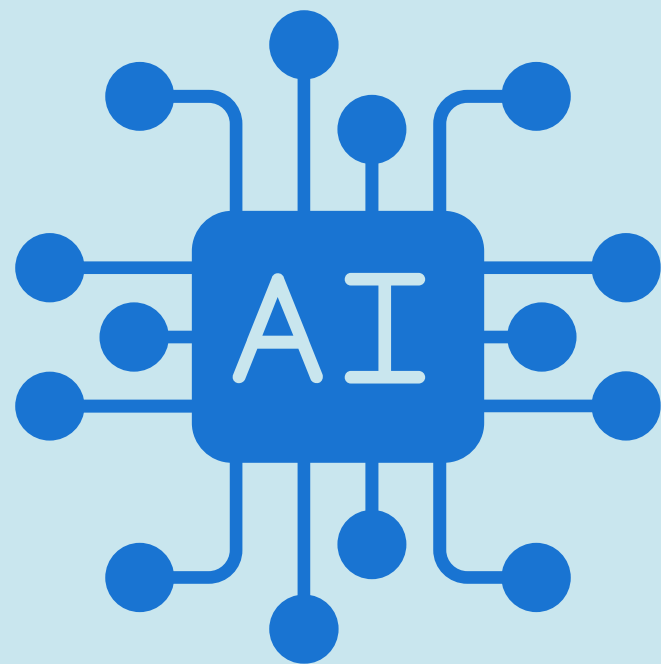
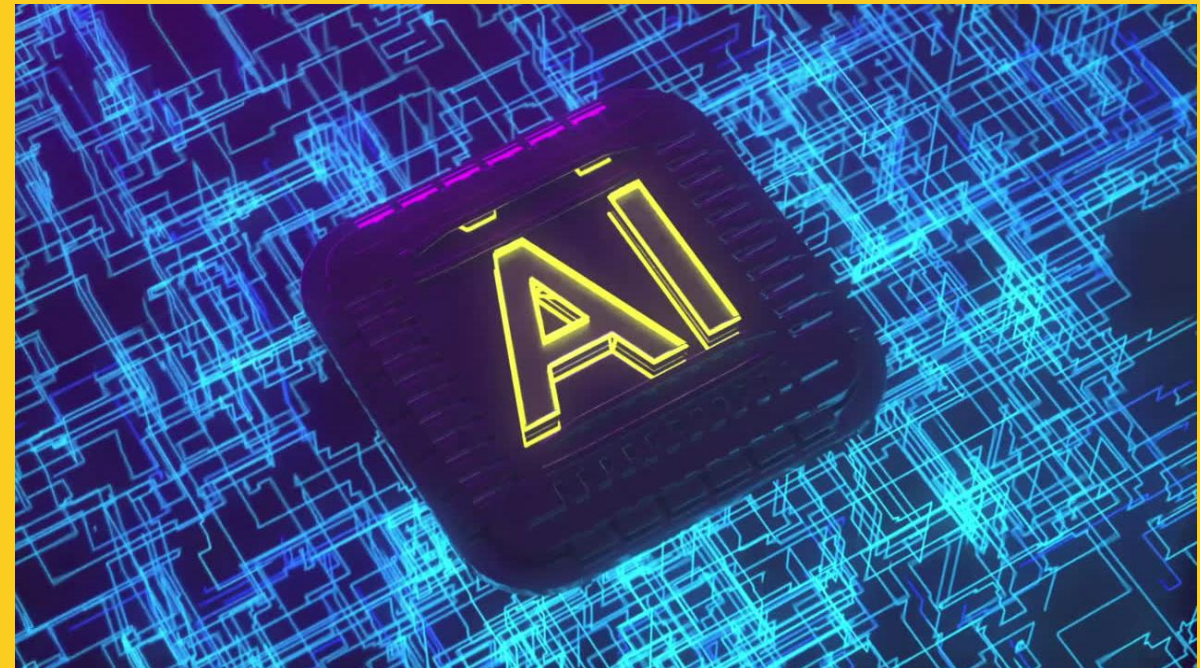




The Future of Work: AI-Driven Efficiency with Copilot

Presented by Endsight



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Jason Clause
Director of
Marketing



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Manager, Development



Stephen Hicks
Security Practice
Manager



SMBs trends using AI technologies

Gen AI in SMBs

Business value with “employee centricity”

Challenges and impacts per business area

Copilot Types, specifically Copilot for Microsoft 365

Demonstration – Solving Common Business Problems

Preparing for Copilot for Microsoft 365

If you have any questions, please put them in the Q&A panel.

Next steps

Please note we have a lot to go over. We'll try to answer your questions live, but if not, we'll make a note and follow up with you after the event.

What SMBs are saying



“

I do believe that there isn't a single job position in the company that won't benefit in some way from Copilot being available to them.”

– Alex Wood, Senior Cloud Engineer



“

I no longer need to spend time consolidating meeting notes, Copilot does it for me. I'm saving at least 10 minutes of time with each meeting.”

– Mahesh Patil, CTO of DLT Apps

Faster.
Better.
Easier.



“

I'm really impressed with how Copilot works in Outlook. I had it generate several emails for me, and it did a really great job. All I had to do was add my own details and they were ready to send.”

– Paul Birkin, Chief Operating Officer

SMBs are rapidly adopting AI to help meet core needs



Grow your customers

- Deliver value to customers
- Find creative ways to attract and grow your customer base
- Provide exceptional customer service



Build your brand

- Create a consistent and professional company image
- Have lasting impressions on customers
- Standout from competitors



Run your business

- Automate and streamline processes for efficiency
- Keep data and assets secure
- Focus on serving customers and growing your business



Scale Securely

- Focus on top and bottom-line growth
- Invest in end-to-end security tools

Latest **trends** specifically focusing on how artificial intelligence (AI) is shaping the landscape for small and medium-sized businesses (SMBs)

The world
is
changing



1. Strategic Planning:

AI analyzes vast data, revealing hidden patterns and correlations. These insights inform strategic decisions by understanding market dynamics, customer behavior, and competition¹



2. Customer Centricity:

AI streamlines Sales & Marketing, automating processes, personalizing communication, and predicting customer needs. SMBs benefit by managing leads, tracking interactions, and enhancing overall satisfaction.



3. Effective Financial Management:

Aggregate, analyze, and make actionable insights from financial data. This capability supports critical functions such as planning, budgeting, and forecasting, enabling organizations to assess their financial health and make strategic decisions effectively.



4. Cybersecurity:

AI helps detect and prevent cyber threats by analyzing network traffic, identifying anomalies, and predicting potential security breaches. Solutions like Intrusion Detection Systems enhance overall security posture².



5. Productivity Boost:

AI-driven automation streamlines repetitive tasks, allowing employees to focus on higher-value activities. SMBs can automate data entry, document processing, and routine administrative tasks, saving time and resources.



6. Advanced Analytics and Business Intelligence:

SMBs are increasingly adopting advanced analytics tools, including BI and AI-powered applications. BI enables data-driven decision-making by providing insights into sales, customer behavior, and market trends.

Source(s)

1. [Empowering SMBs With Essential AI Technologies – Forbes.](#)
2. [AI is helping the digital transformation of SMBs – Kaspersky.](#)
3. [The Future of AI: What Impact Will It Have on SMBs.](#)
4. [Unlocking SMB Potential: How Generative AI Could Be The Answer – Forbes.](#)

Most impacted business areas by Copilot for Microsoft 365

According to McKinsey, generative AI has the potential to impact productivity and contribute between 1.7-2.9% of a company's total revenue, mainly across:

1. Sales & Marketing

2. Finance

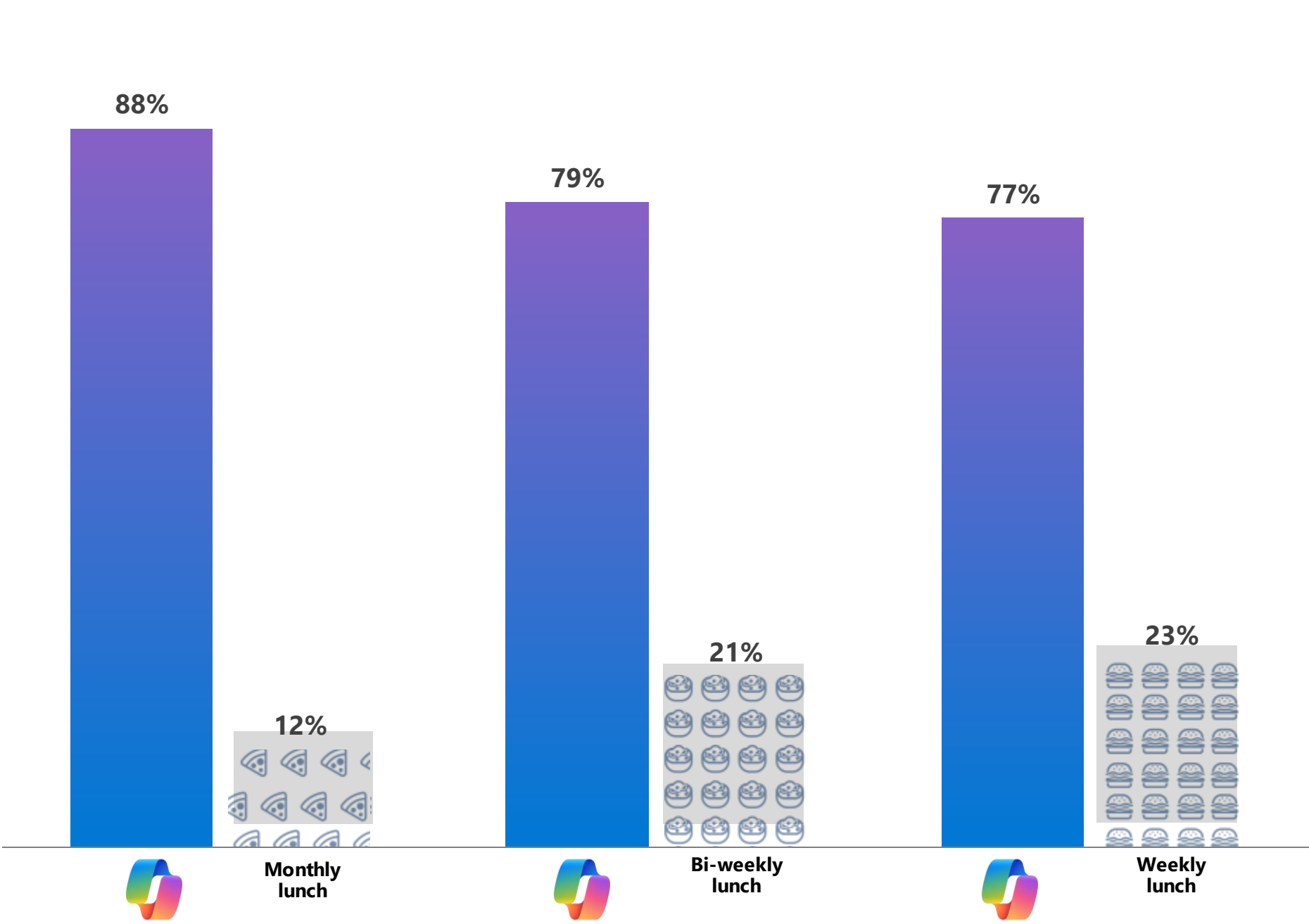
3. Human Resources

4. Customer Service

Source: [McKinsey The Economic Potential of Generative AI](#)

Is Copilot worth more than a free lunch?

If offered the choice, users overwhelmingly said they would pick Copilot



Early findings on the promise of Generative AI transforming 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 completing tasks**.
- 12.5%** increase in the **number of subtasks completed**.
- 40%+** increase in the **quality of responses to subtasks**.



Michelle Brezenski
Manager, Development

- **+20 Years of IT experience**
- **16 years at Endsight**
- **Lead development efforts at Endsight for a decade**
- **Microsoft Office, Power Platform, Database Management, CoPilot**

Preparing for the era of AI



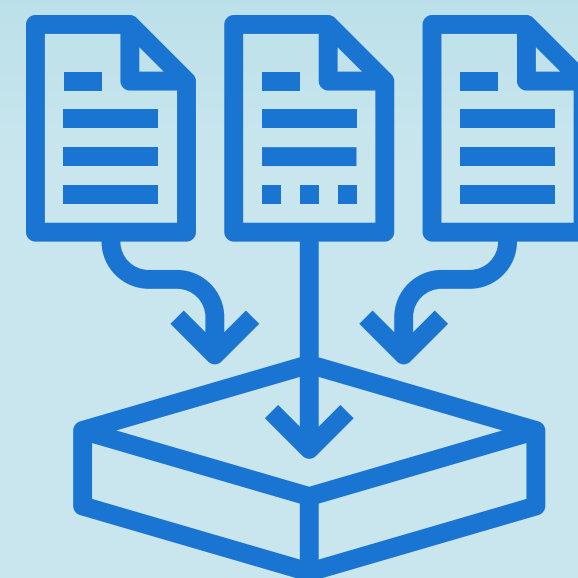
What are your organization's **goals** for using AI?



What are your organization's **pain points** that AI can address?



What are your organization's **current capabilities** in terms of AI?



Does your organization have a **data strategy** in place?



Does your organization have the necessary **infrastructure and resources** to support AI initiatives?

The AI-
powered
organization



1

Foundational
productivity



2

Copilot for
Microsoft 365



The AI-
powered
organization



1

Foundational
productivity



2

Copilot for
Microsoft 365



Foundational
productivity



Get AI-ready checklist

Standardize onto Microsoft 365

Enrich your Copilot for Microsoft 365 experience by getting your data into the Microsoft 365 Cloud.

Organize sensitive business data

Protect internal data from accidental leakage. Ensure users have the right access to the right internal content.

Empower employees with secure, AI-powered tools

Introduce employees to secure generative AI with Microsoft Copilot with commercial data protection to prepare them for the future workplace.

The AI-
powered
organization



1

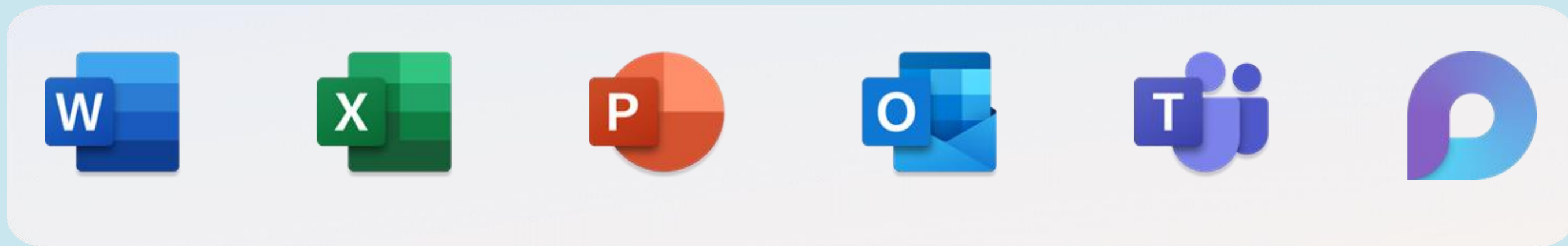
Foundational
productivity



2

Copilot for
Microsoft 365

Copilot for Microsoft 365



Embedded across Microsoft 365
apps

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Copilot in Outlook

The screenshot displays the Outlook interface for a meeting recap. At the top, the Outlook logo and a search bar are visible. The meeting title is "Marketing Sync - meganb@contoso.com" with an event titled "Meeting recap". The specific meeting is "Profitable Projects Pitch & Plan" held on Wednesday 9/8/2023, from 11:00 AM to 12:00 PM. A video conference grid shows six participants. On the right side, the "Content" section includes a "Product Roadmap..." document. Below it, there are "Notes" and "AI notes" buttons. A warning message states "AI-generated content may be incorrect". The "Meeting notes" section contains two entries: one mentioning Daniela's feedback on before-and-after images and Sereni's suggestion, and another mentioning Babak's suggestion for home improvement. At the bottom, there are buttons for "Speakers", "Topics", and "Chapters", and a profile for "Serena Davis".

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Copilot in Teams Meetings

The screenshot displays a Microsoft Teams meeting interface for a meeting titled "Core accounts business review". The interface includes a search bar at the top right, a navigation pane on the left with icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps, and a meeting header with tabs for Chat, Details, Files, and Recap. The meeting date and time are "Mar 16, 10:00 AM", and there is an "Open in Stream" button. The "Shared content" section shows 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". The "Speakers" and "Topics" sections are visible, with "Topics" currently selected. A horizontal bar below the topics section shows a color-coded bar with a legend: a yellow dot for "Proseware negotiation strategy" and a red dot for "Core accounts round table". On the right side, there are buttons for "Notes", "@ Mentions", and "Transcript". The "Notes" section is active, showing a note from "Core accounts.loop" titled "Quarterly results and forecasts for Core Accour" with a "Summary" section. The summary includes a transcription icon and a list of bullet points: "\$230K revenue shortfall in this quarter", "Inventory 15% surplus (renewable products and recycled n)", "Account leads to propose discounting scenarios to lower i", and "Proseware was discussed as a leading opportunity". Below the summary is a "Notes" section with a list of notes, including one that says "Beth emphasized importance of Proseware negotiation st with offers - this is a must win deal." and another that says "The team identified a new opportunity with Proseware thi".

Intelligent recap in Copilot

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only

The screenshot displays the Microsoft Teams interface for a meeting titled "Product roadmap discussion". The "Intelligent recap" panel is active, showing a video player for the meeting recording, a list of speakers (Mona Kane, Babak Shammass, Daniela Mandera, Amanda Brady, Bruno Zhao), and AI-generated meeting notes. The notes include: "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.", and "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." Below the notes are follow-up tasks: "Danielle will follow up on feature enhancement prioritization" and "Jon Shammass will double check with Amanda regarding the ETA for the new...". The "Copilot in Teams" panel is also visible, showing a prompt to "Create a table with pros and cons of option 1" and a table with the following content:

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

The Copilot panel also includes a "Copy" button, a "References" dropdown, and a "Copy all" button for the notes. A "Generated by AI. Be sure to check for accuracy." warning is present. At the bottom of the Copilot panel, there are buttons for "Elaborate on each pro and con.", "List more options.", and a text input field "Ask a question about this meeting".

On-demand

Based on unique prompts

Conversational interaction, with citations

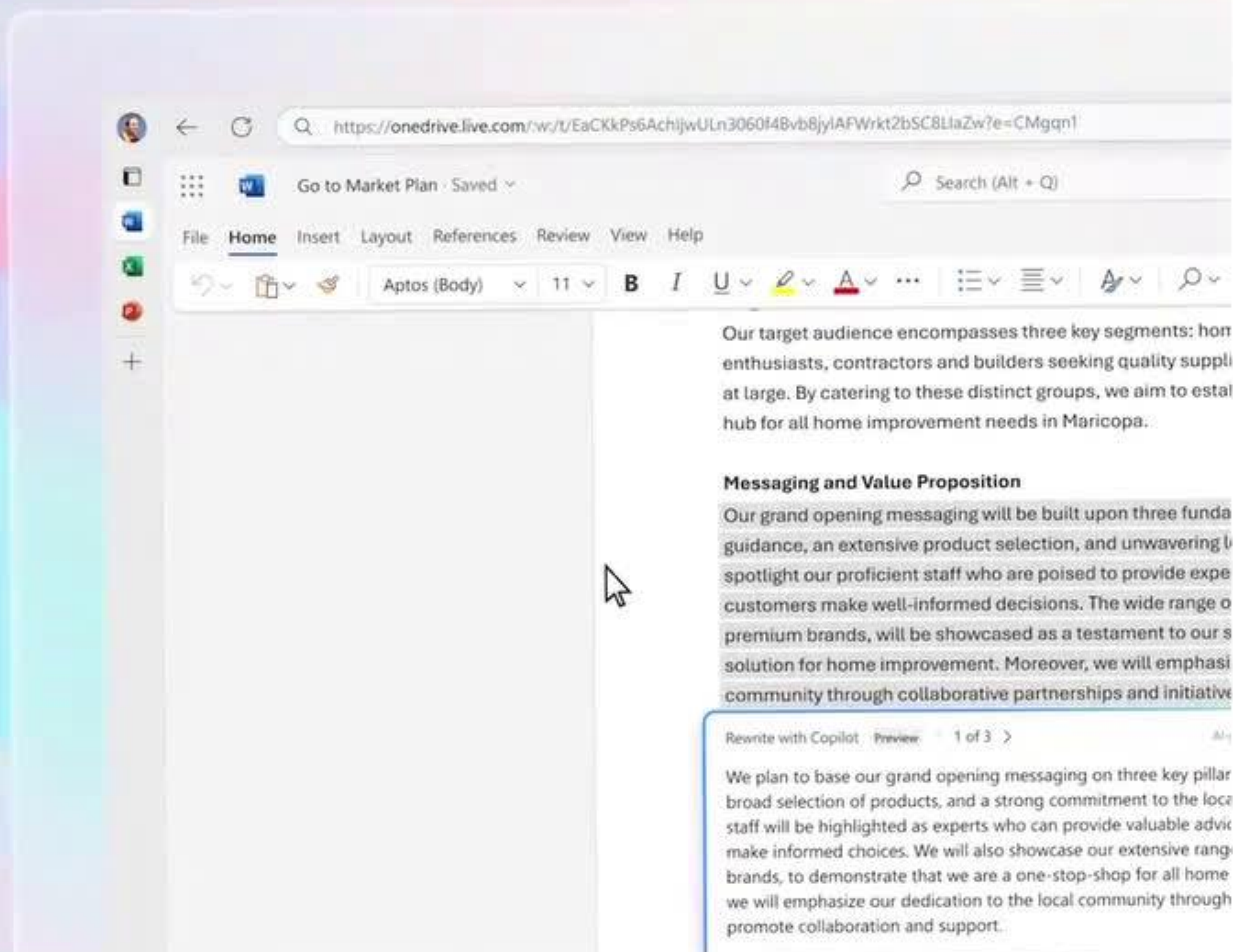
Available real-time (during & after meeting)

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

*Intelligent recap is also available in Teams Premium

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Copilot in Word



The screenshot shows a Microsoft Word document in a browser window. The address bar shows a URL from onedrive.live.com. The document title is "Go to Market Plan - Saved". The ribbon is set to "Home" with the font set to "Aptos (Body)" and size "11". The document content includes a paragraph about target audience segments and a section titled "Messaging and Value Proposition". A Copilot suggestion box is visible at the bottom right, offering a "Rewrite with Copilot" option. The suggestion shows a preview of the rewritten text.

https://onedrive.live.com/w:/t/EaCKkPs6AchijwULn3060f4Bvb8jylAFWwrt2bSCBLlaZw?e=CMgqn1

Go to Market Plan - Saved

File Home Insert Layout References Review View Help

Aptos (Body) 11 B I U

Our target audience encompasses three key segments: home enthusiasts, contractors and builders seeking quality suppliers at large. By catering to these distinct groups, we aim to establish a hub for all home improvement needs in Maricopa.

Messaging and Value Proposition

Our grand opening messaging will be built upon three fundamental pillars: a broad selection of products, and a strong commitment to the local staff will be highlighted as experts who can provide valuable advice to help customers make informed choices. We will also showcase our extensive range of premium brands, to demonstrate that we are a one-stop-shop for all home improvement needs. Moreover, we will emphasize our dedication to the local community through collaborative partnerships and initiatives.

Rewrite with Copilot Preview 1 of 3

We plan to base our grand opening messaging on three key pillars: a broad selection of products, and a strong commitment to the local staff will be highlighted as experts who can provide valuable advice to help customers make informed choices. We will also showcase our extensive range of premium brands, to demonstrate that we are a one-stop-shop for all home improvement needs. Moreover, we will emphasize our dedication to the local community through collaborative partnerships and initiatives.

	A	B	C	D	E	F	G	H	I	J	K
1	Country	Customer	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS
2	France	VanArsdel	Biodegradable Cleaning Products	Low	4345	\$10	\$352	\$1,529,440	\$15,294	\$1,514,146	\$
3	USA	VanArsdel	Biodegradable Cleaning Products	Low	4245	\$10	\$352	\$1,494,240	\$14,942	\$1,479,298	\$
4	Australia	VanArsdel	Biodegradable Cleaning Products	None	4124	\$10	\$352	\$1,451,648	\$0	\$1,451,648	\$
5	Mexico	VanArsdel	Biodegradable Cleaning Products	Medium	3954	\$10	\$352	\$1,391,808	\$83,508	\$1,308,300	\$
6	France	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	4952	\$10	\$127	\$628,904	\$6,289	\$622,615	\$
7	France	Contoso Pharmaceuticals	Recycled Can	Low	4903	\$5	\$127	\$622,681	\$6,227	\$616,454	\$
8	Canada	Proseware	Natural Personal Care Products	Low	1954	\$270	\$302	\$590,108	\$5,901	\$584,207	\$5
9	Canada	Proseware	Biodegradable Cleaning Products	High	1990	\$220	\$302	\$600,980	\$84,137	\$516,843	\$4
10	USA	VanArsdel	Compostable Food Packaging	Low	1254	\$3	\$380	\$476,520	\$4,765	\$471,755	\$
11	USA	Proseware	Natural Personal Care Products	Medium	1465	\$224	\$302	\$442,430	\$26,546	\$415,884	\$3
12	USA	Proseware	Sustainable Snack Packaging	Medium	1410	\$120	\$302	\$425,820	\$25,549	\$400,271	\$1
13	Australia	Proseware	Natural Personal Care Products	Medium	1369	\$224	\$302	\$413,438	\$24,806	\$388,632	\$3
14	USA	VanArsdel	Compostable Food Packaging	Medium	1052	\$3	\$380	\$399,760	\$23,986	\$375,774	\$
15	Canada	VanArsdel	Compostable Food Packaging	Low	980	\$312	\$380	\$372,400	\$3,724	\$368,676	\$3
16	Australia	Proseware	Sustainable Snack Packaging	Medium	1298	\$120	\$302	\$391,996	\$23,520	\$368,476	\$1
17	Australia	VanArsdel	Compostable Food Packaging	None	954	\$3	\$380	\$362,520	\$0	\$362,520	\$
18	Canada	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	2785	\$110	\$127	\$353,695	\$3,537	\$350,158	\$3

Introducing



Copilot Studio

Connect to data

Create and orchestrate
sophisticated logic

IT manageability
& control

MICROSOFT 365

Copilot Lab

More prompts to try

Work Personal

Apps

Categories

What's new?

What's the latest from , organized by emails, messages, and files?



Get key info

List key points from



Summarize

Provide a detailed summary of my recent emails.



Draft an FAQ

Create an FAQ based on



Where was I mentioned?

Summarize emails where I was mentioned recently. Make it detailed, highlighting the sender and categorizing by topic of the email.



Describe concisely

Summarize level overview of [topic]



Write an intro

Prepare for a meeting

How to

1

When you sign in with your Entra ID, the **web toggle**, at the top left, gives you all the goodness of GPT-4 plus **web** grounding plus **Commercial Data Protection** – meaning your user and business data are protected and will not leak outside the organization.

2

Then, when you switch to the **work toggle**, you get **graph** grounding plus **Enterprise-grade Data Protection**- which means that all of your data stays inside the tenant boundary.

Consider these prompts that highlight what is now possible:

- "Can you summarize the last five emails from my boss. To be specific, look for the last five emails from him over the last few days and stack rank them in order of most important to least important, based on your analysis of the contents."
- "Review my meetings this week and create 5-7 categories that describe how I am spending my time. For each category, provide a short description and give me an approximate percentage of time I spent there."
- "Take the [Analysis for FY23] doc that XX sent me last week and the transcript of the meeting we had on that topic this afternoon and give me a set of 5 recommendations for what you think we should do next."

3

In the apps – start with **Teams** and **Outlook**:
If you learn how and when to use Copilot in your daily apps, you'll never want to work without it.

4

Finally, check out **Copilot Studio**:
In three minutes, you can create a custom copilot grounded in your data. There's nothing like it in the market today.

How everything comes together

As you begin your journey with Copilot for Microsoft 365, the best place to start is in the **Copilot mobile app** or **copilot.microsoft.com**



**Microsoft
365 Copilot
Security and
Privacy**



Stephen Hicks
Manager, Security

- Security Practice Manager @ Endsight
- +20 Years of IT experience
- Over a decade in cybersecurity
- Over a dozen technical certifications (CISSP, CISM, and more!)

MICROSOFT 365

Copilot with Data security

Contoso Purchase Agreement for Releasecloud Nov 23.docx Highly Confidential • Saved

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard Font Paragraph Styles Editing Voice

RESTRICTED ACCESS: Access is currently restricted. Only specified users can access this content. Change Permissions.

Purchase Agreement

This purchase agreement ("Agreement") is made as of the date of signature by and between Contoso Electronics, a company incorporated under the laws of California, with its principal place of business at 123 Main Street, Los Angeles, CA 90001 ("Seller"), and the undersigned buyer ("Buyer").

1. Product and Price

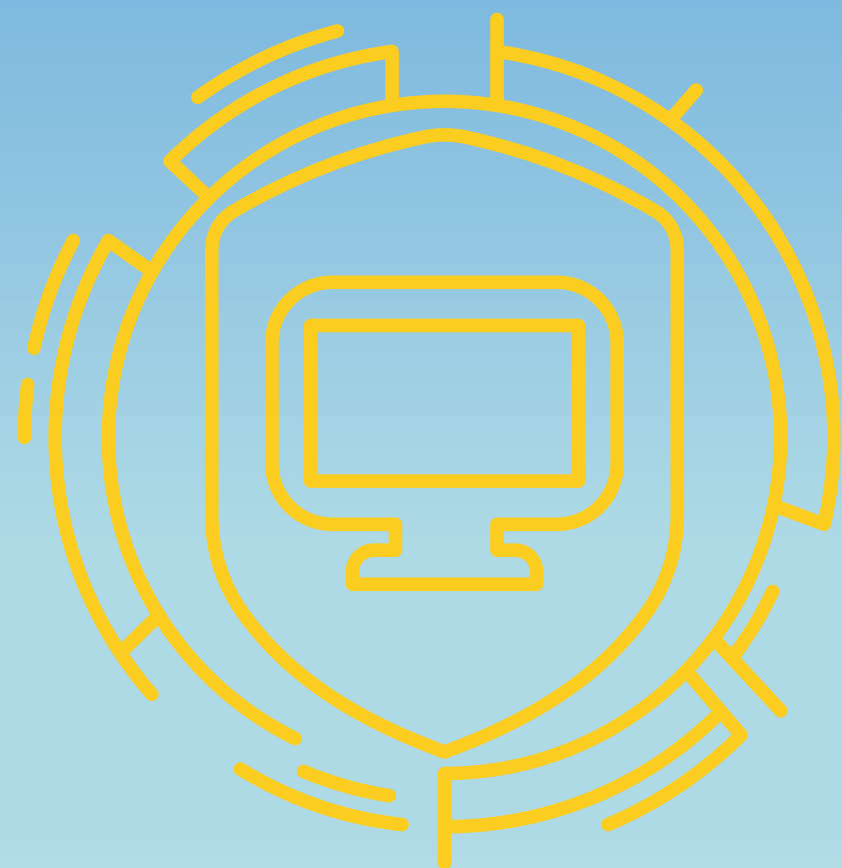
Seller agrees to sell and Buyer agrees to buy 1500 Mark IV quadcopters ("Product") at a price of \$120 per quadcopter, for a total of \$180,000 ("Purchase Price"), subject to the terms and conditions of this Agreement.

2. Delivery

Seller will deliver the Product to Buyer's designated address, as indicated below, no later than November 15, 2023 ("Delivery Date"). Seller will bear the risk of loss or damage to the Product until delivery to Buyer. Buyer will inspect the Product upon delivery and notify Seller of any defects or non-conformities within 10 days of delivery. If Buyer fails to notify Seller within such period, Buyer will be deemed to have accepted the Product as delivered.

3. Payment

Security and Compliance controls for Copilot for Microsoft 365



Essential security Controls

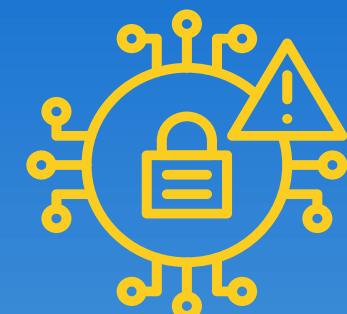
Copilot +
M365 Business Standard

- Multi-factor Authentication either manually or with security defaults
- Device-based access & security controls for M365 resources
- Basic content and keyword search for Copilot generated data

Comprehensive security controls

Copilot +
Microsoft 365 Business Premium

- Everything in M365 Business Standard, plus:
- Conditional Access policies based on identity, device, location, & network
- Terms of use policies to accept before getting access
- Restrict saving business data and files to approved applications only
- Protect sensitive M365 data from exfiltration and improper use (files & emails only)
- eDiscovery, litigation hold and retention policies



Security and Compliance controls for Copilot for Microsoft 365



Baseline security

Copilot +
Office 365 E3

- **Multi-factor Authentication** either manually or with security defaults
- **Manual sensitivity labels** for Copilot generated content (Office only)

Core security controls

Copilot +
Microsoft 365 E3

- **Conditional Access** policies based on identity, device, location, & network
- **Manual sensitivity labels** for non-Microsoft documents (e.g., pdf)
- **Endpoint management** capabilities

Best-In-Class security controls

Copilot +
Microsoft 365 E5

- **User/session risk** and access control
- **Automatic sensitivity labels** for non-Microsoft documents (e.g., pdf)
- **Discover and evaluate** the risk of 400+ AI apps & implement controls to for their use at work

Microsoft's AI principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

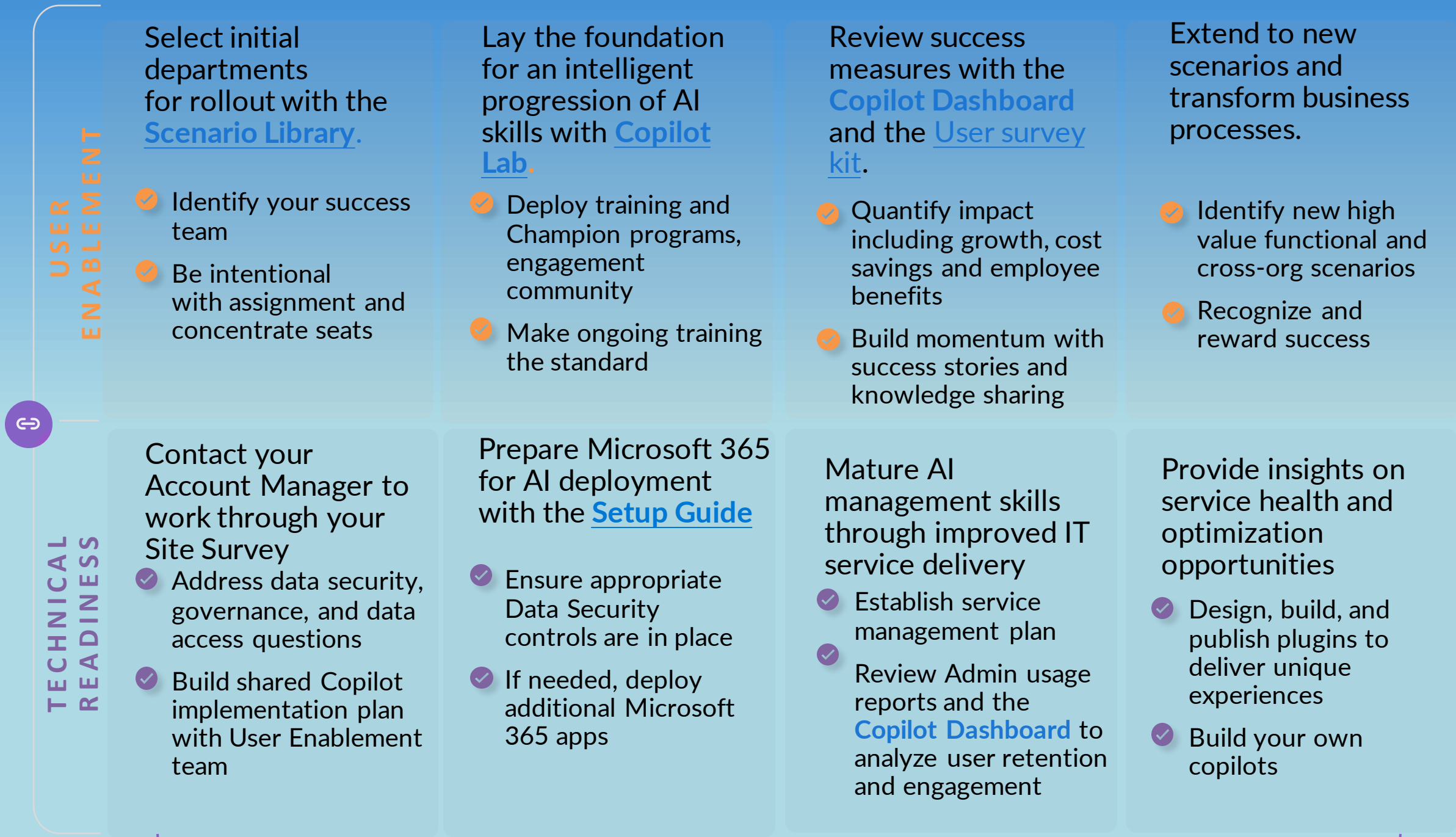
Microsoft Cloud — AI you can trust

Your data is **your** data.

Your data is **not** used to train the OpenAI foundation models without permission.

Your data is **protected** by the most comprehensive enterprise compliance and security controls.

What's next



Endsight is here to help accelerate your Copilot journey with expert-led services

Do you want to get 10 FREE licenses for your organization?

What's
next

Attend an
Introduction to
Co-pilot webinar
(you are about to
complete this
step)

Fill out an
interest form
(included in
follow up email)

Attend a scheduled
1:1 training session
with Synnex and
Endsight (details to
follow interest form
submission)

Complete by June
28, 2024

Quantities are limited

1 Offer redemption per client

Client must meet qualifications:

- Available to Commercial/SMB, Education and Nonprofit end customers - Must have 10 eligible NCE(New Commerce Experience) base licenses to attach Copilot for M365, purchased through TD SYNnex
- Eligible SKUs
 - Microsoft 365 Business Basic/Standard/Premium
 - Microsoft 365 E3/E5, F1/F3, A3*/A5*
 - Office 365 E1/E3/E5, F3, A3*/A5*

Upcoming Sessions

- July 18th - Prompt training
- October 17th – Wineries

- All will be recorded, so if you can't make it, you'll receive a recording!
- You can sign up for our next session in advance! In our final poll, just select YES to preregister
 - You can also email Aaron Kreps, akreps@endsight.net to pre-register

Strategy Sessions

- What to do right now?

Useful Links

1

Scenario Library

<https://aka.ms/Copilot/ScenarioLibrary>

2

CoPilot Lab

<https://aka.ms/CopilotLab>

3

Setup Guide

<https://setup.microsoft.com/copilot/setup-guide>

4

Success Kit

<https://adoption.microsoft.com/en-us/copilot/success-kit/>

Thank you!



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