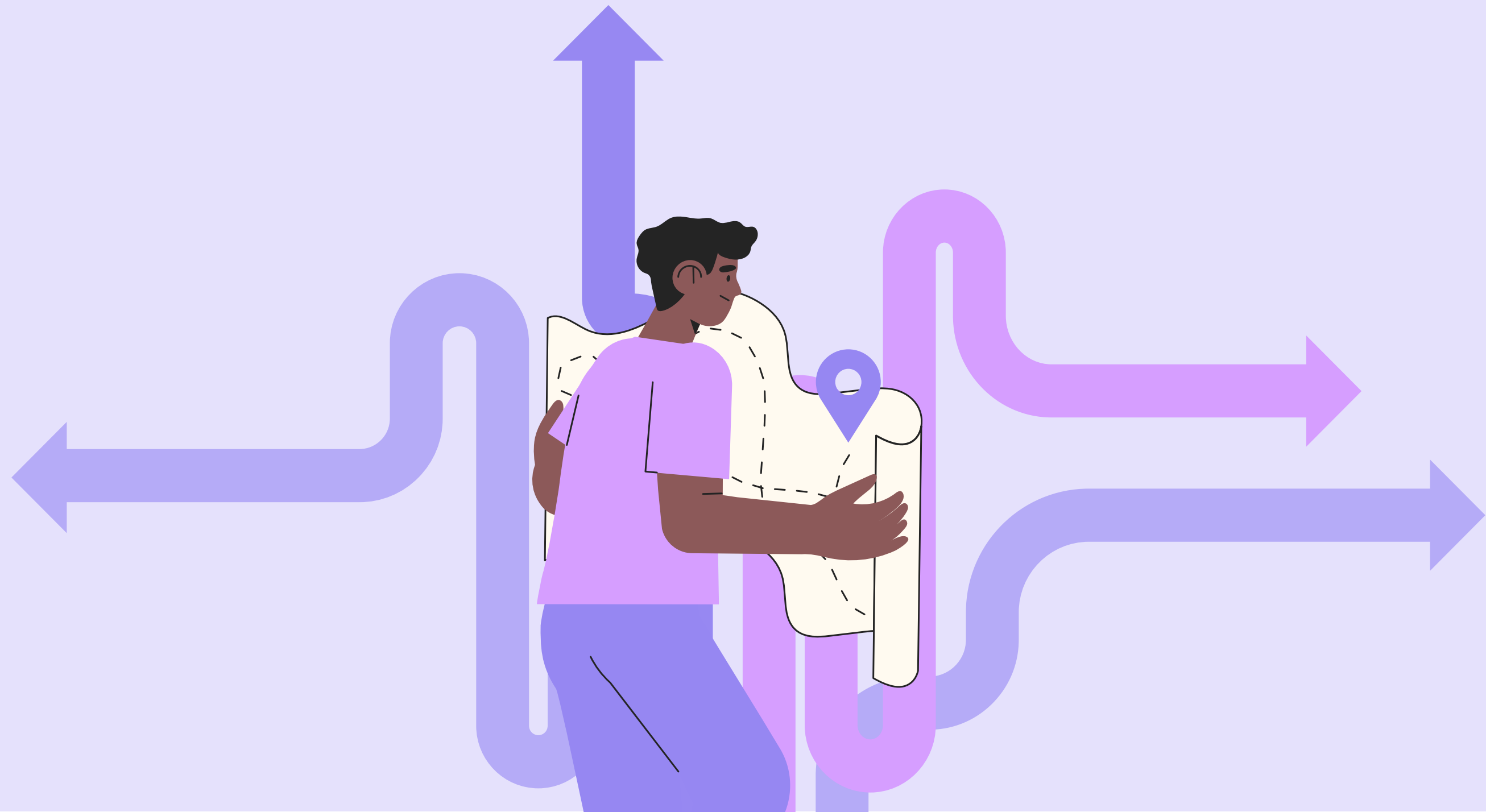
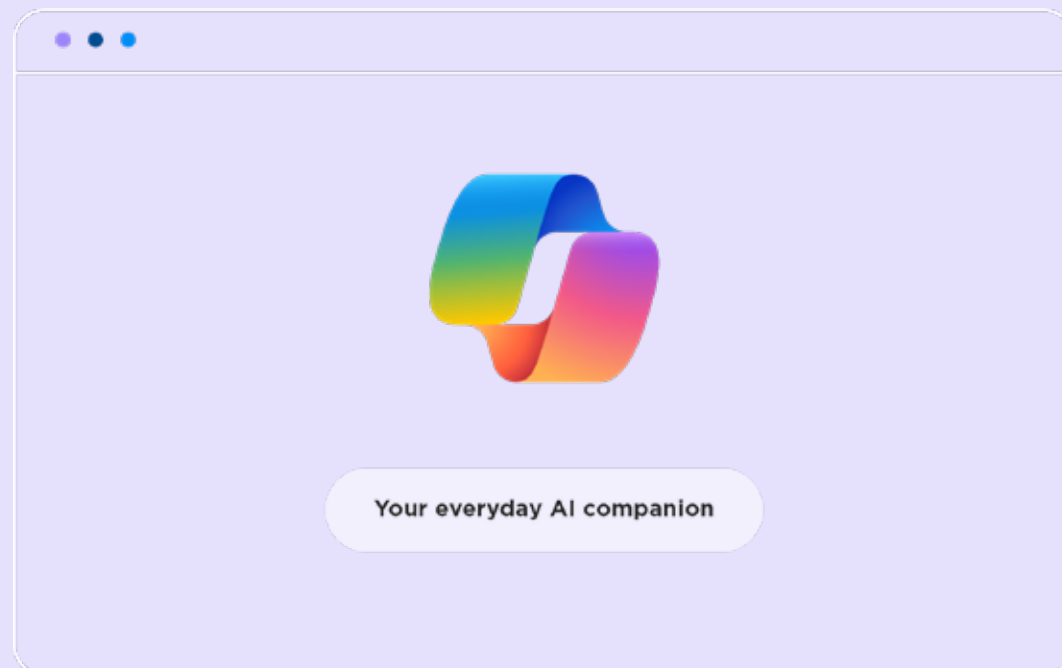


Your definitive guide to Microsoft Copilot— and how to prepare



Microsoft Copilot is an exciting new resource that can enhance your organization's productivity and collaboration. But before you can enjoy its benefits, you may encounter some challenges setting it up for your team. Don't worry, we've got you covered. This guide will provide you with the best practices, tips, and resources to help you overcome those obstacles and get your organization ready for Copilot.



In this guide, we'll cover:

Part 1

How to think about Copilot:
Available features,
and what to prepare for

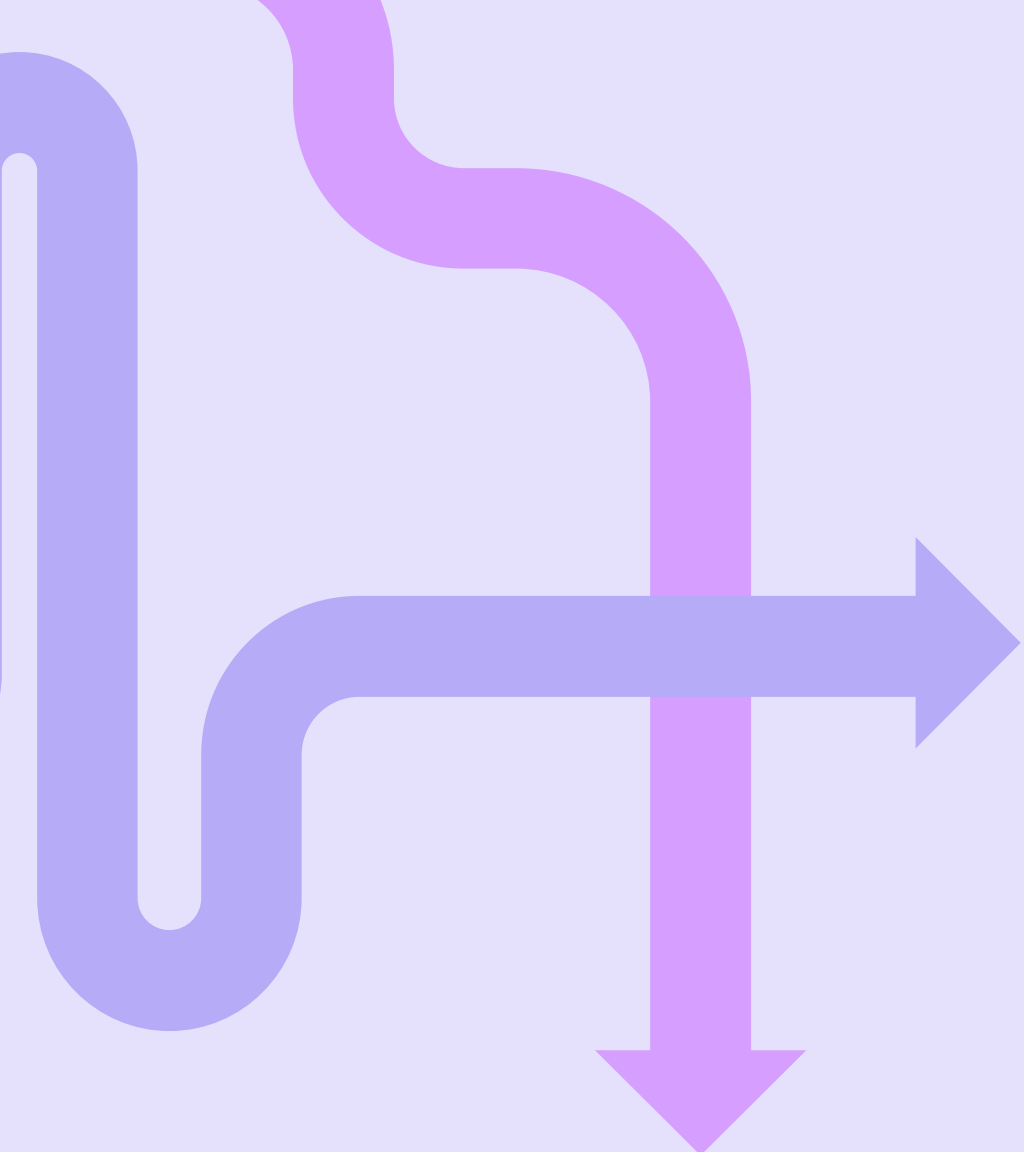
Part 2

The value of Copilot:
Use Copilot to powerfully (and
securely) transform your work

Part 3

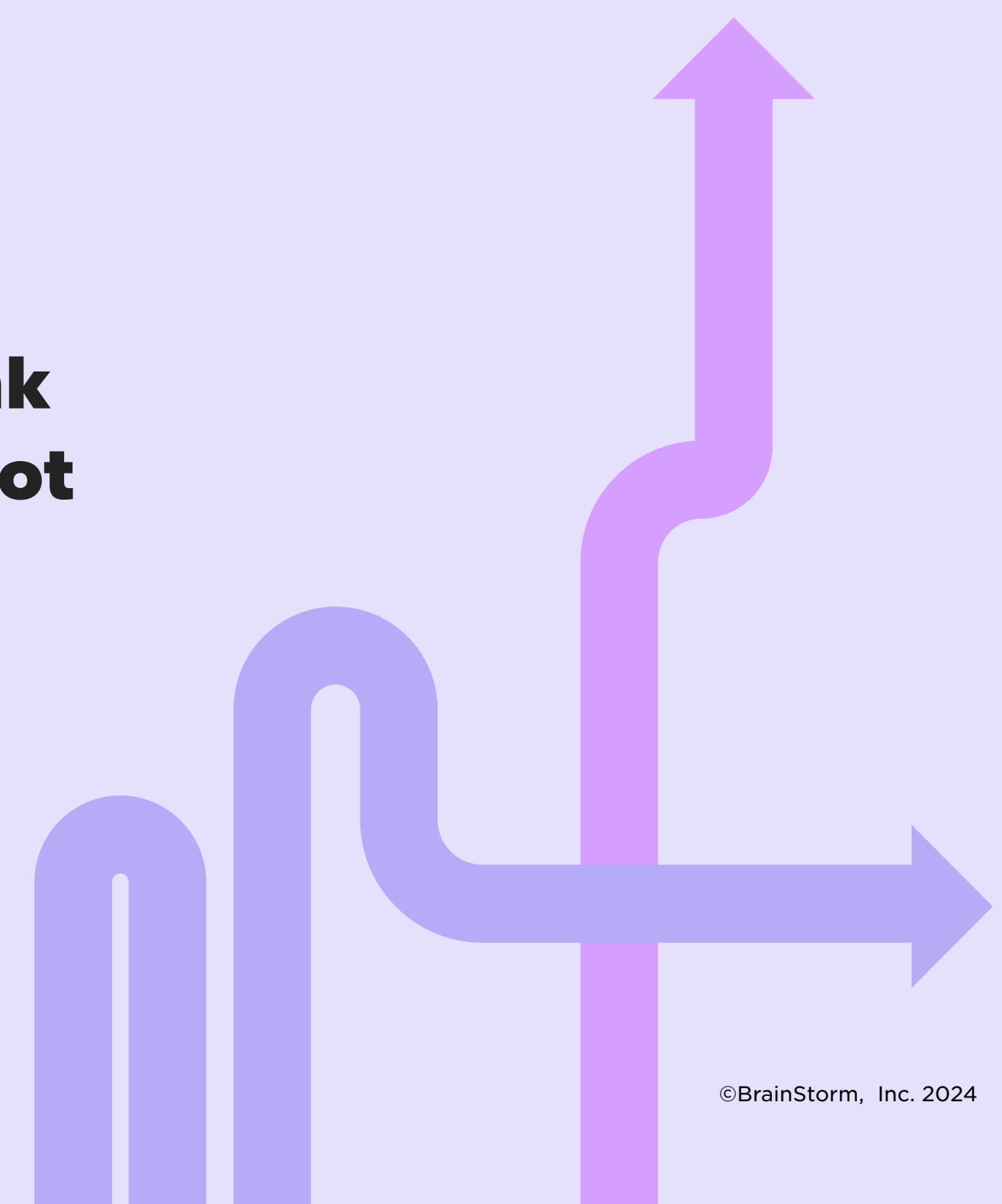
Pitfalls on the road to success:
The steps you need to take today





Part 1

How to think about Copilot



At BrainStorm, we like to talk about Copilot in 3 specific categories:

1. Included Copilots

2. Copilot for Microsoft 365

3. Additional Copilots

Let's go into some more detail on each of these.

Included Copilots

You and your users can start using Copilot today. The included Copilots are tools you (and the rest of the world) already have access to through your M365 licensing. This includes:

Copilot in Edge

A chat feature integrated into the Edge browser that can be leveraged with a personal or work account. Work accounts support commercial data protection.

Copilot in Bing

Copilot-powered conversational search. Accessible without a license.

Copilot in Windows

An AI-powered intelligent assistant that helps users get answers and inspirations from across the web, supports creativity and collaboration, and helps users focus on the task at hand.

copilot.microsoft.com

Similar to Copilot in Bing. This version replaced Bing chat enterprise and is designed to work with your work account.

These tools allow you to compose messages, build templates, generate images, and much more. *Plus*, when you and your end users use them, any personal and organizational data is secure (unlike many other free generative AI systems that store



your data; [one report](#) states that **11% of data that employees paste into ChatGPT is confidential.**)

Copilot for Microsoft 365

Copilot for Microsoft 365 is the Copilot for the tools we use and love every single day. This is also very likely the Copilot you have heard of and are most excited for. It includes Copilot in Teams, Outlook, OneDrive, PowerPoint, Excel, Word, Loop, and more. Getting access to Copilot for Microsoft 365 requires paid licensing as well as some additional prerequisites from Microsoft.

Prerequisites

As of January 2024, Microsoft eliminated minimum license requirements, but you do need to have [prerequisite base licensing](#) to purchase Copilot for your organization.

The cost is \$30 per user per month.

Additionally, you need to have Microsoft 365 Apps deployed, and up-to-date to get the most from Copilot features. What's the most, you ask? Here's a succinct rundown:

For Teams: Users can easily summarize a meeting, prepare for an upcoming meeting, identify action items, generate ideas, and more.

For Outlook: Users can quickly draft an email or email reply, get coaching on a draft, and more.

For OneDrive: Copilot will use data from all relevant files an end user has access to in order to draft it's replies efficiently. Storing and managing access is critical to success.



For PowerPoint: Users can create a PowerPoint from another document, add an agenda slide, add images, extract information, identify key slides, and more.

For Excel: Users can reformat data, perform complex functions with natural language prompts, create visualizations, find trends, and more.

For Word: Users can draft documents, summarize long-form content, brainstorm ideas, get coaching on tone, organize information better, and more.

For Loop: Users can build task lists, create questions, research topics, create outlines, and more.

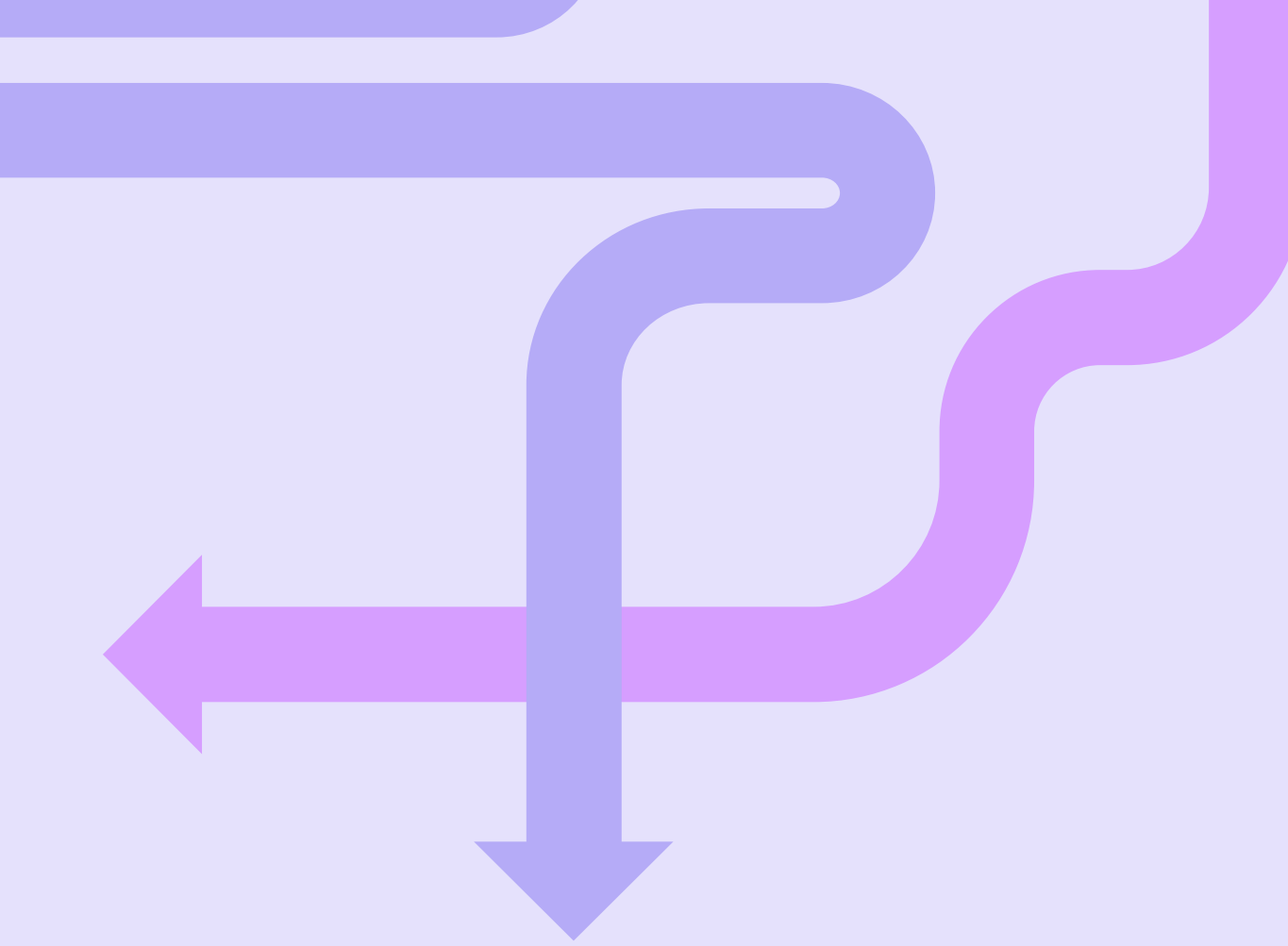
The use cases and options are pretty impressive. Once your organization is licensed with Copilot

you can also access tools and resources that will help you explore effective prompts that are available. The [Copilot Lab](#) is an excellent resource that can be filtered by app and category.

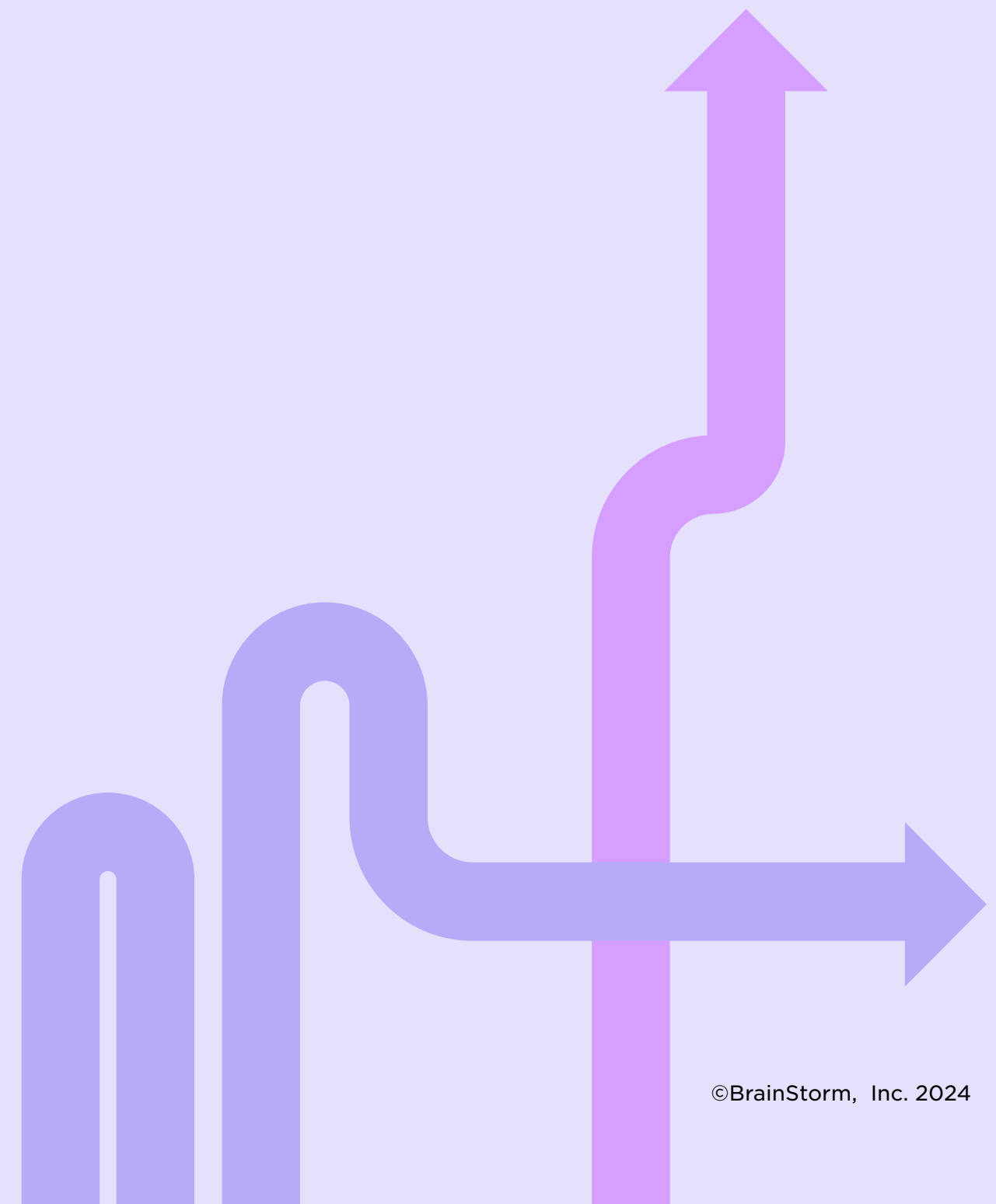
Additional Copilots

Microsoft is putting significant resources behind Copilot and that means it is showing up all over their offerings. Consider Copilot for Sales, Copilot for Service, GitHub Copilot, Power Platform Copilot, and Security Copilot for a start. These different Copilots also come with varying levels of licensing requirements and prerequisites. This category is evolving rapidly and we're excited to see what comes of it.





Part 2
**The value
of Copilot**



The impact of generative AI on the workplace will be as significant as the introduction of the personal computer to the workplace decades ago. And, as this technology accelerates, it is critical for organizations to figure out how AI can benefit their work. Otherwise, you risk falling behind in a fast-changing world.

Automate busywork

Busywork will be redefined. Shifting economics, new technology, and other market demands are forcing organizations to better evaluate how their employees invest their time and energy. Generative AI is transformative for these conversations, and stands to evolve the workplace.

Knowledge workers can stop wasting time on drafting emails and instead just review and send them. They can evaluate and/or skip meetings where their direct input isn't required and still get

a basically live rundown of what was discussed. Technical teams will be able to build reports with human language, and development teams will be able to streamline feature development shaving off weeks and months from development cycles

Find knowledge gaps faster

One of the most intriguing things that has come out of Microsoft's early testing with Copilot is that organizations are learning that they don't know what they don't know. As AI helps workers accomplish their tasks more efficiently, some are discovering features and tools within applications they've had for years without realizing it.

Some of those knowledge gaps can be addressed without AI, and can even go a long way in getting your team ready for the best Copilot experience possible. We'll go into more detail about that in our next section.



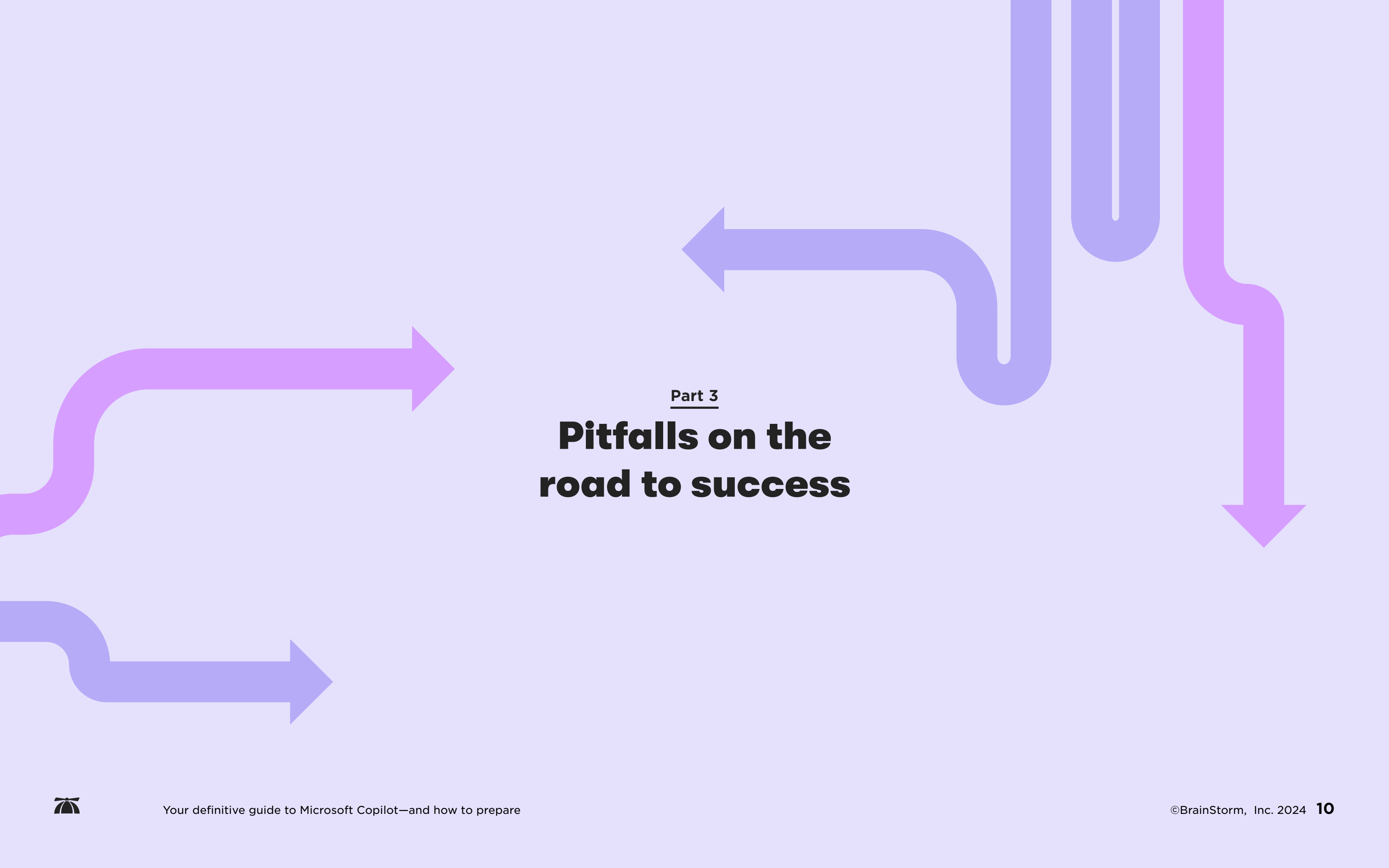
Elevate your employee experience

Having the latest technology at their fingertips is extremely rewarding for employees.

Streamlining their work and helping them succeed with Copilot is a great way to build morale and encourage confidence in their tools.

Some employees may feel hesitant to jump right into generative AI for various reasons: Security concerns, pride of work ownership, fear of obsolescence, and others. We'll discuss some strategies for helping create a culture that is inclusive of powerful AI solutions next.





Part 3

Pitfalls on the road to success



It's a brave new—*AI-driven*—world, and it comes with inherent risks. In this last section we'll discuss some of the risks, and how you can address them to prepare your organization to soar with Copilot.

Required applications and adoption

Microsoft Copilot relies heavily on your companies data and requires certain applications be up-to-date. For example, New Outlook is a requirement, and your organization needs to have Whiteboard, Loop, and some other applications deployed.

It's also essential that these tools have robust adoption among your team. Secure AI relies heavily on your organization's data. Garbage in, garbage out. Making sure your teams are using their tools effectively will go a long way to more effective responses and support from Copilot.

Employee resistance

We discussed briefly that some employees will be hesitant to adopt AI tools based on common objections. For that reason, it's important to clearly communicate your organization's thoughtful approach to AI. Microsoft Copilot makes that conversation simpler because the tool is developed with the highest standards of security and data. The tool relies primarily on your organization's data to produce results, and keeps that data protected.

Also, helping to foster a culture in your company that is welcoming of AI and positions it as a tool to optimize and streamline work is essential. Help employees view Copilot as just that, a copilot for work; an assistant that can take care of the busywork.



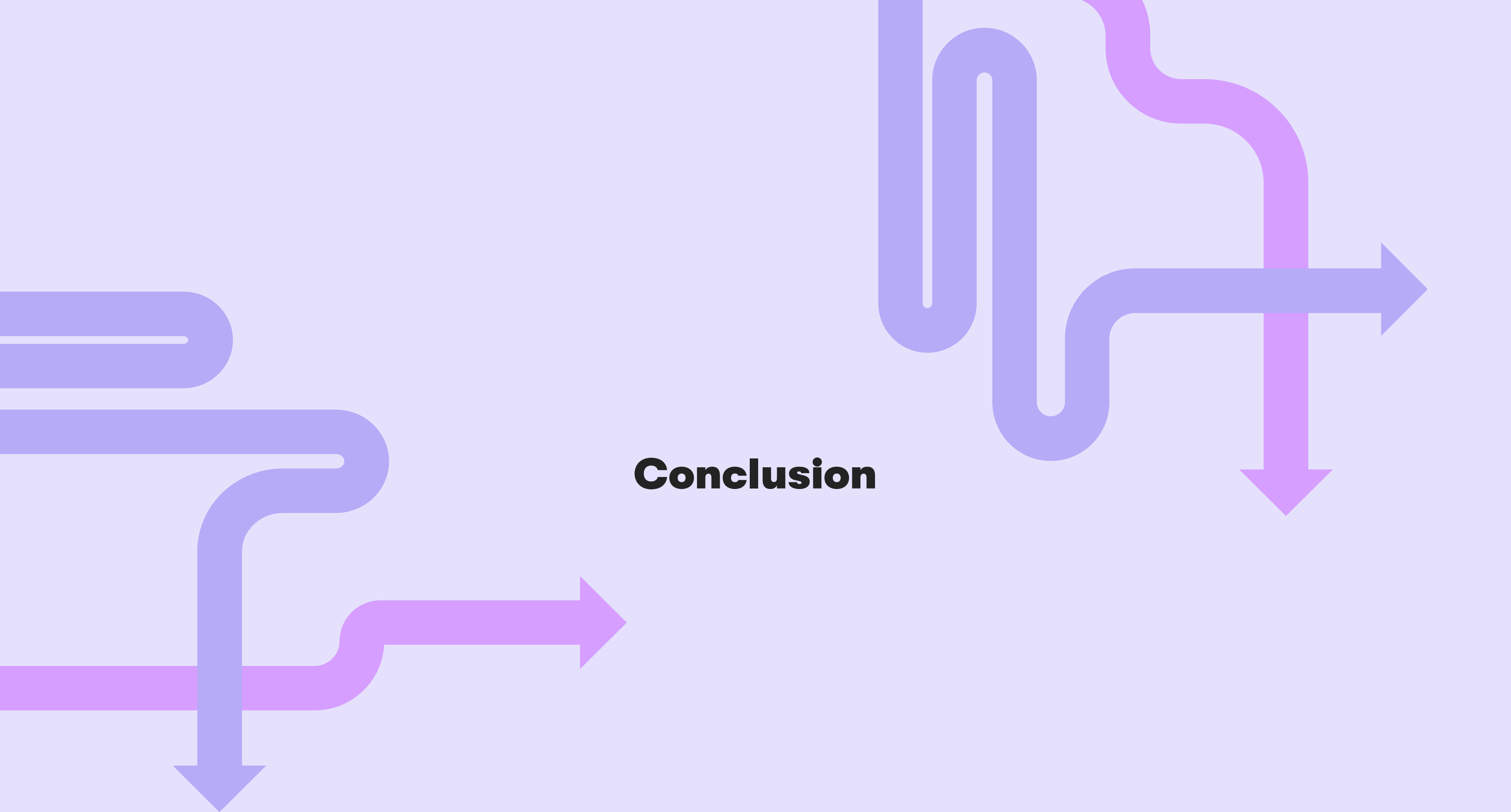
Knowledge gaps

We've talked about how Copilot can help make up for some knowledge gaps, but it can't necessarily help with gaps about how to most effectively use generative AI. That's where you (and BrainStorm) need to step in.

Help your end users understand how to write prompts, where to access and use Copilot, and under which circumstances it makes the most sense to leverage AI. You also need to make sure your end users have effectively adopted the tools that feed the data going into your organization's AI tools.

BrainStorm has a long history of helping organizations effectively adopt their Microsoft tools (including M365, and now Copilot). Check out our pre-flight checklist for Microsoft Copilot adoption, [here](#).





Conclusion





It's an exciting and vibrant landscape for technology today. Get ahead of the curve, and put your end users in the cockpit with an excellent copilot; Microsoft Copilot, to be exact. Understanding the best ways to prepare, and making sure your organization is ready to meet the requirements for deploying the tool will ensure smooth soaring.

You're cleared for takeoff!

Ready to soar with Copilot?
Contact our team today.

[Contact us](#)

