

# Get Ready for Microsoft 365 Copilot

How to ensure your  
foundations are in place  
to introduce AI to your  
business safely



Microsoft Cloud

# Introduction

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With Gartner [predicting](#) 80% of organisations will start to use AI as part of their operations by 2026, the time has come to prepare for its imminent deployment in your business.

[Research](#) conducted in March 2023 found 60% of firms anticipate greater use of generative AI and other tools by the end of Q1 2024. A further [study](#) discovered almost one in 10 (8%) UK employees are already turning to technology driven by Large Language Models (LLM), such as Microsoft 365 Copilot and ChatGPT, to help them do their job.

Expectations are high that AI will boost productivity throughout organisations, with employees saving time on tedious tasks that the technology can do for them. They can then focus on higher-value aspects of their roles. But this anticipation means all eyes are now on IT departments to deploy and manage AI-based solutions that can make a big difference to operations.

When implementing AI, IT experts must also be alive to potential challenges. Chiefly, these are 'over-provisioning risks – allowing too much unrestricted access to sensitive data in a company environment; and productivity issues relating to low user adoption of M365 Apps functionality.

Our guide seeks to clarify and streamline your approach to adopting M365 Copilot. We examine three key elements that are vital to address before introducing it to your business:

- Permissions
- Data
- Apps use / productivity

With these building blocks in place your firm can ensure a secure and successful M365 Copilot implementation, and make profitable change across your organisation.

# What is M365 Copilot, and why do you need it?

Microsoft 365 Copilot is an AI-powered collaborative tool that can revolutionise your business operations by improving your employees' productivity across departments, in a fully secure way.

The tool combines the scale of LLMs with your data that's held in Microsoft Graph: all of the proprietary information in every M365 application you use, from emails, chat and meeting notes to files, contacts and calendar entries.

This rich ecosystem of data is comprehensively searched when M365 Copilot is prompted to respond to a specific request. The results are therefore contextualised to your business, then structured as usefully as possible and returned to the user – transforming the initial query into a powerful productivity tool. Furthermore, the AI handles subsequent iterations to ensure the output is fine-tuned for maximum value.

The technology knows your business – and it isn't limited to the chatbot function of creating an automated stream of information in response to a prompt. M365 Copilot has extensive functionality:

- A conversational interface to ingest and investigate big volumes of corporate data
- Creation of unique text- and image-based content from prompts and available data
- Support with making more accurate decisions and achieve better outcomes
- The ability to run Excel analysis in a fraction of the time it would take a user

All of this means speedy automation of mundane tasks that get in the way of higher-value employee work; relieving stress and boosting morale. As the saying goes, a happier workforce is a more productive workforce.

The speedy automation of mundane tasks that get in the way of higher-value employee work

# Laying the foundations for secure AI success

**M365 Copilot's search capability is transformative. But because the AI is so powerful, it pays to be aware of the safeguards required before your employees begin to use it.**

The tool's ability to access a wide range of data, content and other files stored in your M365 ecosystem, condense the information into meaningful formats and rapidly present it back to users means previously 'hidden' information can be surfaced in a few keystrokes.

This increases the risk of sensitive information being seen by people within and outside of your organisation. For instance, commercial figures which don't have the correct permissions in place could be revealed to users who shouldn't see them.

It's also the case that Copilot 'inherits' the permissions of the person using it; the AI is granted whatever access that individual has been given in order to find results.

That's why it's so important to check permissions and data up front, but also to assess the extent to which your teams already use M365 apps. Following these three steps means you can get everything nailed down before M365 Copilot is unveiled to your workforce. Here's our advice on how to do it right.

# 1

Setting permissions

# 2

Safeguard data

# 3

Prioritise productivity

# 1] Setting permissions

## The challenge

The AI uses all available data to give the user the best answer to their prompt. This means any information that an individual has access to is also fair game for M365 Copilot.

Data risk assessments frequently show a high level of 'over-permissioning' at organisations, such as thousands of unrestricted internal links per year distributed across the whole workforce – often shared to improve collaboration. Too many people have unfettered access to too much data, not least due to poorly managed SharePoint policies.

The consequences are clear. A user may have had no reason to look at sensitive data in the past, and might not even have known it existed. But as the AI is so thorough, the information can suddenly surface, potentially causing harm.

An example is a finance team that doesn't limit permissions to payroll data. As the result of a prompt by a junior employee, the AI tool provides them with a link to a spreadsheet containing everyone's salaries. Imagine the outcry that might follow if the user decides to discuss the unintended findings with colleagues or people outside the business.



## The response

'Just enough access' is the antidote to the problem of enterprise data access sprawl. It affords access only to the information users need, and nothing more. Oversharing will no longer be an issue.

To make this happen, the first step is to instigate a full permissions audit at your organisation. This focuses on SharePoint – checking the environment to review individual and group permission models, reporting what needs to be fixed and informing best practice going forward.

Realistically, this type of investigation can't be done manually and businesses normally need support from external experts to get the job done. SharePoint sites can be built based on comprehensive permission models. Employees who definitely don't need access to certain information can have theirs revoked; those who need to view the data have their permissions maintained.

It's important not to see such an audit as a one-off exercise. Permissions should be reviewed and amended on an ongoing basis to ensure they are kept up to date, particularly as people continually join and leave your business.



## Implementation

Here's a breakdown of the three main steps your organisation must follow to correctly set permissions:

### Microsoft Purview

At file level, Microsoft Purview's information protection, data classification controls, and integrated content labelling and data loss prevention policies can help you identify classified and sensitive information in Teams files, email and chat conversations, and OneDrive locations and SharePoint sites. It will automatically apply controls to limit access.

At the site team and container level within Teams and SharePoint, you can audit access to shared content, and enforce restrictions to limit information discovery only for users who should have access. Microsoft Syntax can also stop information oversharing and add extra layers of access controls.

You can then validate access using search in the context of users with different roles, departments and locations.

### Prerequisites

You can use the new M365 Copilot set-up guide as a wizard-based experience in the M365 admin centre; find it under Copilot "Apps and Email".

This shows which apps and services need to be in place for the full Copilot experience, in addition to having the right M365 Microsoft licence in place: including access to Apps for Enterprise and Web Experiences; a work account in Azure Active Directory; OneDrive and Outlook files and apps, and more.

### Assign licences

The final stage is assigning Copilot licences to users, which can be done in the set-up guide wizard. In 'Licences', you'll see available M365 Copilot and Enterprise licences to assign to groups. You can also use the M365 Copilot admin centre. Assigned users will need both Copilot and Enterprise licences.

There's also a 'get started' template to email to users, as well as additional information under 'Additional resources'.

## 2] Safeguard data

### The challenge

If you don't have a comprehensive data strategy for the use of AI in place before M365 Copilot is switched on at your organisation, you could fall foul of two main problems.

**First**, the effectiveness of the AI's output relies on the data sources M365 Copilot indexes. The technology is only as good as the data it can access. Incorrect, incomplete data and non-standardised storage results in poorer accuracy.

**Second** – and perhaps more seriously – there's a risk that proprietary information could be inadvertently entered into a chat tool and become visible to the public. Good data governance is critical.

It's also worth noting that users generate more data simply by prompting the AI: new reports, proposals, strategies and wider aspects of Business Intelligence are produced. So, the volume of unsecured information at your organisation could rapidly increase in next to no time – a big problem if you don't get a handle on it from the start.





## The response

'Secure from the start' is a useful mantra when you're planning to introduce M365 Copilot. As with permissions, a data governance audit is the best first step. This will expose any issues with your data management – such as disorganised data, and lack of a data loss prevention policy – while also helping to ensure data is kept in the right place and correctly classified.

For example, assigning sensitivity labels to documents to limit access to confidential information is key. This solves the problem of mis- or unlabelled data.

Data must also be well structured to be useful. We recommend considering a full data migration to SharePoint, with its built-in intuitive structure. You can ensure it's ready for search, but never leaves its secure area of your server.

AI has the capability to release a tidal wave of new data in your business so preparing for its impact is vital. Fortunately, M365 Copilot protects your data with the same comprehensive enterprise compliance and security controls available across all M365 applications, from initial prompt to output fine-tuning.



## 3] Prioritise productivity

### The challenge

Are you sure your employees are already using M365 Apps to the max? If they're not harnessing the tools available today to be as productive as possible that could mean your M365 Copilot will lack punch too.

Making the most of the Microsoft stack before turning on M365 Copilot is key if the ROI delivered by using it is to be as positive as your organisation might expect. But it's not always obvious to users how much they can actually get done with M365 Apps, in the same way that we might only use a fraction of the features on our smartphones.



## The response

User adoption of M365 Apps functionality is vital if organisations are to get the best from M365 Copilot and achieve the ROI it promises.

This begins with initially understanding how your workforce is currently using Teams, SharePoint and other M365 tools. Do they make full use of functionality? Are all features turned on and does everyone know how to embed them in their routines?

If your audit uncovers gaps in use then training your teams could be the answer.

End user adoption training involves helping employees get the most from the technology at their fingertips. This helps everyone from early adopters and heavy users, to starters and self-confessed technophobes. The training can deliver the following benefits now - before M365 Copilot is even up and running:

- Increased productivity
- Reduced errors and downtime
- Better communication/collaboration
- Enhanced customer service
- Improved data security

With your M365 App users more aware of the extent of the features available, and consequently working in the most efficient and productive manner, your M365 Copilot strategy can also be informed ahead of launch.

This can involve starting with a proof of concept trial. Examining the M365 Apps usage reports you can assess which of your departments uses each app the most. This allows you to identify an area of the business that could benefit most from M365 Copilot to roll it out as a trial, and assess ROI.

When you have a group of 'super users' who have hammer-tested its capabilities, and have developed protocols and use cases that could support your wider business, you'll get a greater understanding of its potential impact across your organisation.

Then it's time to turn on M365 across the business.



# Do you need help getting your house in order for M365 Copilot?

Getting ready to switch on M365 Copilot is as easy as 1, 2, 3 if you know how to do it properly:

- Set permissions correctly
- Safeguard your data
- Get the most from M365 Apps

BCN is helping a wide range of organisations get the foundations in place for successful use of M365 Copilot, and for the benefit of better operations generally.

Before it can be deployed, the data that sits behind it must undergo a level of transformation. Failure to do this can result in a huge amount of wasted resources. Understanding where your business is on its data journey is key. That's something we're ready to help with, and you can find out more about the BCN Data Journey [here](#).

We can also deliver end user adoption training programmes to ensure all users are as productive as possible with M365 tools, from Teams to Copilot.

With the basics in place, you'll have the opportunity not just to harness the power of M365 Copilot but also to plan a future where your team's output takes off with other productivity tools such as Microsoft Power Platform.

If you're planning to use AI to turbocharge everyday productivity, or seeking to thoroughly disrupt your sector, BCN's team of data scientists and full-stack developers are uniquely placed to help you ensure you're ready to harness AI and take your business to the next level.

With BCN's [Copilot Readiness Assessment](#), you can maximise your investment in the technology. The assessment prepares your organisation for AI integration with a comprehensive consideration of your data and security set-up. We'll lead you through an end-to-end preparation process, with workshops, audits, strategy planning, change management reports and deployment guidance.

Find out how ready you are, and what else you need to do to get the most out of your Copilot investment: [contact us today](#).



# Are you ready to explore the potential of AI and Microsoft Copilot for your business?

Let's talk about how we can help you take your business to the next level with Copilot.

[Get in touch](#)

## About BCN

BCN is uniquely placed to help introduce AI across your business.

As a Microsoft Solutions Partner for Microsoft Cloud, our relationship with Microsoft gives us access to its wide range of capabilities and new technology.

With our data scientists and full stack development team, we can help develop your future AI roadmap and customise Copilot for your business, creating brand new, AI infused applications to bring the power of automation to different functions across your organisation.