

# Dominate your Copilot for Microsoft 365 deployment

April 16, 2024



# Agenda

- 01 Leading a responsible Copilot deployment

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- 02 Drive adoption and manage change
  - Communication, planning and training

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  - Center of Excellence

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- 03 Monitoring and reporting

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- 04 Business value calculations

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- 05 Copilot license management best practices

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- 06 Wrap up

# Presenters



## Zackery Reichenbach-Carr

Sr. Director AI

Zackery Reichenbach-Carr is the Innovation Research Lab and AI Leader at RSM US LLP. He leads RSM's innovation data science team and the emerging technology research function, with a primary focus on machine learning and artificial intelligence research and solution design.



## William Jones

Manager – Modern Work

William Jones is the operational lead for the Enterprise Content Management team at RSM US LLP. His team works with clients to implement Microsoft Copilot in their own environments, with a special focus on both Data Security and Copilot Adoption.



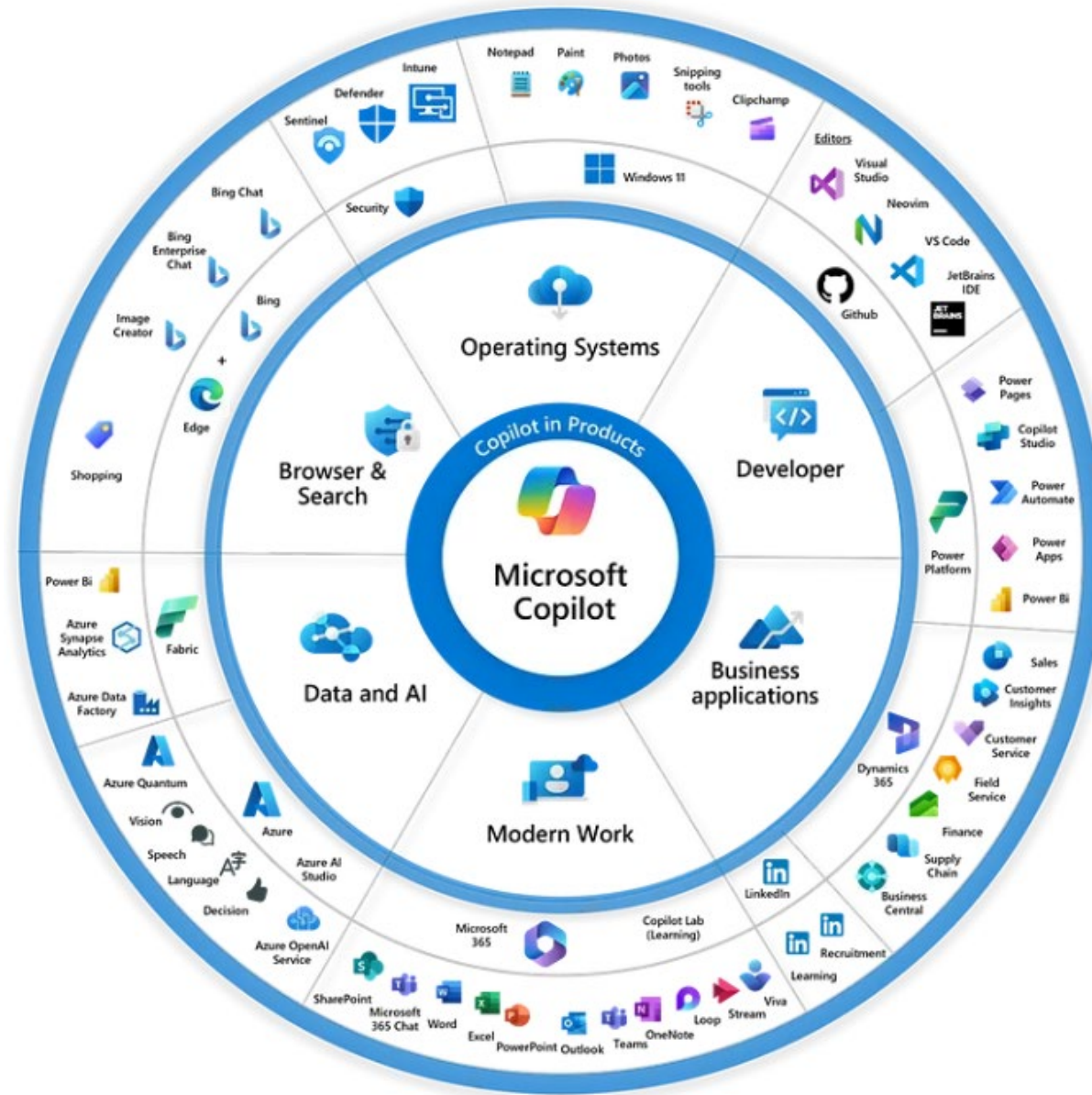
## Kalees Meckling

Director, Americas Small and Medium Business Strategy, Microsoft

# Preparing for Copilot



# M365 Copilot



# M365 Copilot goals and expectations

01

## Education and awareness

- Privacy impact
- Copilot capabilities

02

## Opportunity identification

- Evaluating the time savings and benefits
- Assessing future opportunities for change
- Solution complexity fit

03

## Developing a long-term strategy

- Copilot as part of the digital strategy
- Support and maintenance needs

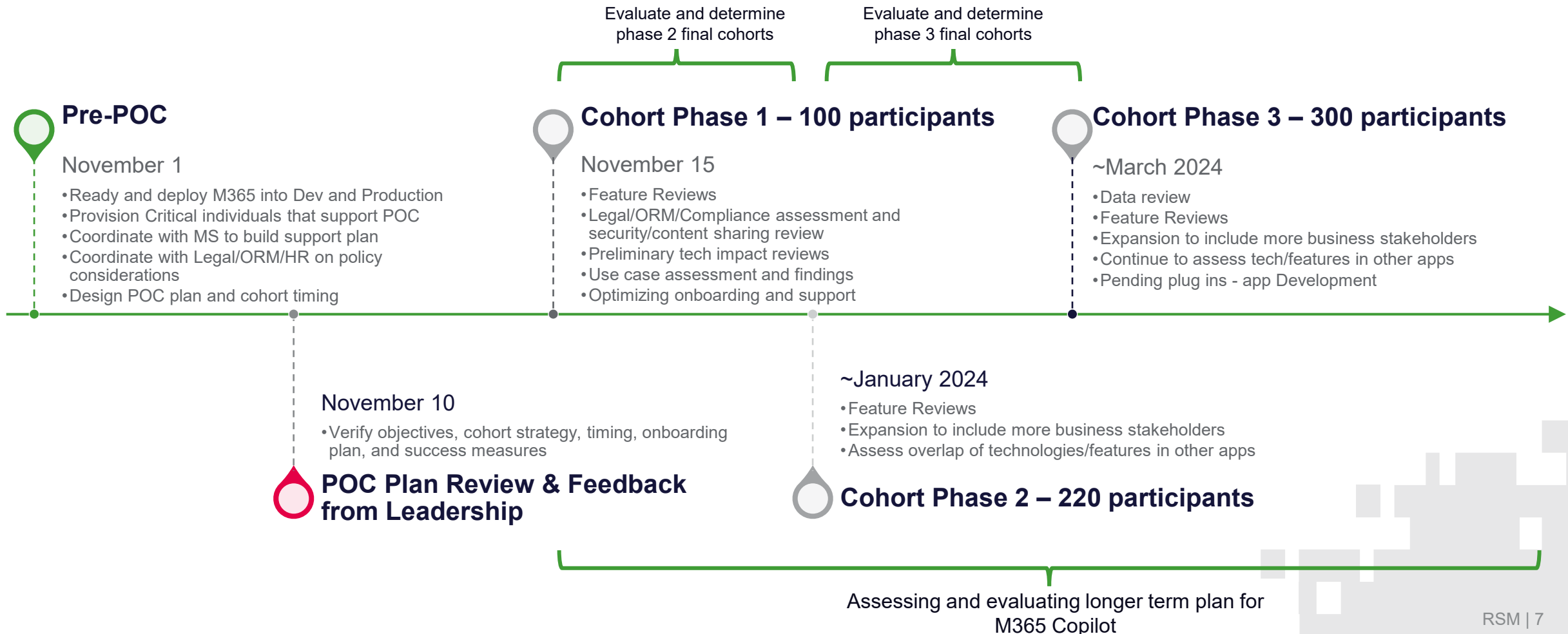
04

## Building excitement and adoption of AI

- Engagement
- Impact assessment

# Timeline

Six months of scaling support and participation



# Considering participants and audiences

Who to include in the adoption plan.

## Phase 01

Early adopters  
Leadership  
Champions  
Cross enterprise representation

## Phase 02

Operations  
IT/Technical resources  
Managers

## Phase 03

Administrators  
Project managers  
Documentation heavy roles



# Risk identification and mitigation

Identifying and creating awareness of the risks of using AI is critical.

01

## Legal and technical risks

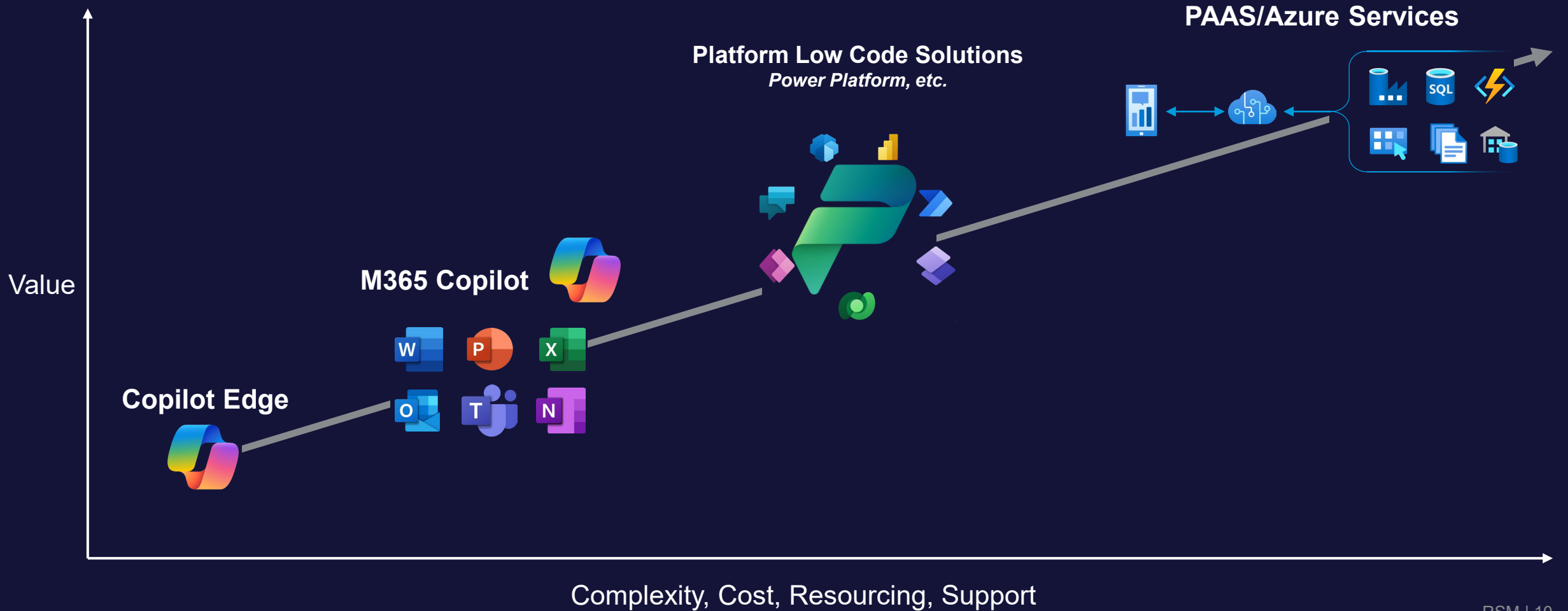
- AI usage policy
- Retention and data management
- Privacy and sentiment analysis
- Storage and data access
- Regulatory and jurisdiction impacts

02

## Behavioural and process risks

- Human review
- Usage guidelines
- Hallucination education
- Proper permissions management

# Solution complexity fit



An aerial photograph of a dense, lush green forest. The canopy is thick and vibrant, with some trees showing lighter green or yellowish hues. A few fallen tree trunks and roots are visible on the forest floor. The overall scene is a rich, textured expanse of greenery.

# Enablement

# Enablement

Communication, planning and training

01

## On-demand resources

- MS Learn site
- Internal demo videos
- Prompt engineering guides
- Viva Engage community
- COE structure

02

## Continuous support

- Kick-off and office hours
- Team use case sessions
- 1:1 use case discovery
- Prompt competitions

03

## Champions and advocates

- Copilot Champions program
- Leaders and sponsors become advocates

# Center of Excellence

The screenshot shows a Microsoft Teams channel page for 'Copilot CoE'. The left sidebar contains a navigation menu with 'General' selected, and sub-items: 'News and Announcements', 'Technical Management', and 'Transcription Enablement Working Team'. The main content area features a blue header with navigation options like 'Page details', 'Analytics', and 'Published 12/9/2023'. Below the header is a large blue banner with several tiles: 'Start Here - Your Copilot Overview', 'Copilot in Microsoft 365', 'Jumpstart your writing with Copilot in Microsoft Word', 'Create presentations with Copilot in PowerPoint', and 'Less triage, more communication with Copilot in Outlook'. At the bottom, there are sections for 'Office Hours' (showing 'No upcoming events') and 'Resources' (with buttons for 'Resources', 'Get Started Guides', 'FAQs', and 'Calendar').

# Monitoring and reporting

Creating awareness and advocacy from our leadership and sponsors

Summarized Update
Phase 2 has been kicked off and users have been licensed.
Metrics & tracking are becoming more advanced
Continual adjustments are being made based on feedback and usage metrics to optimize license distribution.
AI learning resources launched in LMS.

Issues or Gaps Identified
<b>Issue/Gap:</b> Continued need to provide introductory and follow-up training/education.
<b>Solution/Plan:</b> Evaluating Prompt engineering resources/materials and working with TDM and Dig. Upskilling on options for awareness. Also continuing to hold deep dives with specific teams and users where requested.

M365 Copilot Feature/App Updates
<ul style="list-style-type: none"><li>• Feb: Outlook Classic - Summarize functionality</li><li>• March:<ul style="list-style-type: none"><li>• Excel desktop</li><li>• Planner</li><li>• SharePoint</li></ul></li></ul>

Upcoming Events/Activities
<ul style="list-style-type: none"><li>• Weekly office hours</li><li>• Meeting transcription policy follow-up</li><li>• Stakeholder review with IT</li></ul>

HIGHLIGHTS
<ul style="list-style-type: none"><li>• We had a participant of the POC facilitate a day of office hours and got great feedback on the “guest speaker” aspect</li><li>• Engagement via chat, office hours, and Viva Engage has increased with the start of the Phase 2</li></ul>

LESSONS LEARNED
Different than highlights, this area will provide a snapshot of things we have “learned” about the tools or the running of the POC itself and how we will leverage or adapt to findings.
<ul style="list-style-type: none"><li>• Users who were added in Phase 2 expected / desired a formal kickoff or training session, so we held one after a good amount of participant interest was conveyed</li></ul>

# Monitoring and reporting

## Utility across the business

### **Data and Digital Services**

- SOW draft

### **Finance & Accounting**

- Summarizing docs
- Searching for files, people
- Summarizing emails, chats, to-do's

### **Financial Markets**

- Drafting, revising content
- Searching docs, firm guidance

### **Internal Operations - Consulting**

- Drafting, formatting docs, comparing versions
- Drafting, summarizing emails
- Searching for content
- Drafting, summarizing docs
- Notetaking

### **IT**

- Summarizing notes, activities
- Summarizing, drafting, revising emails
- Searching, formatting content

### **Legal & Risk Mgmt**

- Summarizing docs, emails, chats
- Drafting, revising, formatting content

### **Managed IT Cloud & Infra.**

- Drafting, revising emails & docs
- SOW generation
- Doc search
- Summarizing notes, to-do's
- Image generation

### **Management Consulting**

- Summarizing notes, docs
- Analyze data
- Searching for internal info

### **Marketing and Communications**

- Drafting, revising docs

### **Risk Management**

- Drafting, formatting content
- Searching for content

### **Other Consulting Services**

- Summarizing docs, action items
- Searching for RSM info

### **Products**

- Searching for RSM info
- Drafting, summarizing emails & chats

### **Talent Development**

- Searching for RSM info
- Drafting & summarizing emails, chats, to-do's, docs, notes
- Comparing files
- Generating presentations

### **M & A**

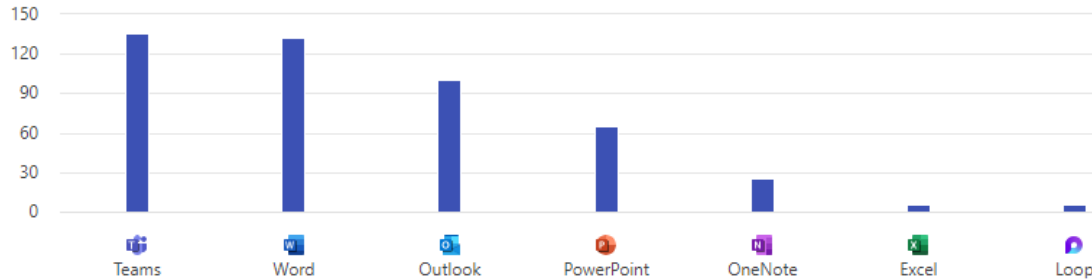
- Searching for RSM info/ documentation

# Monitoring and reporting

## Application utilization

### Understand how many people use Copilot to enhance their work

Count of active Copilot users per app over the past 28 days.



Average AI-assisted actions per user in Word

- Draft documents **4.3**
- Rewrite documents **8.9**
- Summarize documents **3.2**



Average AI-assisted actions per user in PowerPoint

- Create presentations **3.7**



Average AI-assisted actions per user in Outlook

- Summarize email threads **3.3**
- Generate email drafts **6.4**



Average AI-assisted actions per user in Teams

- Summarize meetings **8.4**
- Summarize chats and channel conversations **1.1**



Users of key Copilot features in Word

- Draft documents **74**
- Rewrite documents **44**
- Summarize documents **42**



Users of key Copilot features in PowerPoint

- Create presentations **20**



Users of key Copilot features in Outlook

- Summarize email threads **76**
- Generate email drafts **40**



Users of key Copilot features in Teams

- Summarize meetings **87**
- Summarize chats and channel conversations **11**



# Monitoring and reporting

This slide illustrates some of the opportunities to transform work through broader adoption and utilization of Microsoft 365 Copilot.

<p><b>Meetings</b> Copilot helps users summarize key takeaways and action items.</p> <p><b>18,385</b> Microsoft Teams meeting users over the past 28 days</p>	<p><b>Chat</b> Copilot synthesizes key points and tasks from long chat threads.</p> <p><b>4,123,816</b> Microsoft Teams chats sent per week on average over the past 28 days</p>	<p><b>Email</b> Copilot helps users write effective emails and digest long threads.</p> <p><b>1,035,370</b> Emails sent per week on average over the past 28 days</p>	<p><b>Documents</b> Copilot kickstarts the creative process for docs and presentations.</p> <p><b>19,638,209</b> Active cloud files over the past 28 days</p>
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## What the research says

Microsoft has performed qualitative research from users who say they save 30 minutes or more per week with Microsoft 365 Copilot. This research identifies that on average, users say they save 1.2 hours or more per week. 53% say they repurpose this time for focused work. Applying this extrapolative data to RSM M365 copilot users, the potential time savings the past month is outlined in this graphic.

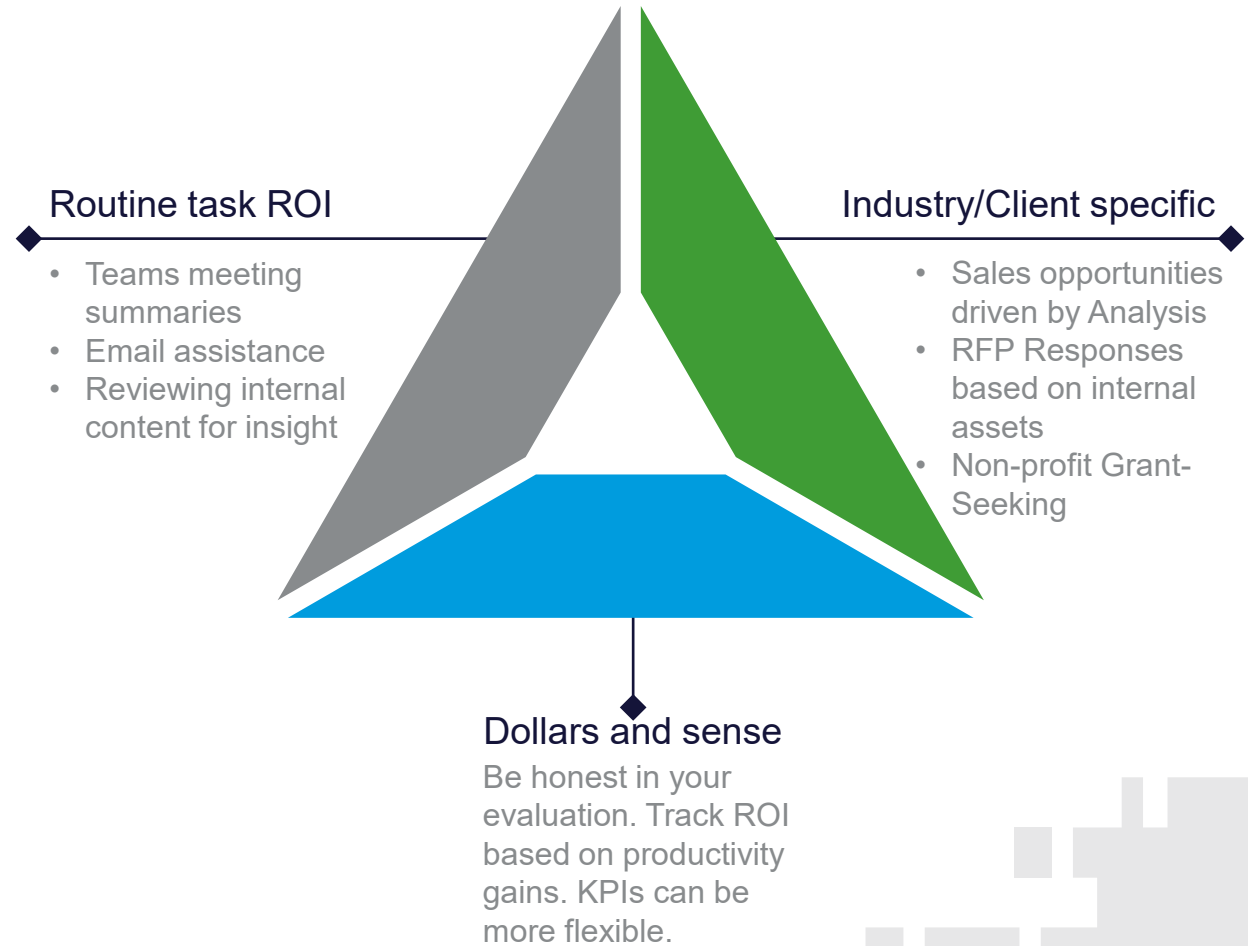
1,210 hours or more potentially saved across 252 active M365 Copilot users the past month.  
(Users x 1.2 hours x 4 weeks)

**If all RSM users (21,571) were licensed for Microsoft 365 Copilot, the potential time savings the past month is outlined in this graphic.**

103,500 hours or more could have been saved across 21,571 total licensed users the past month.  
(Users x 1.2 hours x 4 weeks)

# Business value calculations

We work with clients to determine metrics and KPIs around use cases that work for their particular industry. Information is collected based on internal surveys and metrics.



# Copilot insights and adoption score

Microsoft 365 admin center
Search for users, groups, settings, and actions
Copilot

- Home
- Users
- Devices
- Groups
- Roles
- Resources
- Billing
- Support
- Settings
- Setup
- Reports
- Adoption Score
  - Usage
  - Security & Compliance
- Health
- Admin centers
  - Security
  - Compliance
  - Device Management
  - Azure Active Directory


Home > Adoption Score > AI assistance

## AI assistance PREVIEW

i This score is not included in your organization's overall adoption score. [Learn more](#)

**Score: 60/100 points**

▲ +3 compared to last 30 days



Use the data on this page to assess how well your organization is using the AI capabilities of Copilot in Microsoft 365.

[View AI assistance resources](#)

### What makes up my AI assistance score?

#### Summarize

Copilot concisely summarizes the meetings and messages that are crucial for sharing information in your organization, sparing users the labor of sorting it out from notes and complex chat or email threads. Your people can use Copilot to do the following:

People using Copilot's summarize features across Microsoft 365 apps  ⓘ

Feature	Score
Summarize a Teams meeting	750/1500
Summarize a Teams conversation	1201/1500
Summarize an email thread	1201/1500
Summarize a Word document	1090/1500
Summarize a presentation	1090/1500

#### Create

Copilot gets users past the roadblock of staring at a blank page by jump-starting their creative process and helping to streamline the tasks of researching, writing, and editing.

People using Copilot's creation features across Microsoft 365 apps  ⓘ

Feature	Score
Draft a Word document	348/1500
Create a presentation	721/1500
Generate an email draft	1307/1500
Rewrite a Word document	488/1500

# Copilot license management best practices

Act with intent!

01

## Your corporate licenses

- Participation in the early stages is a commitment, not a reward
- Regularly triangulate on adoption metrics
- Leverage the **User Last Activity Report** in Copilot usage reporting

02

## Choosing early adopters

- Tech enthusiasts
- Go where Copilot shines
  - Sales and marketing
  - Multimedia and text
  - Analysts
  - Customer support

# 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](#)

# 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 business 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 business.

A decorative graphic in the bottom right corner consisting of several blue rectangular blocks of varying sizes and orientations, creating a stepped, abstract shape.

# Questions





Thank you





## THE POWER OF BEING UNDERSTOOD ASSURANCE | TAX | CONSULTING

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