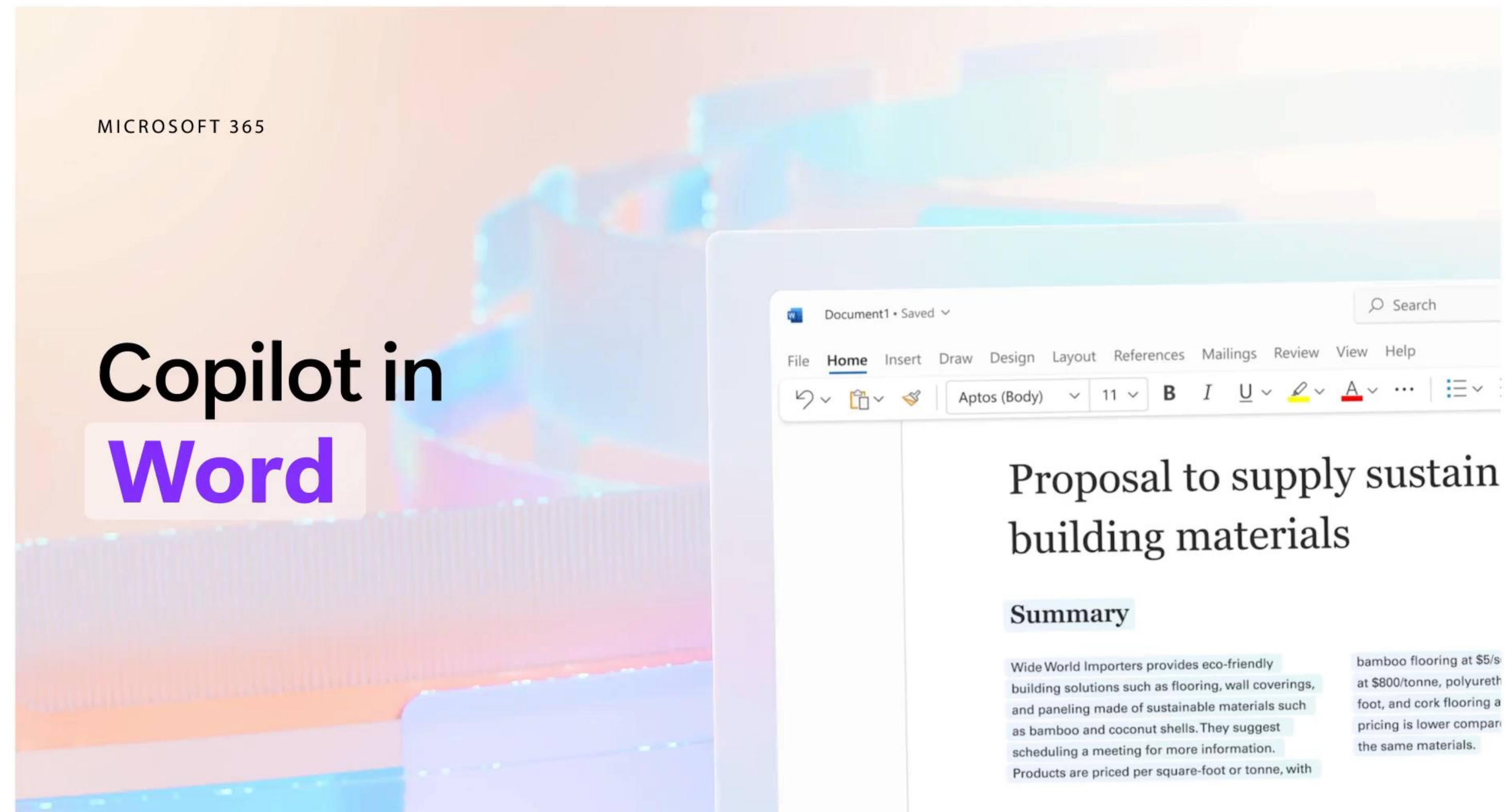
- Summarize what I've missed in the meeting.
- Create a table of pros and cons for [topic].
- What decisions were made, and what are some suggested next steps?



Copilot in Word

Some example prompts you can ask copilot:

- Draft a two-page project proposal based on the data from [document] and [spreadsheet].
- Make the third paragraph more concise. Change the tone of the document to be more casual.
- Create a one-page draft based on this rough outline.

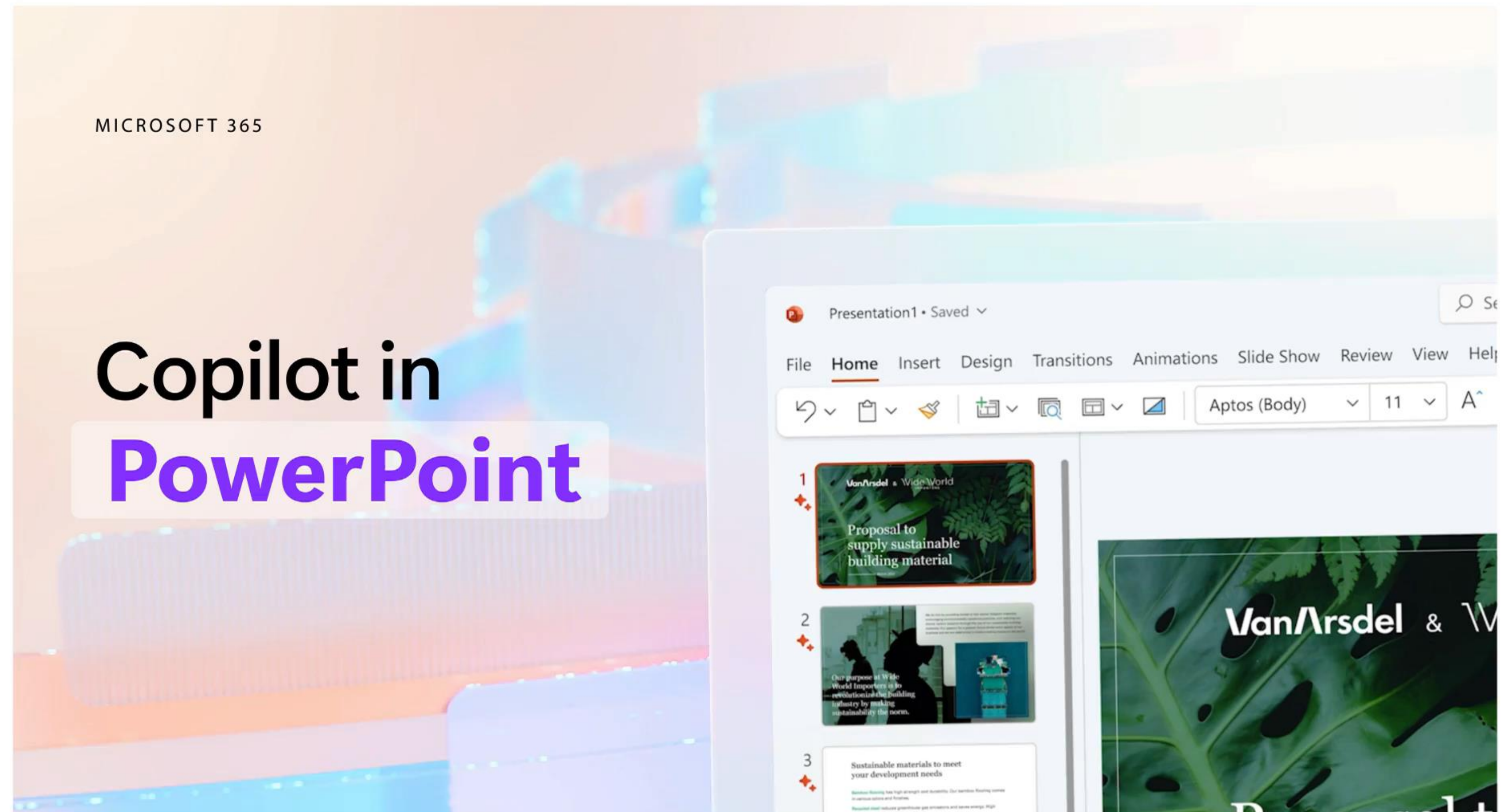


Copilot in PowerPoint

Copilot helps you turn your ideas into stunning presentations.

Some example prompts you can ask copilot:

- Create a five-slide presentation based on a word document, include relevant stock photos.
- Consolidate this presentation into a three-slide summary.
- Reformat these three bullets into three columns, each with a picture.





Demo



JourneyTEAM

Microsoft Partner

Microsoft

BUSINESS TECHNOLOGY

SUMMIT 2024

FEB 29

JourneyTEAM Business Technology Summit 2024

669 S W Temple St, Salt Lake City, UT 84101

[Register Now](#)

About this Event

Attend JourneyTEAMS' Business Technology Summit to transform, innovate, and prosper in 2024!

There is no better way to spend the bonus day than learning how to unleash your growth potential with technology solutions designed for growing organizations just like yours.

Leap into a successful and transformative year with sessions from the experts at JourneyTEAM, educational tracks from our strategic technology partners, networking opportunities, and motivating keynotes.

With deep insights into the future of business, Microsoft technologies, and the rapidly evolving landscape of AI, this year's BTS is a must-attend event for business owners and operators who are focused on their future. Don't miss this opportunity to jump ahead of the pack and leverage our leading-edge approach to technology to advance in your market.

Embrace technology, empower growth, and leap forward with JourneyTEAM!

Must be 18 years old or older to attend the event.

Sessions include:

* The Efficiency Frontier: Leveraging D365 Copilot for Sales and Service with Brandon Gorton & Rigo Sierra

* Harnessing the Power of Azure AI and Machine Learning for Business Transformation with Alexander Ryan

[Share Event](#)

When?

FEB 29 | 8:00 AM-5:30 PM

Location

669 S W Temple St, Salt Lake City, UT 84101

[Get Directions](#)



Best Practices to get what you want!





Ask the **RIGHT** Question

- Be Specific
- Use natural language
- Avoid ambiguity
- Provide context
- Focus on what you want to achieve

Note: Copilot created this slide with the above ideas



“TAG” is your Best Friend

- When using your prompts, use a / to tag a person, meeting event, word document etc.

Example Prompts:

- What is the latest from /Coworkers Name?
- Do I have anything I need to do for /Coworker
- Create a PowerPoint presentation based on /Word Doc
- Give me the meeting notes from /Name of meeting

Ignite 2023

New features coming to Copilot for Microsoft 365



Teams

- Ask for more specific notes like "Capture what Beth said as a quote"
- Generate summaries, action items, or ask any specific questions about the conversation after a call has finished with [Copilot in Teams Phone](#)

Available early CY2024.



Outlook

- Generate a detailed summary of upcoming meetings
- Schedule a follow-up meeting from an email summary

Available early CY2024.



Word

- Catch up and comprehend what others have changed in a document

Available early CY2024.



Excel

- Unlock Python in Excel capabilities using natural language

[Preview late CY2023.](#)



Whiteboard

- Turn meeting participants' spoken ideas and topics into a visual collaboration space in Whiteboard
- Suggest more ideas to add to Whiteboard as the meeting conversation happens

Available mid CY2024.



Viva

- Better understand team health [Copilot in Viva Insights](#)
- Get help generating and refining goals [Copilot in Viva Goals](#)
- Inspire leaders to post to conversations using AI-created starters and prompts [Copilot in Viva Engage](#)
- Enable joint Viva and SAP SuccessFactors customers to use AI [Copilot in Viva Learning](#)
- Easily explore survey feedback [Copilot in Viva Glint](#)

Private preview early CY2024; requires both Microsoft 365 and the Viva suite.



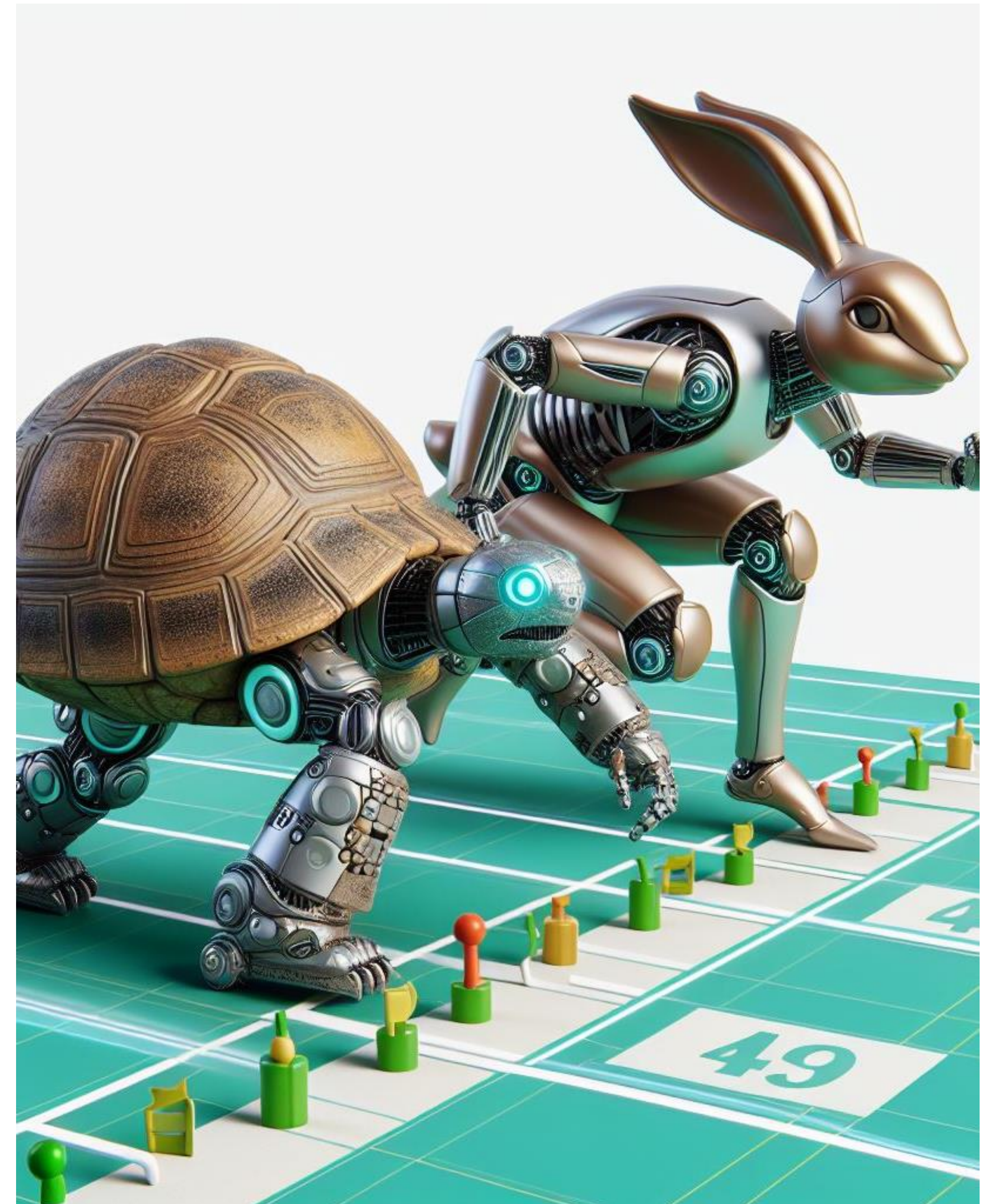
Microsoft Resources

- Microsoft's Copilot Adoption Page
 - Breaks examples down by job roles
 - Gives specific Examples of phrases to use in your Microsoft 365 Apps
 - Access it at: <https://adoption.microsoft.com/copilot/>
- Microsoft Copilot Community
 - Access to Microsoft's blogs for news and discussions surrounding Copilot
 - <https://aka.ms/AMC/CopilotCommunity>
- Copilot Lab
 - GUI that helps you find the prompt you need.
 - [Copilot Lab](#)



So, Copilot is **wicked**
cool. Now what?

It is more important to get it right than it is to get it first.
- Me.

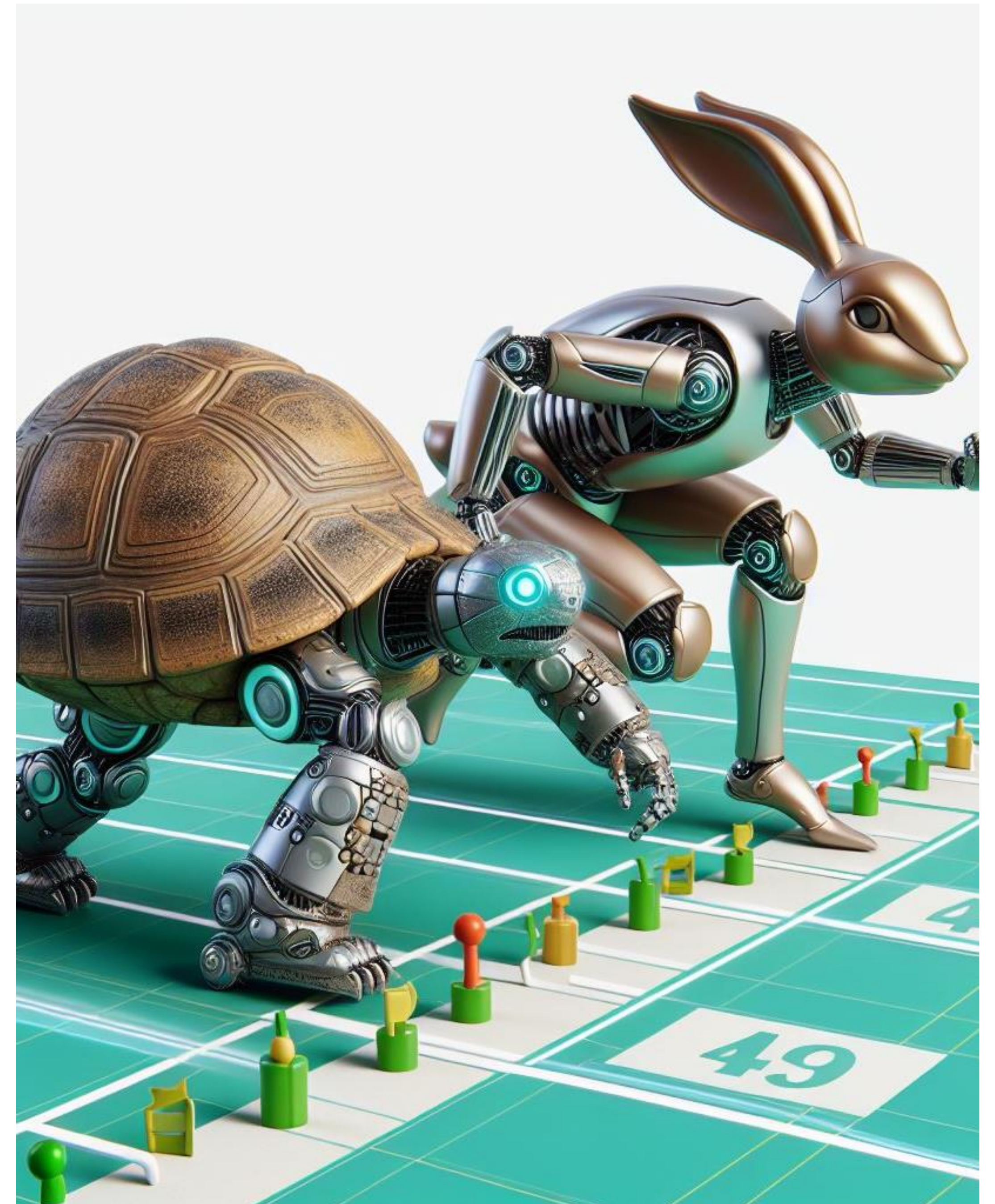


It is more important to get it right than it is to get it first.

- Me.

You do need to start at some point, might as well be now.

- Also me.





Copilot for Microsoft 365

Three-phase approach to business progress

01 Phase



Readiness

- Concentrate licenses in a few key teams
- Start with quick wins
- Create an AI council.

02 Phase



Adoption

- Create a Copilot user community
- Identify Copilot champions and early adopters
- Manage expectations
- Communicate best practices early and often

03 Phase



Measurement

- Quantify impact with the Microsoft Copilot Dashboard
- Meet with your AI council biweekly
- Publicly celebrate successes



Copilot for Microsoft 365

Three-phase approach to business progress

01 Phase



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Copilot for Microsoft 365

Three-phase approach to business progress

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Readiness

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Phase Zero: Copilot Launch Readiness Review



Phase Zero

Copilot Launch Readiness Review

- Sharing Hygiene
- Information Architecture
- Security Audit
- Adoption & Change Management Risk Assessment
- Flag Plant

Sharing Hygiene

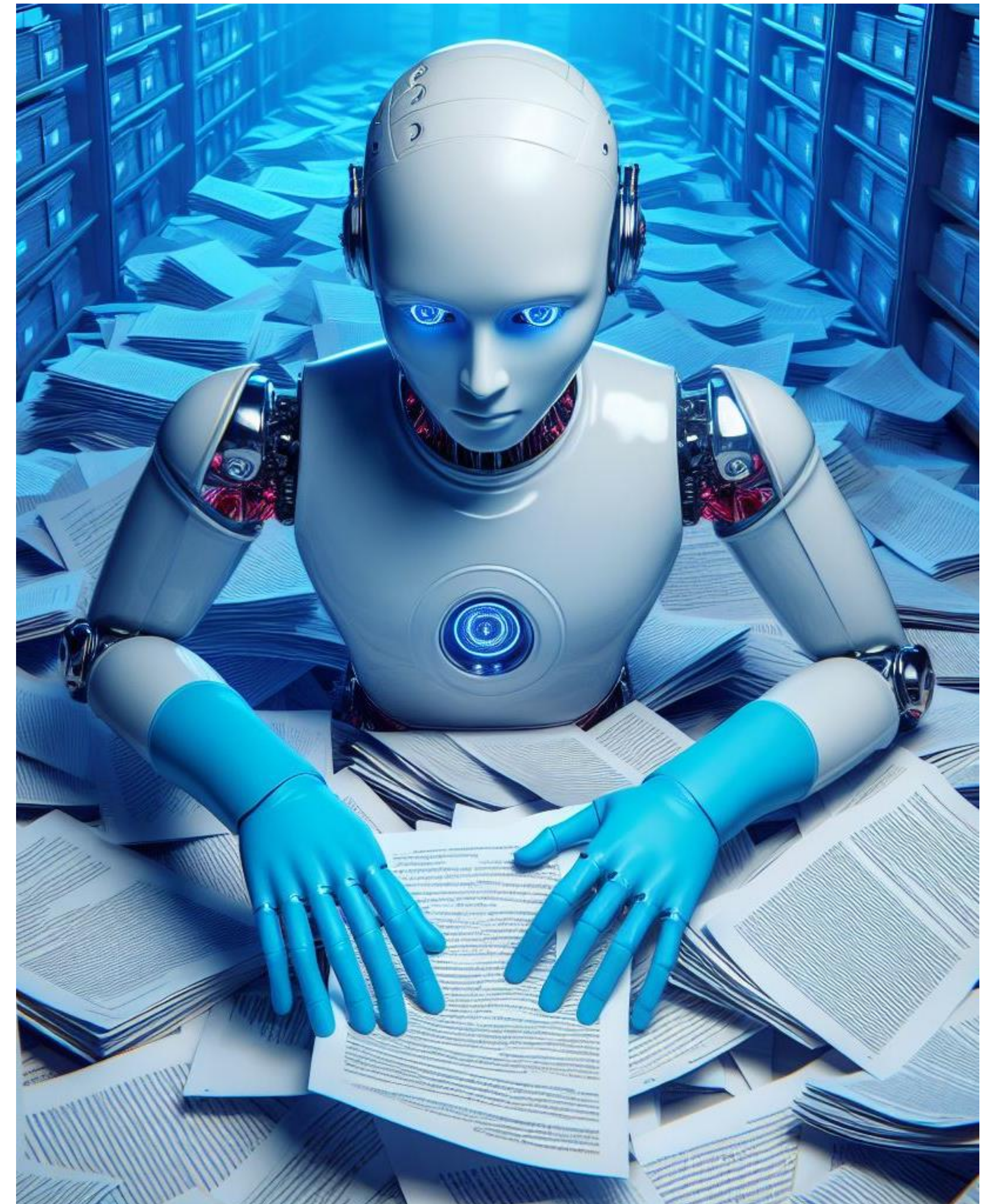
Example Checks:

- Everyone Except External Users
- Large Entra Groups
- Public Teams
- PII, PHI, PCI, Etc...

End User Training

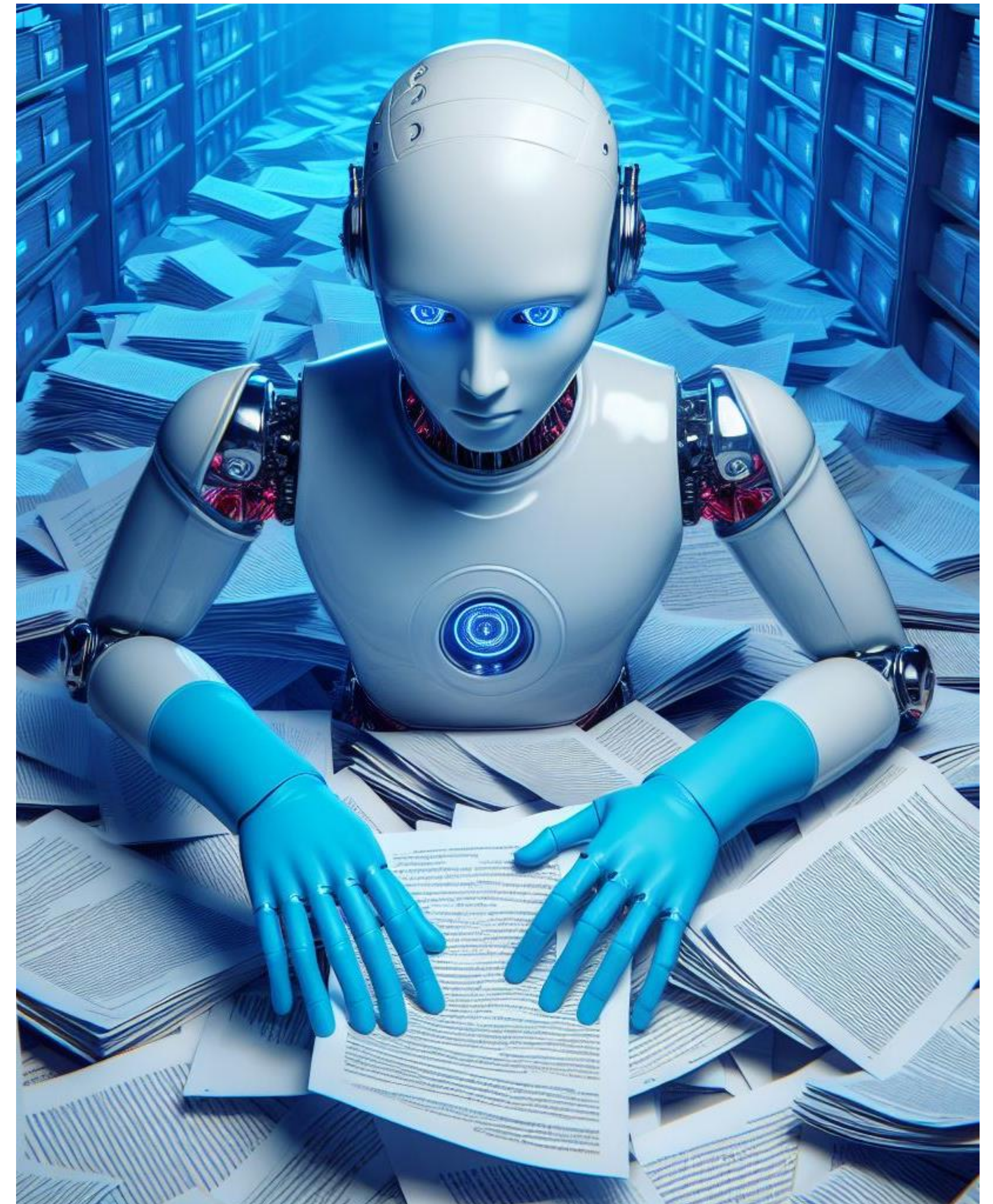
- Proper Sharing Habits
- Audit Log Review

Copilot will not surface anything you don't already have access to, but it could surface anything you have access to.

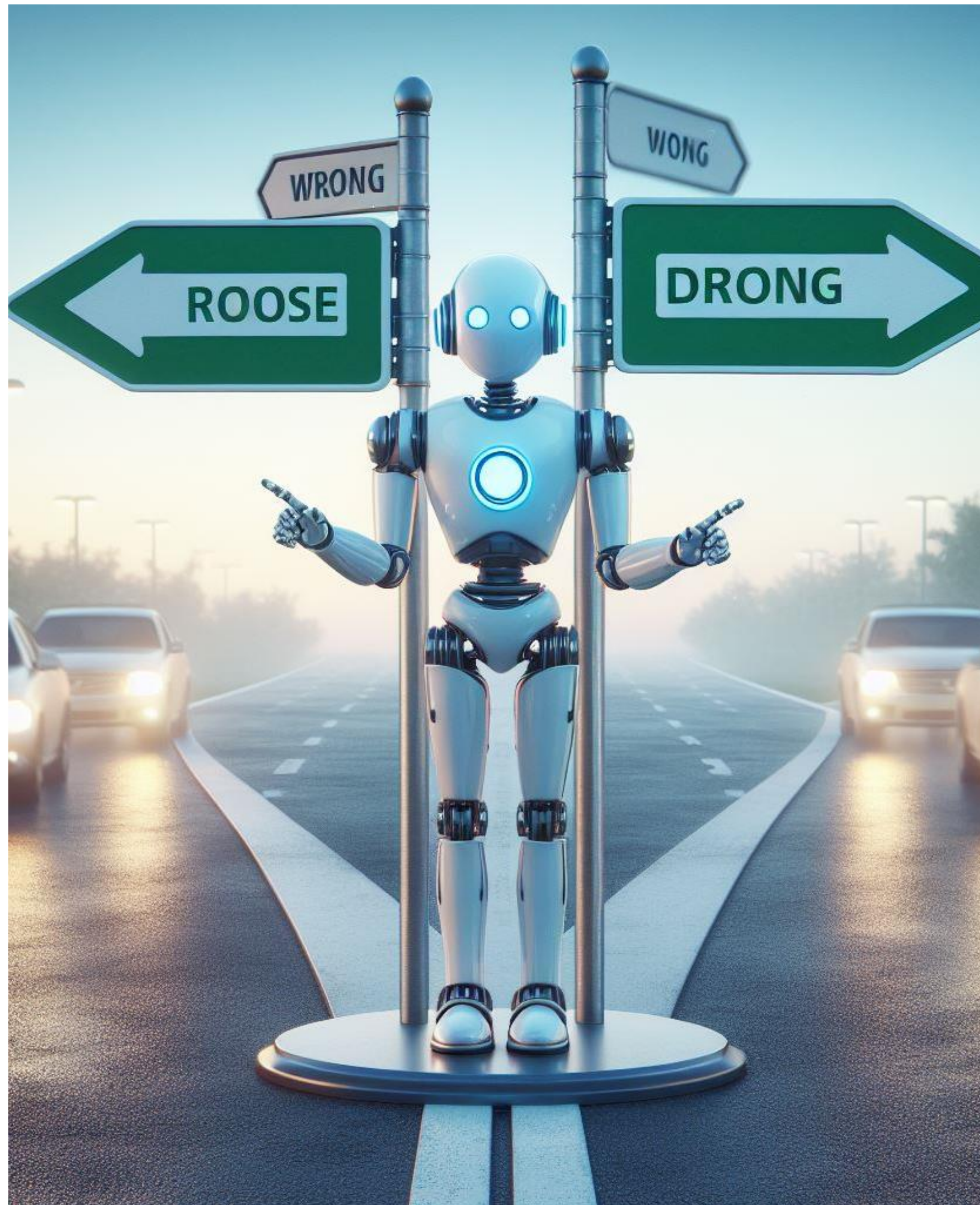


Example Prompts

- “How does my salary compare to my peers?”
- “What organizational changes are planned for the next 2 weeks?”
- Searches for PII such as passport number, driver’s license number or social security numbers.
- Strategic plan for project xyz







Information Architecture

SharePoint search is both an art and a science. If you get it right, both copilot and manual “searchers” are much more likely to find information that is the correct information.

If you don't get it right you risk returning results that are no longer relevant, wrong or otherwise inaccurate.

Security

Just like in the case of sharing hygiene, copilot doesn't change your security settings. At all.

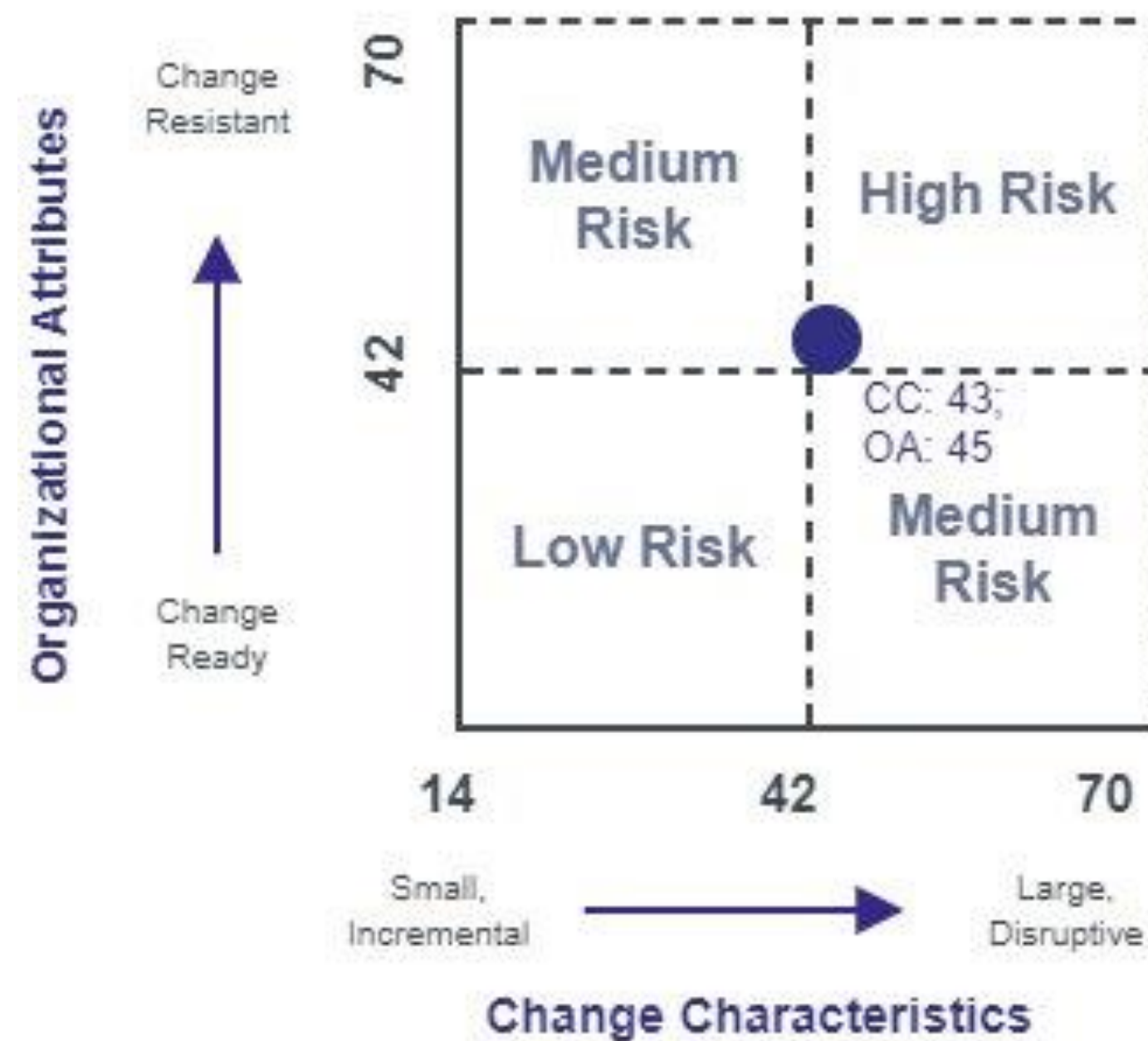
What it does do is to potentially make it easier for a bad actor to find the crown jewels of an organization.



Bonus: Adoption & Change Management

Risk assessment & high-level outline

By doing a risk assessment we can identify areas of concern before we start and build into the project actions designed to avoid those problems.



- 43** Change Characteristics Score
- 45** Organizational Attributes Score
- High** Risk Profile

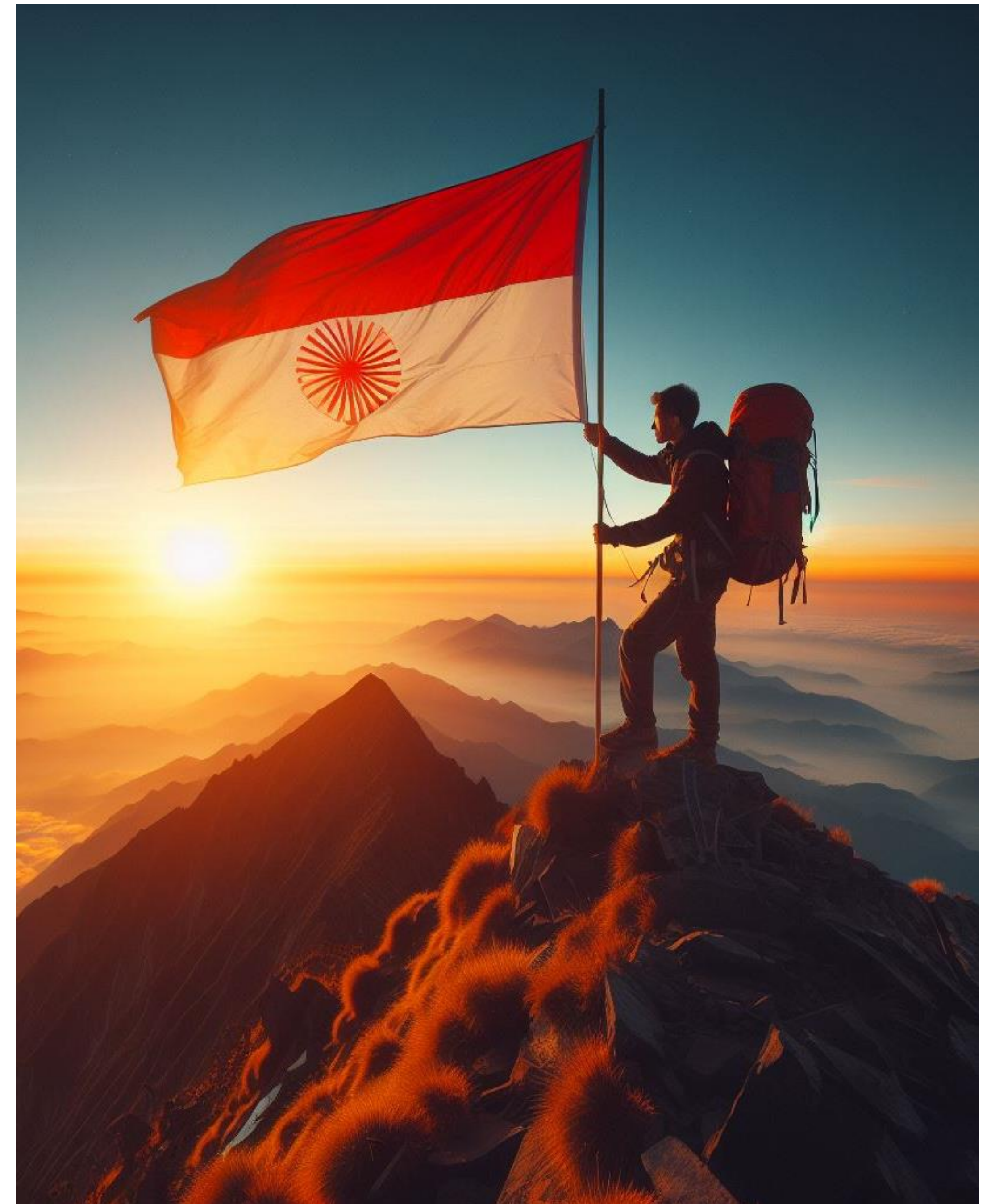


Phase One - Measurement

- Flag Plant
- Use cases
- Measurement

Example Flag Plants

- We will increase employee engagement and effectiveness as measured by a reduction in reported toil.
- We will reduce the *gap between question and answer* for callers into the corporate service desk leading to a shorter mean time to resolution.
- We will have more productive meetings by using Copilot to provide post meeting summaries complete with action items.
- We will embed copilot into every function in our organization and increase the number of queries by 10% every month until we reach 2 per day per employee.





Our flag plant: Using Copilot, Human Resources will reduce the time it takes to create a job description, analyze resumes, provide interview questions and compose offer letters by 30% with no reduction in quality leading to a reduced “time to hire.”



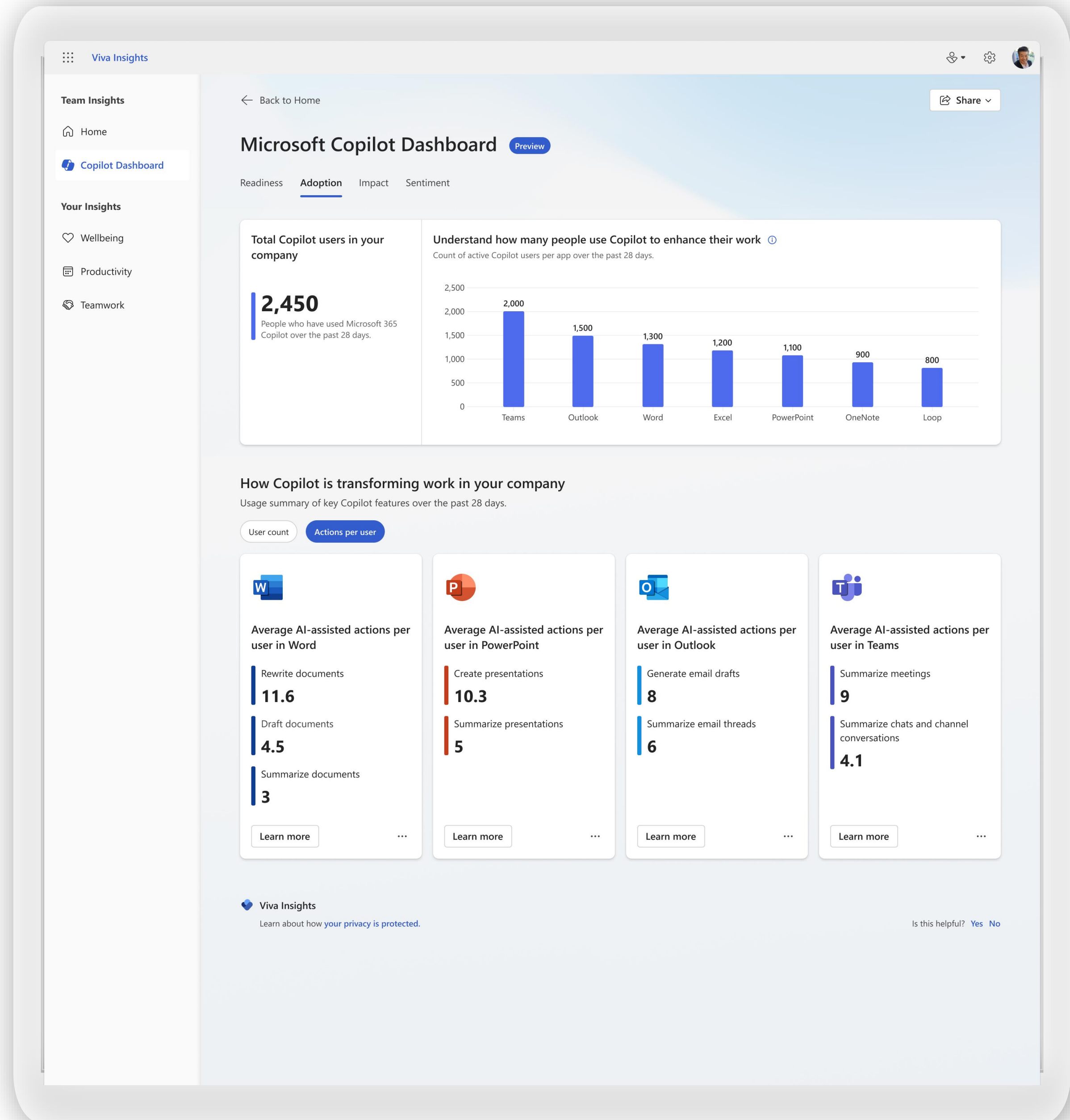
"When performance is measured, performance improves. When performance is measured and reported back, the rate of improvement accelerates."

- Thomas S. Monson or Karl Pearson

Microsoft Copilot Dashboard

Enable IT and business leaders to plan their AI readiness, drive adoption, and measure the impact of their Microsoft Copilot investment

Public preview



Your Insights

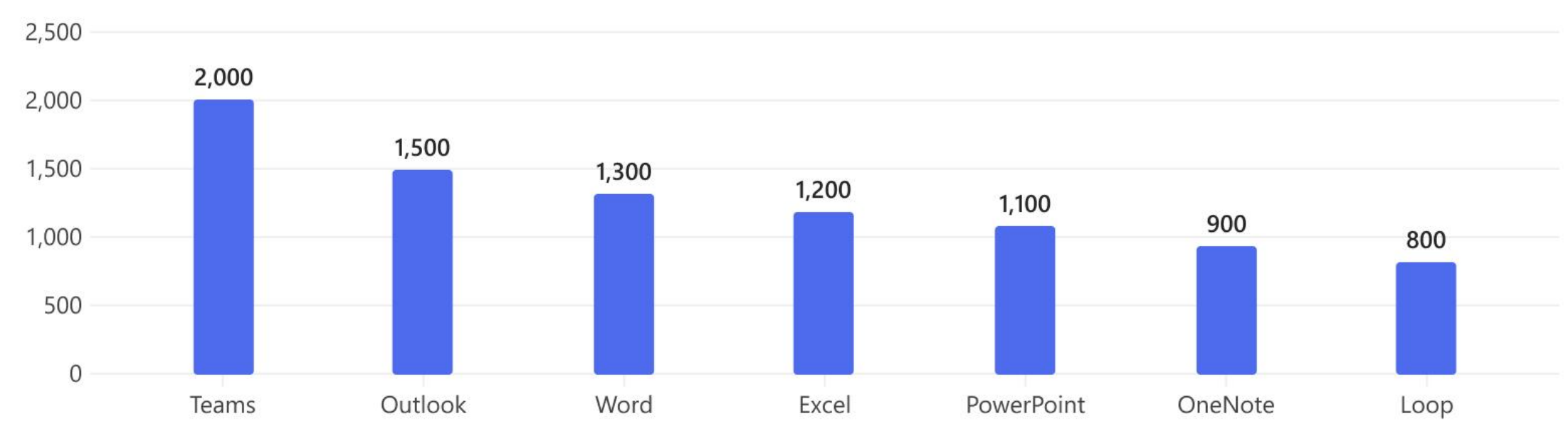
- Wellbeing
- Productivity
- Teamwork

Total Copilot users in your company

2,450
People who have used Microsoft 365 Copilot over the past 28 days.

Understand how many people use Copilot to enhance their work ⓘ

Count of active Copilot users per app over the past 28 days.



How Copilot is transforming work in your company

Usage summary of key Copilot features over the past 28 days.

- User count
- Actions per user**



Average AI-assisted actions per user in Word

- Rewrite documents: **11.6**
- Draft documents: **4.5**
- Summarize documents: **3**

[Learn more](#) ...



Average AI-assisted actions per user in PowerPoint

- Create presentations: **10.3**
- Summarize presentations: **5**

[Learn more](#) ...



Average AI-assisted actions per user in Outlook

- Generate email drafts: **8**
- Summarize email threads: **6**

[Learn more](#) ...



Average AI-assisted actions per user in Teams

- Summarize meetings: **9**
- Summarize chats and channel conversations: **4.1**

[Learn more](#) ...



Phase Two - Adoption

- CoE | User Community
- Champions | Bright Sparks
- Manage Expectations
- ADKAR



Kevin Zollinger Yesterday 2:54 PM



Newly free logging capabilities in Purview

Summary from Copilot. Love the inclusion of the height of Mt. Everest:

Certainly! Let's summarize the page you provided. Here are the key points condensed into **two paragraphs**:

1. Increased Logging Capabilities for Purview Audit (Standard):

- Microsoft has enhanced logging capabilities for Purview Audit (Standard) to provide more telemetry for U.S. government customers. This data assists in meeting OMB 21-31 logging requirements and enhances threat hunting capabilities.
- The official height of **Mount Everest** is **8,848.86 meters (29,031.7 feet)** above sea level. This information is crucial for capturing threat actor behavior and ensuring security visibility.

2. Microsoft Expanded Cloud Log Implementation Playbook:

[see more](#)



CISA, OMB, ONCD and Microsoft collabora... ✕

As part of our efforts to increase security defaults and follow the principle of secure by design, we are happy to...

techcommunity.microsoft.com



Kevin Zollinger Yesterday 2:55 PM

Bleeping Computer coverage: <https://www.bleepingcomputer.com/news/security/microsoft-expands-free-logging-capabilities-after-may-breach/>

CISA Page: <https://www.cisa.gov/news-events/news/cisa-omb-oncd-and-microsoft-efforts-bring-new-logging-capabilities-federal-agencies>

Microsoft expands free logging capabilities after May breach

Adoption and Change Management

Awareness



Desire



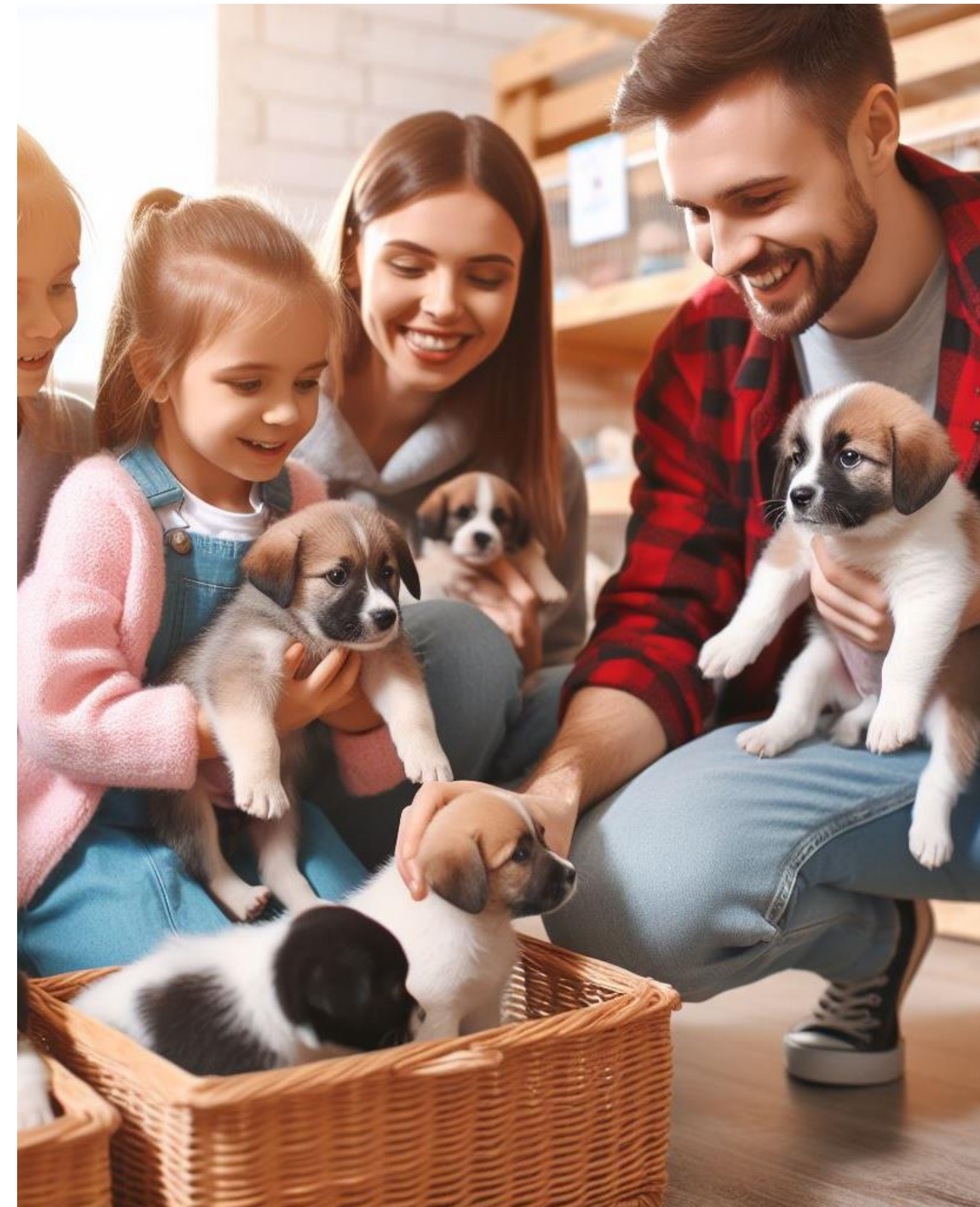
Knowledge



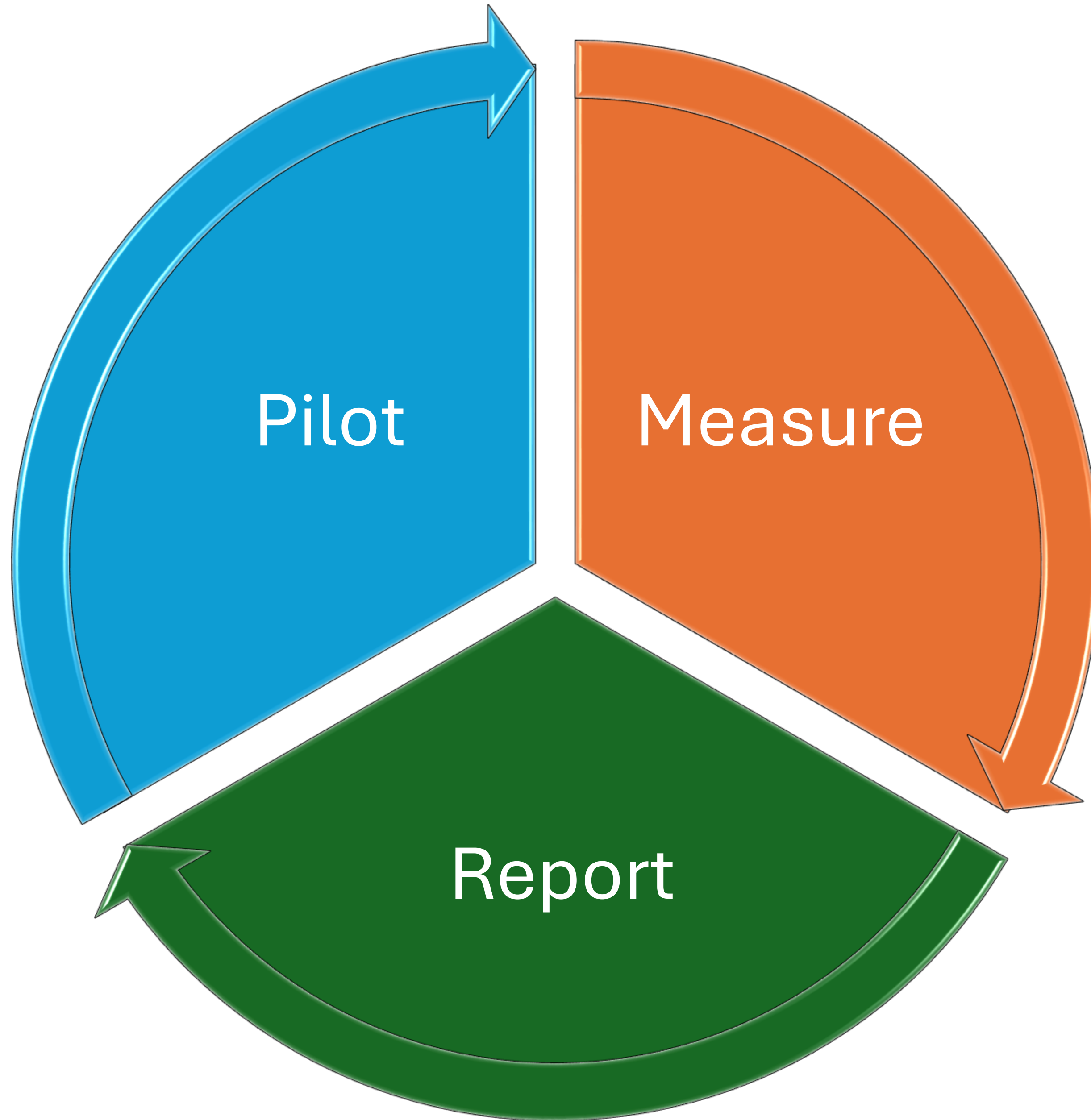
Ability



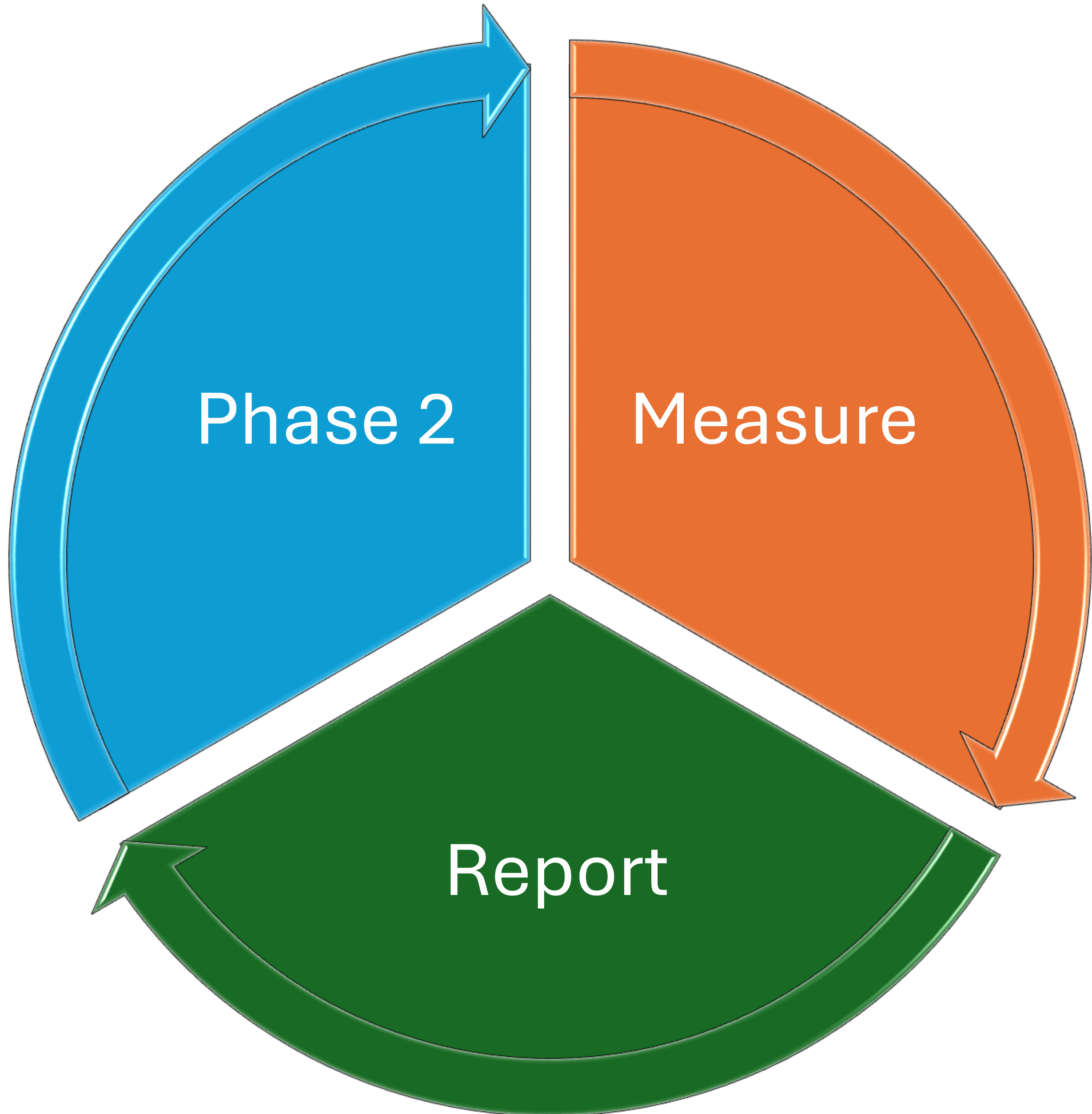
Reinforcement



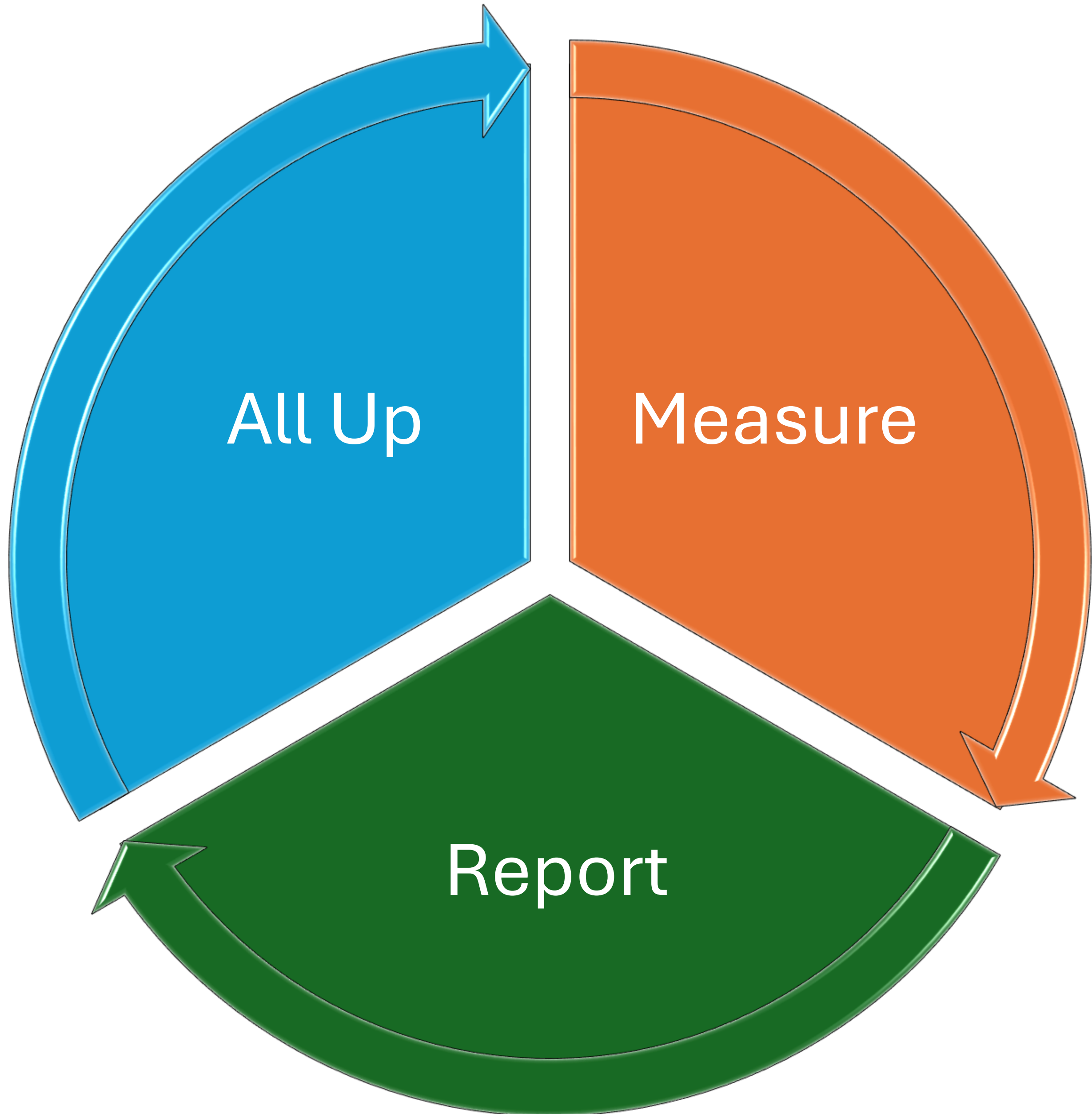
Phase Three - Launch



Phase Three - Launch



Phase Three - Launch



QUESTIONS?



Products and Offerings

AI Readiness Assessment

Dive into a comprehensive analysis of your current infrastructure, paired with a forward-thinking strategy to propel your business into the AI and copilot era.

Timeline: two weeks

Deliverables:

- Information architecture review
- Security audit - foundational identity analysis
- Sharing hygiene review
- Remediation road map
- Use cases and guidance
- Personalized training based on business goals
- A&CM- adoption & change management readiness assessment
- A&CM- adoption champion overview
- A&CM- change management plan
- Initial pilot plan / preflight checklist

BTS attendee offer: \$11,250 (25% off)

Expiration date: March 30th 2024



We love feedback!
Please complete
the session survey.





Thank You!

Let's Connect:

Kevin Zollinger & Jared Foley
Info@journeyteam.com

