

**Did you know 75% of  
your team are already  
using AI?**



# Who am I?



**INGRAM**<sup>®</sup>  
MICRO

**Mike Markey**  
Partner Development Manager



MS - 900



SC - 900



AI - 900



AZ - 900



# Who am I?



**INCRAM**  
MICRO

**Euan Wilkie**  
Customer Success Consultant



MS - 900



MB - 910



AI - 900



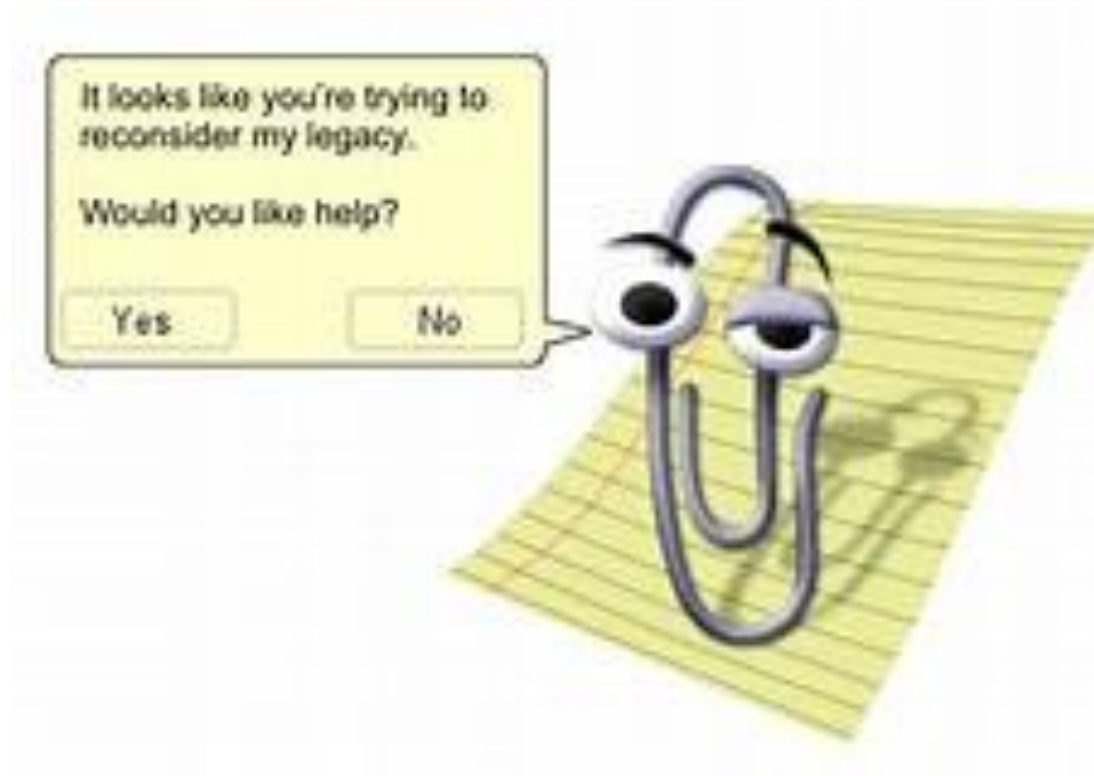
AZ - 900



# Thoughts on AI?

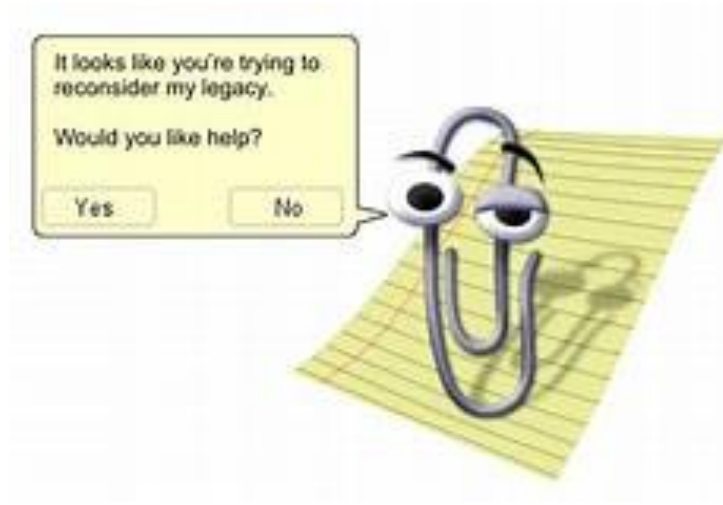


# Thoughts on AI?





# Thoughts on AI?



X



# Thoughts on AI?



# What changed in AI?

Exponential growth of hardware and advances in software finally allowed neural networks to become complex

## Before (2022)

- Good at playing chess and Jeopardy.
- Mostly recognizers not generators – recognize a few things in an image, key words/concepts.
- Chatbots are more like a menu selection.
- Only usable by experts and researchers; usually each system is only good at one thing.
- Used behind the scenes (e.g., optimizing inventory, directing ride-sharing, optimizing advertising).
- Mostly limited to structured data (databases, forms, maps).
- Progress measured in years. No one approach seemed to generalize.
- 2018 started to see momentum – AlphaZero could play Chess, Go, and Shogi very well after 9 hours of learning. **Neural networks.**

## Now (2022 onward)

- Won art and photography competitions against humans.
- Can generate language at a university graduate level on almost any topic.
- Have passed most human tests very strongly (e.g., Legal exams).
- Can pass coding tests for major corporations in minutes or help you write code.
- Strong visual recognition and tracking of objects in images and video, can transform them.
- Anyone can use via chat or even voice; can read documents and answer questions about them.
- Progress made daily – faster, smaller, more accurate, safer.
- **Fundamental models** can do many of these things. (They are good at almost everything.)
- Capabilities emerge that were not designed or even imagined.



# Common challenges from customers:

## Uncertainty about where to begin

Desire guidance and direction on best way to get started

## Preparing for AI seen as complex

Desire a simplified approach to starting their AI transformation

## Concerns about upfront commitment

Would like to evaluate without long-term commitment

# Copilot Private Preview **user** statistics

SPEED

73%

complete tasks faster

QUALITY

68%

improved the quality of their work

EFFORT

72%

spent less effort on mundane tasks

Source: [Work Trend Index Special Report: What Can Copilot's Earliest Users Teach Us About Generative AI at Work? November 2023](#)

# Emerging Work Patterns

Survey

Meetings

84%

easier to take action after a meeting

Emails

64%

reduces time spent processing email

Find info

75%

saves time by finding whatever they need

Writing

85%

helps them get to a good first draft faster

Experiment

3.8x

faster to get caught up, identify decisions, and draft an email

18%

more clear and more concise vs. control group

27%

faster to find + analyze info from files, emails, calendar

68%

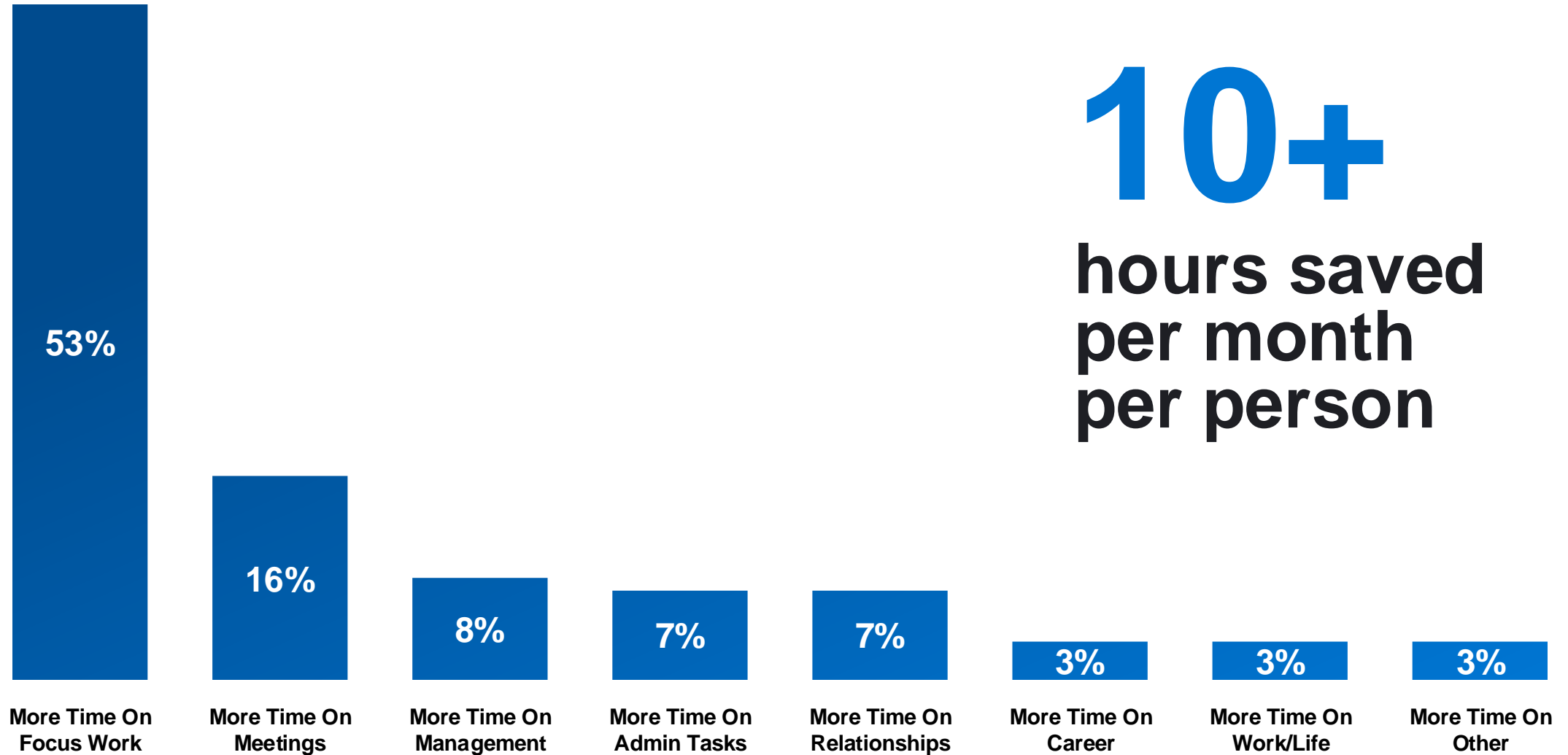
less time to get to a first draft with equal quality

Qualitative source: Survey of Copilot for Microsoft 365 Early Access Program users, October 2023.

Quantitative source: Microsoft Office of the Chief Economist, October 2023, "A Day in the Life Study." Microsoft Internal Research Team, October 2023, "The Missed Meeting: Evaluating Copilot's Effectiveness in Teams." Microsoft Office of the Chief Economist, October 2023, "The Strain of Searching Study."

# 10+

## hours saved per month per person



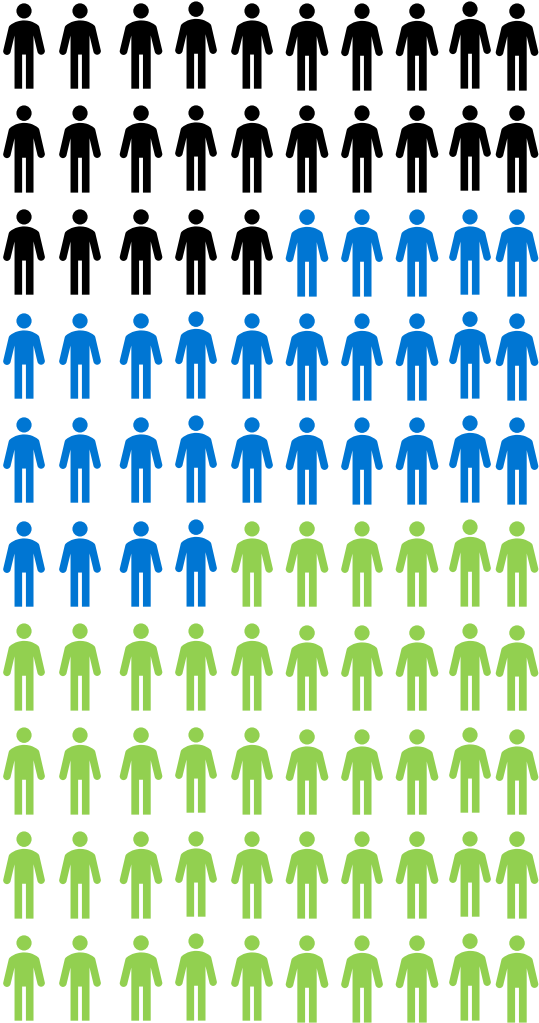
# Employees want AI at work, and they **won't** wait for companies to catch up.

75%

of knowledge workers use AI at work

46%

of knowledge workers started using AI less than 6 months ago

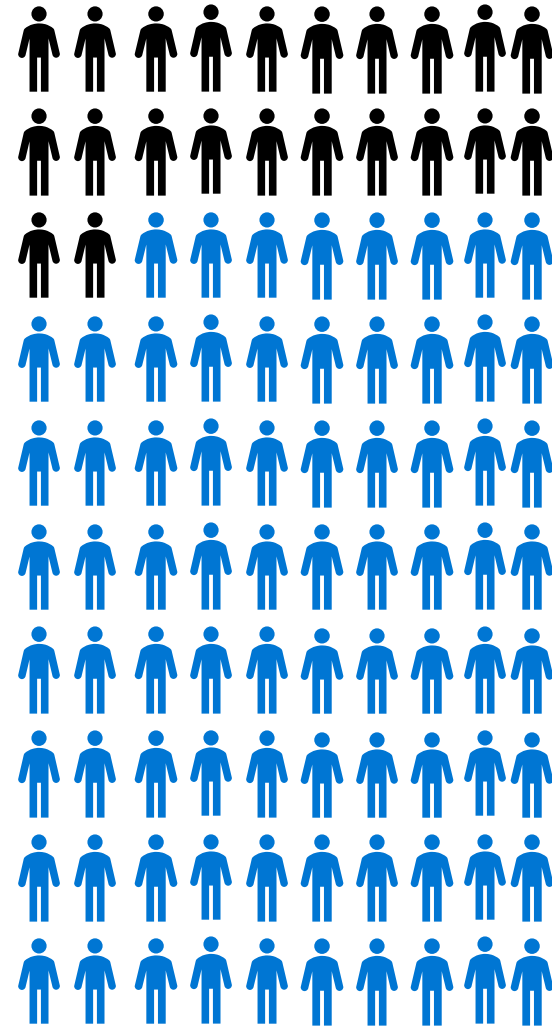




# Employees **want AI at work**, and they won't wait for companies to catch up.

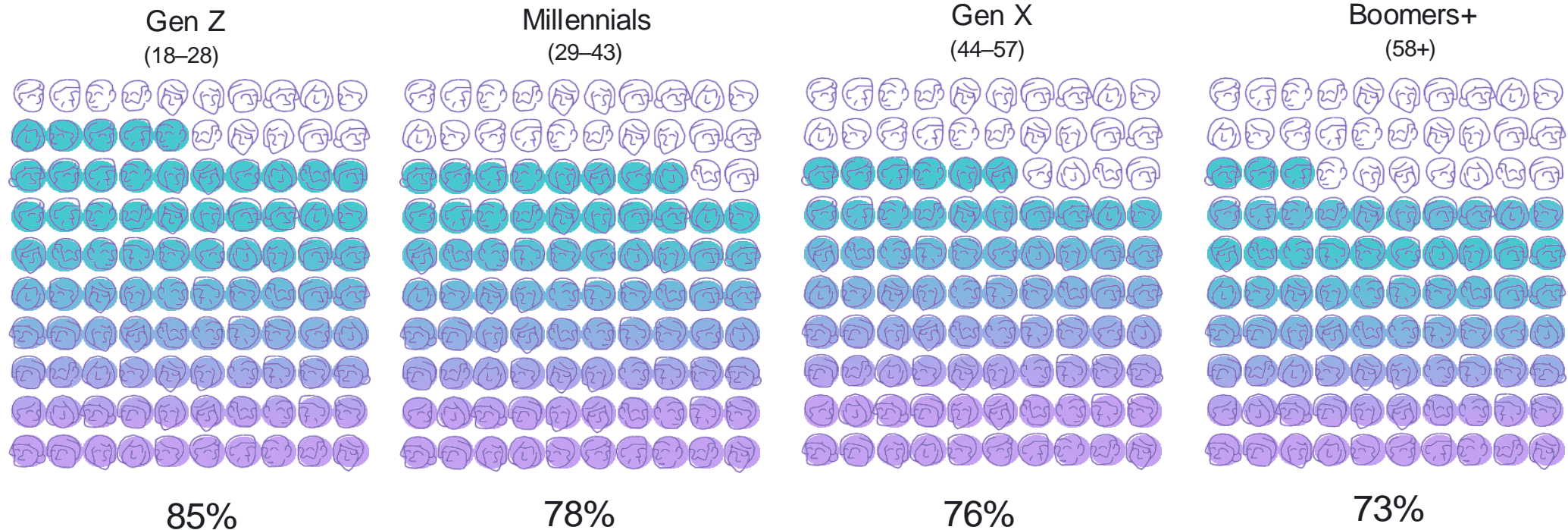
**78%**

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*

# Early findings on the promise of Generative AI to transform productivity

A recent report published by Harvard Business School and Boston Consulting Group found that Generative AI in the workplace led to:

- 12.2%** increase in **task completion rates**
- 25.1%** decrease in **time spent to complete tasks**
- 12.5%** increase in the **number of subtasks completed**
- 40%+** increase in the **quality of responses to subtasks**

# So What?

# AI Models























# Shadow IT

## Definition:

**Shadow IT** is the use of technology, like apps or devices, without the approval of the IT department. It can boost productivity but also poses security risks.

# Examples of Shadow IT

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

# Manage work data on mobile devices with Intune

## Mobile Device Management (MDM)

Conditional Access:  
Manage access to company owned devices.



Enroll devices for management



Provision settings, certs, profiles



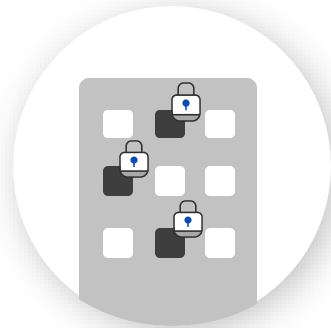
Report & measure device compliance



Remove corporate data from devices remotely

## Mobile Application Management (MAM)

Conditional Access:  
Manage which apps can be used to access work email or files on personal devices



Publish mobile apps to users



Configure and update apps



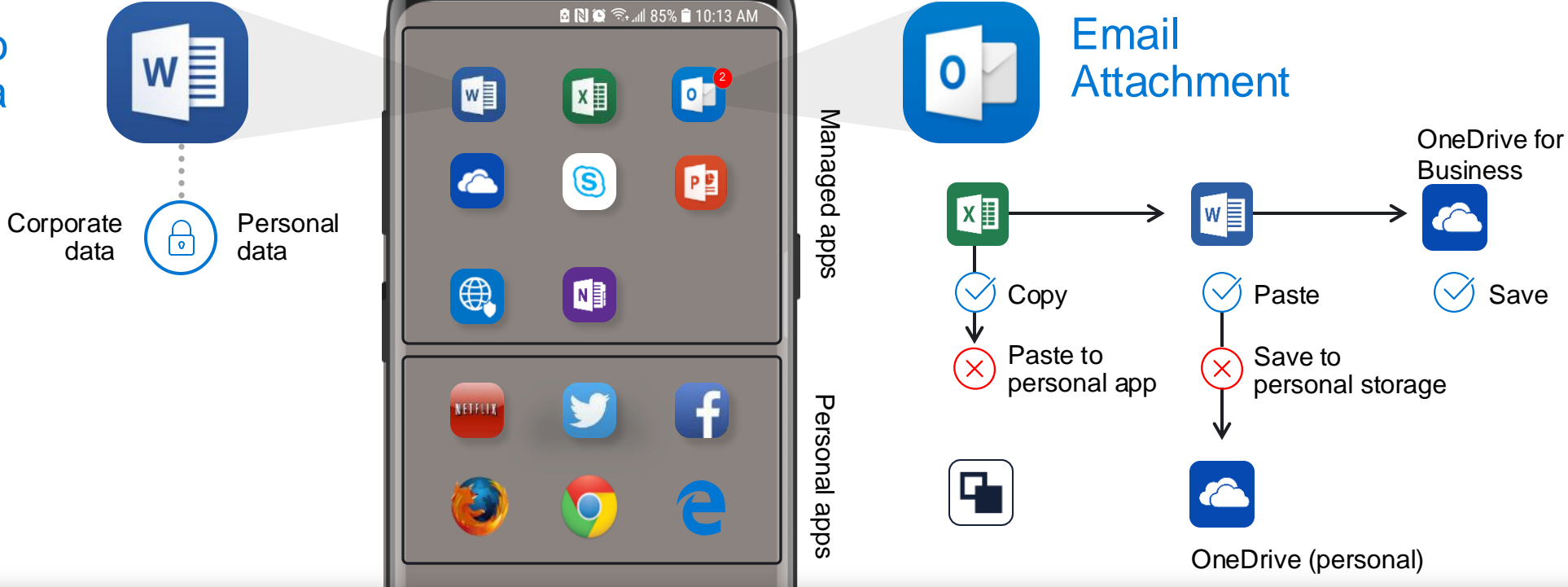
Enforce that work data cannot be saved on personal apps



Secure & remove corporate data within mobile apps

# Example: Managing work data on personal devices

MAM policy to secure work data



Azure Information Protection (AIP) empowers you to specify access controls for work data

Separate company managed apps from personal apps, and set policies on how work data is accessed from managed apps

Intune APP helps ensure corporate data can't be copied and pasted to personal apps within the device



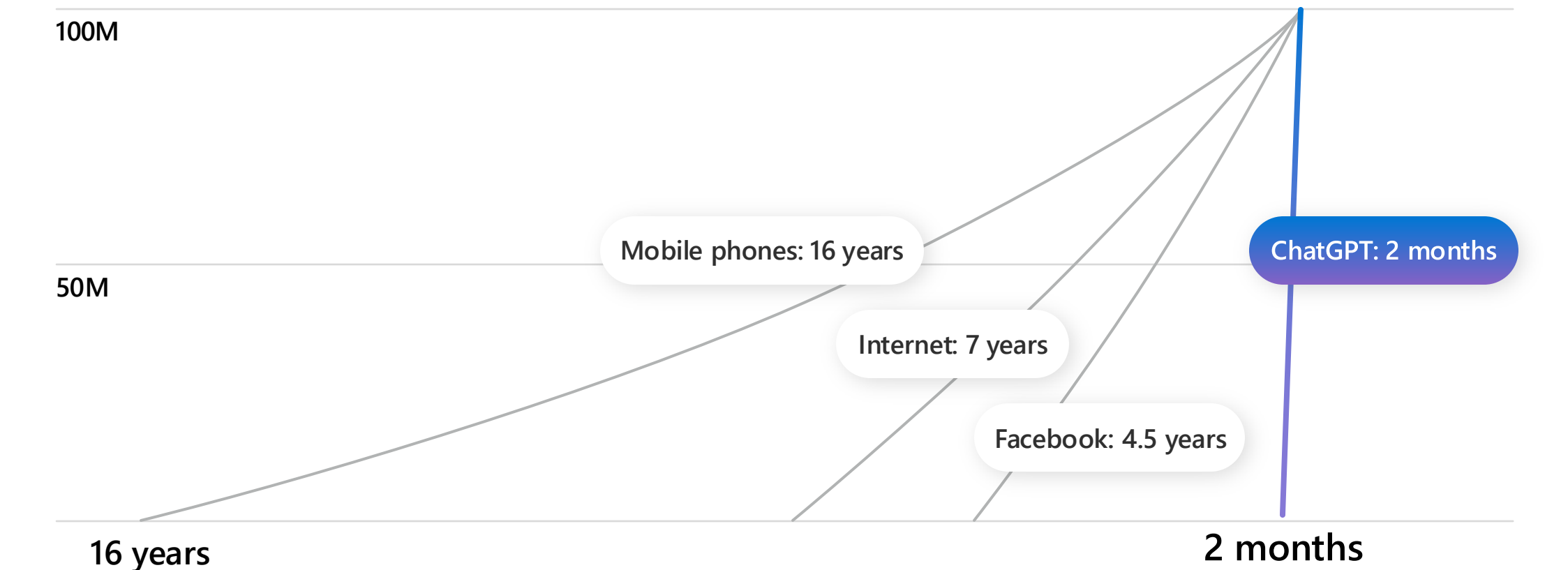


# Unlocking Productivity and Security with Microsoft 365 Copilot



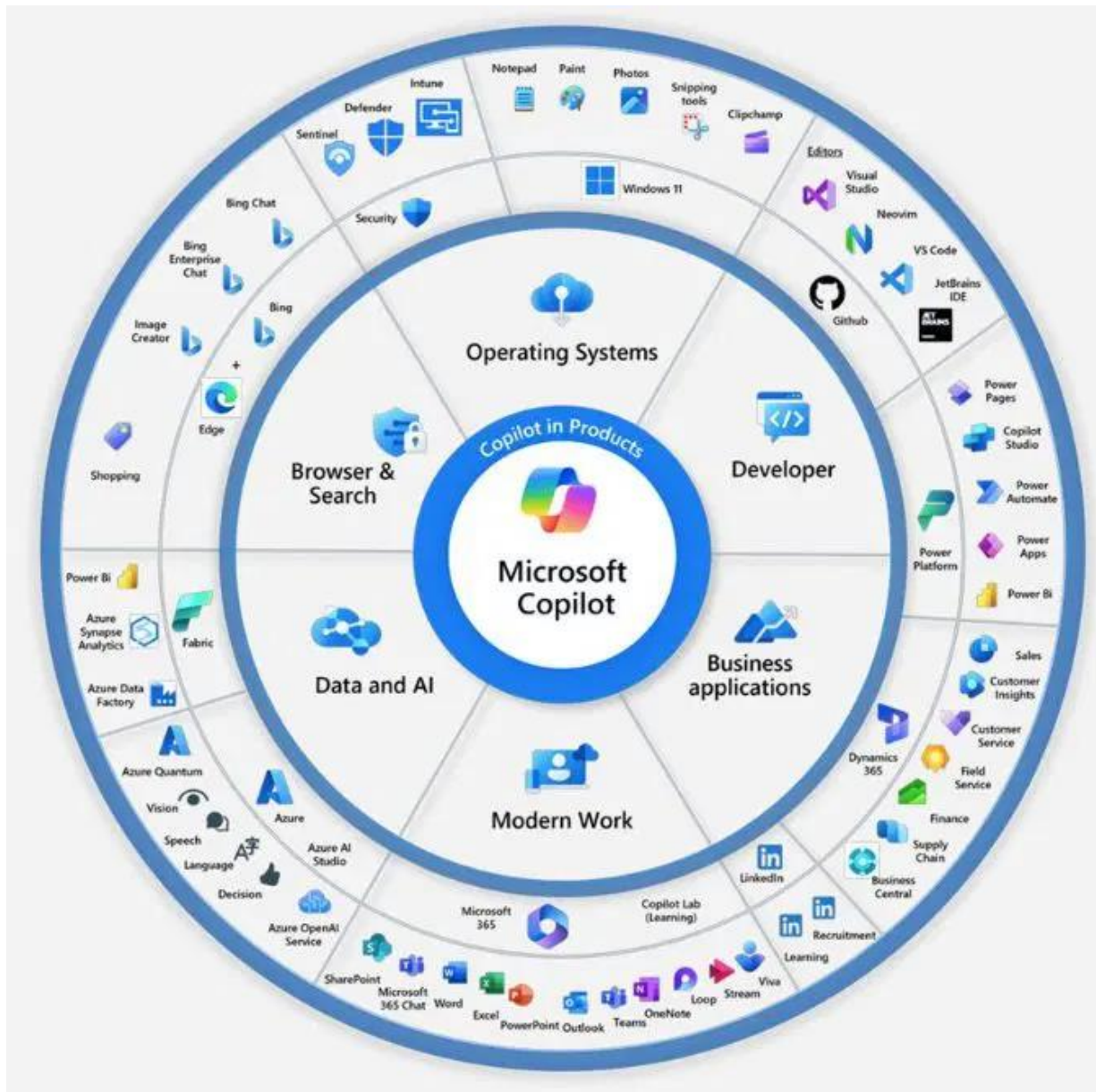
# Generative AI technology is here

Time to reach 100M users





# The age of Copilots has arrived.





Alexis Blackwell

**Arce** Vol.10

Brooklyn, NY



# 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 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%

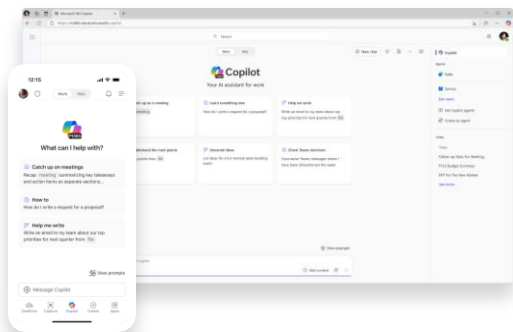
said they didn't want to give Copilot up

*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.<sup>2</sup>*



# Microsoft 365 Copilot

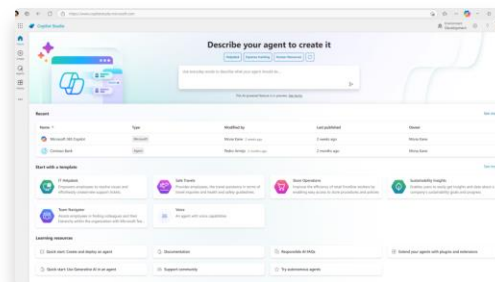
Your AI assistant for work



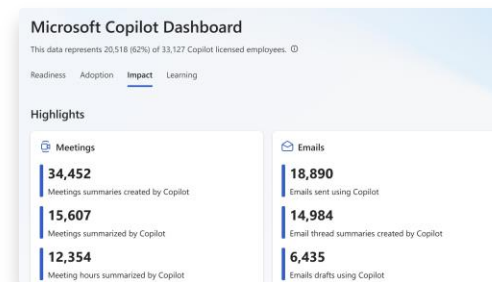
Copilot Chat  
for web and work



Microsoft 365  
apps



Copilot Studio + agents



Adoption &  
measurement

Copilot Control System

# Copilot for Microsoft 365

1



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Security  
foundation

2



---

AI at  
work

3



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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 365 Copilot is the AI assistant you can trust



## Security

Honors your existing permissions

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Persistent label inheritance and DLP policies

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Risk-based conditional access and endpoint management



## Governance & Compliance

Ramp your data preparedness for AI

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Detect and investigate non-compliant usage

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Granular controls and transparency for web queries



## Privacy

You control your data

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You control your data location

---

Your data isn't used to train foundation models

**Your Microsoft 365 security, governance, compliance, and privacy policies**

# Secure and govern Copilot with Microsoft Security



## Baseline

### Essential security controls

- Multi-factor Authentication
- Audit logging
- Basic content and keyword search

Microsoft 365 Copilot +  
Microsoft 365 Business Standard



## Core

### Comprehensive security controls

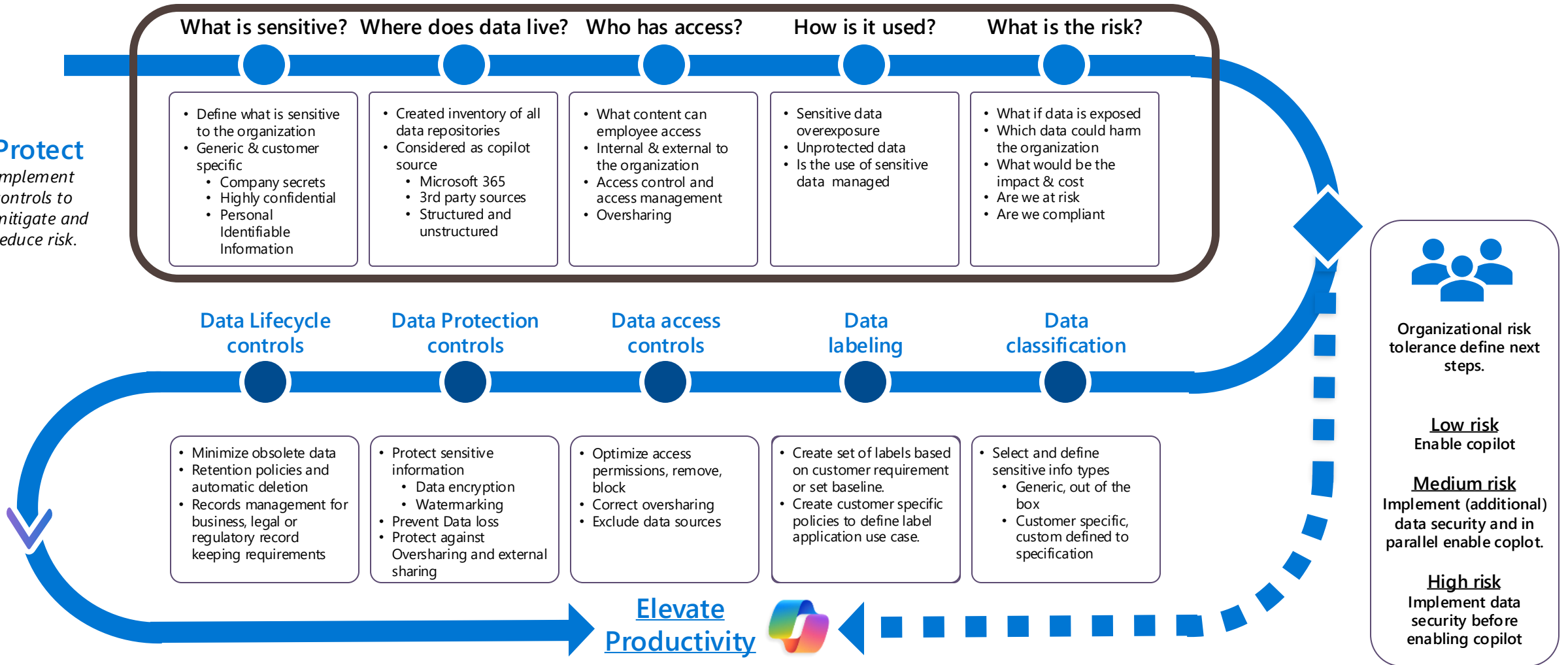
Everything in Microsoft 365 Business Standard, plus:

- Conditional Access
- Sensitivity labels
- Data loss prevention policies
- Unified endpoint management
- eDiscovery, litigation hold and retention policies

Microsoft 365 Copilot +  
Microsoft 365 Business Premium

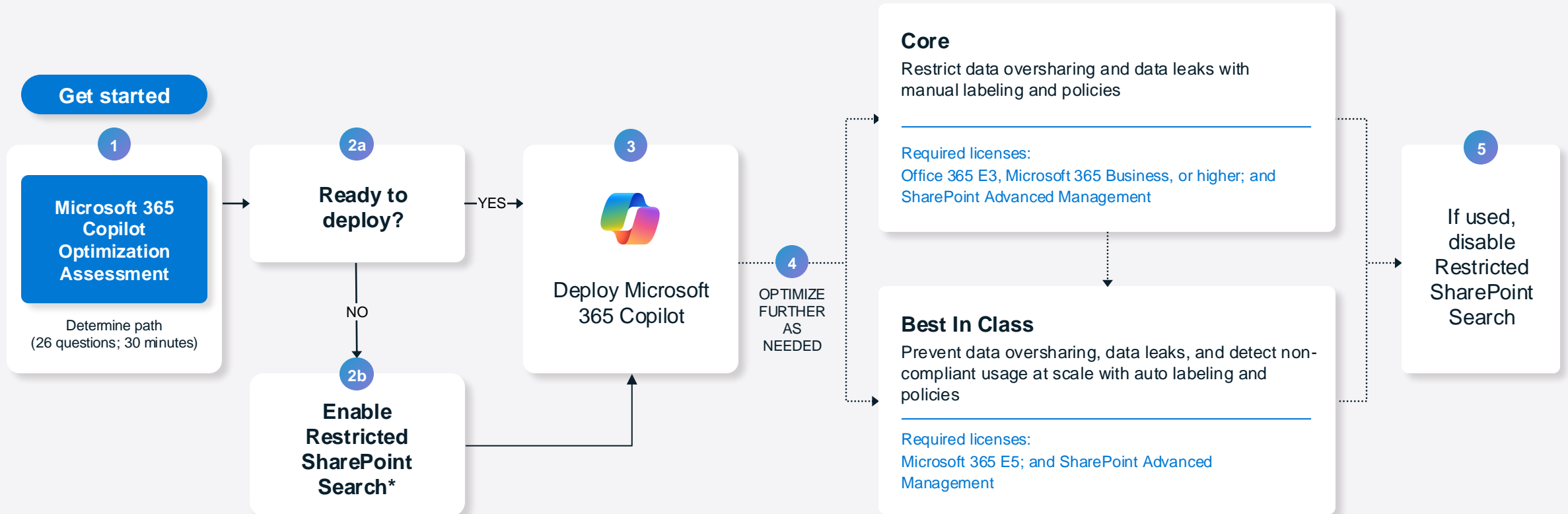
# Know your data and understand the risks

**Protect**  
Implement controls to mitigate and reduce risk.



# Apply appropriate data security controls

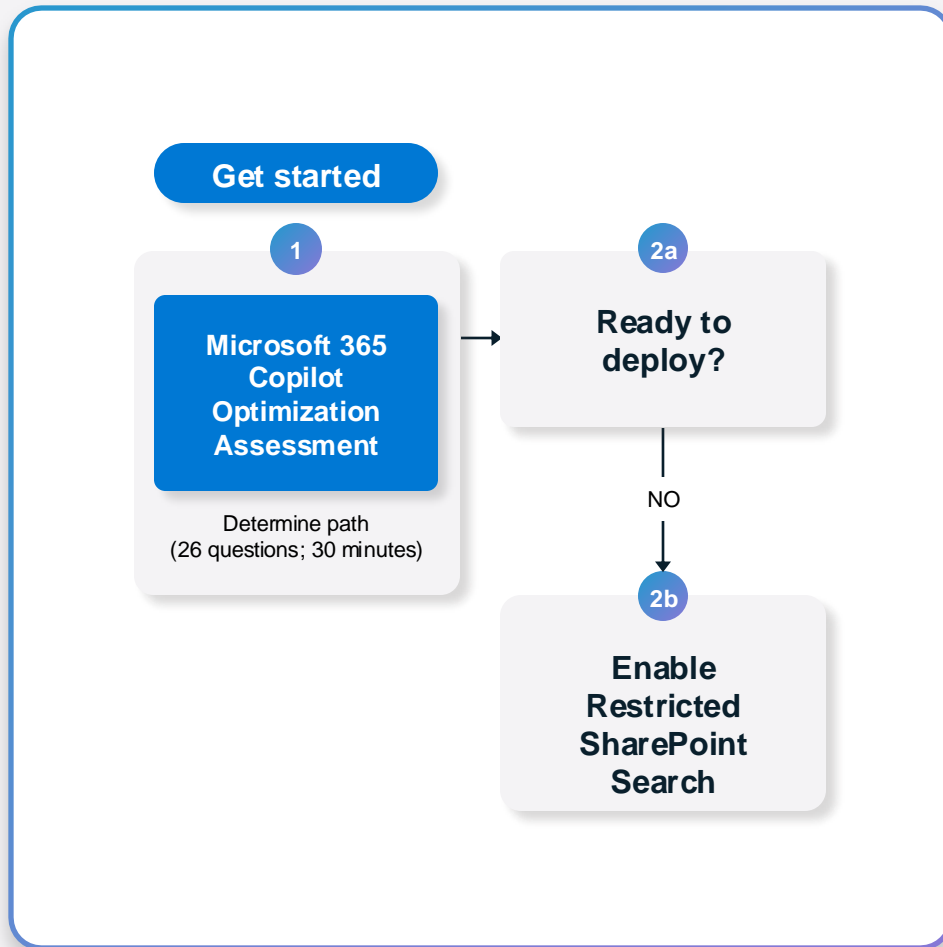
Get started quickly and continue to optimize along the way



\* Restricted SharePoint Search will limit Microsoft 365 Copilot experiences and organization-wide search. It is a temporary option which gives you time to address oversharing concerns while getting started on your Copilot journey.



# Why Restricted SharePoint Search?

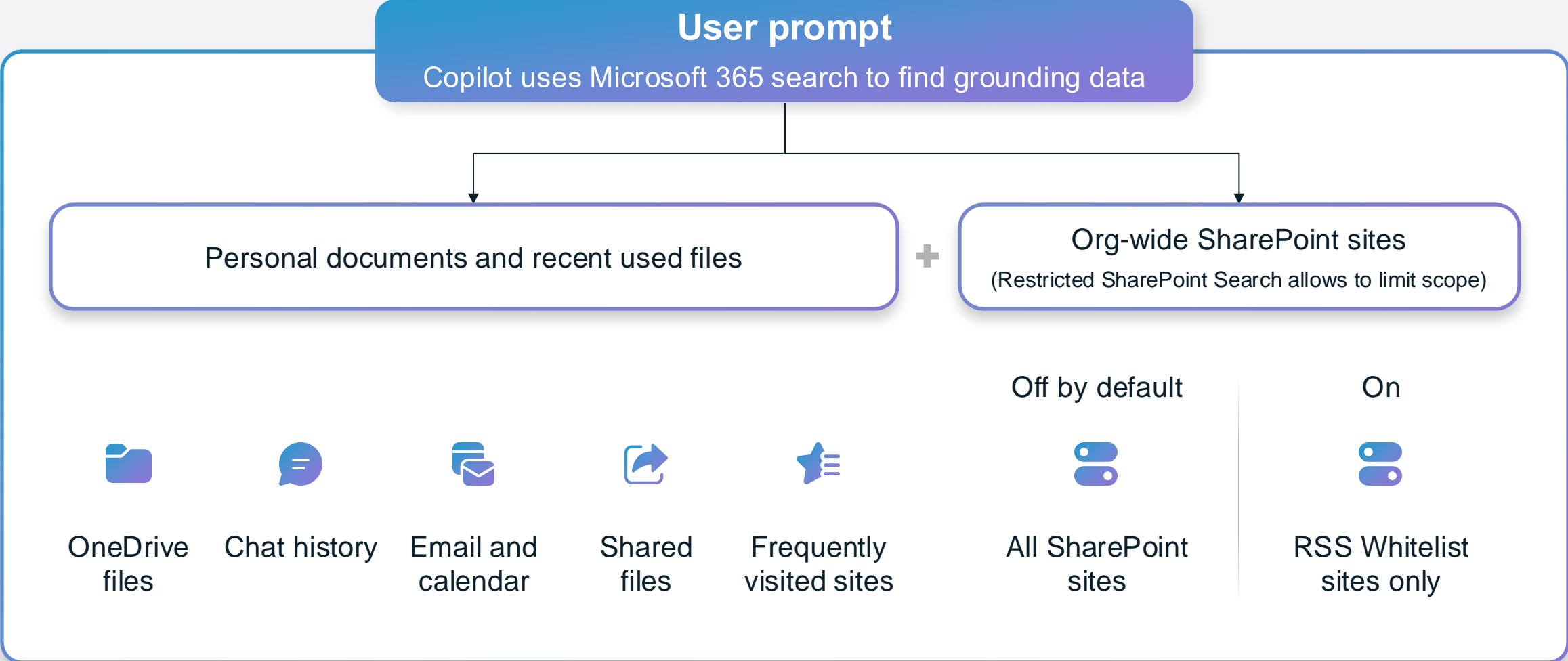


- Restricted SharePoint Search is designed for organizations particularly concerned about unintentional oversharing of content.
- This is intended as a temporary solution to give you time to review and audit site permissions while implementing robust data security solutions from Microsoft Purview and content management with SharePoint Advanced Management.

## PRE-REQUISITES

- Available to tenants with Microsoft 365 Copilot subscriptions.
- Activation requires Global/Tenant/SharePoint admin rights.

# What is Restricted SharePoint Search?



# 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*

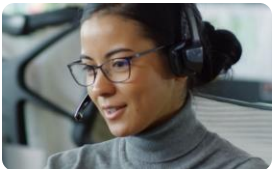


## Data and IT Pros

*Effectively manage shared projects and track progress*



# Key processes



## Customer Service

- Self-help
- Support assignment
- Issue diagnosis
- Problem resolution
- Continuous improvement



## Sales

- Customer self-service
- Lead generation
- Customer engagement
- Negotiations & closing
- Post-sale follow-up & upsell
- Sales analysis & forecasting



## Finance

- Quote to cash
- Record to report
- Tax & treasury
- Planning & analysis
- Risk management and compliance
- Procure-to-pay



## Marketing

- Customer insights & strategy
- Demand generation
- Content creation
- Campaign execution
- Predictive analysis
- Personalization
- Sales enablement & recommendation



## HR

- Employee engagement
- Recruiting
- HR admin & payroll
- Compensation & benefits
- Learning & development
- Talent management
- HR strategy & planning



## Legal

- Regulatory & compliance management
- Contracting
- Risk management
- Litigation
- Consultation
- Intellectual property
- Advisory services



## IT

- Data management
- Software management & acquisition
- Device management
- IT operations
- Network operations
- Information security
- Change management & user adoption

# KPIs by function



## Customer Service

First Call Resolution (FCR) rate

Calls answered by agents

Issue resolution time

Customer retention

Case volume

Time to first response

Average call time

Customer experience (CSAT)



## Sales

Opportunities pursued

Deal size

Win rate/Close rate

Customer retention

Average discount size

Upsell/Cross sell rate

Cost per lead

Sales cycles length



## Finance

Finance outsourcing spend

Cost per analysis request

Deal review time

Time to close

Compliance rate

Forecast accuracy

Employee retention

Day sales outstanding



## Marketing

Leads generated

Agency spend

Customer retention

Employee retention

Cost per lead

Brand value

Lead conversion rate

Revenue per lead generated



## HR

Employee onboarding time

Calls answered by agents

Issue resolution time

Employee retention

Hiring costs per employee

Admin cost per employee

First call resolution rate

Workforce demographics



## Legal

Outside counsel spend

Cost per internal review

Compliance rate

Contract error rate

Number of disputes

Dispute win rate



## IT

IT operation costs

IT issue/ticket resolution time

IT outsourcing costs

Product adoption & usage

Application downtime

Network/infra reliability score

Reduce shadow IT risk

NSAT- User Satisfaction

# Copilot for Microsoft 365



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## Supercharged Productivity

Unlock access to data and  
knowledge across your  
organization



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## 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



MICROSOFT 365

# Copilot in Teams Meetings

The screenshot displays a Microsoft Teams meeting interface. At the top, there is a search bar and navigation arrows. The meeting title is "Core accounts business review" with tabs for Chat, Details, Files, and Recap. The meeting time is "Mar 16, 10:00 AM" and there is an "Open in Stream" button. A sidebar on the left contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area shows "Shared content" with a file named "Proseware Proposal.pptx". Below this is a video player showing a hand pointing at a screen, with a play button and a duration of "48m 42s". Under the video are "Speakers" and "Topics" sections. The "Topics" section lists "Proseware negotiation strategy" and "Core accounts round table". On the right side, there are buttons for "Notes", "@ Mentions", and "Transcript". The "Notes" section is expanded, showing a note from "Core accounts.loop" titled "Quarterly results and forecasts for Core Account". The note includes a "Summary" section with a play button icon and a list of bullet points: "\$230K revenue shortfall in this quarter", "Inventory 15% surplus (renewable products and recycled materials)", "Account leads to propose discounting scenarios to lower inventory", and "Proseware was discussed as a leading opportunity". Below the summary is a "Notes" section with a list of notes, including one mentioning "Beth emphasized importance of Proseware negotiation strategy with offers - this is a must win deal." and another mentioning "The team identified a new opportunity with Proseware that...".

# Intelligent recap in Copilot

The screenshot displays the Microsoft Teams interface during a meeting. The main window is titled 'Product roadmap discussion' and shows a video player with a 'Product Roadmap Discussion' title. Below the video is a 'Speakers' list with names like Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, and Bruno Zhao. To the right, the 'Intelligent recap' panel is visible, showing 'Content' with links to 'Product Roadmap...', 'Marketing budget...', and 'Marketing demo f...'. Below this, there are tabs for 'Notes', 'AI notes', 'Mentions (3)', and 'Transcript'. The 'AI notes' section contains text generated by AI, such as 'Serena wants to look at the product roadmap before she and Danielle commit to more feature enhancements.' and '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.' Below the notes are 'Follow-up tasks' listed as 'Danielle will follow up on feature enhancement prioritization' and 'Jon Shammass will double check with Amanda regarding the ETA for the new product.' To the right of the main window, the 'Copilot in Teams' panel is open, showing a prompt 'Create a table with pros and cons of option 1'. Below the prompt, it displays 'Pros and cons of option 1: Drive campaign traffic to generic Sign up page:' followed by a table with two columns: 'Pros' and 'Cons'. The table contains the following data:

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 buttons for 'Copy', 'Elaborate on each pro and con.', and 'List more options.'. At the bottom of the Copilot panel, there is a text input field with the placeholder 'Ask a question about this meeting' and a send button.

On the left side of the image, there are four blue circular markers connected by a vertical line, each corresponding to a feature listed below:

- Built-in and automated
- Standardized
- Video, speaker, and chapter markers
- Available after meeting only

On the right side of the image, there are four blue circular markers connected by a vertical line, each corresponding to a feature listed below:

- 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

# A day in the life of a Finance Manager

Available with:  
**Microsoft 365 Copilot and Copilot Studio**

Scenario level:   
**Extend**

Benefits


 ~1 hour per week

 Areas of investment: Communications

 Delivering quality analysis

8:00 am


Jack wants to deliver a presentation on the first quarter earning report to his team.

 Copilot in PowerPoint

Example prompt: **Create presentation** from [First quarter earnings report.docx]

8:30 am


He wants to start with a slide that provides a short introduction to the organization.

 Copilot in PowerPoint

Example prompt: **Add a slide** with an organization overview

9:00 am

Jack is tasked with analyzing an earnings report from a key competitor.

 Copilot in Word

Action: **Summarize this document**

4:00 pm

Jack needs to see the balance in his team's travel budget. He uses Copilot to access a Copilot Agent to get that information from the organization's SAP system

 Copilot Agent<sup>3</sup>  
+Connection to SAP

Example prompt: **How much budget is available** this quarter for travel to customers?

2:00 pm

Jack new needs to create some charts for a presentation based on the data in the Excel.

 Copilot in Excel

Action: **Show Insights**

11:00 am

Jack needs to update some financial numbers that are in a table in Excel. He uses Copilot to add some calculations and make the data easier to read.

 Copilot in Excel

Example prompt: **Add a column for YoY sales increase** and **Add a color scale to the column**

Jack  
is a Finance team  
manager



<sup>1</sup>Access M365 Copilot Chat at [m365copilot.com](https://m365copilot.com) or the Microsoft 365 Copilot Chat mobile app and set toggle to "Web".

<sup>2</sup>Access M365 Copilot Chat at [m365copilot.com](https://m365copilot.com), the Microsoft 365 Copilot Chat mobile app, or the M365 Copilot Chat app in Teams, and set toggle to "Work".

<sup>3</sup>Copilot agents allow Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.

The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.

# A day in the life of a Modern Work Revenue Finance Manager at Microsoft

Available with:

Scenario level: ● ● ●

Benefits

🕒 ~30 – 45 minutes daily

🔄 Areas of investment: Detailed analysis

★ Faster responses, better insights, and fewer errors

8:00 am

Yesterday was filled with many calls, so Brandon's email piled up. He starts his day by asking Copilot to recap yesterday, helping to remind him he owes his VP, Javier, a compete report.

 Copilot Chat<sup>2</sup>

Example prompt: **Summarize my email and Teams messages** from yesterday into a table. List the topic, a summary, and follow-ups. If I have been directly mentioned, make the font of the topic bold.

4:00 pm

As the day comes to an end, he needs to respond to Javier. Brandon asks Copilot to help draft an email summarizing the key points from his PowerPoint slide.

 Copilot in Outlook

Example prompt: **Draft an email** responding to Javier, summarizing content from [Q3CompeteInsights]. Make this email brief and in a formal tone. Add a link to the deck.

8:30 am


Brandon sets up a call with his manager, Gillian, to align on the deliverable. Brandon wants to ensure he captures everything that Gillian suggests. He asks Copilot in Teams to recap the meeting after.

 Copilot in Teams

Example prompt: **Create a meeting report** that includes an in-depth summary of everything that [Gillian] recommended. **Remind me** how she felt about my initial approach.

2:00 pm

Brandon must aggregate the insights now. He builds a summary slide compiling the work from Excel and Outlook but needs help formatting the content. He asks Copilot to help him.

 Copilot in PowerPoint

Example prompt: **Format this slide** to align to [Q2CompeteInsights]. Make sure all fonts besides the title are the same size. Bold the key summary points.

9:00 am

After the call, Brandon works in Excel to model compete insights. When building his model, he encounters a formula error, so he asks Copilot to troubleshoot and rebuild the formula as intended.

 Copilot in Excel

Example prompt: **Add a column** to the table that subtracts the Annual Run Rate (Revenue x 12) from the Max Annual Run Rate. **Title the column** "ARR Delta".

11:00 am

Now that Brandon has completed his modeling, he wants to pair the data with insights from a recent email. He asks Copilot to summarize revenue projections from Wall Street shared to him via email.

 Copilot in Outlook

Example prompt: **Summarize** the compete email and extract the most important bullet points to understand the revenue projections for each of our competitors.

Brandon is a Finance Manager at Microsoft



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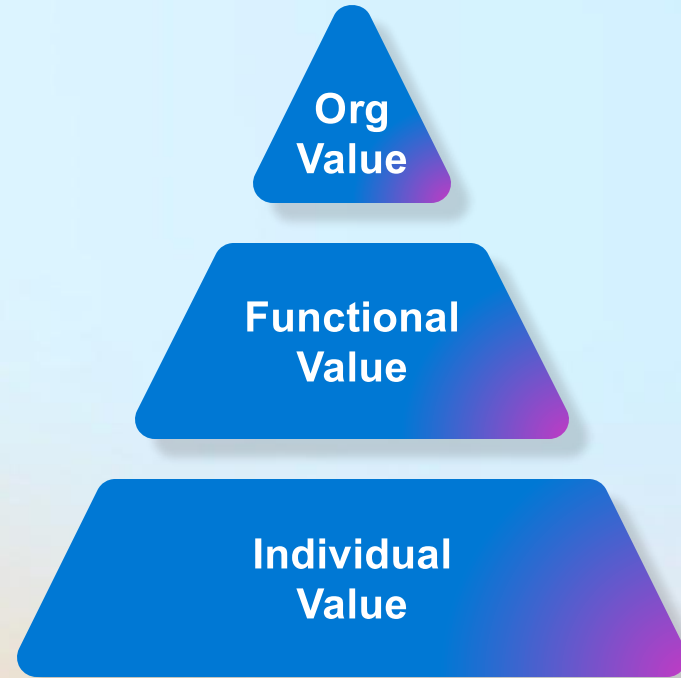
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# Copilot value journey

Grow value from a base of solid usage and individual productivity and then extend through agents to impact organizational KPIs.



Autonomous agents  
Industry scenarios

Copilot Studio  
Role-based agents  
Functional scenarios

Copilot Studio agent builder  
Day in the Life scenarios  
Prompt library

# 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.



# Preparing to embrace AI now

1



Are your leaders engaged and employees ready?

2



Do you have a culture of learning and the right skills?

3



Can you measure business value and continuously improve?

# Three essentials for Copilot success



## Leadership

Develop leadership capabilities to use AI for business outcomes

- Top-down sponsorship
- Align AI to business goals
- Provide clarity and prioritization
- **Best practice:** Form a decision-making group to coordinate AI efforts



## Business scenarios

Define business objectives, target scenarios, and measures of success

- Identify pilot users
- Communications and community
- Skilling and training
- **Best practice:** Leverage Scenario Library and use case materials



## Technical readiness

Leverage training and onboarding materials to upskill users

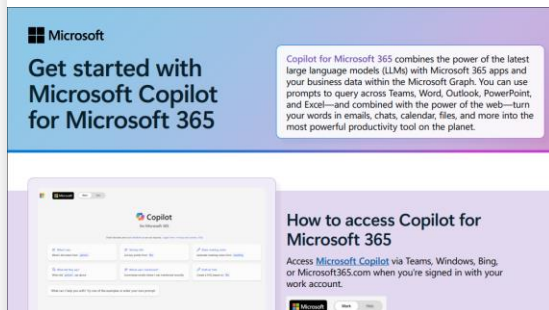
- Protect your data infrastructure
- Manage risks effectively
- Invest in technical skilling
- **Best practice:** Copilot Lab Prompt sharing, host training days

Responsible AI principles

# Copilot Success Kit

What's included

## Quick Start Guide



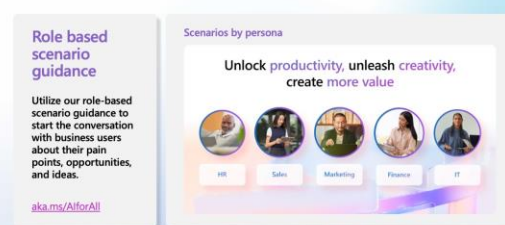
PDF

## Technical Readiness & Adoption Guide



PowerPoint

## Implementation Checklist



Excel Worksheet

## Onboarding Email Templates

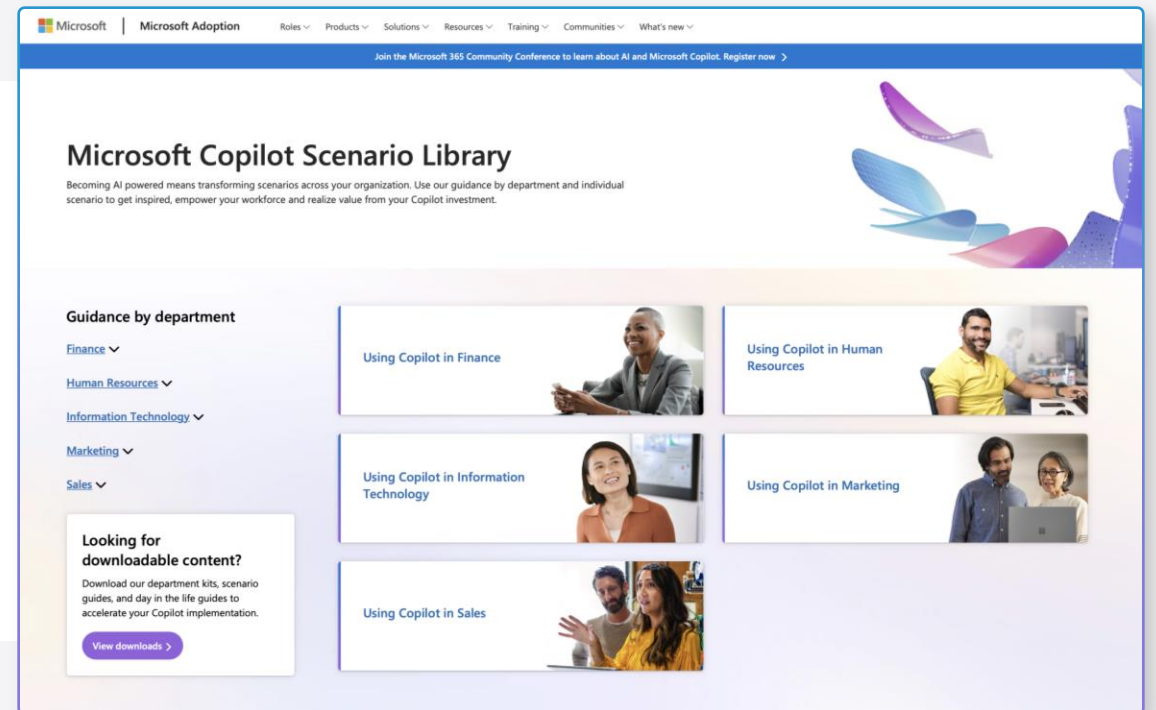


OFT files

# Copilot Scenario Library

 Copilot brings AI value across **lines of business**

Use the [Scenario Library](#) to identify top use cases and key metrics you would like to improve in that functional area.



## All roles & leaders

Improve meetings  
Content creation  
Manage daily agenda

## HR

Cost per hire  
Employee turnover  
Compliance risk reduction

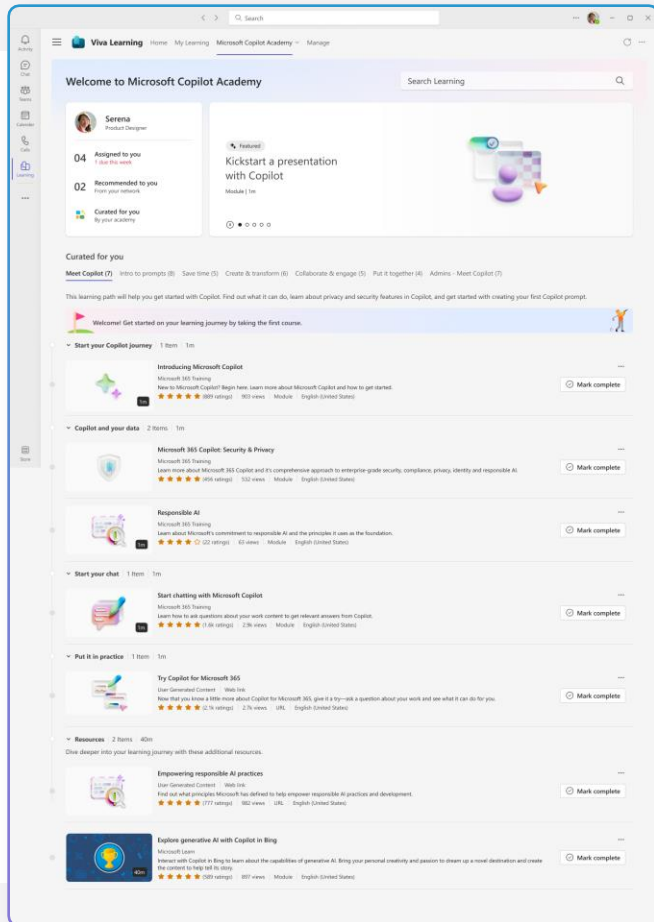
## Marketing

Leads created  
Brand value  
Cost per lead

## Sales

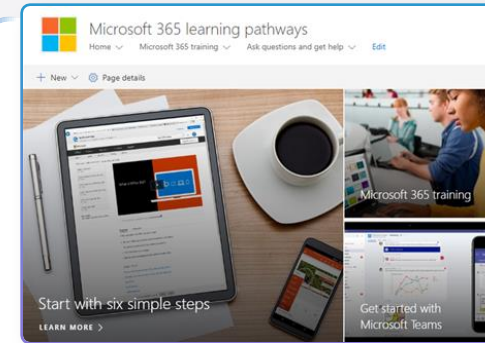
Number of opportunities  
Close rate  
Revenue per sale

# Copilot skilling experiences



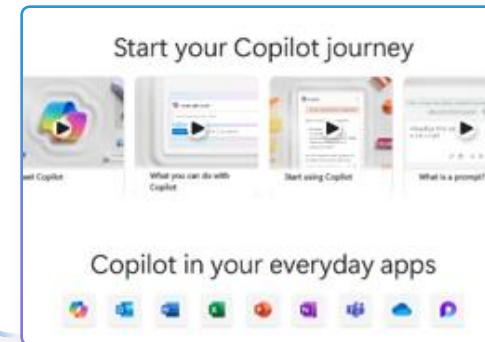
## Microsoft Copilot Academy

- Centralized location to help with the basics of Copilot learning and upskilling, pulling the best content from available free Microsoft sources
- Structured content in easily consumable learning paths curated by Microsoft experts
- Develop your AI interaction skills from your Viva Learning app in Teams or webapp



## Microsoft Learn

- Free, on-demand training content for skill development
- Step-by-step exercises guiding learners through common Copilot prompts and use cases



## Copilot Prompt Gallery

- Free location to meet, learn about, and test the capabilities of Copilot
- Improve your prompt engineering skills in an interactive hands-on environment

# Expanding Copilot to a team

Enhance individual workflow and collaboration with a team or department



Many customers start with one or two users

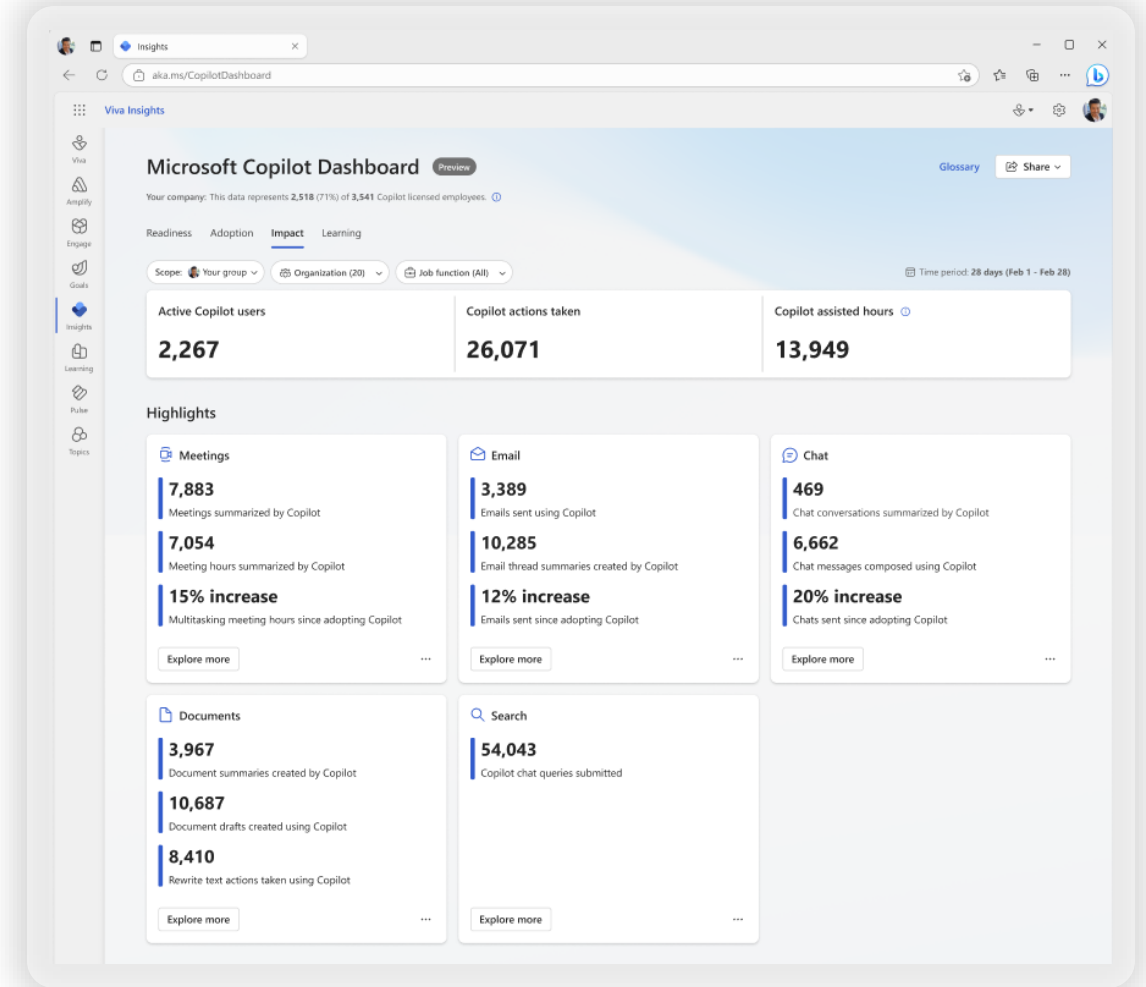


Starting with a team promotes greater collaboration

# Microsoft Copilot Dashboard

The Microsoft Copilot Dashboard helps business leaders understand and drive usage and adoption, and measure the impact of their investments

- See where Copilot is adding value and saving time
- Scope and filter results for deeper organizational views
- Capture user sentiment to gauge perceived value and benefits



# Copilot for Microsoft 365

Get started today quickly and with confidence

# 15% off

Copilot for Microsoft  
365

## Unlocks

- Get started with a team or department
- Partner as Customer Zero
- Capitalize on customer interest

## Details

- Annual Term | Annual Bill
- **Annual Term | Monthly Bill\* NEW \***
- New and existing Copilot for M365 customers with qualified [pre-req SKUs](#)
- Min 10 seat, max of 300 seats

## Recipe for success

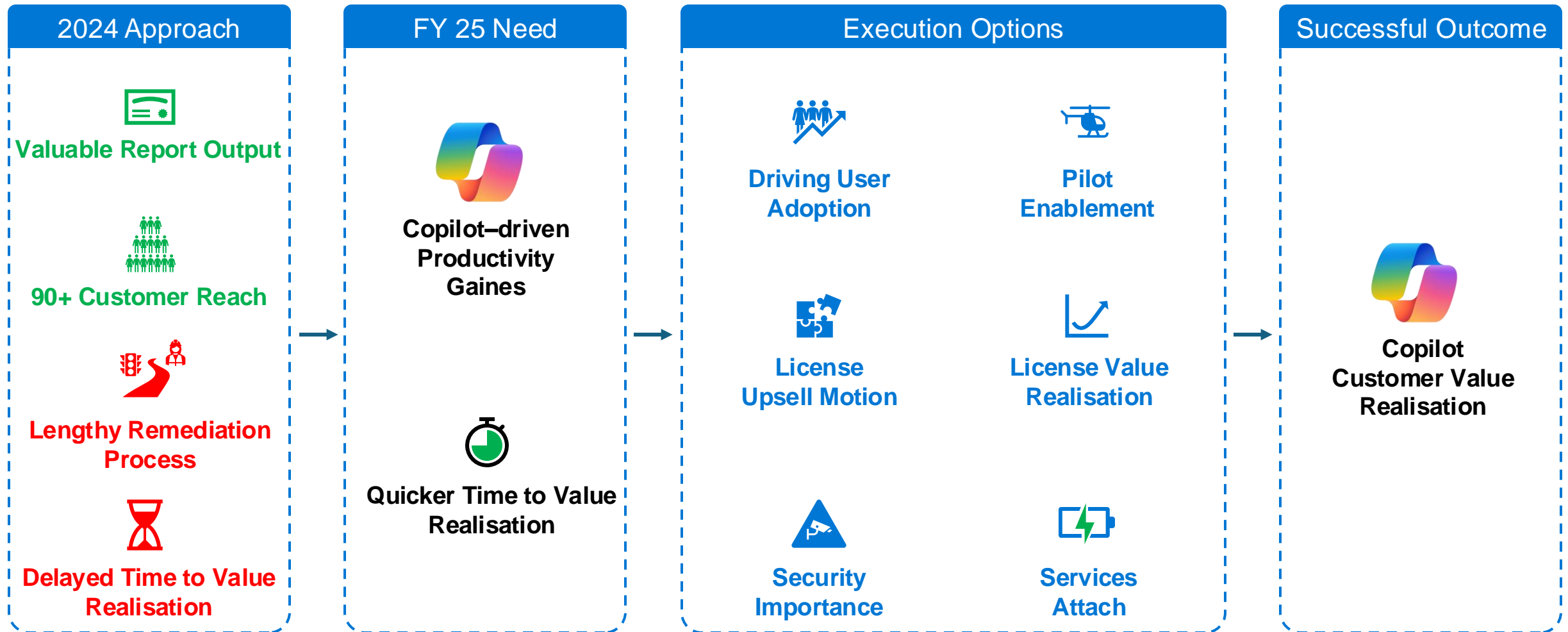
- Create a fixed-fee Getting Started offering that bundles key customer essentials needed to get started
- Identify and review data and security recommendations
- Configure settings, assign licenses, and communicate to end users
- Provide training and change management services

Available to All Markets from September 1<sup>st</sup> – April 1<sup>st</sup>, 2025



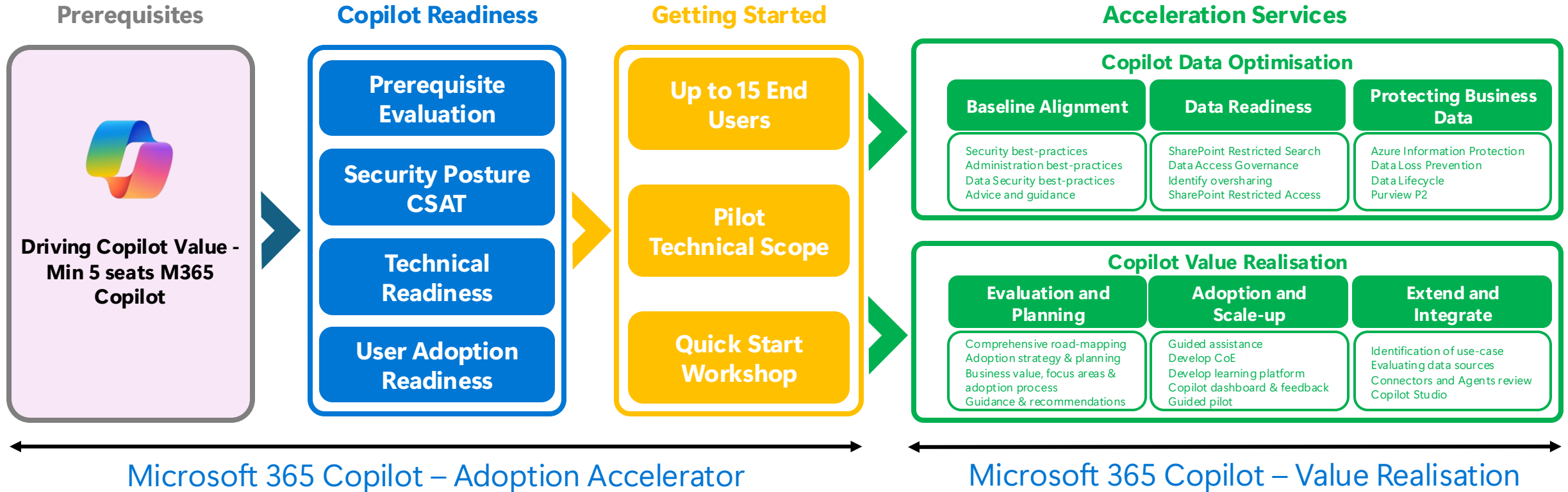
# Ingram Micro Cloud Services

## FY 2025 Copilot Services Journey



# Getting Copilot Started Offer

## Copilot Customer Adoption Accelerator Journey



# New for 2025 – Complimentary Vision & Value session



Microsoft  
365 Copilot  
Vision &  
Value  
Workshop

The Vision and Value Workshop is designed to highlight the potential value of Microsoft 365 Copilot and identify specific value opportunities in the context of your organisation.

There is no entry requirement for the Vision and Value session

The workshop will consist of three core themes covering the fundamentals of how Copilot can provide benefit and value and how to approach getting started:

- Copilot Value Proposition
- Value Discovery
- Getting Started with Copilot

# Copilot Readiness Sessions

## Prerequisite Evaluation

Working with the Microsoft Copilot Optimisation Assessment tool, this stage ensures that the baseline Copilot Prerequisites within the M365 tenant are in place for licensing and initial readiness

## Security Posture CSAT

The CSAT engagement, delivered by the Ingram Micro Cyber Security team, offers a questionnaire and agent driven assessment of the core environment providing a CIS security alignment report

## Technical Readiness Review

A technical consultant-led session to review the prerequisites and CSAT results as well as looking at the tenant configuration, providing guidance and best-practices on readiness activity for securing your tenant and data in readiness for using Copilot

## User Adoption Readiness

Adoption consultant led-sessions helping you build strategic and adoption plans for initial pilot and wider adoption of Microsoft 365 Copilot.



**Getting Started**

## Getting Started with a pilot for Copilot

**Up to 15 End Users**

**Pilot Technical Scope**

**Quick Start Workshop**

**Helping you to define the scope of the pilot group, which candidate users, department representation, develop use cases, SharePoint repositories and success metrics.**

**Deploying tools and techniques (such as SharePoint Restricted search) to limit the scope of Copilot indexing to protect sensitive data which is yet to be secured from being surfaced by Copilot**



**Acceleration Services**

# Acceleration Services – Additional services to help you drive Copilot adoption success

## Copilot Security & Data Optimisation – Technical Readiness

### Baseline Alignment

Security best-practices  
Administration best-practices  
Data Security best-practices  
Advice and guidance

### Data Readiness

SharePoint Restricted Search  
Data Access Governance  
Identify oversharing  
SharePoint Restricted Access

### Protecting Business Data

Azure Information Protection  
Data Loss Prevention  
Data Lifecycle  
Purview P2

## Copilot Value Realisation – User Adoption Readiness

### Evaluation and Planning

Comprehensive road-mapping  
Adoption strategy & planning  
Business value, focus areas &  
adoption process  
Guidance & recommendations

### Adoption and Scale-up

Guided assistance  
Develop CoE  
Develop learning platform  
Copilot dashboard & feedback  
Guided pilot

### Extend and Integrate

Identification of use-case  
Evaluating data sources  
Connectors and Agents review  
Copilot Studio

# How do you get started?

- ✓ Get copilot-ready with prerequisite licenses:
  - Microsoft 365 – Business Basic/Business Standard/Business Premium
  - Microsoft 365 – F1/F3 & E3/E5
  - Office 365 – E1/E3/E5
- ✓ Utilise the getting started offer via Lugo/Ingram Micro
- ✓ Understand file permissions & loss prevention policies
- ✓ AI Strategy: Learn how AI is creating a whole new way of working
- ✓ Adoption Strategy: Leverage Resources for Adoption for your Copilot roadmap



# Thank You





# Microsoft Copilot Demo and Prompts Masterclass



# Top 10 to "Try First"

## with Microsoft 365 Copilot

Foundational skills for new users



1

### Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

→ Draft an email with notes and action items from meeting



2

### Summarize an email thread

– get quickly caught up to a long, complex email thread.

→ Click on the Summarize icon



3

### Draft email

– personalize the tone and length.

→ Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

### Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

→ Give me a bulleted list of key points from file



5

### Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

→ Tell me what's new about topic organized by emails, chats, and files?



6

### Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

→ Suggest 10 compelling taglines based on file



7

### Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

→ Generate three ways to say [x]



8

### What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

→ What did person say about topic



9

### Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

→ Rewrite with Copilot



10

### Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

→ Translate the following text into French:

For more prompts, visit Copilot Lab at: [aka.ms/CopilotLab](https://aka.ms/CopilotLab)

**WHAT**  
*do I want?*

**WHY**  
*do I need it?*

**WHERE**  
*to look?*

**HOW**  
*do I need it?*



**Goal**

What response do you want from Copilot?



**Context**

Why do you need it and who is involved?



**Source**

Which information sources should Copilot use?



**Expectations**

How should Copilot respond to meet your expectations?

# The Art of Prompting

## The ingredients of a good prompt

Generate 3 to 5 points to prepare for a meeting with Client X to discuss their "Phase 3+" brand campaign.

Focus on Teams emails and chats since June.

Thank you for using plain language so I can prepare quickly.

### Goal

**What** response would you like to get from Copilot?

### Context

**Why** do you need it and who is affected?

### Source

**What sources** of information or examples should Copilot use?

### Expectations

**How** should Copilot respond to meet your expectations?

# The art and science of prompting



**Prompts** are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

## 1. Tell Copilot what you need

### Learn about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

### Edit text:

"Check this product launch rationale for inconsistencies."

### Transform documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

### Summarize information:

"Write a session abstract of this [presentation]."

### Create engaging content:

"Create a value proposition for [Product X]."

### Catch-up on missed items:

"Provide a summary of the updates and action items on [Project X]."

# The Art of Prompting

## Few examples

We include the art of a good prompt in the persona template to refer to during the prompting

### Goal

### Context

### Source

### Expectations

*I want a list of 3-5 points to best prepare myself...*

*... for an upcoming meeting with client X, focused on project Y*

*Based on emails and Teams chats from the last 2 weeks...*

*... and respond with detail and without using technical jargon.*

*Help me write the content of the new web page...*

*... I'm the marketing manager for product X, which is a modern drone.*

*Refer to product sheet X [\[link to document\]](#) ...*

*... and uses a captivating tone by referencing cult films*

*Give me detailed tips on how to create a successful ad campaign...*

*... acting as a marketer on the Microsoft Teams product*

*Takes into account current market trends and collaboration preferences*

*Use a professional tone. The following keywords should appear: year of the Voice, productivity, return on investment*

# Iterate and regenerate



Often the first result isn't the final or best response. If you're not satisfied with the results Copilot gave you, revise your prompt, and try again. Try the following three iterations and see how the responses can improve with each iteration.

- *Round 1:* Write about advancements in renewable energy technologies.
- *Round 2:* Write a technical article discussing recent advancements in renewable energy technologies, focusing on solar and wind energy, for an audience of engineers and environmental scientists.
- *Round 3:* Compose a detailed technical article for engineers and environmental scientists, exploring recent advancements and innovations in renewable energy technologies, with a focus on solar and wind energy. Discuss the scientific principles behind these technologies, their efficiency improvements, and real-world applications. Refer to recent research papers, patents, and industry reports for accurate and up-to-date information.

Goal

Context

Source

Expectations