

# Become an AI-powered organization with Microsoft Copilot for Microsoft 365

Adoption, Trends, and Landscape

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# Generative AI Adoption & Trends





# 52%

using AI

7% Extensive use to optimize business

15% Using AI that appeared as an update to software they use (\*)

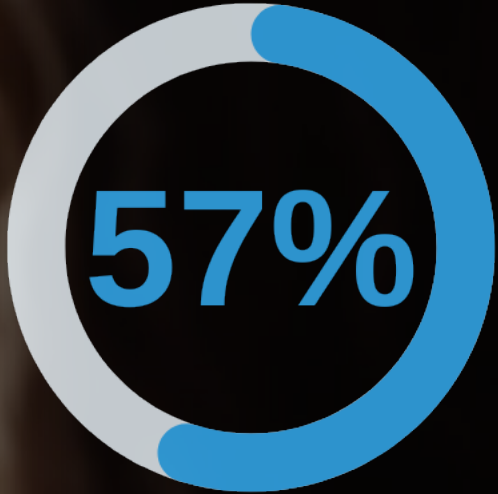
30% Early Pilots or deep adoption on a group or niche

(\*) sometimes unaware they are using AI as it feels like an enhancement of something they already are familiar with



**Satisfied  
with AI  
Results**





**Have Privacy  
and Security  
Concerns**

# Why Not Using AI Yet?

## Misconceptions

Cost, ROI, Relevant use case



## Skills Gaps & Trust

Privacy, Compliance, Low Tech  
Maturity, Need Scientists?



## Awareness Gaps

Where to find trustworthy AI?



0%

25%

50%

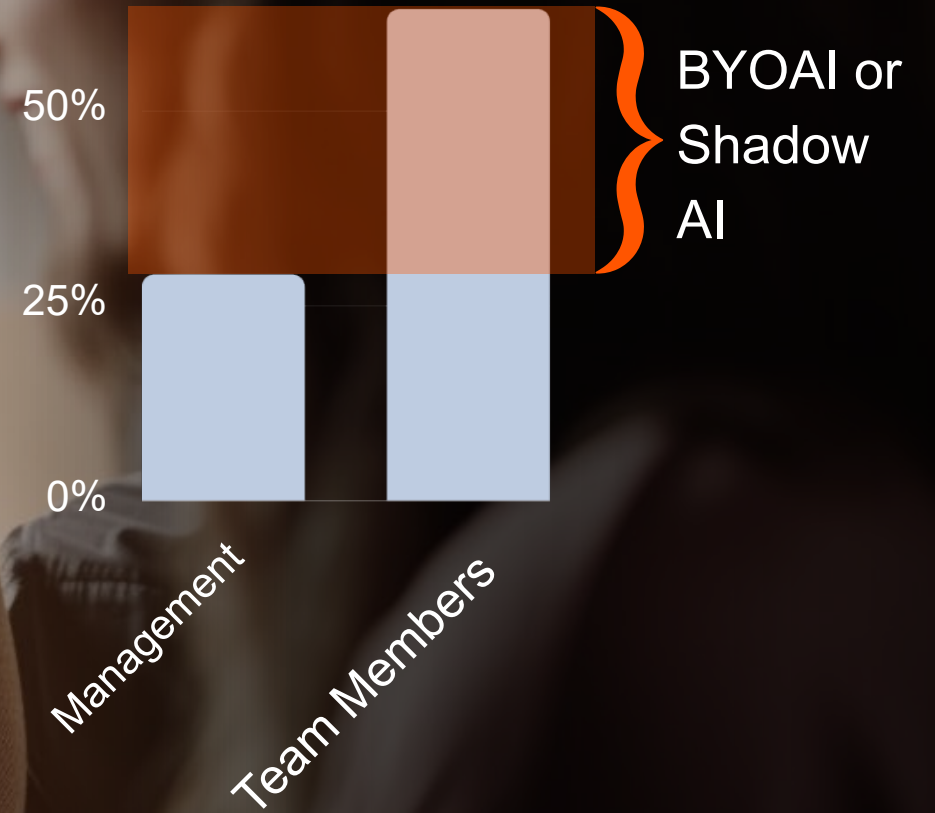




**AI Adoption  
Driven by  
Team Members**



# Is your organization using AI?



# AI Use Cases

Automation to Reduce Costs

Automate Marketing, Sales,  
and Client interactions

Employee recruitment,  
retention and scheduling

Data-driven Decision-  
making

Optimizing training and up-  
skilling

Other





# Early Trends



20%

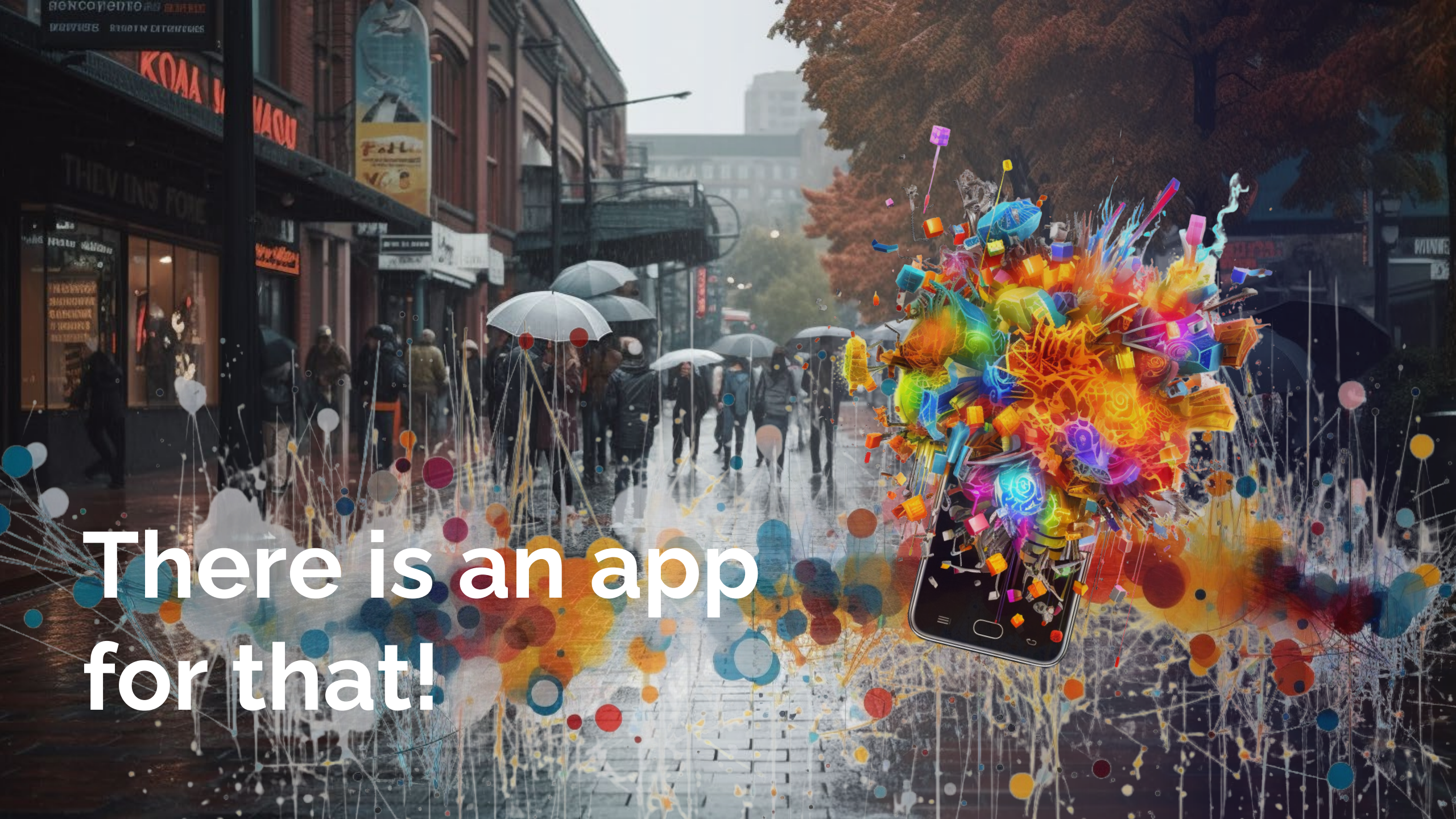
tasks or roles  
automated



# Early Trends

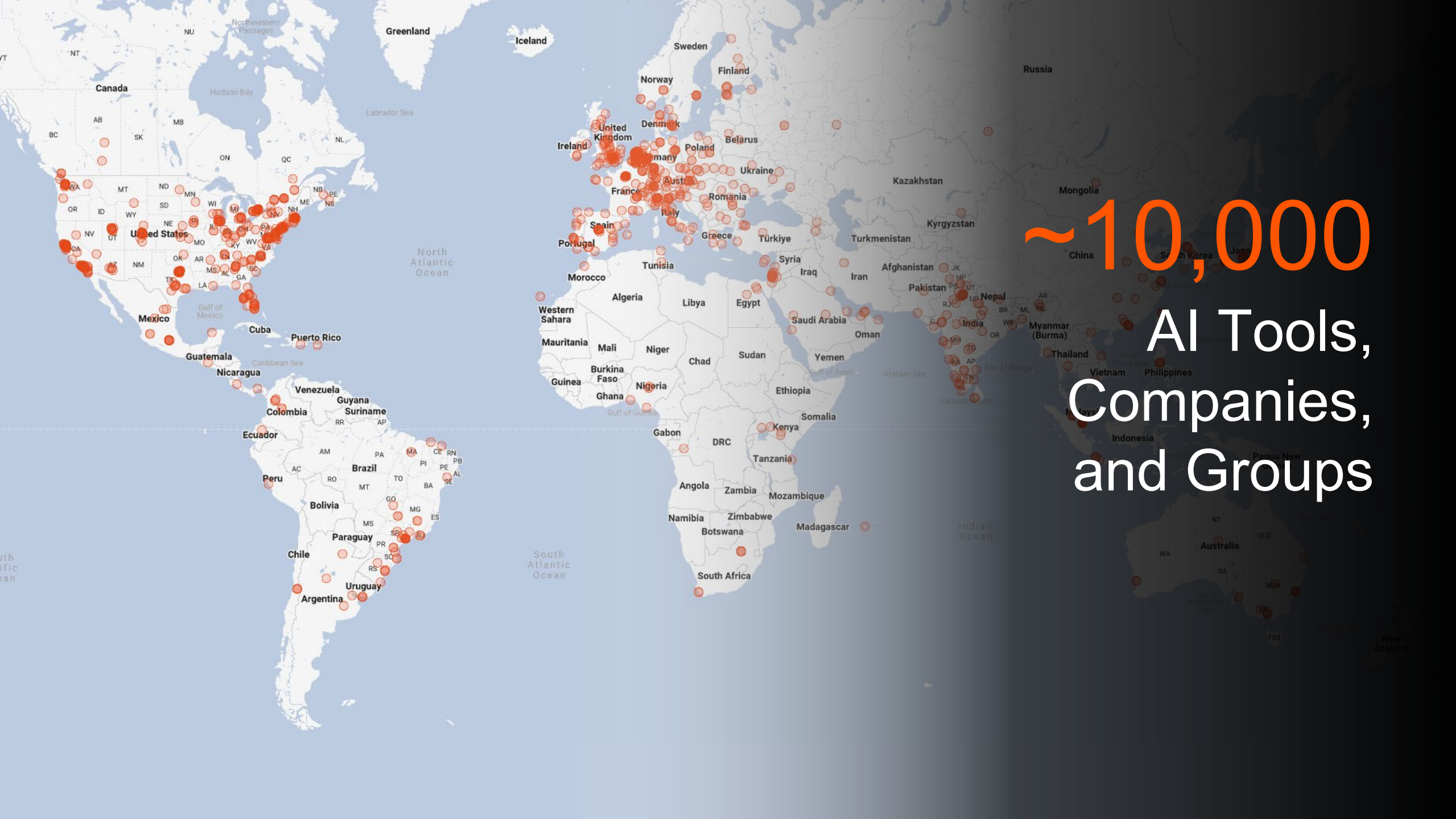
**10x**  
economic  
disruption





**There is an app  
for that!**





~10,000

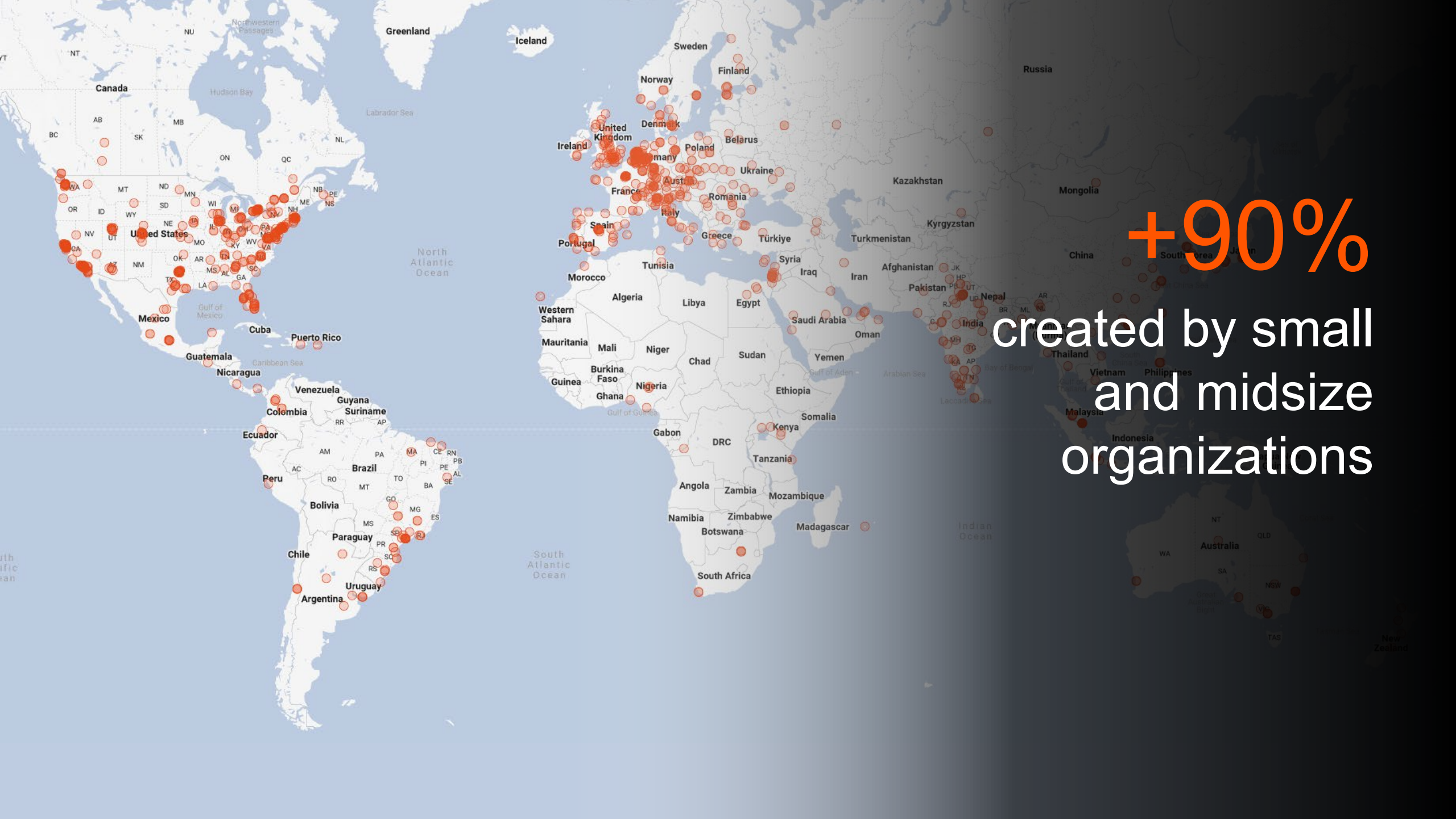
AI Tools,  
Companies,  
and Groups





+90%

created outside  
of the classic  
tech hubs

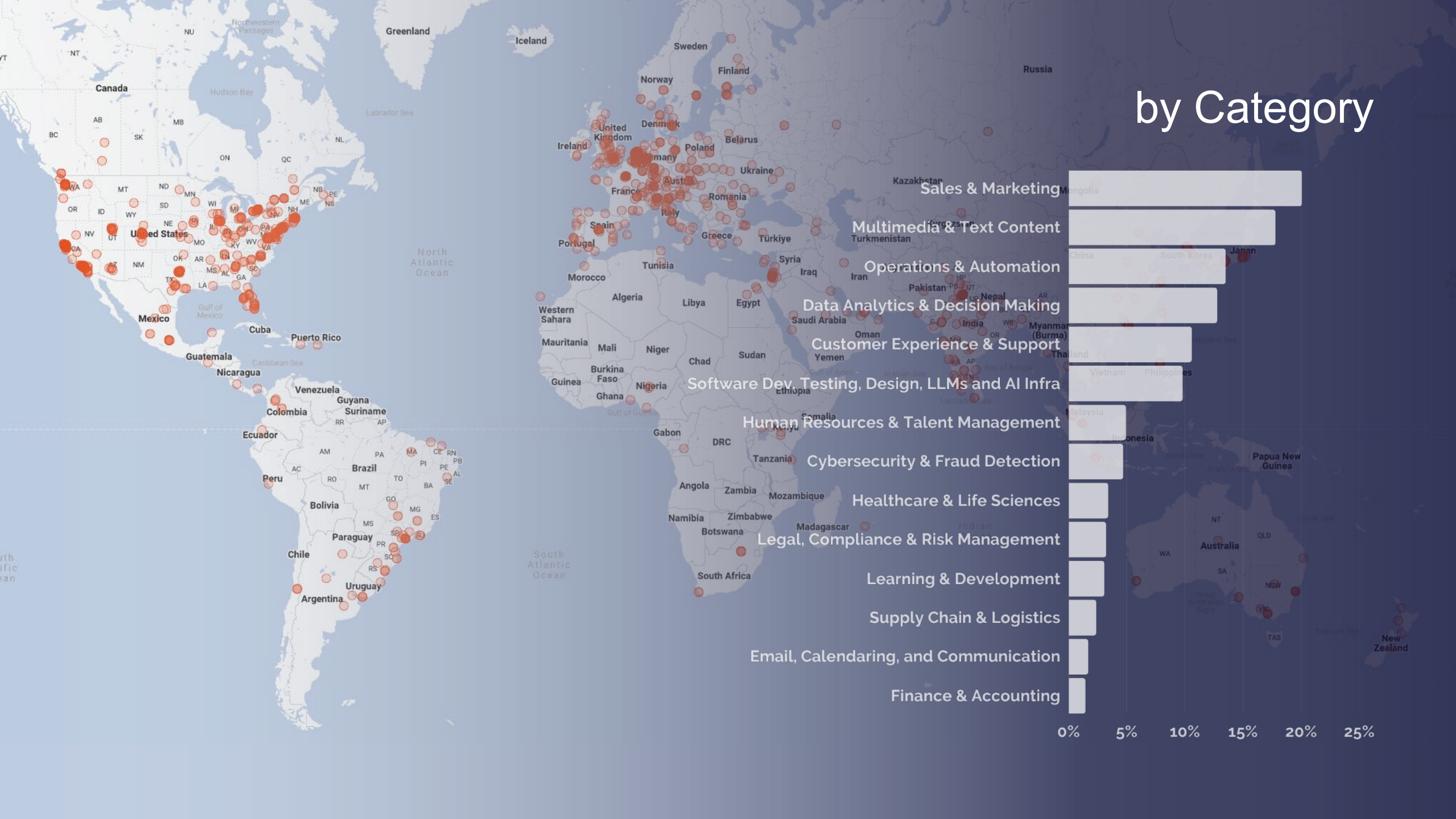


+90%

created by small  
and midsize  
organizations



# by Category

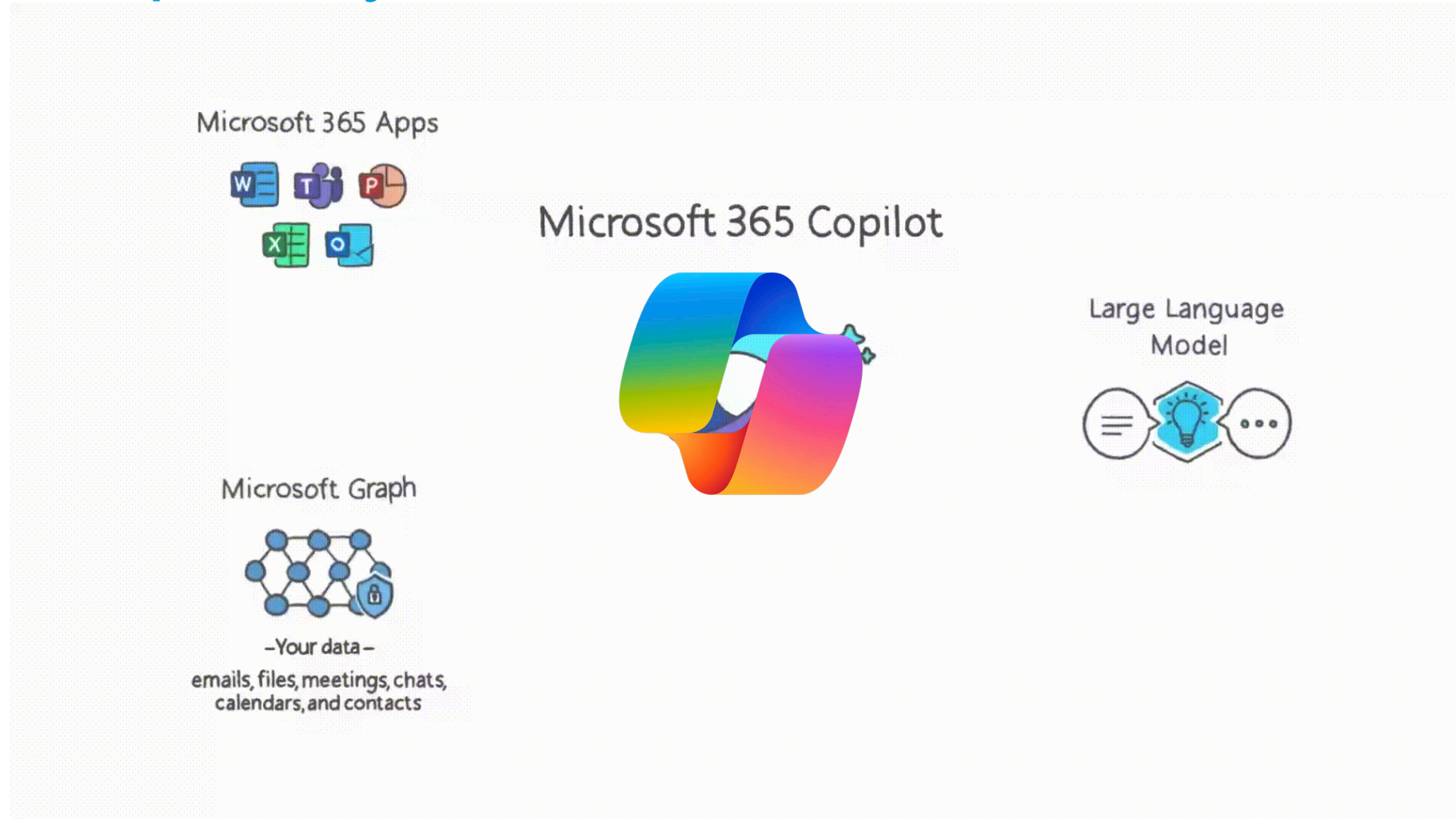




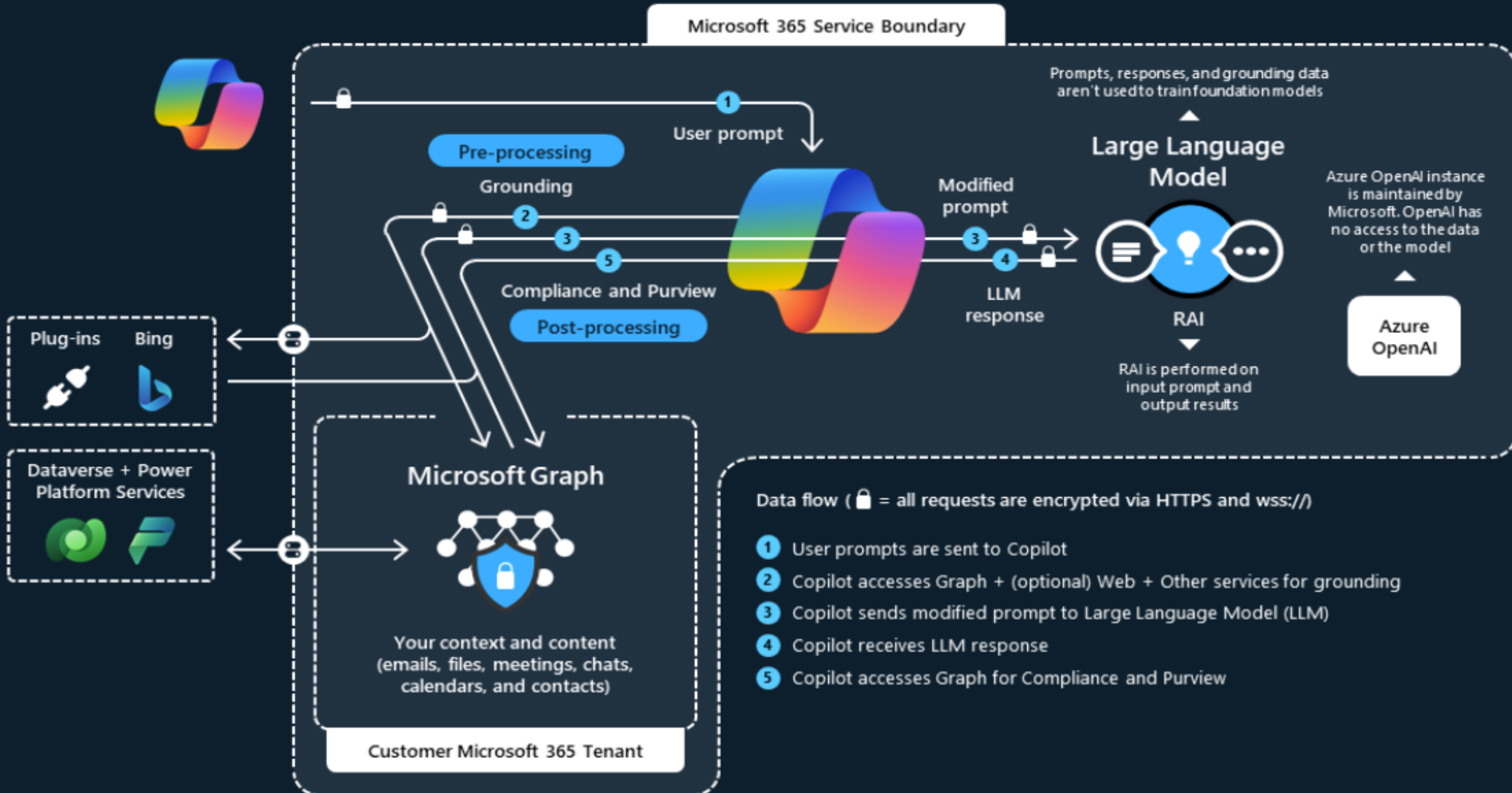
# How can Copilot help?



# The Copilot System



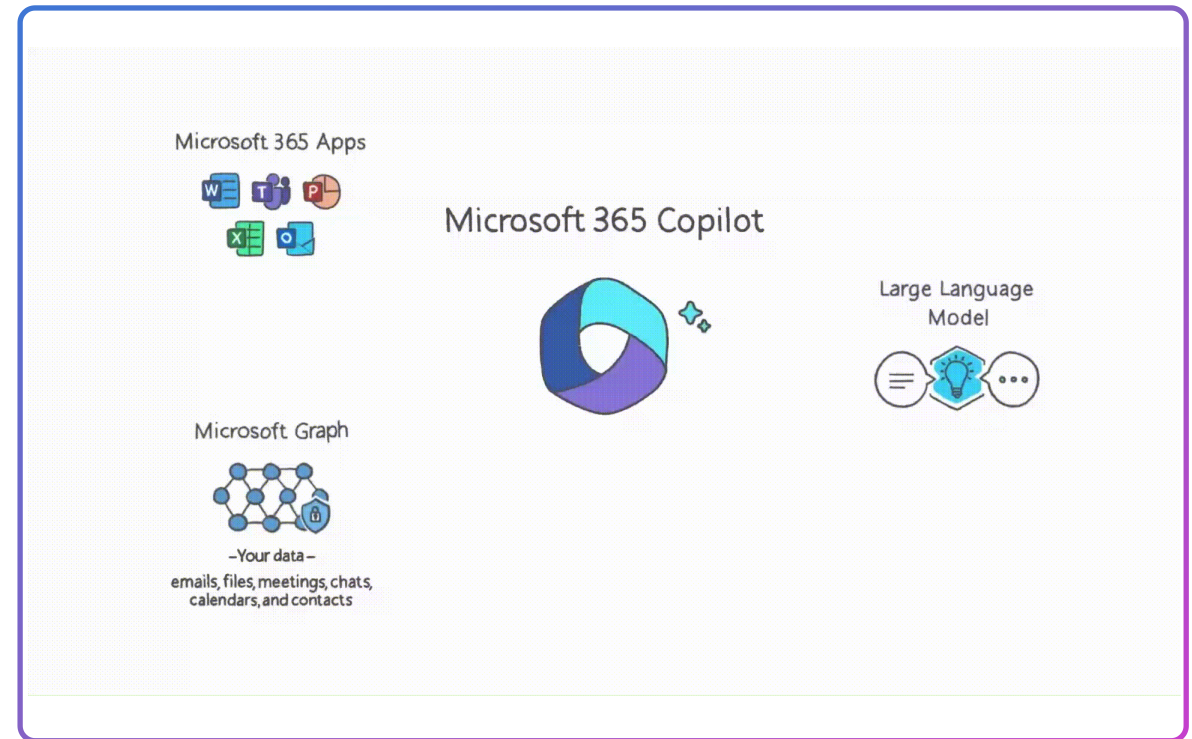
# Copilot for Microsoft 365 Architecture





# Enhanced Productivity Today

- **Find** content
  - Search for data and information related to a topic anywhere in Microsoft Graph
- **Summarize** content
  - Condense content into a concise summary
- **Understand** Insights
  - Analyze content to gain new understanding
- **Draft** a document
  - Write a preliminary version of a document
- **Rewrite** the report
  - Revise and improve content based on feedback and/or tone



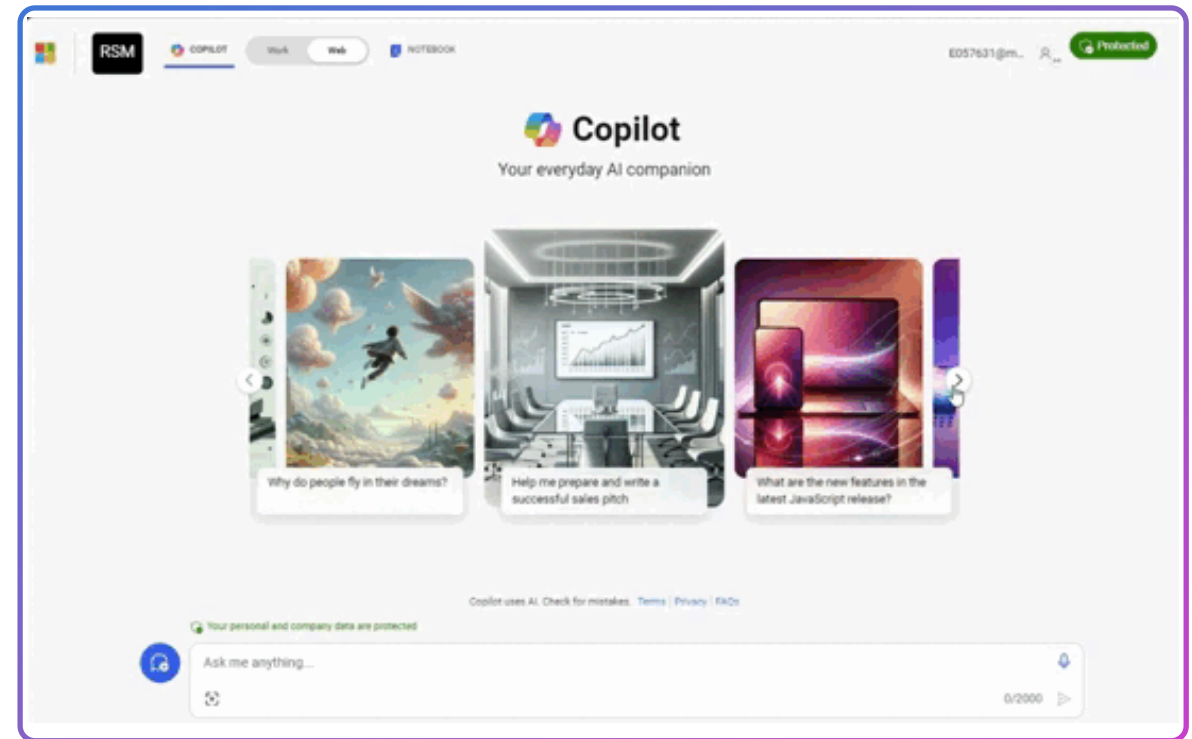
 **Copilot for Microsoft 365**

# Microsoft Copilot for Web AND Work (M365 Chat)

Search will never be the same.

With **Microsoft Copilot**, all the Web AND all your Work are easy to query.

- Securely find answers from real-time content on the Web
- Securely find answers in Microsoft Graph via Microsoft 365 Chat (the hero application)
  - People
  - Files
  - Meetings (Chats)
  - Emails

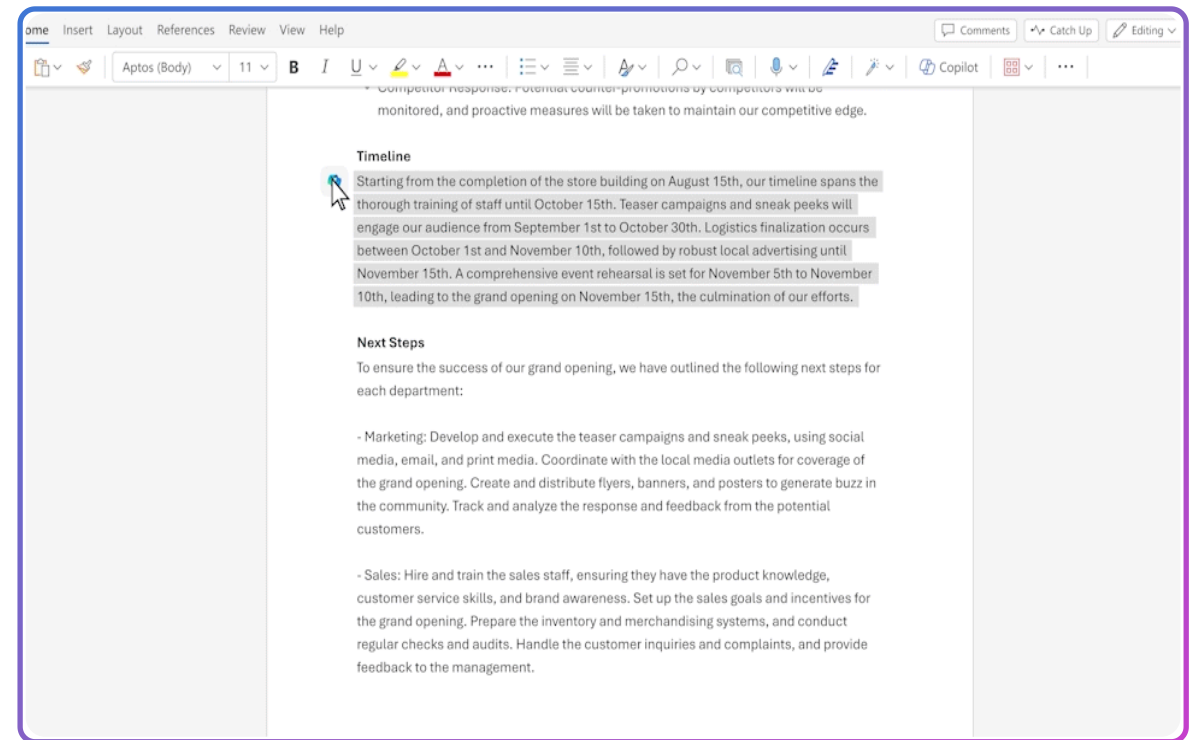




# Jumpstart the writing process

With **Copilot in Word**, transform writing with efficiency and creativity.

- Create first draft by referencing up to three documents
- Rewrite sections or an entire document, or change the tone to refine existing documents
- Receive suggestions to strengthen arguments, smooth inconsistencies
- Save time and summarize text in lengthy documents
- Discover information—for example, ask if there is a call to action

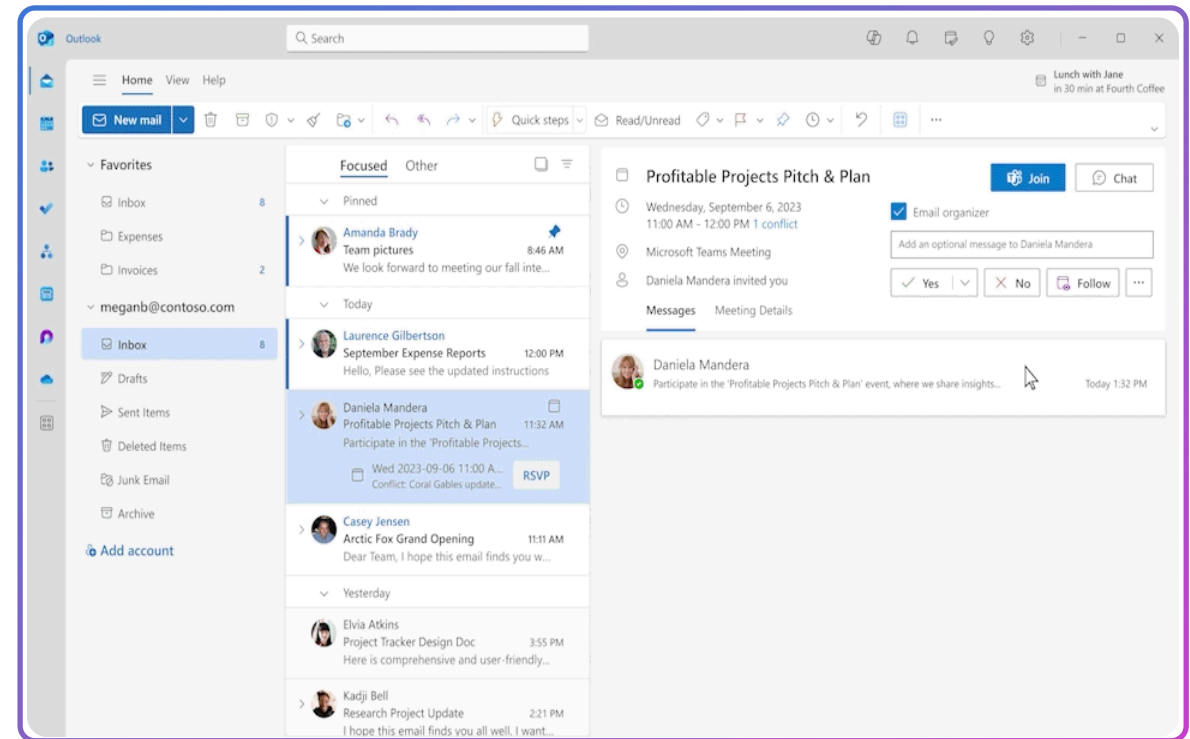


 **Copilot in Word**

# Stay focused on productivity

With **Copilot in Outlook**, stay on top of your inbox, manage meeting follow-ups and create impactful communication in a fraction of the time.

- Summary by Copilot for long email threads; includes what is asked of you in that thread
- Customize an email prompt with options for length and tone
- Include people's viewpoints in conversation summaries
- Prepare for meetings with a meeting prep summary



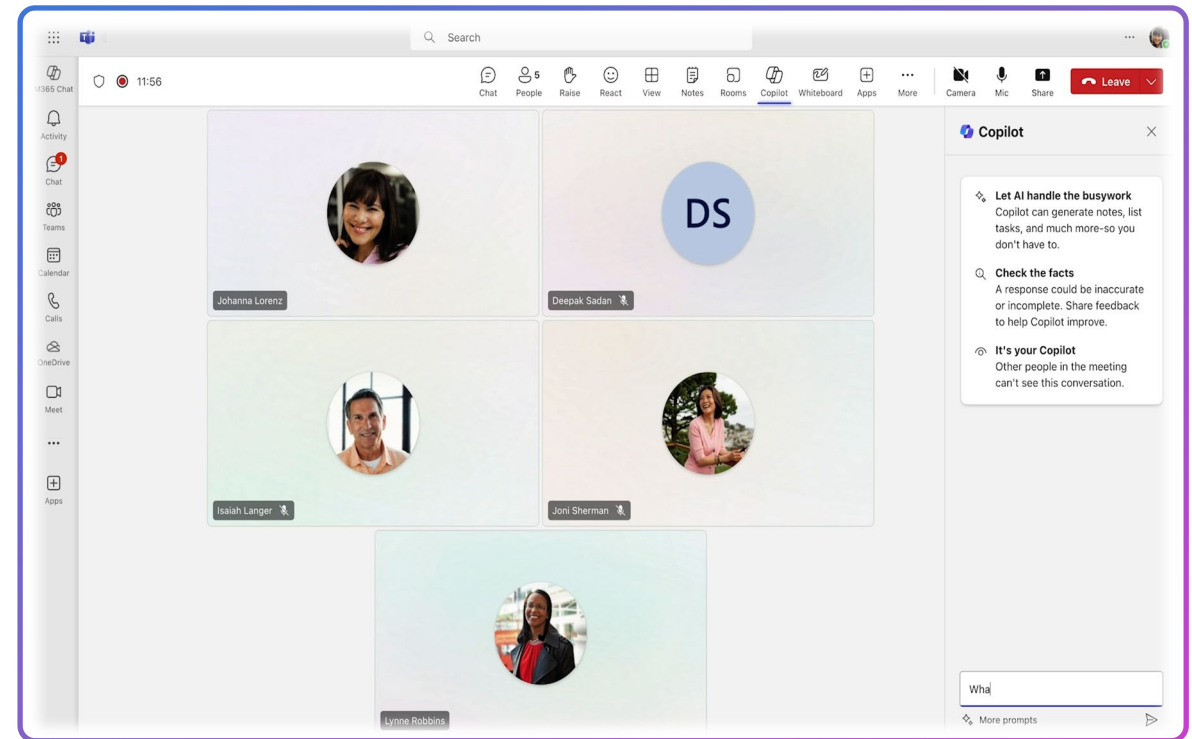
 **Copilot in Outlook**



# Stay coordinated as a team with customers

With **Copilot in Teams**, stay organized and on top of all your chats, meetings and calls.

- Catch me up when arriving late or you had to step away
- Summarize meeting notes, document decisions made and tasks assigned
- Build agendas based on chat history transcripts from other meetings or calls
- Discover answers to specific questions—such as what decisions were made—from chats or meetings



 **Copilot in Teams**

# Meeting Overview & Recap

**Intelligent recap**

**Copilot in Teams**

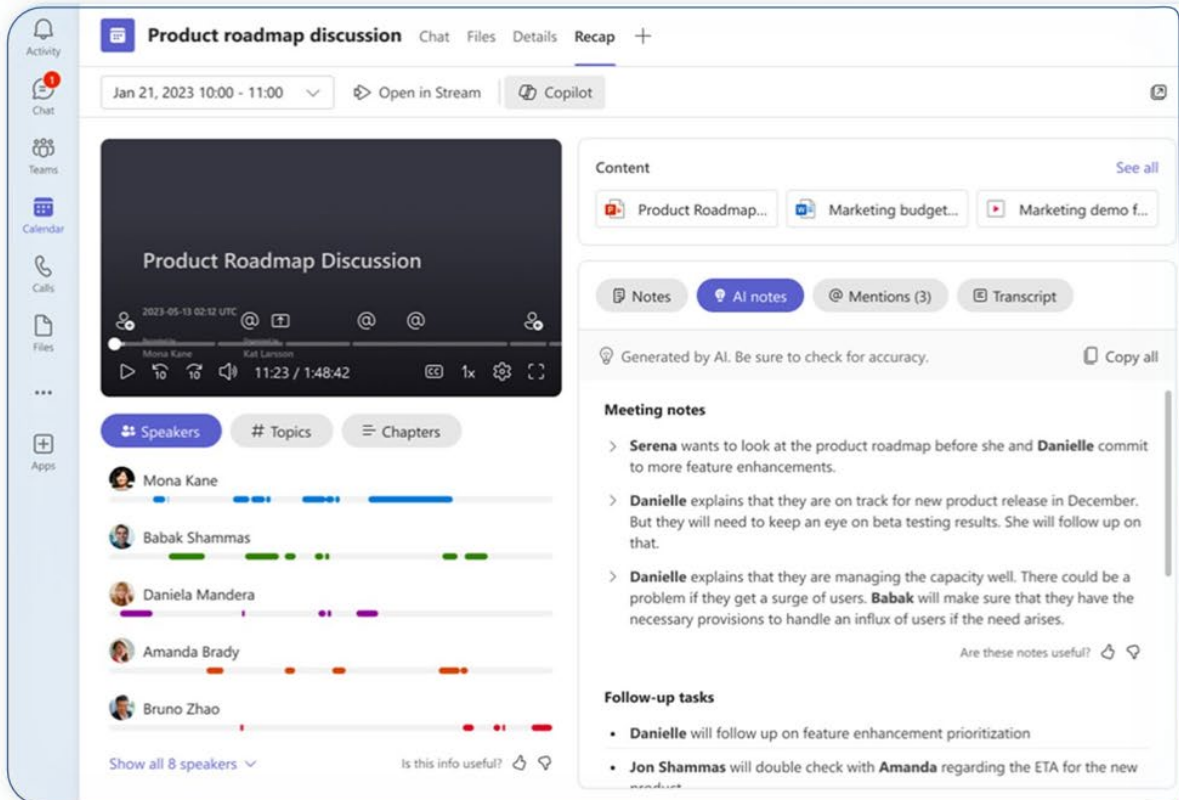
  

Built-in and automated

Standardized

Video, speaker, and chapter markers

Available after meeting only



On-demand

Based on unique prompts

Conversational interaction, with citations.

Available real-time (during and after meeting)

**Copilot**

Create a table with pros and cons of option 1

Copilot 11:43 AM

Pros and cons of option 1: Drive campaign traffic to generic Sign up page:

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

Copy

References

Elaborate on each pro and con.

List more options.

Ask a question about this meeting

On-demand

Based on unique prompts

Conversational interaction, with citations.

Available real-time (during and after meeting)

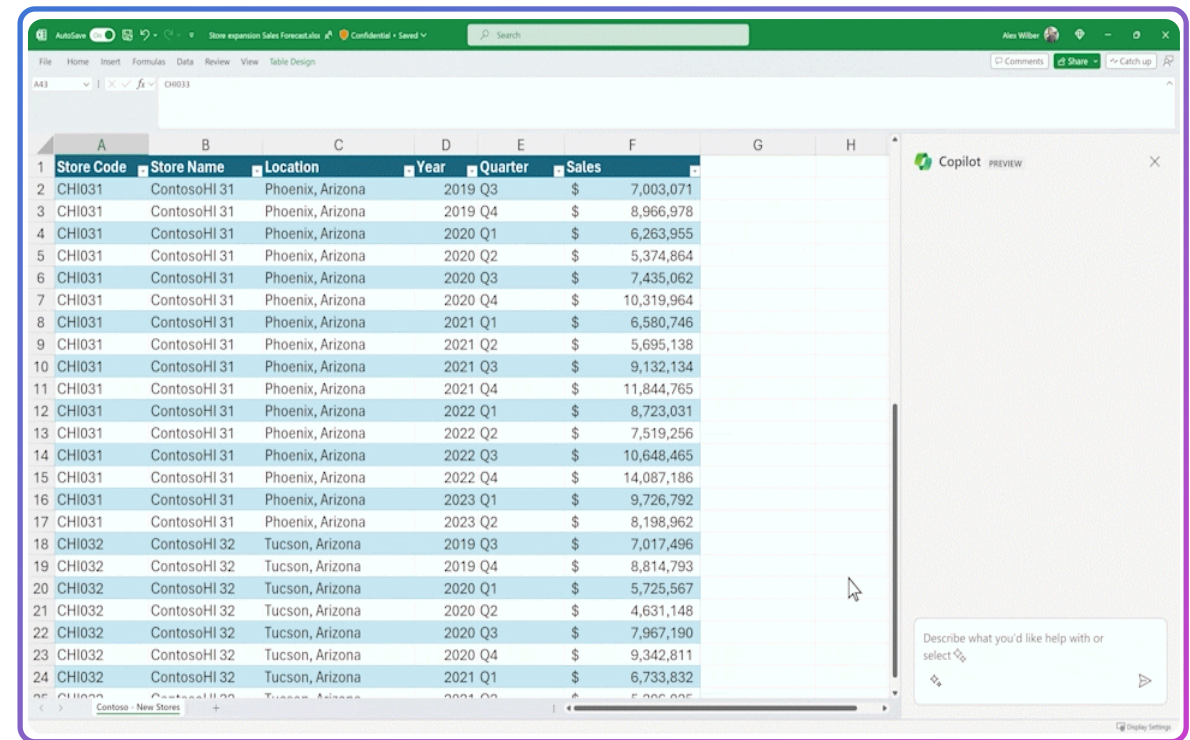
Use built-in meeting summaries and ask any question about the meeting



# Analyze data and generate formulas

With **Copilot in Excel**, analyze, comprehend and visualize data with ease.

- Create new formula columns or insert charts
- Insert pivot tables into new a sheet
- Refine data by providing simple commands
- Identify trends, create visualizations or ask for recommendations with natural language queries

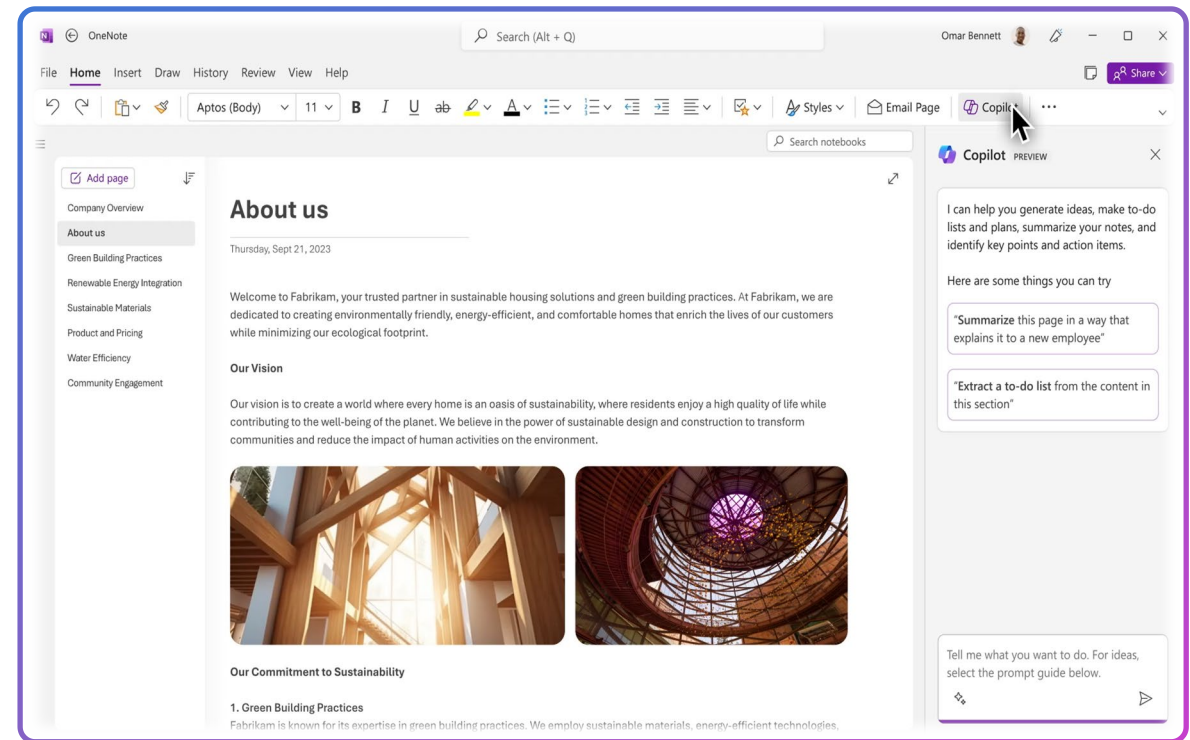


 **Copilot in Excel**

# Store, access, and prioritize notes

With **Copilot in OneNote**, revolutionize the way you plan and organize staying better prepared and proactively take action.

- Discover deeper insights about your notes
- Summarize your OneNote content, so you can make better sense of longer page notes you've taken
- Get a Copilot-generated paragraph, bulleted list or organized section



 **Copilot in OneNote**



# Microsoft Copilot Everywhere



**Copilot in PowerPoint**



**Copilot in Loop and  
Microsoft To Do**



**Copilot in Whiteboard**



**Copilot in ClipChamp**



**Copilot in Designer**

**Coming Soon...**



**Copilot in SharePoint**



**Copilot in OneDrive**

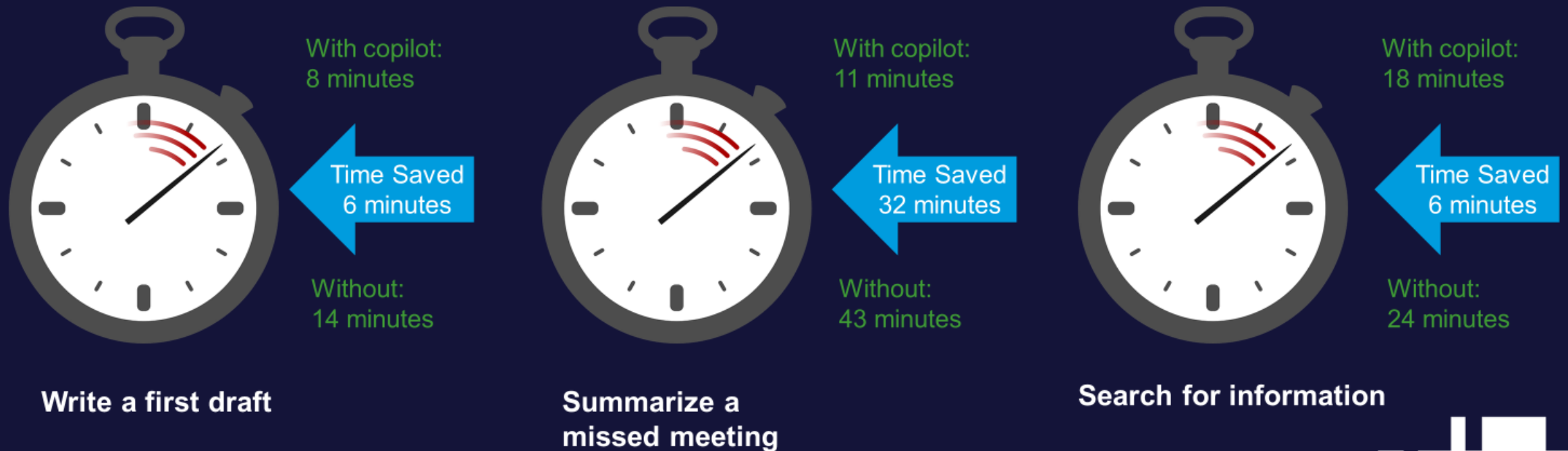


**Copilot in Stream**



**Copilot in Engage  
(AKA Yammer)**

# Microsoft Copilot “Time Savings”



*“Time is free, but it’s priceless. You can’t own it, but you can use it. You can’t keep it, but you can spend it. Once you’ve lost it, you can never get it back.”*



# Are you ready for Copilot?

Basic requirements for an implementation:

1. Schedule and time commitment for success

2. Security and content

- Is your security in a state where your teams have proper access to content?
- Is there anything in your content that should be reviewed before opening it to Copilot?

# Build your plan

Implementing this is unlike anything you've taken on before. Teaching people to use natural language to interact will be a big lift. You need to build a comprehensive plan to ensure success.

- Governance
- Identifying your team
  - Executive Sponsors, IT Staff, Early Adopters, and Champions
- Adoption community
- Start with Business Scenarios that matter to your teams
- Define your goals / Measure Success / Monitor progress
- Mission Statement
- Communication Plan
- Training (Rapid Learning or partner-led engagements)

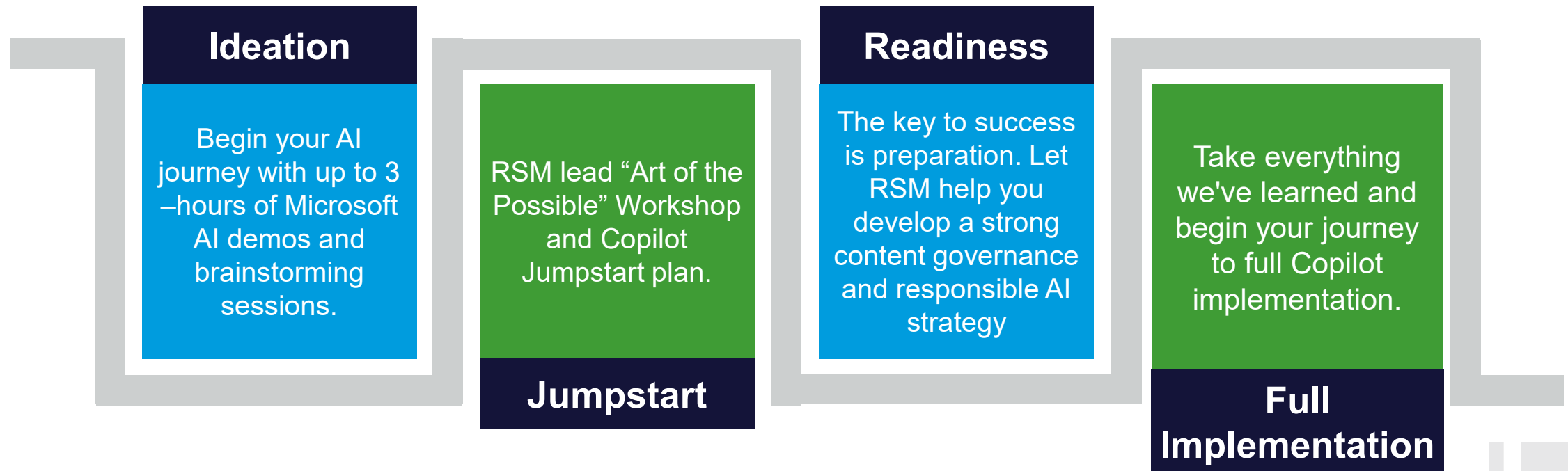


# Execute your plan

- Build your Center of Excellence
- Train your Early Adopters / Champions
- Build awareness in your organization
- Deliver training to the wider organization
- Monitor success
- Review feedback

# Copilot for Microsoft 365 Journey

Let RSM guide your AI Journey with Copilot for Microsoft 365





# Copilot in All



**Copilot in Word**



**Copilot in Outlook**



**Copilot in Teams**



**Copilot in Excel**



**Copilot in OneNote**



# Is your organization getting the benefits of AI solutions?

Whether you prefer to learn at your own pace, use interactive tools for a hands-on learning experience or have a conversation with someone who can guide you, we have you covered!



## Get a free assessment using AI

Use our AI-powered guide: The **AI & Digital Maturity Compass**. Gain personalized insights on using AI to cut costs, boost sales, and improve decision-making.

 [Get a personalized report on using AI](#)



## Explore AI trends and resources

Explore the latest AI adoption trends, case studies, frameworks, videos, and implementation guides for successful and responsible use of AI in your organization.

 [Explore AI content and tools](#)



## Have a no cost consultation

After you explore our content and try our AI and Digital Maturity Compass, contact us for a no-cost consultation with a Microsoft expert.

 [Start a consultation with an expert](#)





# Next Steps

# Protect data and privacy

AI needs access to data to deliver value. Use reputable providers.

When you use [Copilot for M365](#), [Copilot Studio](#) or [Azure AI Studio](#), your data is never used to train AI models, and it remains confidential and safe.

[Learn more here](#)



1

Sign up for the [no cost AI Consultation with RSM](#)

Select your preferred method to contact on question #12, then select **RSM** on question #15.

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2


Utilize the no cost [AI & Digital Maturity Compass assessment](#) to get a personalized report on how AI can help you and your organization today.

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3

Access the free [AI for Small to Midsize Businesses webpage](#) to learn more about AI resources and tools to help your organization.

A decorative graphic in the bottom right corner consisting of several overlapping, semi-transparent blue rectangles of various sizes and orientations, creating a modern, abstract look.



# Questions



Thank you





## THE POWER OF BEING UNDERSTOOD

### ASSURANCE | TAX | CONSULTING

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