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# The Copilot Blueprint: 4 Key Elements for a Successful AI Implementation



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*Client Experience  
Solution Architect*  
*Alithya*



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*Principal Partner  
Solution Architect*  
*Microsoft*

**Alithya**

CONFIDENTIAL

# Proven approach for

Power Platform / BI / Digital / Azure / Modern Workplace

30+

Years in Business  
serving enterprise  
customers

1%

In 1% of Microsoft  
Partners

18x

Inner Circle for  
Microsoft Dynamics



Data & AI  
Security  
Modern Work  
Business Applications  
Digital & App Innovation  
Infrastructure Azure

2023

U.S. Partner of  
the Year

*Business Excellence - Learning*

3.5x

Increases speed  
of adoption 3.5x

\*Source - Alithya program data  
from Microsoft

82 NPS

Exceptional customer  
satisfaction ratings  
*attributed by 2M business users*

2023/2024  
**INNERCIRCLE**  
for Microsoft Business Applications

# Agenda

- / What is Microsoft 365 Copilot?
- / Technical requirements & recommendations
- / Assess the state of your data
- / Information protection tactics
- / Change management considerations
- / A day in a life LIVE DEMO

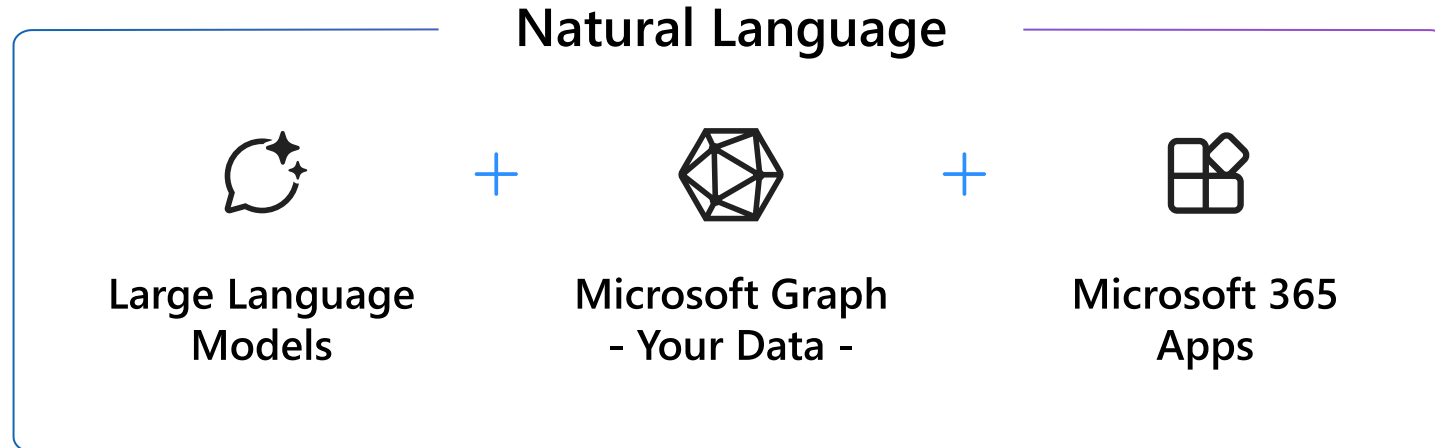
# Introducing Microsoft 365 Copilot

Alithya

# What is Copilot?



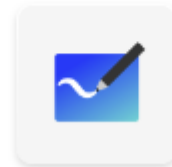
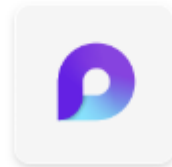
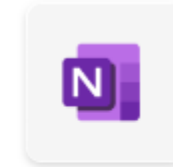
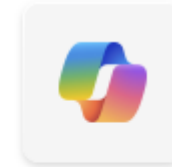
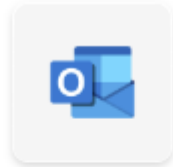
## Microsoft 365 Copilot



# What is included?



## Microsoft 365 Copilot



# Microsoft 365 Apps



# Microsoft 365 Copilot

Microsoft 365 Trust Boundary

Response + app commands

User prompt

Pre-processing

Grounding

Modified prompt

LLM response

Large Language Model

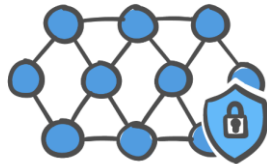
RAI

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

Azure OpenAI

RAI is performed on input prompt and output results

# Microsoft Graph



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

Semantic Index

Post-processing

Grounding

Data flow (🔒 = all requests are encrypted via HTTPS)

- 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

Customer Microsoft 365 Tenant

# Copilot Technical Requirements



# Act now to prepare your Microsoft 365 environment for Copilot

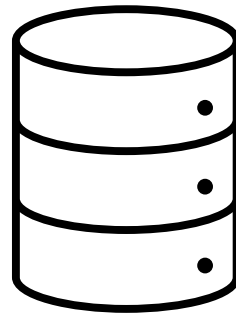
- ✓ Must be on Microsoft 365 E3 or E5.
- ✓ Users must have Azure Active Directory -based accounts ([Learn More](#)).
- ✓ Several features require users to have a OneDrive account ([Deploy OneDrive](#)).
- ✓ Copilot in Outlook: Users will need to be using the new Outlook for Windows (which is publicly called “the new Outlook for Windows.” This version is currently in public preview. Users can load the new Outlook by toggling or use Outlook Mobile ([Getting Started with the New Outlook for Windows - Microsoft Support](#)).
- ✓ Copilot in Teams: Users will need to enable the Teams desktop client ([Deploy Teams](#)) as well as transcription ([Configure Transcription](#)).
- ✓ Copilot in Loop: Tenants must have Loop enabled ([Learn How to Enable Loop](#)).
- ✓ Monthly or Current Update Channel: Users need to be on either monthly or current M365 update channel ([Configure the Update Channel](#)).
- ✓ Cross-app intelligence: The richness of the experience will depend on the data sources indexed by Microsoft 365. Tenants with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, and Teams) will get the best results.

# Networking Recommendations

Align network with the [Microsoft 365 network connectivity principles](#)



Ensure WebSockets are not blocked from user endpoints

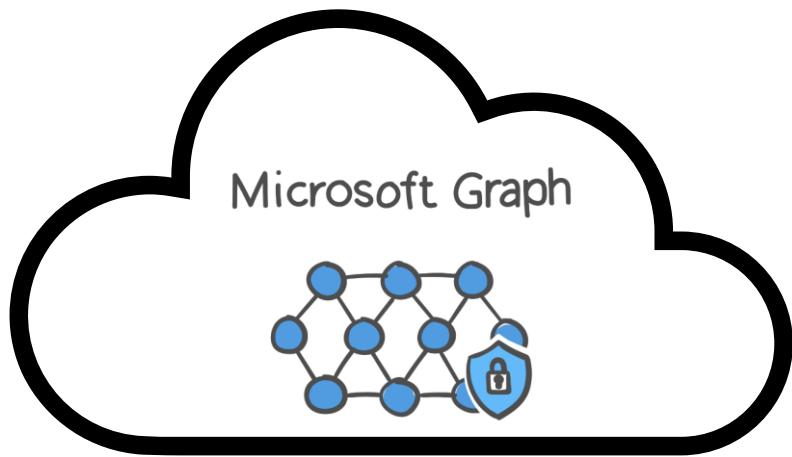


Enable Teams plugins from the Teams admin center to leverage cross-app intelligence



Assess the state  
of your data

# Data Location



/ Network Drive



/ 3<sup>rd</sup> Party Apps & Data



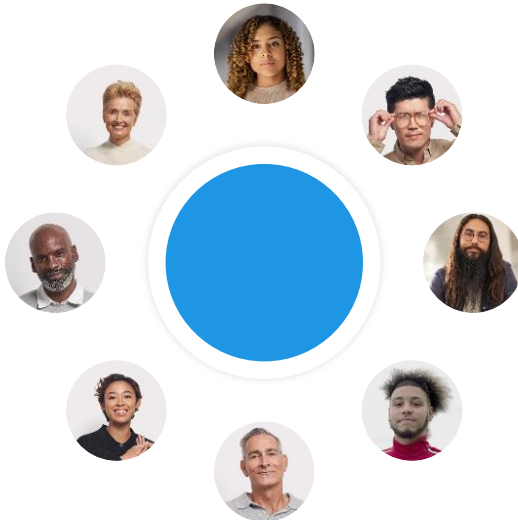
/ M365 Data that I don't have access to, but should

# Data Security

Protect sensitive data wherever it lives throughout its lifecycle



Understand user activity context around the data and identify risks

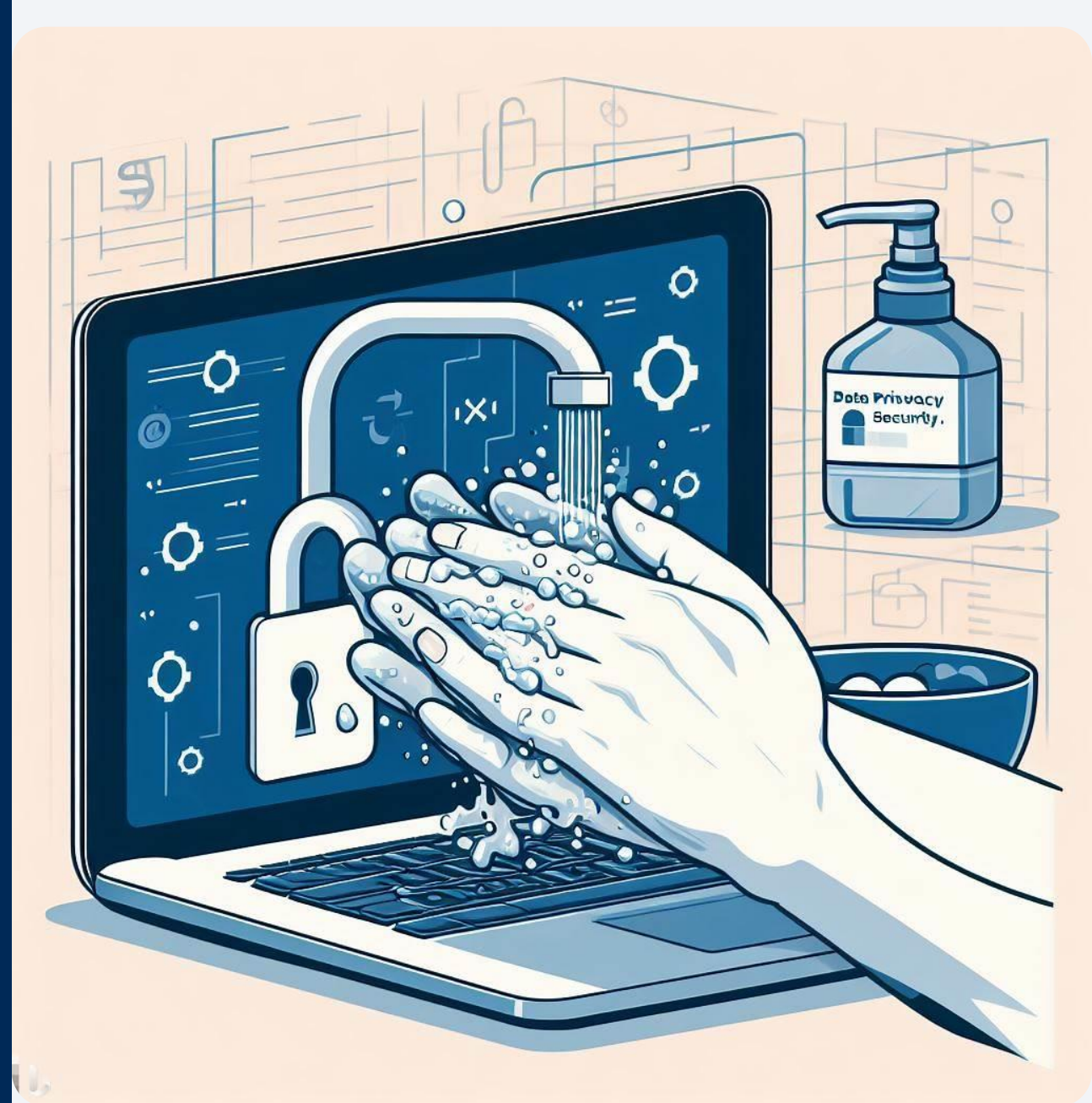


Prevent data from unauthorized use across apps, services, and devices



# Data Hygiene

The data that comes out of Copilot is only as good as the data that comes in.



# Purview information protection tactics

# Exposing Data to Copilot



Microsoft 365 Copilot

## Plugins



Open AI plugins



Power Platform connectors



Teams message extensions

**Alithya**



Bring your data into the Semantic Index with **Graph Connectors**



# Sensitivity Labels

## Sensitive info types



Over 200 out-of-the-box information types like Social Security and credit card numbers  
Clone, edit, or create your own  
Supports regular expressions (regex), keywords, and dictionaries

AVAILABLE TODAY

## Named entities



Over 50 entities covering person name, medical terms, and drug names  
Best used in combination with other sensitive information types

AVAILABLE TODAY

## Exact data match



Provides a lookup to exactly match content with unique customer data  
Supports 100 million rows and multiple lookup fields

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## OCR



Expanded OCR for Exchange Online, SharePoint Online, OneDrive for Business, Teams, and endpoint devices  
Supports over 150 languages  
Supports image files and images embedded in PDFs

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## Trainable classifiers



Over 35 pre-trained ready-to-use trainable classifiers  
Create your own classifier based on business data

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## Credentials SITs



42 new SITs for digital authentication credential types  
Use in auto-labeling and DLP policies to detect sensitive credentials in files

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## Fingerprint SITs



Detect exact or partial matching of sensitive intellectual property  
Use in Exchange Online, SharePoint Online, Microsoft Teams, and devices  
Note: Available in Purview DLP

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## Context-based classification



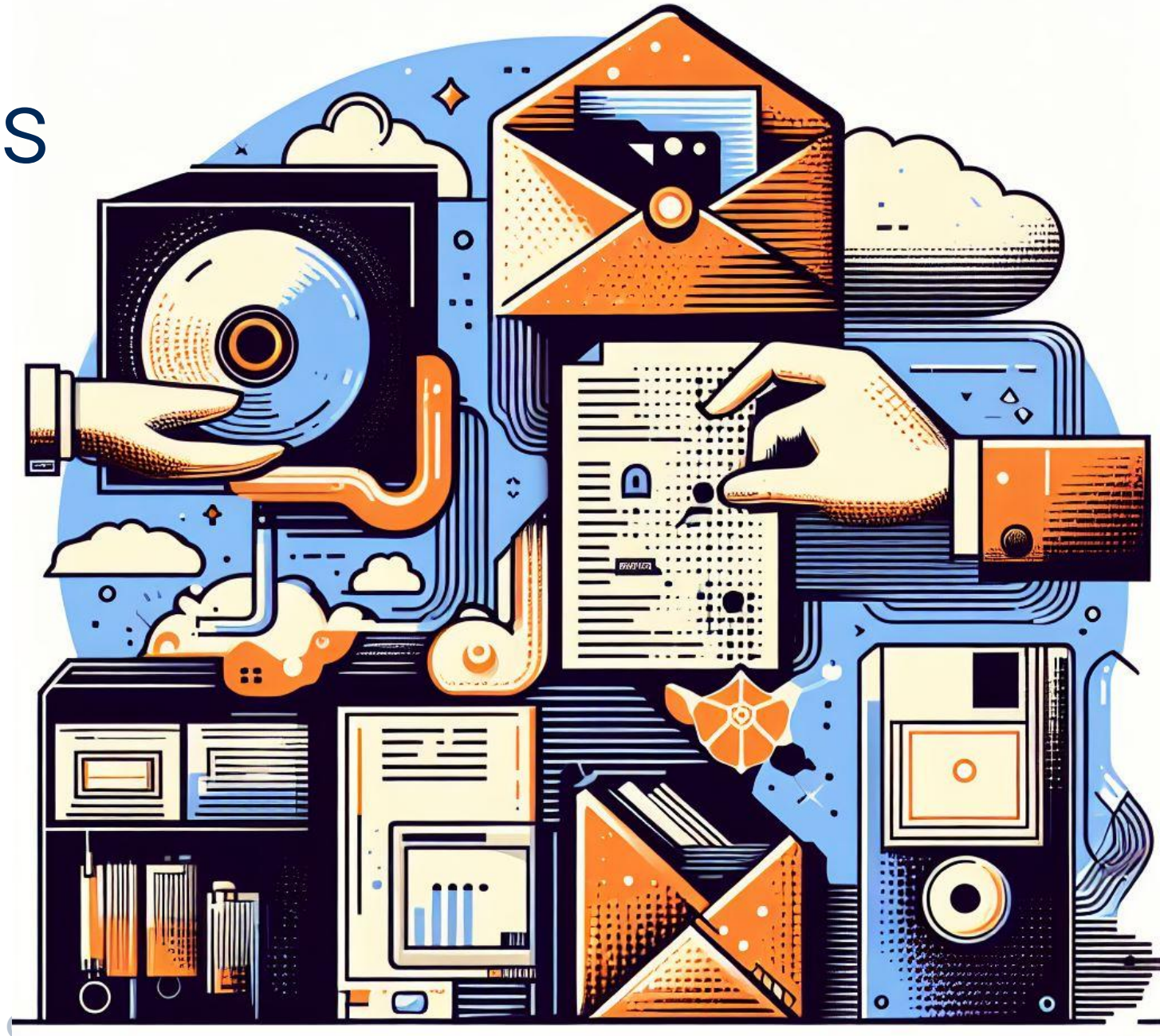
SharePoint and OneDrive default site label  
Service-side auto-labeling

- File extension
- Document name contains word
- Document property is
- Document size greater than
- Document created by

ROADMAP ITEM

# Retention Policies

- / Outdated data can negatively impact Copilot results
- / Retention Policies or Labels could help clean-up stale data



# Managing Change

**Alithya**

# How Alithya Helps You Drive Change & Deliver Adoption Success

Optimizes individual adoption to change with [Alithya's Propel Methodology](#), underpinned by the Prosci® ADKAR model

## PROPEL Stages

-  **Discover**  
Work with clients to assess the baseline
-  **Plan**  
Design Learning based on findings
-  **Adopt**  
Apply hybrid training solution
-  **Empower**  
Achieve Organizational transformation and ROI

Move users → through

## Prosci® ADKAR

Move individuals through ADKAR PROCESS

**Awareness**  
" I understand why..."

**Desire**  
" I have decided to..."

**Knowledge**  
" I know how to..."

**Ability**  
" I am able to..."

**Reinforcement**  
" I will continue to..."



Utilizes [Change Enablement Workshops](#) designed to help build your strategy, identify gaps, develop a transition and training plan for digital adoption success.

# Guest speaker



**Robert Gates**

*Principal Partner Solution Architect  
Microsoft*

**Alithya**

# What can I do today to prepare for M365 Copilot?

- ✓ Set your default link sharing permission setting.
- ✓ Ensure Microsoft 365 is on the Current Channel or Monthly Channel.
- ✓ Run out-of-the-box Data access governance reports for SharePoint.
- ✓ Contact [matt.musial@alithya.com](mailto:matt.musial@alithya.com) to inquire about our Copilot Technical Readiness Workshop



As your organization prepares to leverage Microsoft Copilot to transform work, it is imperative that both Copilot services and the individuals who use them have the RIGHT access to corporate data. The Microsoft 365 Copilot Technical Readiness Workshop will help you understand best practices for discovering, classifying and securing your data in preparation for Microsoft 365 Copilot.

### Workshop Summary:

- 1 Assess the Current State**
  - / M365 licensing and network configuration
  - / Corporate data state (Teams, OneDrive/SharePoint, on-prem, Exchange)
  - / Data discovery and classification
  - / Potential oversharing
  - / Sensitivity Labels and Label Policies
  - / DLP Policies
  - / Retention Policies
- 2 Know, Classify and Protect your Data**
  - / Sensitive Information Types
  - / Trainable Classifiers
  - / Microsoft Information Protection
  - / Microsoft Data Loss Prevention
  - / Data Lifecycle Management
- 3 Build the Plan for the Future State**
  - / Define a strategy for structuring SharePoint/OneDrive Permissions
  - / Define baseline M365 security posture
  - / Define baseline policies to classify and protect data through data classification and sensitivity labels
  - / Define baseline retention policies

These results will help determine the action plan for Alithya's enablement services

- ### Outputs
- Action plan for securing M365 services and data
  - Action plan for implementing Purview policies
  - Detailed reporting of your current M365 data

# Any Questions?

*Matt.musial@alithya.com*

Thank you!