

Unlocking Productivity and Security with Microsoft 365 Copilot

Who am I?



INGRAM[®]
MICRO

Mike Markey
Lead Partner
Development Manager
Microsoft Copilot



MS - 900



SC - 900



AI - 900



AZ - 900

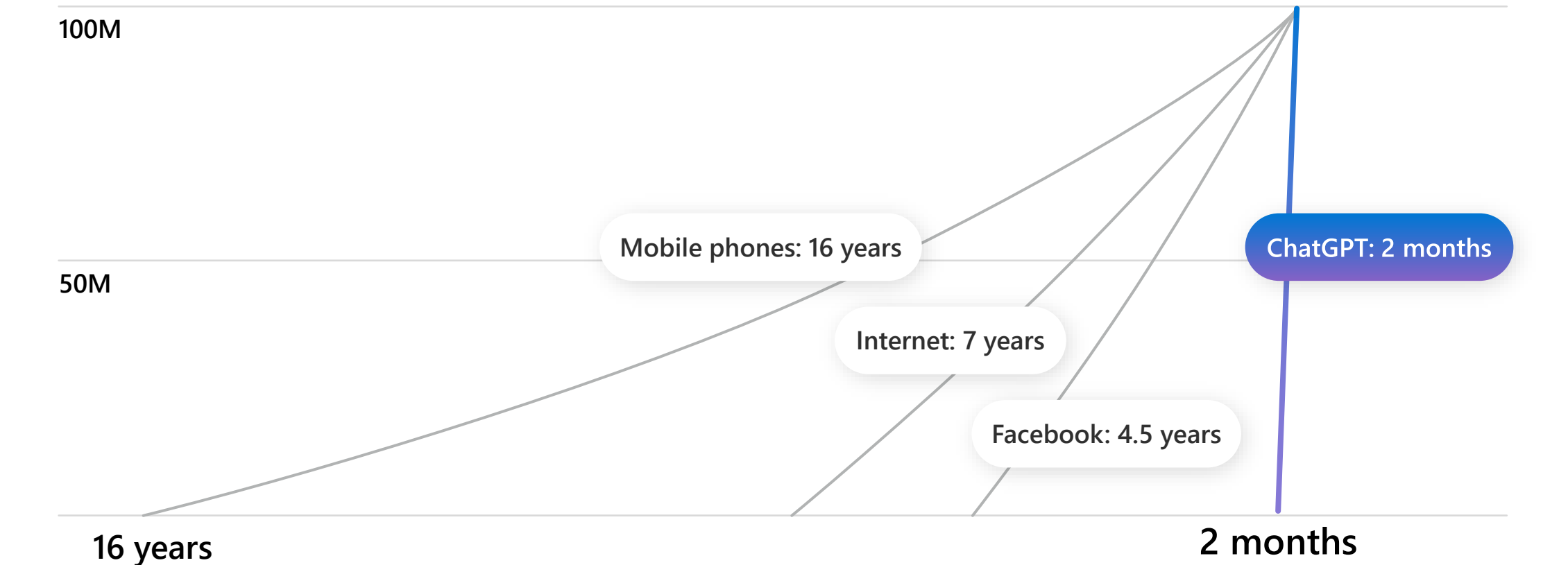


Agenda

- Why Microsoft 365 Copilot?
 - Shadow AI
- Keeping Sensitive Data Safe

Generative AI technology is here

Time to reach 100M users

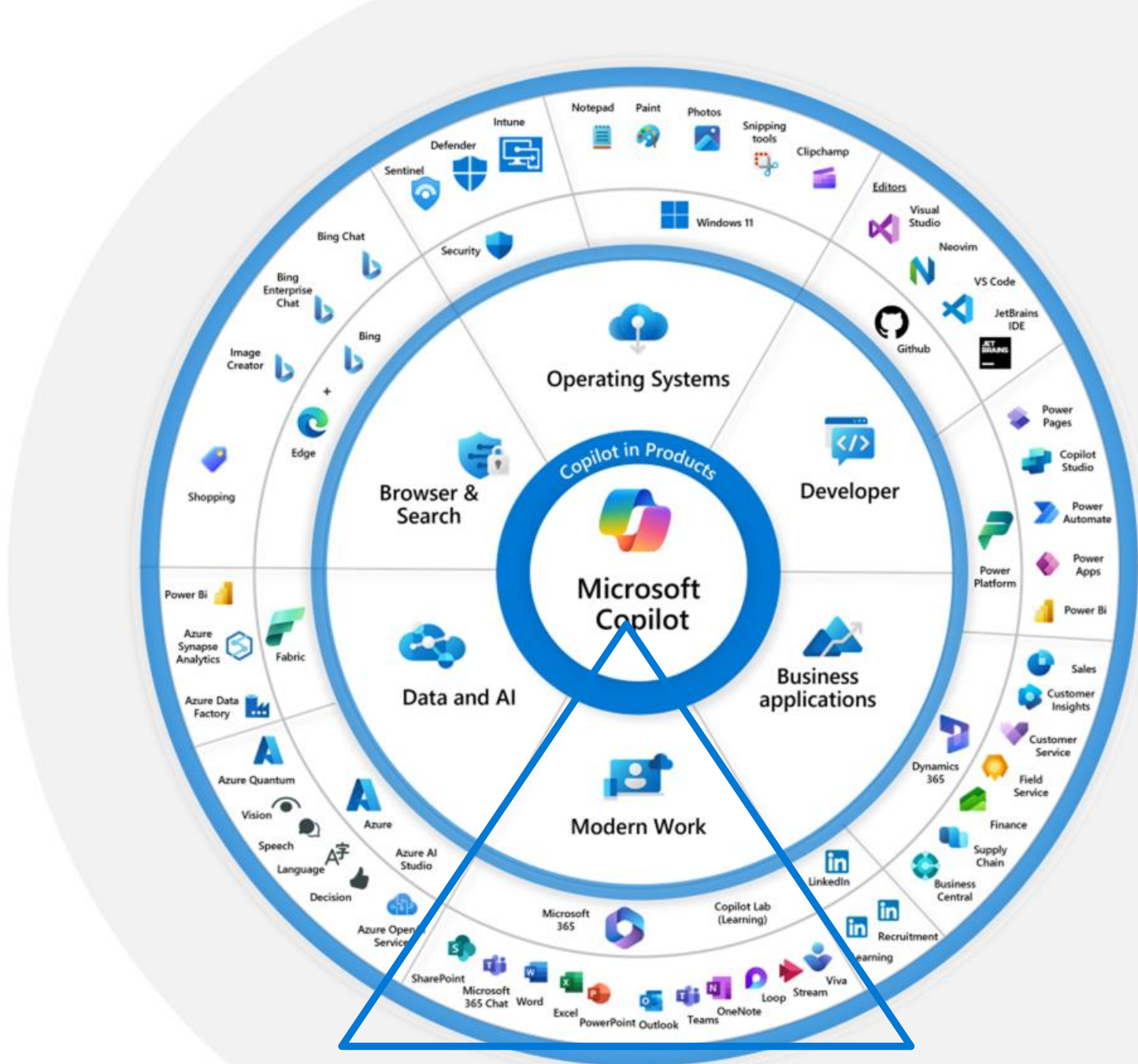




The age of Copilots has arrived.

Microsoft Copilot

Copilot experiences across the ecosystem





Alexis Blackwell

ARCE Vol.10

Brooklyn, NY

Copilot for Microsoft 365 is transforming work

64%

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

62%

spend too much time searching for information during the workday

60%

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



70%

said Copilot made them more productive

68%

said Copilot improved the quality of their work

77%

said they didn't want to give Copilot up

The heaviest Teams users (the top 5%) summarized 8 hours of meetings using Copilot in the month of March, the equivalent of an entire workday.²



Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language



Large Language
Models

+



Microsoft Graph
- Your Data -

+



Microsoft 365
Apps

+



The
Internet



Copilot for Microsoft 365











Unlock productivity and unleash creativity

Natural Language



Copilot Chat in Microsoft 365 apps use cases

Microsoft 365 Copilot Chat	Microsoft 365 Copilot
w/o a Copilot license	£23.10 pupm

Use Case	Microsoft 365 Copilot Chat (w/o license)	Microsoft 365 Copilot (£23.10 pupm)
 Write an intro paragraph Copilot can understand the open file you're working on and help quickly write a strong introduction.	✓	✓
 Visualize top insights and trends Copilot can pull top insights and data trends from your open spreadsheet and create a data visualization.	✓	✓
 Create images for your slides Copilot can generate images from a prompt to use in the design of your presentation deck.	✓	✓
 Draft a recap email Copilot can draft a recap email based on an open email thread, which you can send to update your team.	✓	✓
 Organize your content Copilot can convert a paragraph of specifications into a table directly in your document.		✓
 Forecast sales data Copilot can create a visual of next year's sales data by using Analyst to forecast from past data.		✓
 Generate bullet points Copilot can extract key points from your work document to generate bullet points for your presentation.		✓
 Summarize unread emails Copilot can analyze your entire inbox and create a summary of high priority unread emails.		✓
 Build an industry report Researcher agent can build a report including trends, competitors, and strategic recommendations.		✓
 Analyze customer data Analyst agent can analyze customer reviews data and share trend sentiments in a visualization.		✓

Copilot for Microsoft 365

1



Security
foundation

2



AI at
work

3



Culture
shift

Copilot for Microsoft 365

1



Security
foundation

2



AI at
work

3



Culture
shift



Copilot for Microsoft 365

Built on Microsoft's comprehensive approach



Security



Compliance



Privacy



Responsible AI

Microsoft
protects your data
and enables you
to control it

Protecting your data through the LLMs



Security and
Compliance



Data Usage
and Privacy



Committed to
responsible AI



Inheriting Microsoft 365 policies and controls



Data access &
permissions



User-tenant
focus



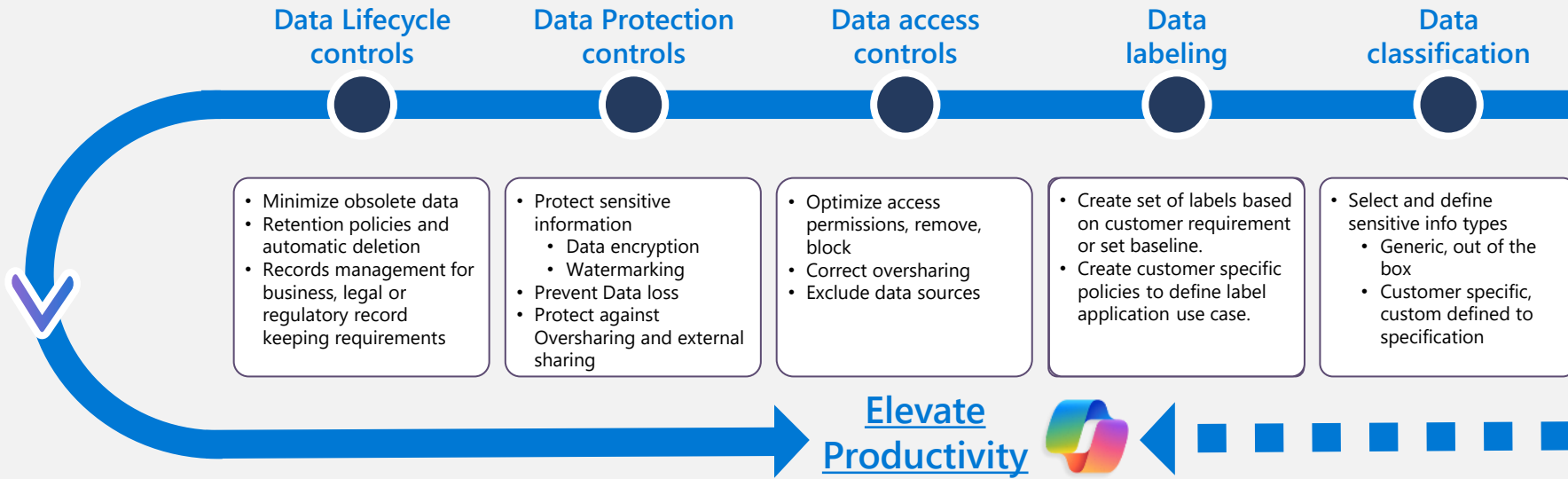
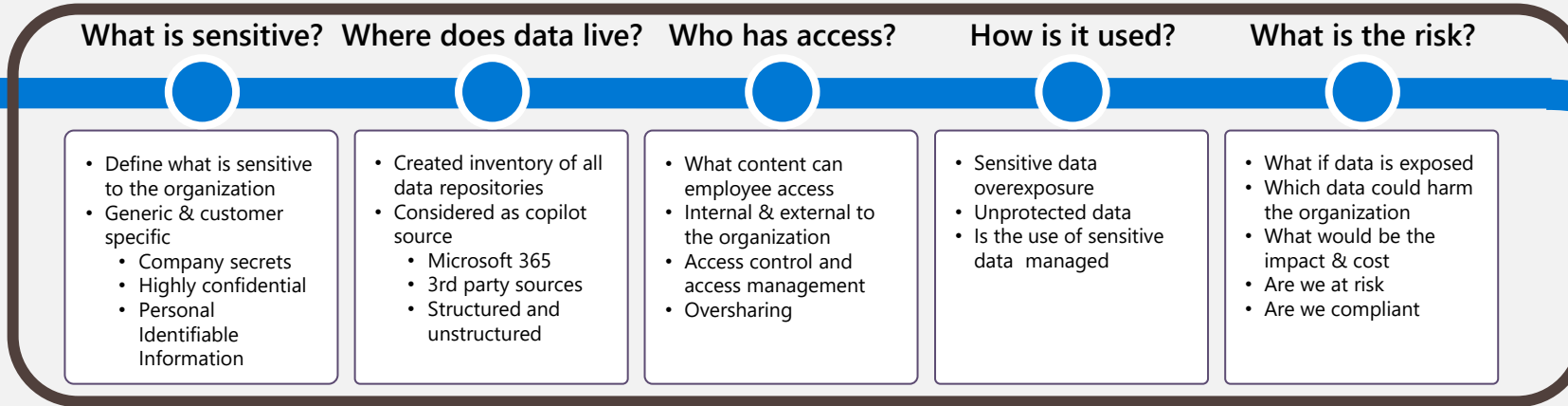
Customer data
protection



Data processing
and residency

Know your data and understand the risks

Protect
Implement controls to mitigate and reduce risk.



Organizational risk tolerance define next steps.

Low risk
Enable copilot

Medium risk
Implement (additional) data security and in parallel enable copilot.

High risk
Implement data security before enabling copilot

Copilot for Microsoft 365

1



Security
foundation

2



AI at
work

3



Culture
shift



Microsoft Copilot empowers
every end user

HR

Store, access, and prioritize notes in a fraction of the time



Marketing

Jumpstart the creative process and generate ideas while writing



Sales

Stay focused on closing deals with an AI assistant for email



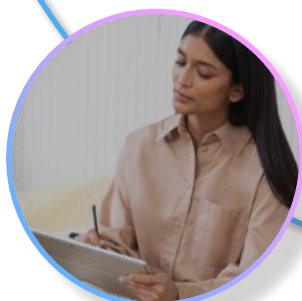
Customer Service

Stay coordinated as a team to resolve more customer issues



Finance

Simplify financial reporting and validating data quality



Data and IT Pros

Effectively manage shared projects and track progress



Impact by Workflow



Effective meetings

- Quickly catch up on meetings you missed
- Summarize a meeting and identify next steps
- Run a more effective meeting



Data analysis

- Get answers from across all your data
- Instantly uncover key insights
- Create powerful and professional visualizations



Content creation

- Jumpstart creativity, and write and edit like a pro
- Quickly catch up on the key points of a document or presentation
- Create documents, presentations, charts, and tables



Email processing

- Draft email replies instantly
- Personalize the tone and length even on the go
- Quickly summarize a long email thread

Copilot for Microsoft 365



Supercharged Productivity

Unlock access to data and
knowledge across your
organization



Amplified Creativity

Amplify human ingenuity
and innovation with AI

Copilot for Microsoft 365



Supercharged Productivity

Take productivity to the next level by unlocking access to data and knowledge across your organization

Microsoft 365 Copilot turns your words into the most powerful productivity tool on the planet. Because Copilot is integrated into the apps you use every day, you will spend less time focused on the tools, and more time focused on what really matters – serving your customers and growing your business

Lighten the load in Outlook

- Clear your inbox in minutes, not hours, by summarizing long messages and generate suggest action items and replies
- Create impactful communications by leveraging coaching tips to help you hit just the right note

Stay caught up with Teams

- Easily track discussions and suggested action items in real time
- Produce conversation summaries with citations to keep you up to speed and organized

Laser focus on what matters most

- Get up to speed and complete tasks in no time with integrated cross-application intelligence working across all your data
- Quickly pull together information from multiple sources

Intelligent recap in Copilot

The image displays a Microsoft Teams meeting interface with an 'Intelligent recap' overlay. The meeting title is 'Product roadmap discussion' and it took place on 'Jan 21, 2023 10:00 - 11:00'. The recap includes a video player for the meeting, a list of speakers (Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, Bruno Zhao), and AI-generated notes. The notes are categorized into 'Meeting notes' and 'Follow-up tasks'. The 'Meeting notes' section includes:

- > **Serena** wants to look at the product roadmap before she and **Danielle** commit to more feature enhancements.
- > **Danielle** explains that they are on track for new product release in December. But they will need to keep an eye on beta testing results. She will follow up on that.
- > **Danielle** explains that they are managing the capacity well. There could be a problem if they get a surge of users. **Babak** will make sure that they have the necessary provisions to handle an influx of users if the need arises.

The 'Follow-up tasks' section includes:

- **Danielle** will follow up on feature enhancement prioritization
- **Jon Shammass** will double check with **Amanda** regarding the ETA for the new product

On the right, the 'Copilot in Teams' interface is shown, displaying a prompt: 'Create a table with pros and cons of option 1'. The Copilot response includes a table:

Pros	Cons
Wider range of potential leads	Less persuasive
Simpler, faster sign-up process	Difficult to segment audience
Streamlines multiple campaigns	Less engaging

Below the table, there are options to 'Copy', 'Elaborate on each pro and con.', and 'List more options.'. A text input field at the bottom asks 'Ask a question about this meeting'.

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

On-demand

Based on unique prompts

Conversational interaction, with citations

Available real-time (during & after meeting)

Use **built-in meeting summaries** and **ask any question** about the meeting

*Intelligent recap is also available in Teams Premium

Copilot for Microsoft 365



Amplified Creativity

Amplify human ingenuity and innovation with AI

Microsoft 365 Copilot is designed to help you get your creative juices flowing, so you never have to start from scratch again. Copilot will help you turn your ideas into the masterpieces you, while making it easier to collaborate with your team.

Be more creative in Word and PowerPoint

- Partner with Copilot in Word to write, edit, and summarize content
- Transform written content into compelling presentations with a single command
- Create custom graphics right in your document with Microsoft Designer

Think faster by analyzing trends and creating data visuals in Excel

- Enjoy all the rich capabilities of Excel at your fingertips
- Create powerful, professional visualizations
- Explore your data without modifying it

Make meetings more creative with Whiteboard

- Ask Copilot to turn ideas into designs and summarize whiteboard content
- Gather ideas on specific topics and run more creative and efficient meetings
- Create original images in Whiteboard with Microsoft Designer

Copilot for Microsoft 365

1



Security
foundation

2



AI at
work

3



Culture
shift

This is a whole new way of working that
involves both software and culture.

Common questions we hear from customers



● **Who** do I give the first Copilot licenses to?



● **How** do I get employees up and running quickly?

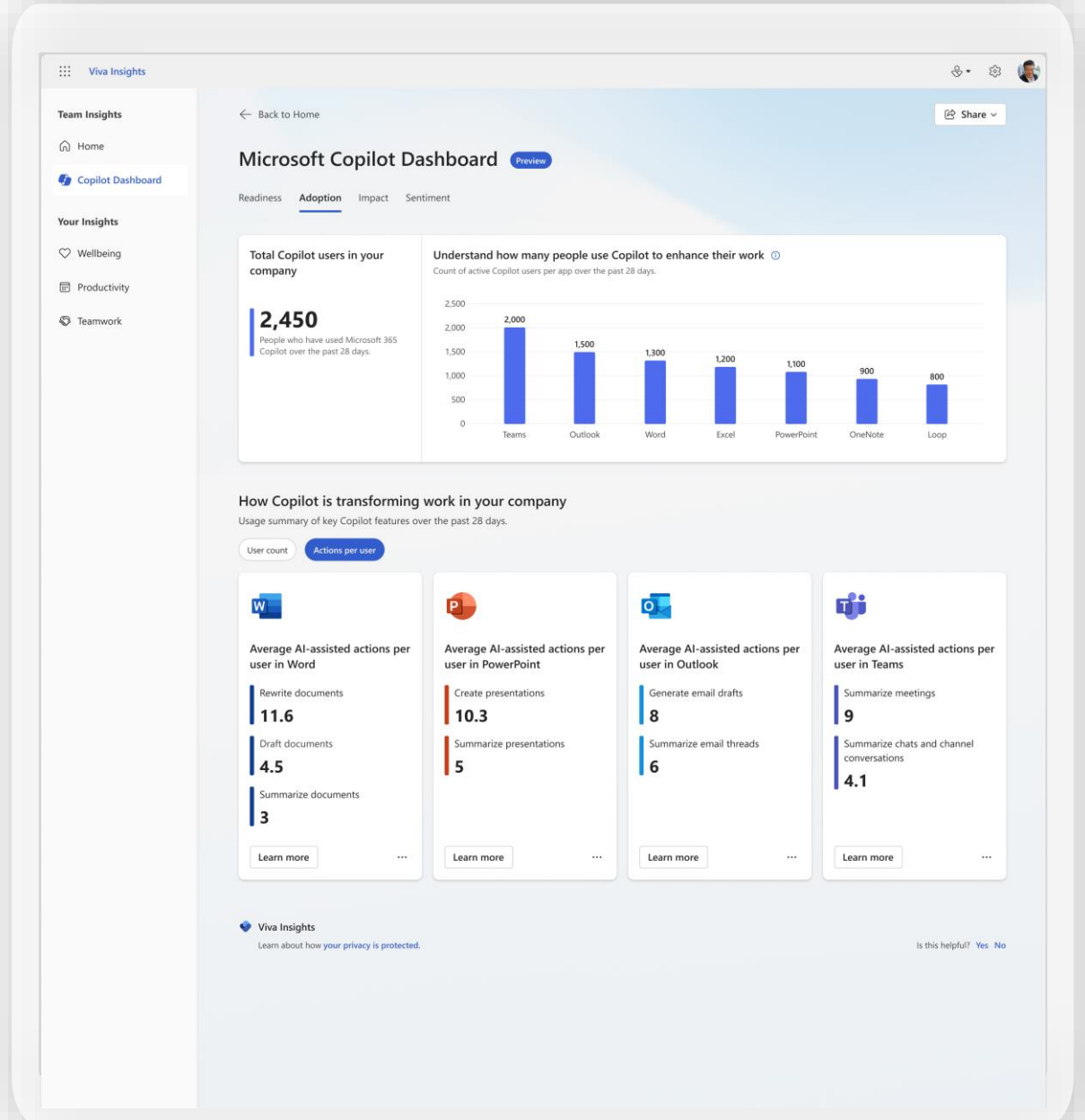


● **What** are the ways to measure impact?

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



Shadow AI

Proprietary information of Ingram Micro — Do not distribute or duplicate without Ingram Micro's express written permission.



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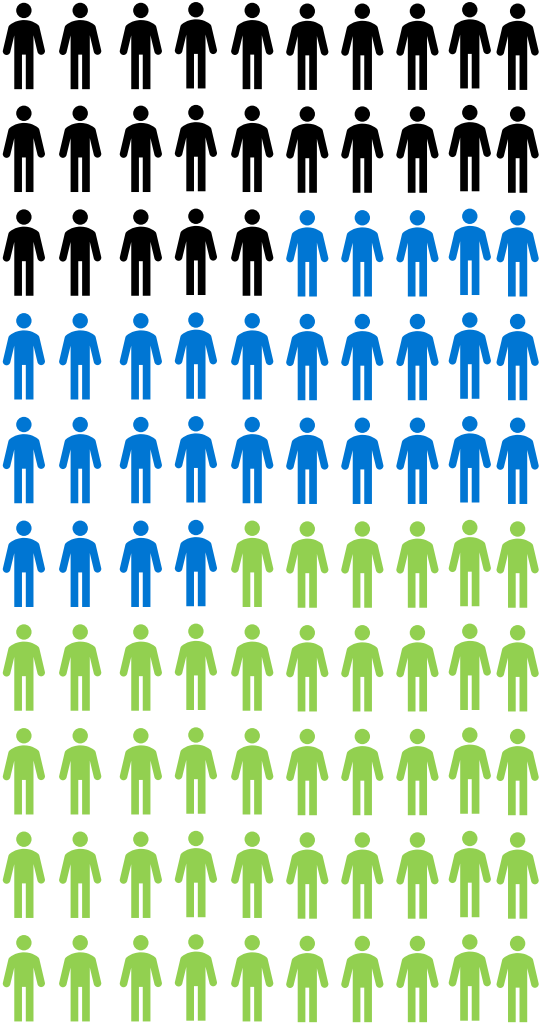
Employees want AI at work, and they **won't** wait for companies to catch up.

75%

of knowledge workers use AI at work

46%

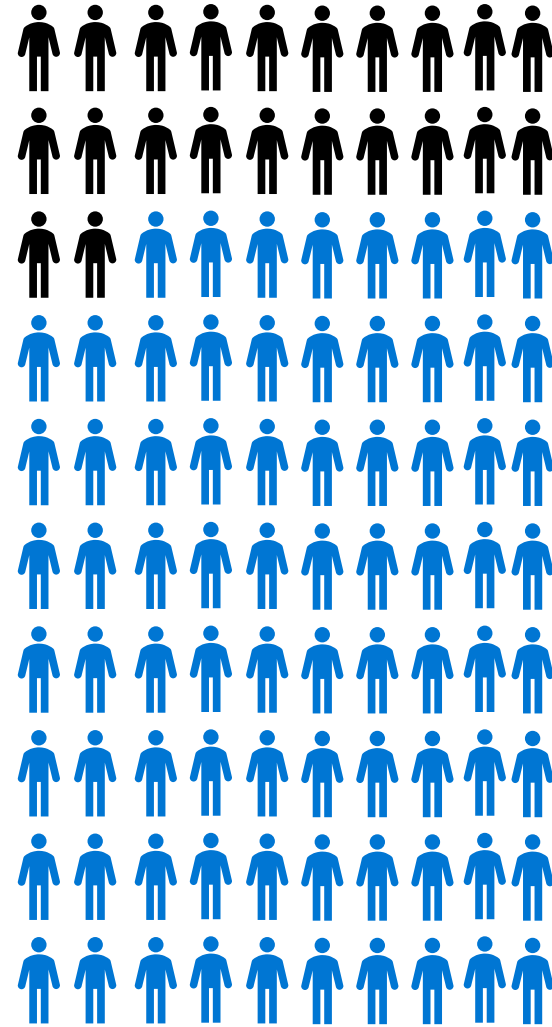
of knowledge workers started using AI less than 6 months ago



Employees **want AI at work**, and they won't wait for companies to catch up.

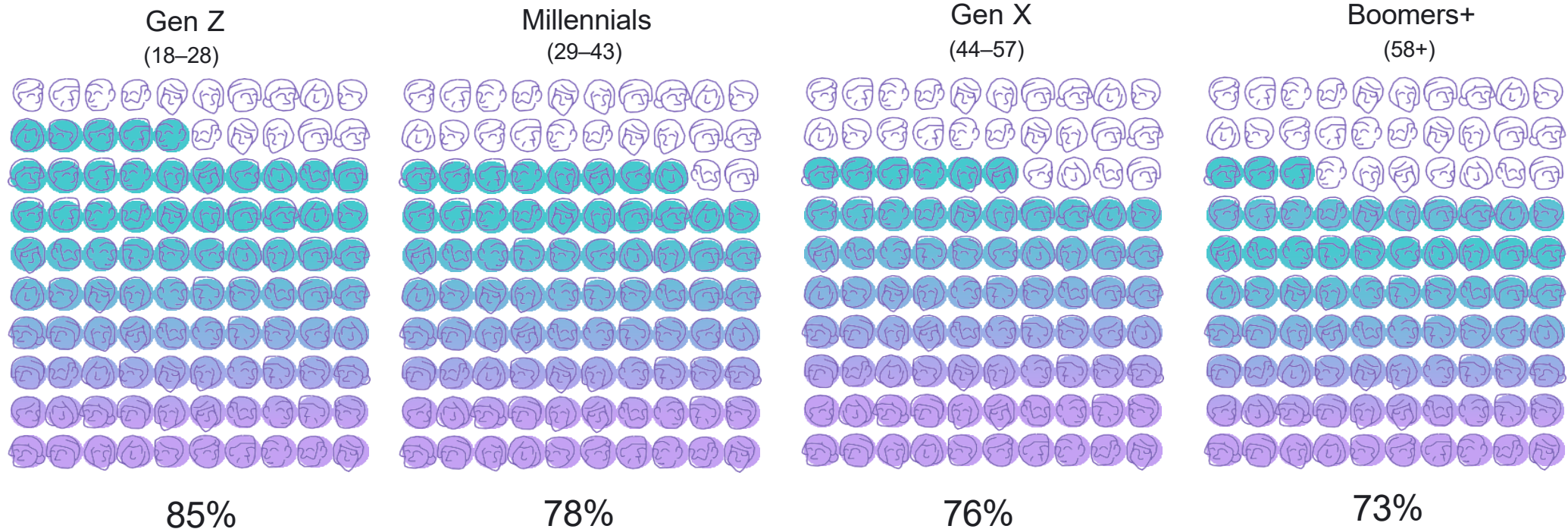
78%

of AI users are bringing their own AI tools to work (BYOAI)



BYOAI Is Not Just for Gen Z

Employees surveyed across every age group are bringing their own AI tools to work.



Share of survey respondents who are using AI tools at work not provided by their organization

The origins of Shadow IT

When users introduce digital tools into their workplace without explicit IT approval or oversight, the result is Shadow IT.

This could include:



AI assistants and tools



Productivity applications



Personal cloud storage



Project management tools



Collaboration and chat platforms



And more

What's driving Shadow IT use?

As productivity pressures increase, more employees are turning to unsanctioned tools—especially AI—to overcome their workplace challenges.

80%

of knowledge workers surveyed across 31 countries—including employees and leaders—reported feeling that they lack the time or energy to do their work.¹

More than 70%

of knowledge workers surveyed that use AI at work reported bringing their own AI tools.²

¹ "Work Trend Index Annual Report, 2025: The Year the Frontier Firm Is Born," Microsoft, Inc., and LinkedIn, Inc., 2025

Microsoft analyzed survey data from 31,000 full-time employed or self-employed knowledge workers across 31 countries between February 6, 2025 and March 24, 2025, LinkedIn labor market trends, and trillions of Microsoft 365 productivity signals.

² "Work Trend Index Annual Report, 2024: AI at Work Is Here. Now Comes the Hard Part," Microsoft, Inc., and LinkedIn, Inc., 2024

Microsoft analyzed survey data from 31,000 full-time employed or self-employed knowledge workers across 31 markets between February 15, 2024 and March 28, 2024, LinkedIn labor and hiring trends, and trillions of Microsoft 365 productivity signals, as well as research with Fortune 500 customers.

Shadow AI: A risk that arises from real workplace needs

Potential uses of Shadow AI to increase productivity:

- Marketing teams use external AI tools to generate content
- Business analysts upload company data to unauthorized visualization tools
- HR teams share documents through consumer file-sharing services

Potential uses of Shadow AI to optimize work:

- Project managers adopt an unapproved scheduling platform
- Developers share proprietary code with AI coding assistants
- Finance employees use personal AI tools to analyze company financial data

The potential business impact of unmanaged technology

Unsanctioned tools may contribute to risks:



Security vulnerabilities from unvetted applications



Hidden costs from redundant or inefficient solutions



Compliance gaps leading to potential regulatory violations



















IT troubleshooting challenges for unsupported systems



Data governance incidents and information sprawl

Examples of Shadow IT

	File Sharing Services	Messaging Platforms	Cloud Storage	Project Management Tools	Email
Managed					
Personal	 Google Drive  Dropbox	 	   Google Drive	 <i>Trello</i>  asana	 

So What?

AI Models



Gemini



 deepseek

Keeping sensitive data safe

Microsoft Purview Suite for Business Premium built-in compliance and protection designed for SMBs

Small businesses face bigger risks in the age of AI

Small businesses are

4x

more likely to be a victim of cybersecurity breach than large enterprises

Source: Verizon. (2025). [2025 Data Breach Investigations Report](#). Verizon Enterprise Solutions.

£180K

Average reported cost for a cyberattack for small businesses

Source: [Microsoft SMB CyberSecurity Report](#)



1 in 5 data security incidents happen because of insiders

Source: [Internal Incidents Cause Almost A Quarter Of Breaches, With More Than Half Intentional](#), Forrester Mar 2024

Protecting data is complex in the era of AI



Different types of data, users, and objectives



AI transformation brings new data risk



Regulations continue to evolve

All of which can lead to...

 Duplicate copies of data

 Inconsistent data classification

 Redundant alerts

 Siloed + slower investigations

 Untrusted data sources

 Exposure gaps



Complex and disjointed control

Increased manual management

Regulatory non-compliance

Ineffective controls for
AI-readiness

Microsoft Purview



A unified approach to secure
and govern your data

Microsoft Purview Suite for Business Premium

Unified data security, governance and compliance solutions for the era of AI



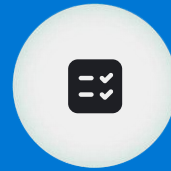
Simplify controls

Secure and manage data confidently with prebuilt templates, automated monitoring, and guided workflows.



Automate data security

Automatically classify and retain data, and enforce data loss prevention policies.



Streamline compliance

Streamline meeting regulatory compliance with built-AI that helps cut down complexity.



Get AI-ready

Adopt AI securely with automatic safeguards that helps prevent oversharing, risky prompts, and unintended exposure.

Unified, affordable, AI-powered data protection

Microsoft Purview Suite for **Business Premium**

Microsoft 365 Business Premium

Easy productivity with
built-in security

- ✓ Peace of mind for everyday work
- ✓ Core Protections built-in with simplified setup.



Microsoft Purview Suite

Helps you stay compliant and protect sensitive info

- ✓ Automatically protect sensitive data important to your business
- ✓ Extend data loss prevention and detect insider risks
- ✓ Help maintain compliance and regulatory readiness

Affordable security and compliance for SMBs

Microsoft Purview Suite for Business Premium

Monthly cost

E5 eDiscovery & Audit	£4.83
E5 Insider Risk Management	£4.83
E5 Info Protection & Governance	£5.67



£15.33
value of Individual licenses

£8.09
Microsoft Purview Suite for Business Premium*



~47%
cost saving per license with enterprise-grade compliance and data protection

*CSP List Price

Price is pupm and subject to change based on subscription term, currency and region.

Comprehensive security at a small business price*

Core Security Features	M365 Business Premium	Business Premium + Defender Suite	Business Premium + Purview Suite	Business Premium + Defender & Purview Suite	Microsoft 365 E5
	£17.75	£25.84	£25.84	£29.83	£51.45
Purview Communication Compliance Purview Compliance Manager Purview Data Lifecycle and Records Management (labels and rules) Purview Data Loss Prevention (Teams, browser, endpoint, Copilot) Purview eDiscovery and Audit (premium) Purview Insider Risk Management w/adaptive protection Purview Information Protection (automatic labels, advanced classifiers)			✓	✓	✓
Defender for Cloud Apps Defender for Endpoint P2 Defender for Office P2 Defender for Identity Entra ID P2		✓		✓	✓
Purview Data Loss Prevention (Email + Files) Purview Information Protection (Manual) Purview Data Lifecycle Management (org-wide only) Purview eDiscovery and Audit (Standard) Intune P1 Entra ID P1 Defender for Office 365 Plan 1 Defender for Business (EDR/XDR)	✓	✓	✓	✓	✓
Advanced Enterprise Productivity and Collaboration Capabilities					✓

*Price is pupm in GBP and subject to change based on subscription term, currency and region. While Business Premium with Purview and Defender add-ons delivers advanced security and compliance for SMBs, Microsoft 365 E5 provides a more comprehensive suite of productivity, security, and governance tools designed for enterprise-level needs.



50% off Purview Suite for Business Premium when you bundle with Copilot

50% off

Microsoft Purview Suite for Business Premium*

Included with Business Premium

- Enable compliance without extra tools – Compliance Manager and audit logs help you meet regulations and track activity.
- Respond quickly to legal requests – Basic eDiscovery makes investigations simple and efficient.

Even more with Purview Suite

- Monitor AI data use – Gain visibility into Copilot and third-party AI interactions to prevent oversharing.
- Automate compliance tasks – Advanced eDiscovery, Audit Premium, and lifecycle management keep you ready for legal and regulatory reviews.

Details

- ~£4.05 Promo Price (50% off)*
- Annual Term | Annual Bill & Monthly Bill
- Promo Seats (min/max): 10 to 300
- Require 1 M365 Copilot for Business in tenant and/or 1 Business Premium + Copilot for Business hard bundle.

Available to all markets from December 1, 2025 – March 31, 2026

*Purview Suite for Business Premium can only be added to customers that have purchase Business Premium and Copilot Business Or Microsoft 365 Copilot Business

Partner **call to action**

Build your Microsoft 365, Copilot and Purview winning formula

- **Investigate how the current promotions align with your current IT priorities.**
- **Register with Lugo for your Free Eyesight Report**
- **Sign up for your Free Microsoft Solutions Assessment**
- **For current non-Lugo clients:**
 - **Speak to Lugo representative around their technology alignment services**

Thank you!



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