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Microsoft 365 Copilot Readiness Planning and Roadmap

Peter Carson
MVP



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The logo for appficiency, featuring a blue square icon with a white geometric shape, followed by the text 'appficiency' in blue.

appficiency

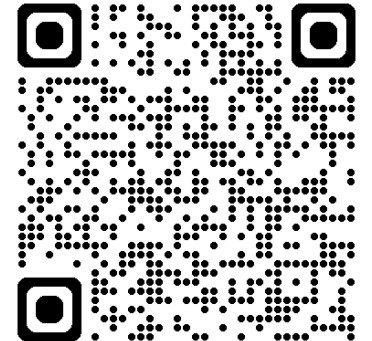
twoads
WERBUNG



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- [linkedin.com/in/petercarson](https://www.linkedin.com/in/petercarson)
- President Toronto M365 User Group



Agenda

Introductions

Microsoft 365 Copilot at Ignite

Readiness Roadmap

Summary, Q&A and Closing

3 Key Takeaways

1

AI Is Coming – Either Under Your Control or Not

2

Data Needs to Be Prepared Before You Turn on Copilot

3

Start with Tenant Reporting and Analysis

Microsoft 365 Copilot at Ignite

Tuesday, Nov 19

Microsoft 365 Copilot Advantages: How does it compare with other AI solutions
(Decision-maker)

Speakers: Seth Patton, Rob Howard

Time: 2:45 – 3:30 PM CST

Where's the ROI? We've got you.
(Technical)

Speaker: Matthew Duncan

Date & Time: 3:45 – 4:00 PM CST

Explore technical details and applications of Microsoft 365 Copilot Business Chat and Copilot Pages
(Technical)

Speakers: Ned Friend, Maya Rodrig

Time: 4:00 – 4:45 PM CST

Explore top Copilot functional and industry use cases, prompts, and tools
(IT/Pro TDM)

Speakers: Alyson Ginesta, Cynthia Johnson

Time: 4:30 – 5:00 PM CST

Wednesday, Nov 20

How M365 Copilot Works
(Decision-maker)

Speaker: Ned Friend

Time: 11:15 – 11:45 AM CST

Ground Microsoft 365 Copilot in your business knowledge
(Decision-maker)

Speakers: Jenn Cockrell, Mike Bassani

Time: 1:15 – 2:00 PM CST

How to drive user engagement and business value with Microsoft 365 Copilot
(Decision-maker)

Speakers: Cynthia Johnson, Alyson Ginesta

Time: 5:00 PM – 5:45 PM CST

Thursday, Nov 21

Follow the prompt! Tracking and managing Copilot prompts at hyperscale
(Technical)

Speakers: Ben Summers, Erica Toelle

Time: 9:45 – 10:30 AM CST

Discover a new way of working with M365 Copilot + Pages at the center
(Decision-maker)

Speaker: Manon Knoertzer

Time: 1:30 – 2:00 PM CST

Friday, Nov 22

The spectrum of agents with Copilot Studio
(Decision-maker)

Speakers: Jack Rowbotham

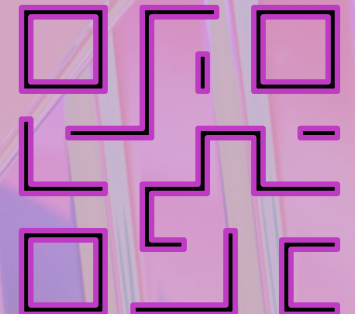
Time: 9:00 – 9:45 AM CST

Prepare your data for Microsoft Copilot with new tools
(Technical)

Speakers: Alex Pozin, Erica Toelle, Dave Minasyan

Time: 9:00 AM – 9:45 AM CST

Optional QR Code



Is Deploying Copilot like opening Pandora's Box?

- Copilot for Microsoft 365 has great potential
- It combines large language models (LLMs) with your organization's data making it one of the most powerful productivity tools on the planet
- But with great power comes great responsibility, especially when it comes to keeping your data safe





Search



Work

Web



Copilot

To get started, try one of the suggested prompts, type your own, or just select the content you want to work with.

All

People

Files

Meetings

Emails

Prompts



Help me learn about
topic

Draft email notes for
meeting

Help me improve my
writing based on **file**

View prompts

Are there any ORG changes happening next month?

Add content



Home

Copilot

Create

OneDrive

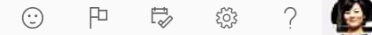
Feed

Pages

Apps



Search



Work Web



11:10 AM

Are there any ORG changes happening next month

Yes, there are some organizational changes happening next month. Here are a few updates:

- 1. BWS Organizational Update:** Kristin Patterson has joined the BWS leadership team to lead the Customer Voice & Health Team. Kadji Bell will transition manager responsibilities to Kristen and take on a critical IC role focused on the execution of the center of excellence, change management, and scaling processes. This change will be effective from August 26 ¹.
- 2. Changes to the BWS Design team:** Mona Kane, Ray Tanaka, and Sarah Evans will move to Sarah Perez's team. Mona will report directly to Sarah, and Ray and Sarah will report to Robyn. Sara Kiani will remain in BWGD and will report to Robin Counts' team. This change is effective immediately ².
- 3. Confidential Q2 CY24 ReOrg:** There are org changes coming up on September 4th based on this report ³ ⁴.

1 BWS Org Update 2 Changes to the BWS D... 3 Confidential Q2 CY... +1

Copy

Share

1 of 20 responses AI-generated content may be incorrect

View prompts

Are there any ORG changes happening next month?

Add content



How Copilot gets access to content

Copilot retrieves only the information you have access to

The process is called “retrieval augmented generation”

1

You submit a prompt

2

Orchestrator determines what it needs to answer the prompt

3

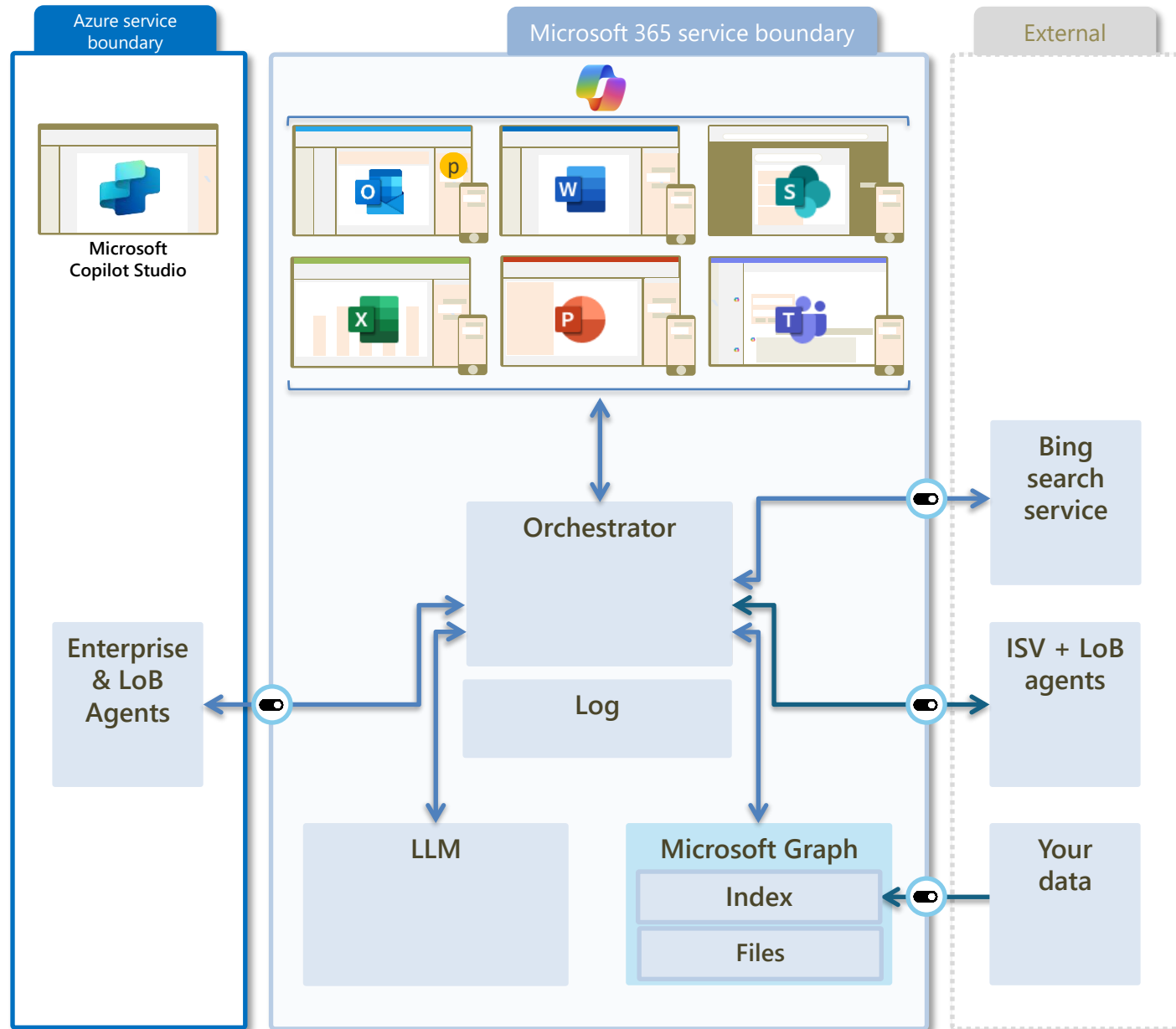
Orchestrator uses Graph to find relevant info you **are allowed to access**

4

Orchestrator appends info to your prompt to enhance it

5

LLM uses additional that information to generate a response



Internal oversharing: Too much access and too few controls

1

Over-permissioning
too much internal access

Bias towards overly broad access
for permissions and links

2

Under-enforcement
too few internal controls

Content looks the same without
labeling and content-aware policies
to follow its use

Implications

Risk of exposure in search and AI tools

Hard to get started with AI and solve without the right tools

Oversharing is a byproduct of collaboration

Individual user permissions



Exchange mailbox



Teams chats



OneDrive for Business

Group based permissions



Teams channels

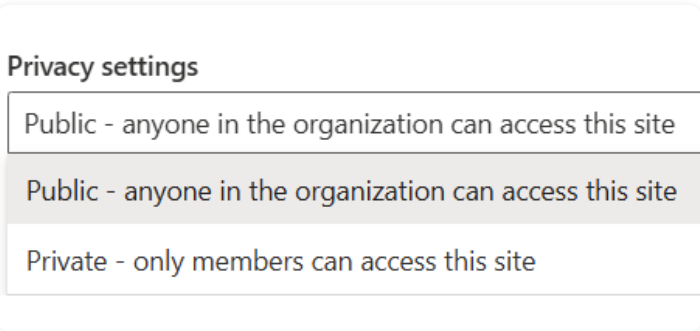


SharePoint sites

Option to share more broadly via link

Highest risk of oversharing in Microsoft 365 Copilot

Common causes of Copilot oversharing in SharePoint



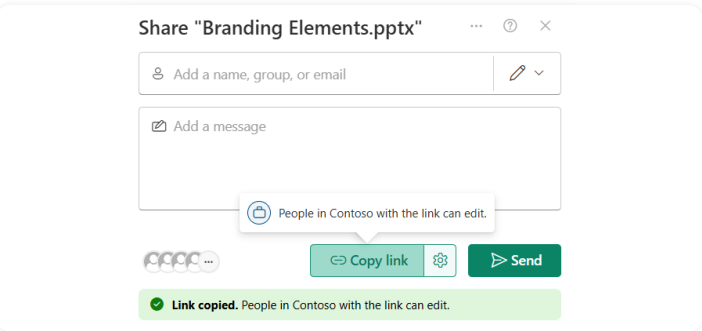
Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public



Share "Branding Elements.pptx"

Add a name, group, or email

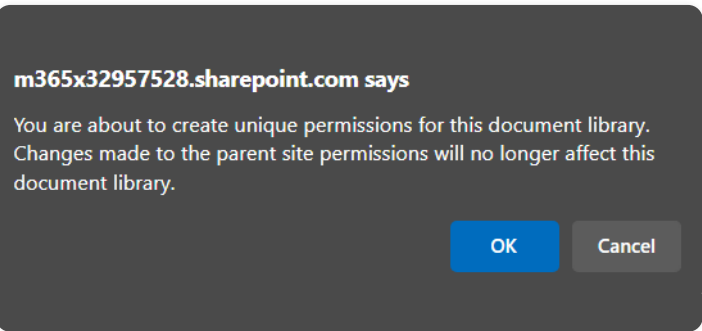
Add a message

People in Contoso with the link can edit.

Copy link Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

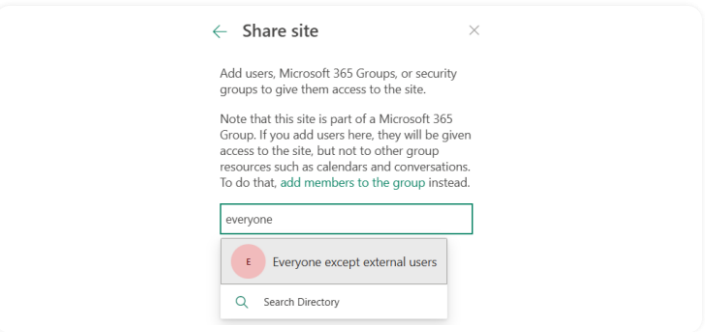


m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK Cancel

Broken permission inheritance



Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

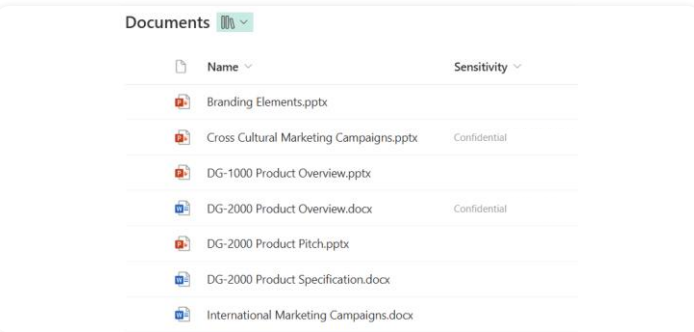
Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

everyone

Everyone except external users

Search Directory

Use of "everyone except external users" domain group



Documents

Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels

Two powerful tools to address oversharing



Microsoft 365 Copilot

Now powered by SharePoint Advanced Management

Provides SharePoint site management and content governance capabilities



Microsoft Purview

Provides security, compliance, and governance across data and files

Govern Copilot content access and quality with SAM

SharePoint Advanced Management enhances content governance for SharePoint and OneDrive, streamlining content management and preventing content sprawl and oversharing



Content Sprawl

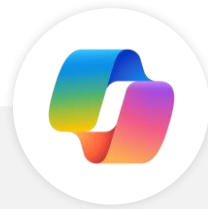


Content Oversharing
prevention



Site Lifecycle

Secure and govern Copilot data with Microsoft Purview



with



Security

+



Compliance

+

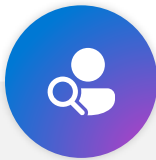


Privacy

+



Responsible AI



Discover
AI risks












Protect
sensitive data



Govern
Copilot usage

Prevent Data Oversharing | Data Leaks | Non-Compliant Usage

Address internal user oversharing concerns for M365 Copilot deployment

	Pilot (optional) 	Deploy (at scale) 	Operate 
Activities	<ul style="list-style-type: none"> Identify most popular sites & assess oversharing Grant Copilot access to popular, low risk sites Turn on proactive audit and protection 	<ul style="list-style-type: none"> Discover oversharing risks Restrict sensitive info from Copilot access and/or processing Increase site privacy 	<ul style="list-style-type: none"> Further reduce risk and simplify oversight Further secure sensitive data Improve Copilot responses
Outcomes	 Deploy copilot to sub-set of users with up to 100 sites	 Copilot fully deployed in your organization	 Continuous improvement of data security practices
Effort*	 2-4 days	 2-4 weeks	 More than one month

*Suggested efforts should be reviewed into timelines based on your tenant size and organizational complexity

Microsoft deployment blueprint to address internal oversharing in Microsoft 365 Copilot

Customers with E3 **Foundational**

LEGEND 1 - Copilot and SharePoint Adv. Mgt. 2 - OEI/MEI

Address internal user oversharing concerns in Microsoft 365 Copilot

Realize value quickly with Copilot by reviewing potential content sharing risks and optionally enabling Restricted SharePoint Search to address risk to enable full Copilot deployment

Select services are included in your FastTrack benefit. Other critical services are available thru Microsoft Unified or our Partner Ecosystem

Phase	Pilot	Deploy	Operate
Effort	2-4 days	2-4 weeks	1+ months
Deployment steps	<ol style="list-style-type: none"> 1. Identify the most popular sites & assess oversharing <ul style="list-style-type: none"> Export the top 100 most used sites from SPO admin center Run SAM permission state report¹ Use Purview Content Explorer to view which sites contain sensitive information types (SITs)² 2. Grant Copilot access to popular, low risk sites <ul style="list-style-type: none"> Cross reference the report results from SAM and Content Explorer with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery³ Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified⁴ 3. Turn on proactive audit and protection <ul style="list-style-type: none"> Turn Off EEEU (everyone except external users) at the tenant level⁵ Turn on Audit and view Copilot interaction activity reports and charts^{1,2} Turn on audit-mode oversharing SPO DLP policy to detect anyone sharing links for labeled and unlabeled data² 	<ol style="list-style-type: none"> 1. Discover oversharing risks <ul style="list-style-type: none"> Use permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)¹ Identify Copilot agent insights & take actions¹ 2. Restrict sensitive info from Copilot access and/or processing <ul style="list-style-type: none"> Initiate Access Review for all sites that are overshared¹ Apply restricted access control (RAC) on business-critical sites¹ Exclude critical sites from Copilot reasoning over them¹ 3. Increase site privacy <ul style="list-style-type: none"> Publish labels to Office apps, Container/Sites, Outlook for manual data protection by user² Use site labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members² Turn on enforce-mode oversharing SPO DLP policy to restrict access to sensitive data exposure & starting remediating them² Disable RSS (if enabled) to allow full Copilot experience⁴ 	<ol style="list-style-type: none"> 1. Further reduce risk and simplify oversight <ul style="list-style-type: none"> Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners¹ Automate SAM permission state report to maintain permissions hygiene¹ <ul style="list-style-type: none"> Automate permission reports and actions to maintain permission hygiene¹ Regularly review oversharing reports and restrict access as needed¹ Proactively avoid oversharing by applying RAC at site provisioning¹ Periodically review inactive sites and take necessary action¹ Control site provisioning by allowing creation for users that complete training¹ Use change history to identify site changes that may cause oversharing¹ Continuously manage all your oversharing DLP alerts via the Microsoft Purview Portal² 2. Secure Copilot responses <ul style="list-style-type: none"> Reduce risk by remediating alerts for overshared documents from the SPO DLP policy and applying sensitive labels² 3. Improve Copilot responses <ul style="list-style-type: none"> Setup retention/deletion policies for SharePoint to reduce data surface² Identify inactive sites, then restrict access or delete²

Guidance assumes Copilot technical prerequisites in place: Technical enablement of core services (Teams, SharePoint, Exchange), Office Applications deployed (modern Outlook recommended) and on current or monthly update channel

Customers with E5 **Optimized**

LEGEND 1 - Copilot and SharePoint Adv. Mgt. 2 - OEI/MEI 3 - MEI/ES Compliance

Address internal oversharing concerns in Microsoft 365 Copilot

Realize value quickly with Copilot by reviewing potential content sharing risks and optionally enabling Restricted SharePoint Search to address risk to enable full Copilot deployment

Select services are included in your FastTrack benefit. Other critical services are available thru Microsoft Unified or our Partner Ecosystem

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Deployment steps	<ol style="list-style-type: none"> 1. Identify the most popular sites & assess oversharing <ul style="list-style-type: none"> Export the top 100 most used sites from SPO admin center Run SAM permission state report¹ Run the Purview DSPM Oversharing posture assessment to gain visibility into all data at risk of Copilot access, pivoted on labels and sensitive information types¹ 2. Grant Copilot access to popular, low risk sites <ul style="list-style-type: none"> Cross reference the report results from SAM and Purview DSPM for AI with the top 100 used sites to identify up to 100 sites to be allowed for Copilot discovery^{1,3} Optionally enable Restricted SharePoint Search (RSS) for up to 100 sites identified⁴ 3. Turn on proactive audit and protection <ul style="list-style-type: none"> Turn Off EEEU (everyone except external users) at the tenant level⁵ Turn on Purview Audit and view Copilot interaction activity reports and charts^{1,2} Turn on proactive analysis for sensitive data handling with prompts and responses with Purview Communications Compliance³ Turn on audit-mode oversharing SPO Purview DLP policy to detect anyone sharing links for labeled and unlabeled data² 	<ol style="list-style-type: none"> 1. Discover oversharing risks <ul style="list-style-type: none"> Use DAG permission state report with SITs to flag sites and files that are potentially overshared (includes: EEEU, company shared links)¹ Identify Copilot agent insights & take actions¹ Create customized Purview DSPM Oversharing posture assessments to scale out data security actions, pivoted on labels and sensitive information types¹ 2. Restrict sensitive info from Copilot access and/or processing <ul style="list-style-type: none"> Initiate SAM Access Review for all sites that are overshared¹ Apply SAM restricted access control (RAC) on business-critical sites¹ Exclude critical sites from Copilot reasoning over them with SAM Restricted Content Discovery (RCD)¹ Publish sensitivity labels with Purview Information Protection to Office apps, Container/Sites, Outlook for manual data protection by user² Exclude Copilot from summarizing sensitive content via sensitivity labels² 3. Increase site privacy <ul style="list-style-type: none"> Use site sensitivity labels to limit access to org-wide sharing by marking sites as 'Private' and giving access only to site members² Apply default site library sensitivity labels to protect new and modified unlabeled documents² Turn on enforce-mode oversharing SPO Purview DLP policy to restrict access to sensitive data exposure & starting remediating them² Disable RSS (if enabled) to allow full Copilot experience⁴ 	<ol style="list-style-type: none"> 1. Further reduce risk and simplify oversight <ul style="list-style-type: none"> Routinely run the SAM site lifecycle management policy's site ownership policy and review the ownerless sites and assign owners¹ Automate SAM permission state report to maintain permissions hygiene¹ <ul style="list-style-type: none"> Automate permission reports and actions to maintain permission hygiene¹ Regularly review oversharing reports and restrict access as needed¹ Proactively avoid oversharing by applying RAC at site provisioning¹ Periodically review ownerless sites and take necessary action¹ Control site provisioning by allowing creation for users that complete training¹ Use change history to identify site changes that may cause oversharing¹ Routinely run Purview DSPM Oversharing posture assessments to scale out data security actions, pivoted on labels and sensitive information types³ Continuously manage all your oversharing Purview DLP alerts via incidents with Microsoft Defender XDR incident queue³ View risky user activity in context of oversharing Purview DLP incidents³ 2. Further secure sensitive data <ul style="list-style-type: none"> Automatically label new documents and prevent them from oversharing with run time auto-labeling policy, starting with client-side policies and extend to service-side policies³ Reduce risk by remediating alerts for overshared documents from the SPO Purview DLP policy by applying sensitive labels and disabling anyone access³ 3. Improve Copilot responses <ul style="list-style-type: none"> Setup Purview retention/deletion policies for SharePoint to reduce data surface² Identify inactive sites with SAM, then restrict access or delete²

Guidance assumes Copilot technical prerequisites in place: Technical enablement of core services (Teams, SharePoint, Exchange), Office Applications deployed (modern Outlook recommended) and on current or monthly update channel

Get the blueprint:
<https://aka.ms/Copilot/OversharingBlueprintLearn>

Copilot Readiness Roadmap

- Consolidate
- Inventory
- Clean
- Secure
- Label
- Train
- Governance

Consolidate

- Unified Data Platform
 - Migrating from file shares and on-premises SharePoint
 - Ensures all data is accessible and manageable
- Enhanced Data Visibility
 - Leverages advanced features of Microsoft 365
 - Includes enhanced security and collaboration tools
- Informed Decision Making
 - All data in one place aids in making better decisions

Inventory



Up Next: Addressing oversharing *at site level*

1

Identify overshared sites with **Permission State Report**

2

Enlist site owners to address permissions and access with **Site Access Review**

3

Temporarily lock down site access to clean up permissions with **Restricted Access Control**

4

Prevent Copilot from accessing sensitive sites with **Restricted Content Discovery**



Up Next: Addressing oversharing at file level

1

Identify overshared files and sites with new **Oversharing assessments** surfaced in **Data Security Posture Management for AI**

2

Keep Copilot from using labeled files in prompts responses with **Data Loss Prevention for M365 Copilot and Information Protection sensitivity labels**

Third Party Tools

ShareGate
by **workleap**

 **AvePoint**
Insights
For Microsoft 365

 **Orchestra**


Rencore
governance

LightningTools

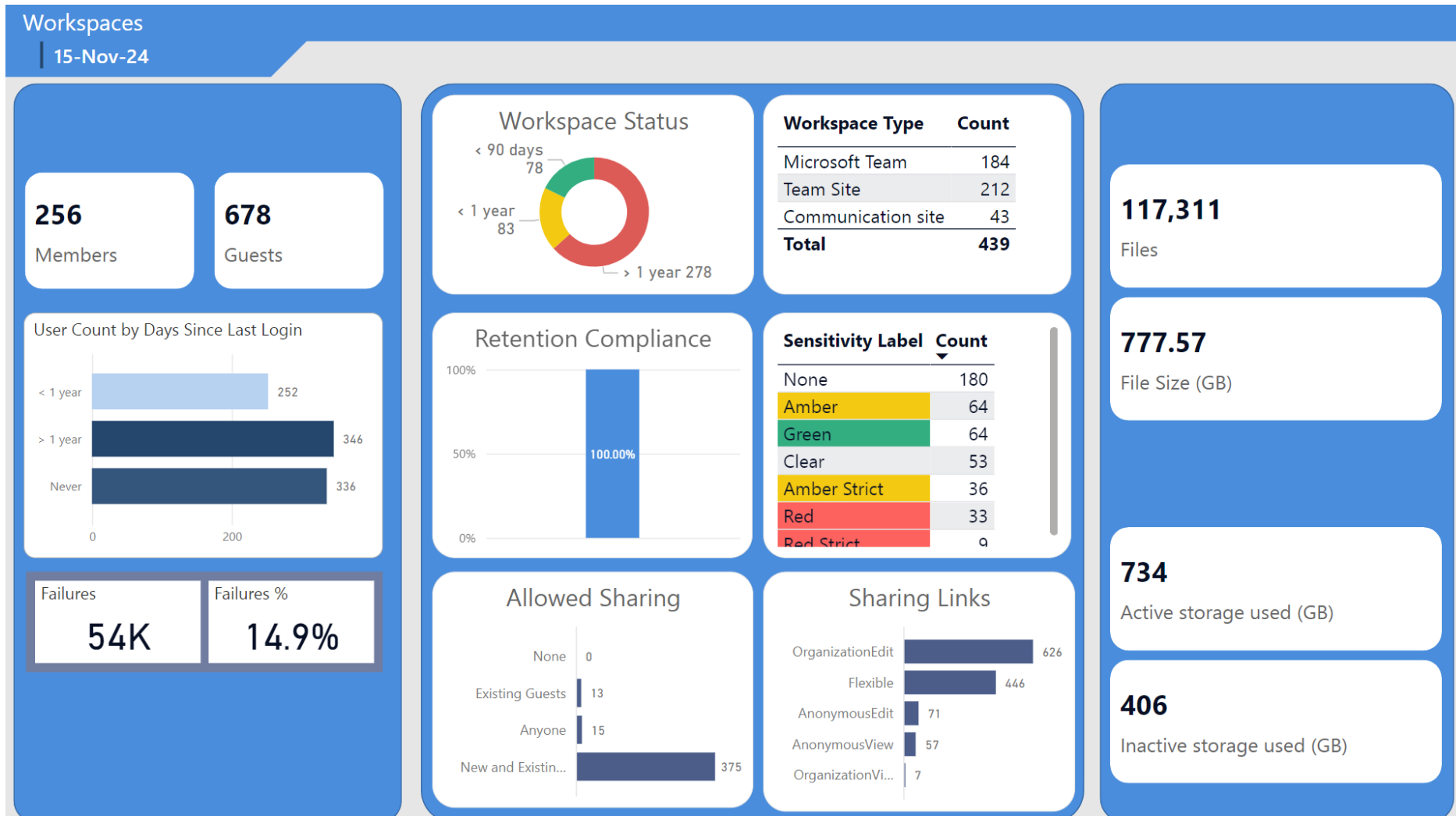
 **bindtuning**

 **envision IT**

 **Syskit**

 **BCC**

Envision IT M365 Tenant Dashboard



Clean, Secure, and Label

Clean

- Delete or archive stale content
- Retention policies

Secure

- Default sharing
- Private versus public
- Broken permissions
- Everyone

Label

- Workspace and container labels
- Document labels



**Microsoft
Purview**



Data Security



For information and cybersecurity teams



**Data
Governance**



For data consumers, data engineers, data officers



**Risk &
Compliance**



For risk, compliance, and legal teams

Purview Labels

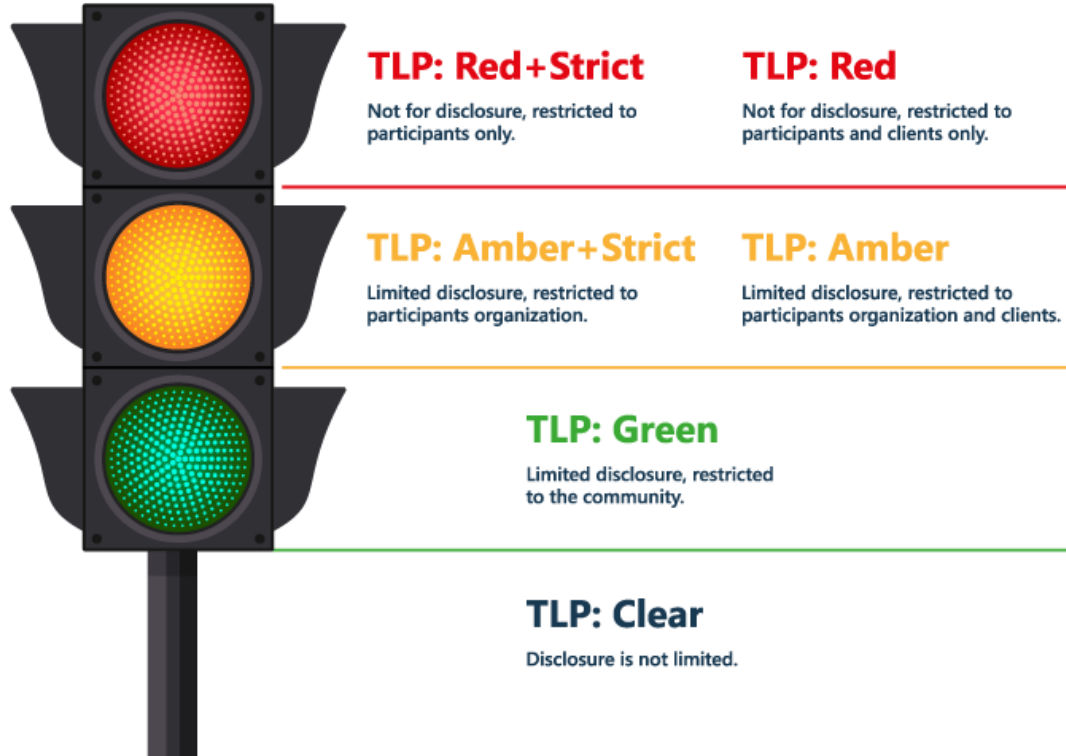
Retention

- Manage lifecycle of data
- Specify how long content should be kept and then what actions should be taken
- Ensure compliance with regulations and internal policies
- Typically many (could be hundreds) of labels

Sensitivity

- Designed to protect sensitive information
- Classifying and secure
- Control how content is handled and shared
- Small number of labels

Sensitivity Labels



- Apply labels to data to enforce protection policies
- Control how content is handled and shared
- Designed to protect sensitive information

AI-Powered Classifiers



- Utilize AI to accurately classify data based on content and context
- Enhance the precision of data protection measures
- An emerging technology

Default Labels for Document Libraries

Library settings

Name *

Documents

Description

Default sensitivity labels ⓘ

Choose a default sensitivity label that will be applied to all the Office or PDF files within your library. This will only be applied to newly created or edited files. [Learn more](#)

General

[More library settings](#)

Save Cancel

- Traditionally required E5 or E5 Compliance licenses
- Now also part of SharePoint Advanced Management
 - \$3 USD / user / month
 - Need to license 100% of users, including F1/F3
- Auto-labelling is still E5

Train

- Training your users, not the LLM
- Use cases
- Prompt engineering
 - [Microsoft Copilot for Microsoft 365 Tips, Tricks & Prompts - Microsoft UK](#)
 - [Craft effective prompts for Microsoft 365 Copilot - Training | Microsoft Learn](#)
 - [Copilot Prompt Gallery](#)
 - [10 Prompt Strategies in Copilot for Microsoft 365 | LinkedIn](#)

Governance

- Microsoft Purview Compliance Manager
 - Helps you automatically assess and manage compliance across a multicloud environment
 - Features
 - Assessments
 - Compliance score
 - Automatic and manual testing
 - Document evidence
 - Third party tools

3 Key Takeaways

1

AI Is Coming – Either Under Your Control or Not

2

Data Needs to Be Prepared Before You Turn on Copilot

3

Start with Tenant Reporting and Analysis

Thank you!

Any Questions?

