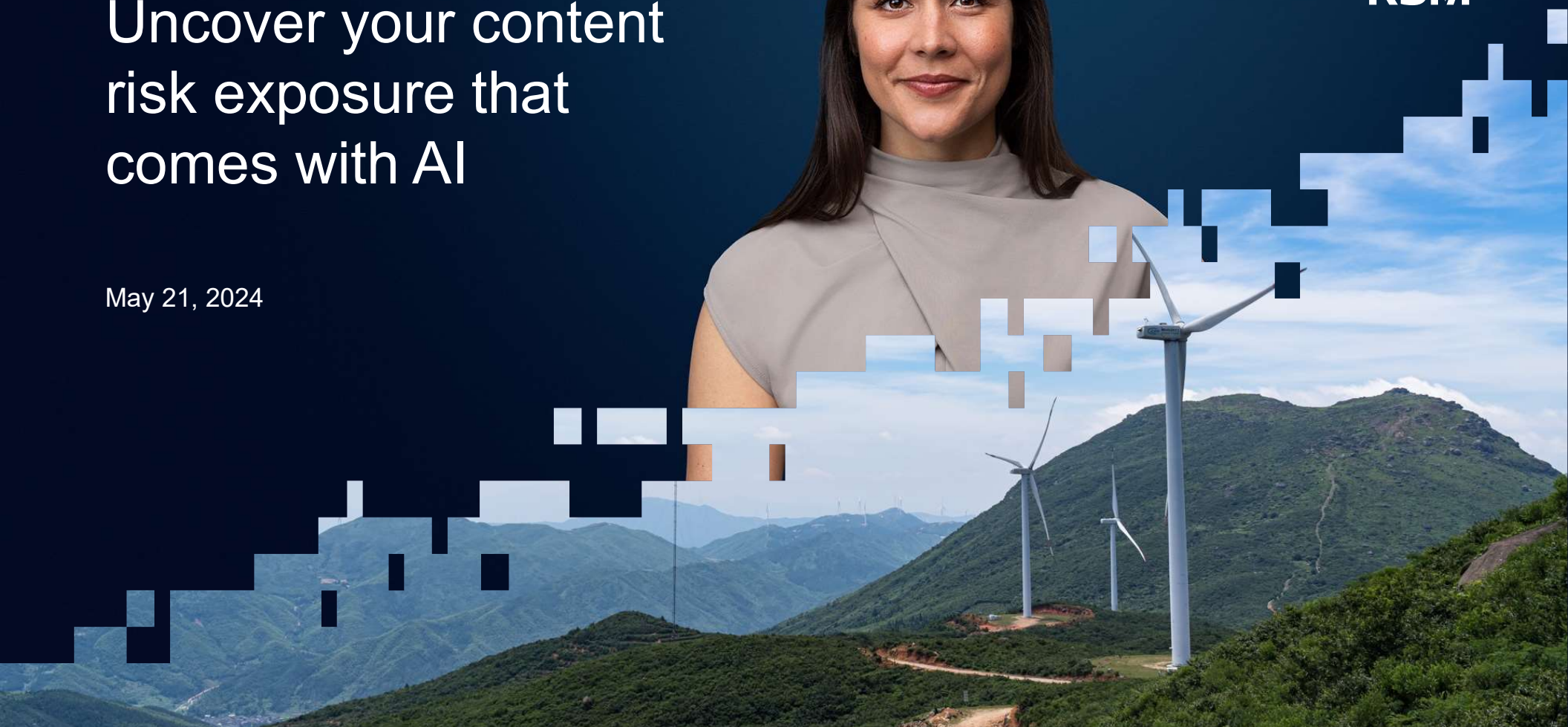


Uncover your content risk exposure that comes with AI

May 21, 2024



Agenda

Introductions

Security, compliance & privacy

AvePoint Copilot Adoption Framework

Collaboration today

Understanding and uncovering risk

Workspace governance

Demo

Q&A

Presenters



Jonathan Blaue

RSM – Cloud Solution Architect



Cody McLees

RSM – Microsoft Security
Implementation Leader

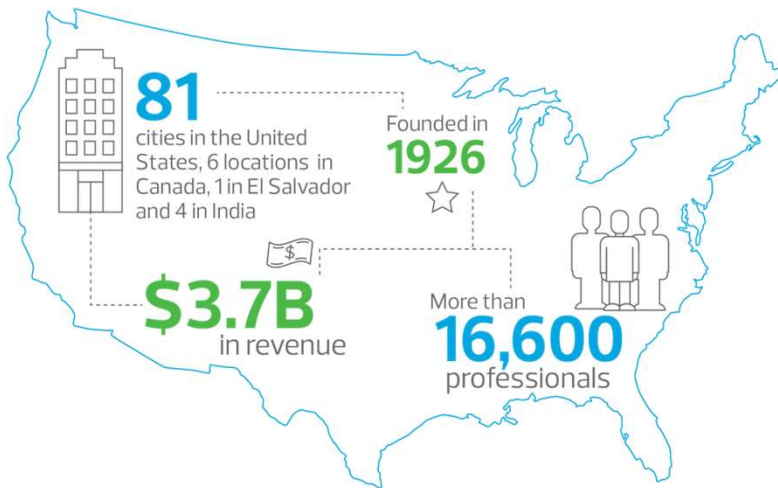


Conor Dean

AvePoint – Senior Solution Engineer

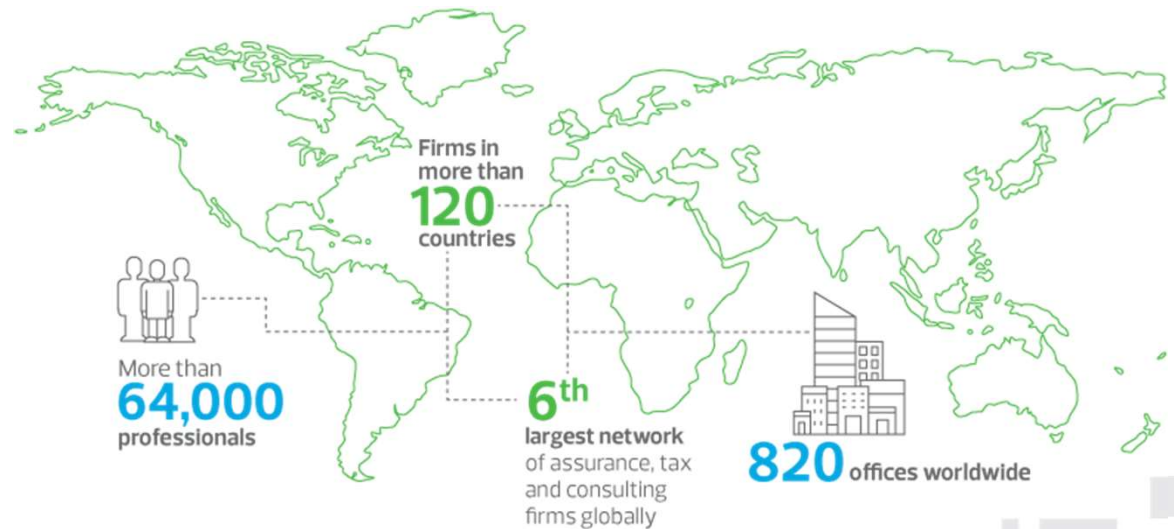
RSM's global reach & local touch

RSM North America



RSM US LLP is the **leading provider** of assurance, tax and consulting services focused on the **middle market**.

RSM Global



RSM's partnership with Microsoft



Recent Microsoft FY23 Awards

- ✓ Partner Of the Year Winner Defense and Intelligence
- ✓ Partner Of the Year US Finalists Government
- ✓ Partner Of the Year WW Finalists Government
- ✓ Partner Of the Year Winner D365 Finance
- ✓ Partner Of the Year Finalists D365 Business Central
- ✓ Partner Of the Year US Finalists Community Response
- ✓ Partner Of the Year WW Finalists Healthcare & Life Sciences
- ✓ Partner Of the Year WW Finalists Business Intelligence

Top 1% of Dynamics Partners for the past 20 Years

Microsoft
Solutions Partner

Security

Specialist
Cloud Security
Identity and Access Management
Information Protection and Governance
Threat Protection

Microsoft
Solutions Partner

Modern Work

Specialist
Adoption and Change Management
Calling for Microsoft Teams
Teamwork Deployment
Modernize Endpoints

Microsoft
Solutions Partner

Business Applications

Specialist
Small and Midsize Business Management
Supply Chain
Finance

Microsoft
Solutions Partner

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Azure

Specialist
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Migrate Enterprise Applications to Microsoft Azure

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Solutions Partner

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Specialist
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Migrate Enterprise Applications to Microsoft Azure

Microsoft
Solutions Partner

Infrastructure
Azure

Specialist
Infra and Database Migration
Azure Virtual Desktop

We Are AvePoint


Leader in Microsoft 365 data management solutions



9M
Cloud Users

88
Countries

7
Continents

 AvePoint[®] is headquartered in Jersey City, NJ, with approximately 2,000 employees across 29 offices, 14 countries, and five continents.

Microsoft
Partner


5x
Partner of the Year
Award Winner

AVPT
Nasdaq Listed



Customers We Serve

Communications



Retail / Consumer



Pharma & Health



Financial Services



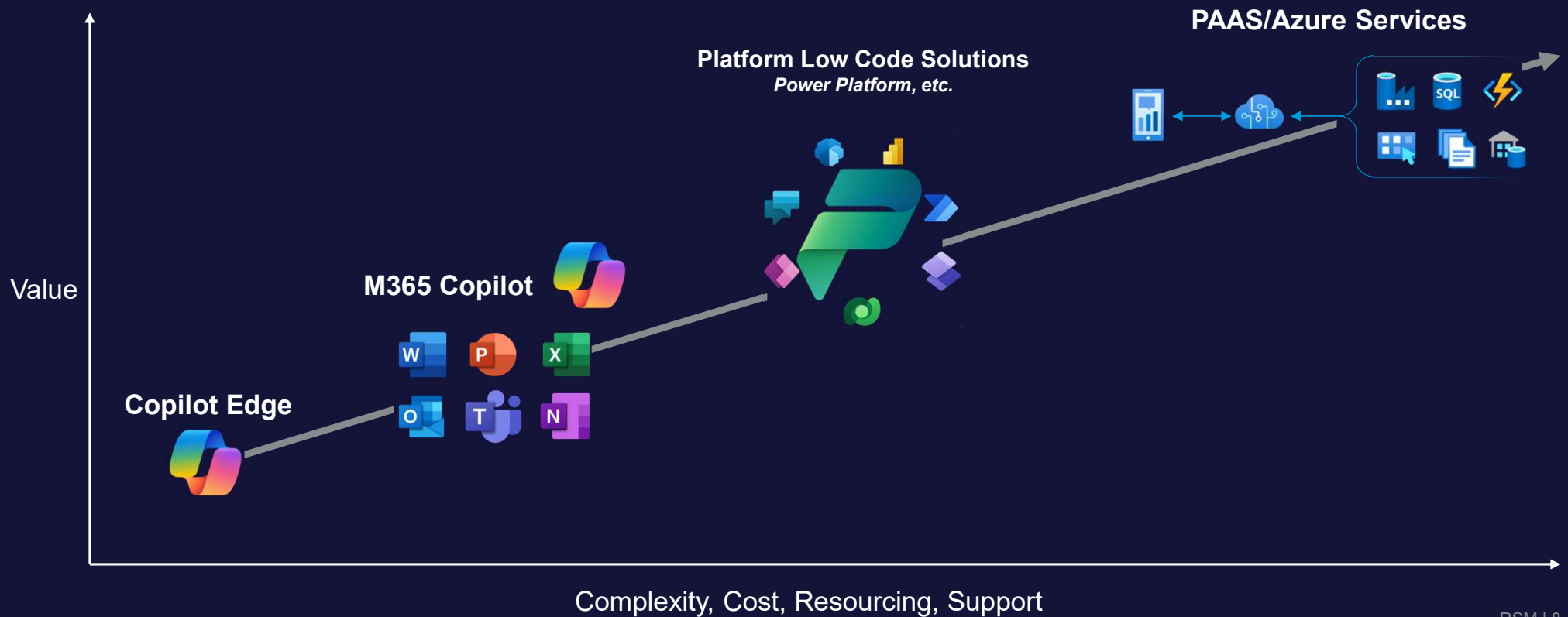
Govt / Education



High Technology



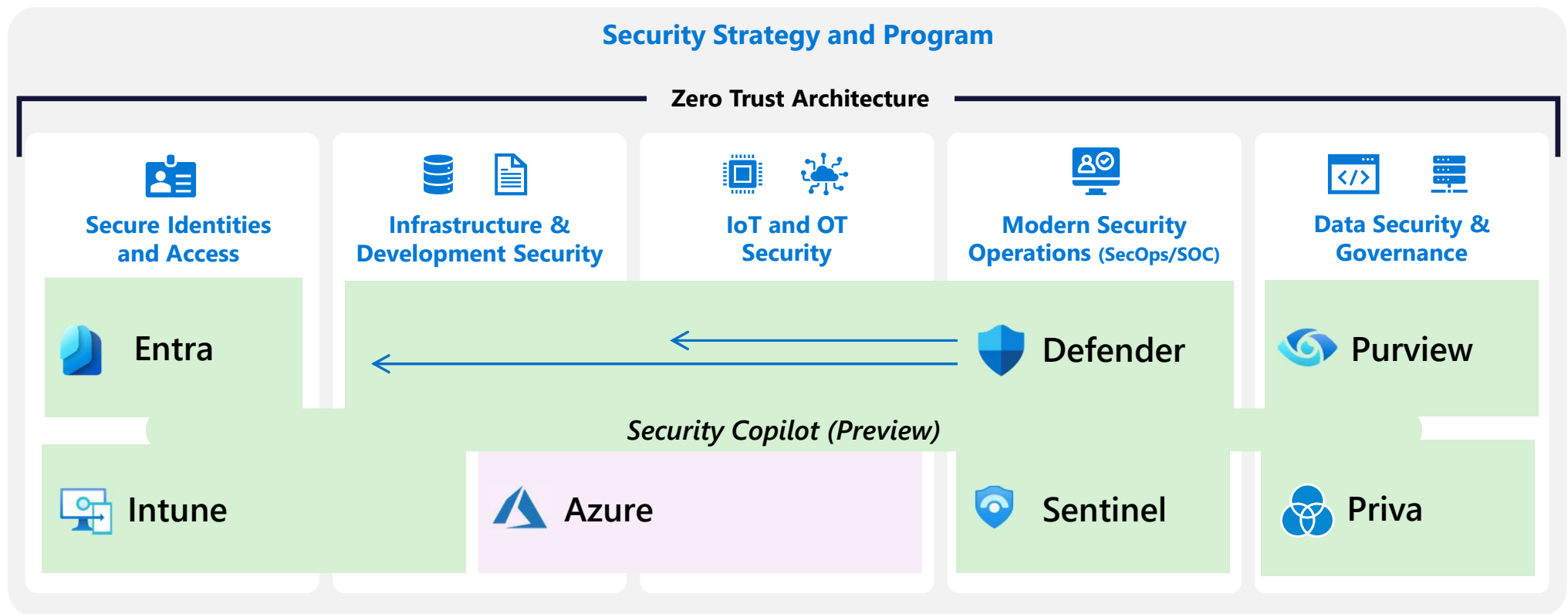
Solution complexity fit



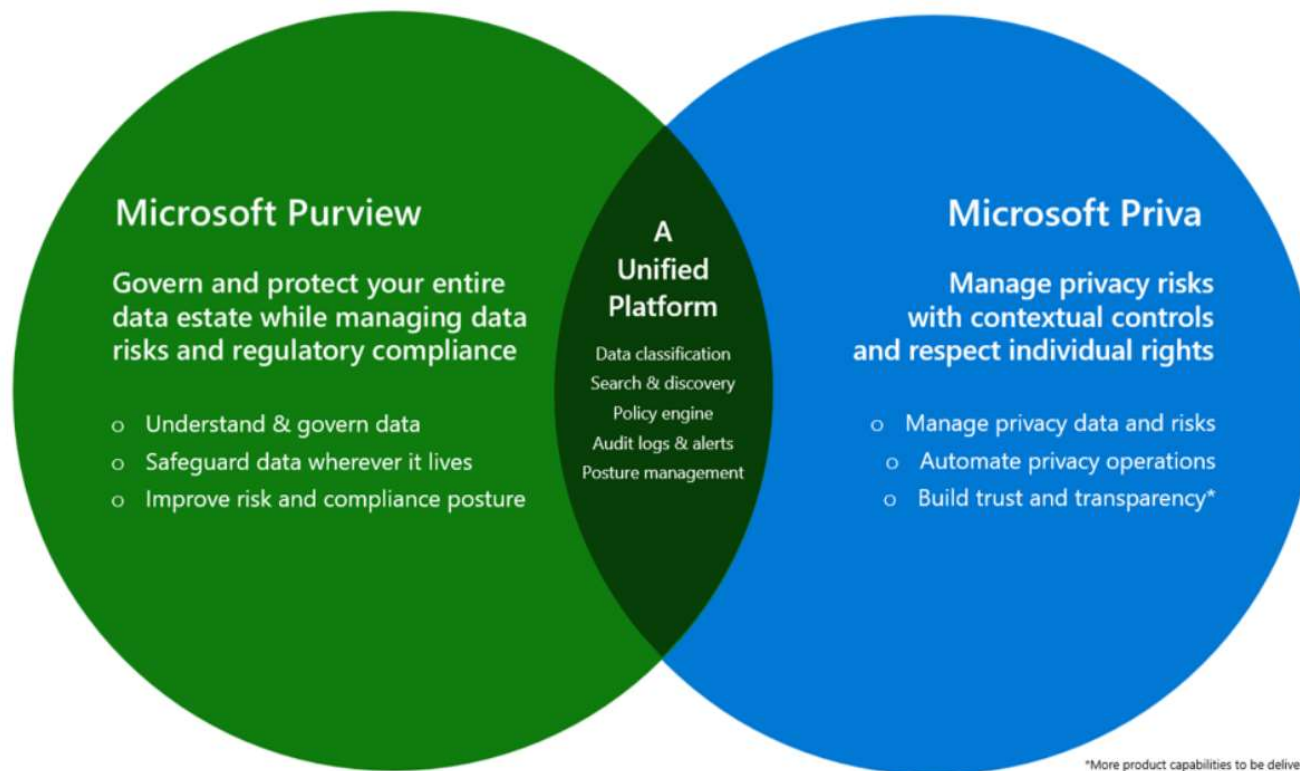
Security,
compliance &
privacy



Product families enable modernization initiatives

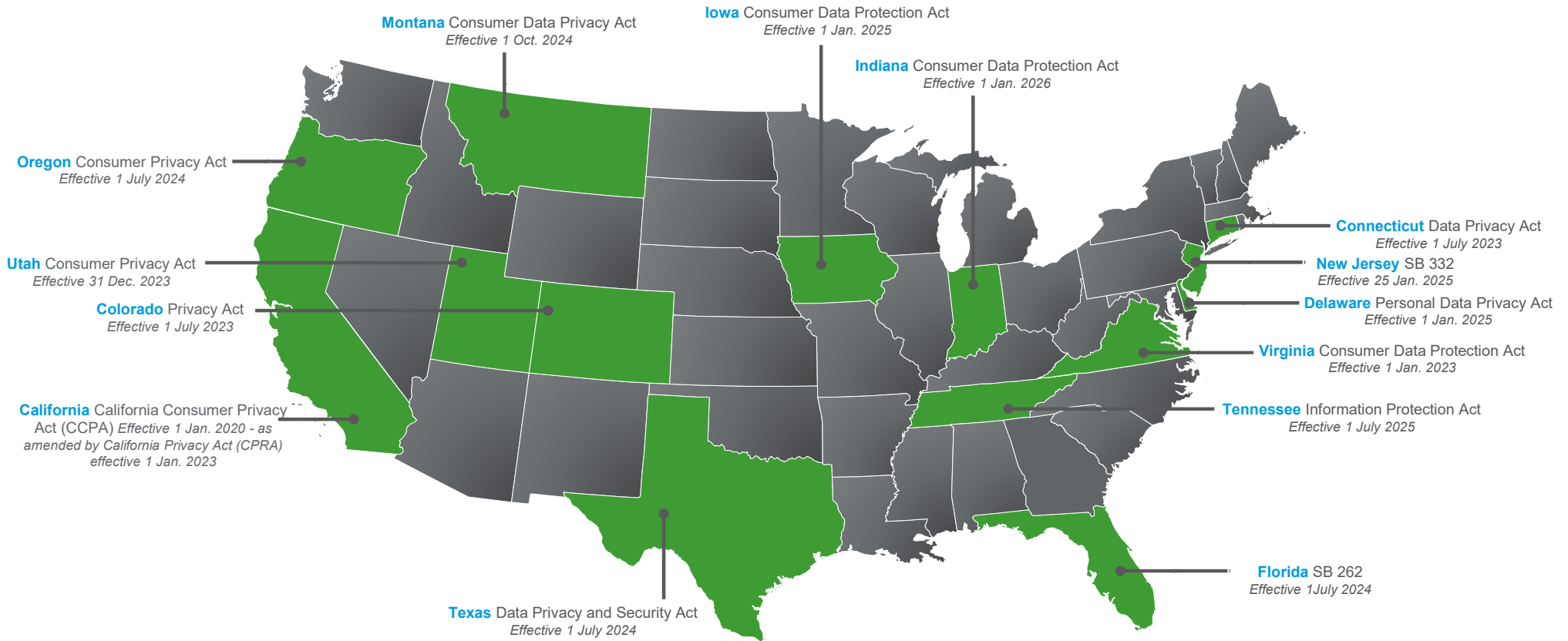


Data governance for Copilot



*More product capabilities to be delivered in the future

United States Comprehensive Privacy Law Map

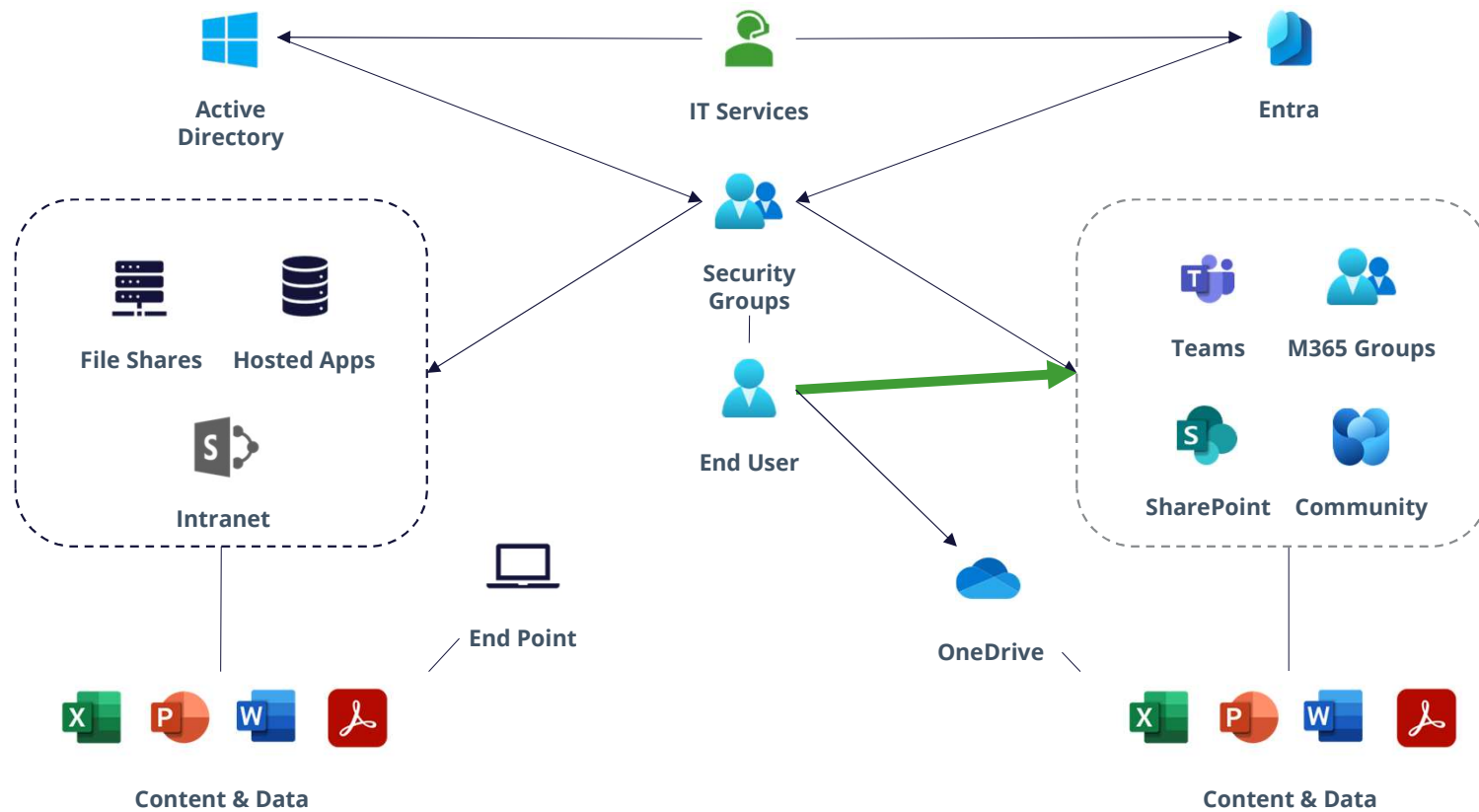


AvePoint Copilot Adoption Framework



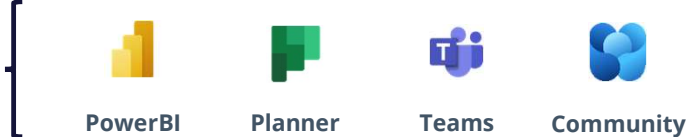
Collaboration Today

Moving to the cloud changed what exactly?



Refresher on M365 Groups

Optional experiences that create a M365 Group



M365 Groups

Membership experience to organize what users collaborate with content and other users

What an M365 Group comes with



News, Process,
Instructions



External



Outer Loop



Inner-Loop



User



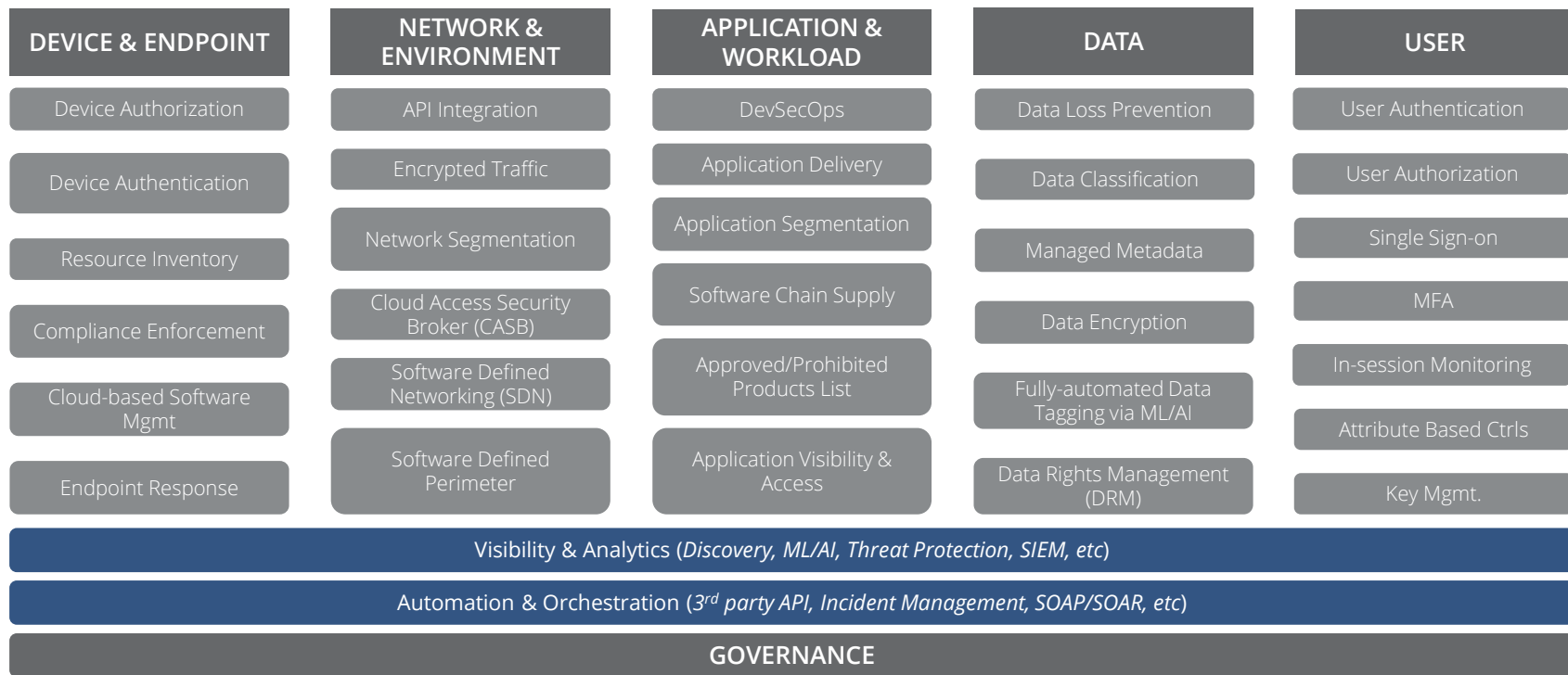
Understanding Risk

A top-down view of a meeting table with people's hands, papers, a laptop, and glasses. The table is made of dark wood. There are several people around the table, their hands and arms visible. One person is holding a pen over a document. Another person is holding a pen over a document. There is a laptop in the center. There are several papers and documents scattered around. There are also some glasses on the table. The overall scene is a professional meeting.

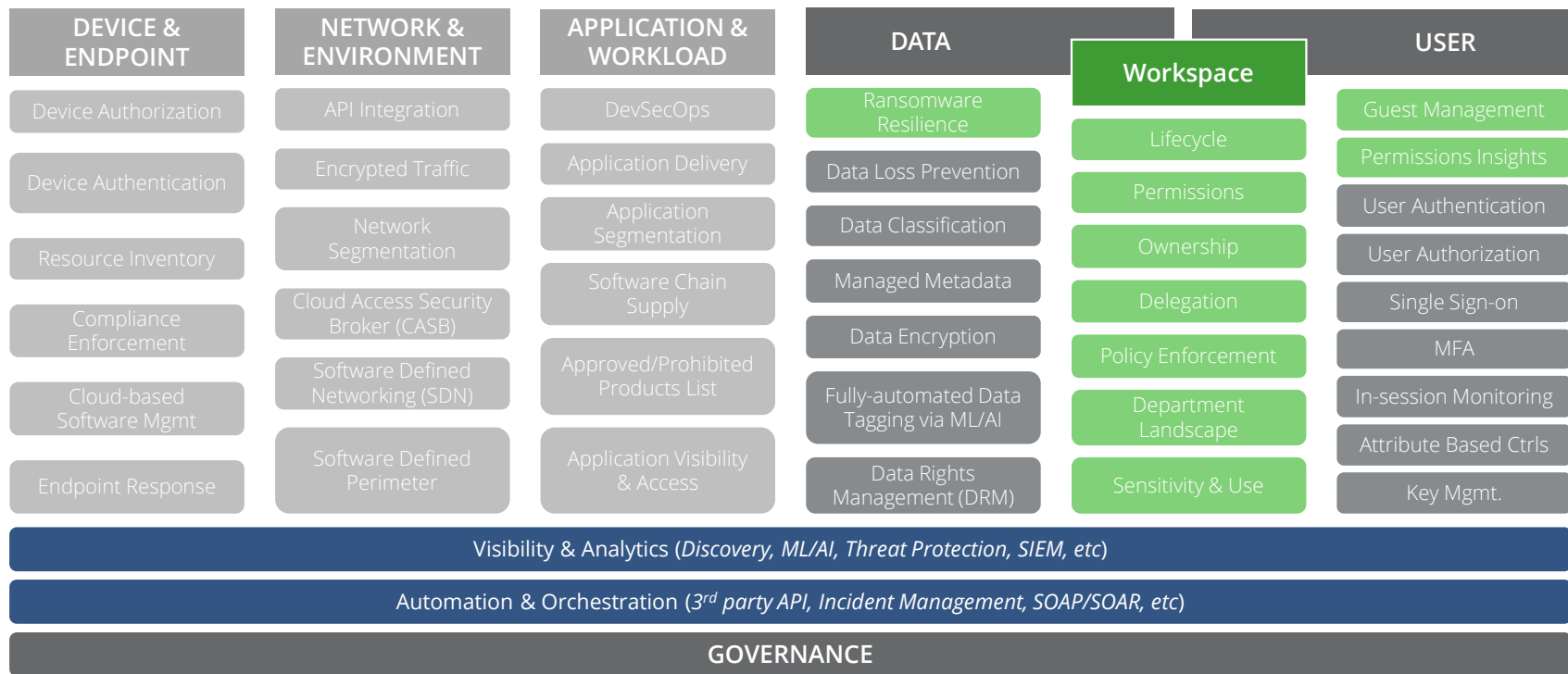
**“Could you show me everything
this user has access to?”**

Microsoft 365

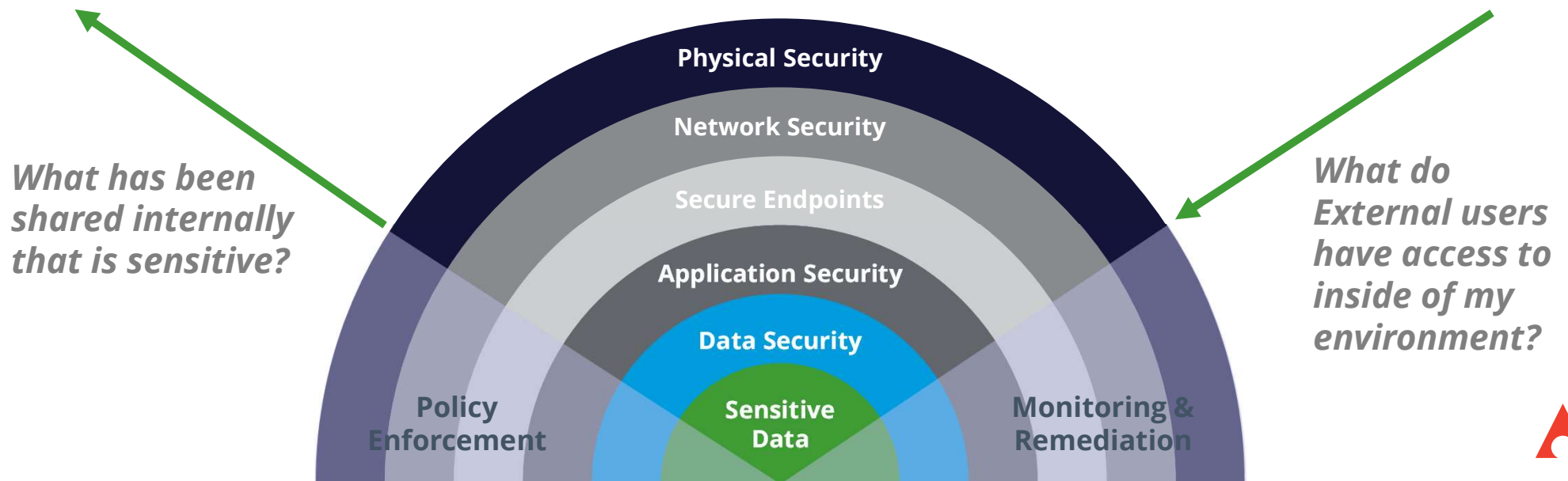
Core Pillars of Zero Trust



Zero Trust with a focus on Collaboration



Being Specific with Risk.



Filter by role

Learn / Microsoft 365 / Microsoft 365 Copilot /

Data, Privacy, and Security for Microsoft Copilot for Microsoft 365

Article | 01/01/2024 | 2 contributors

Feedback

Microsoft Copilot for Microsoft 365 documentation

Get started with Microsoft Copilot for Microsoft 365

View

Overview of Microsoft 365

Requirements for Microsoft 365

Data, Privacy, and Security for Microsoft 365

Data Trust principles for Microsoft 365

Extend Microsoft Copilot for Microsoft 365

Deploy

Manage

Microsoft Copilot for Microsoft 365 only surfaces organizational data to which individual users have at least view permissions. It's important that you're using the permission models available in Microsoft 365 services, such as SharePoint, to help ensure the right users or groups have the right access to the right content within your organization. This includes permissions you give to users outside your organization through inter-tenant collaboration solutions, such as shared channels in Microsoft Teams.

Microsoft Copilot for Microsoft 365 is a sophisticated processing and orchestration engine that provides AI-powered productivity capabilities by coordinating the following components:

- Large language models (LLMs)
- Content in Microsoft Graph, such as emails, chats, and documents that you have permission to access.
- The Microsoft 365 apps that you use every day, such as Word and PowerPoint.

For an overview of how these three components work together, see [Microsoft Copilot for Microsoft 365 overview](#). For links to other content related to Microsoft Copilot for Microsoft 365, see [Microsoft Copilot for Microsoft 365 documentation](#).

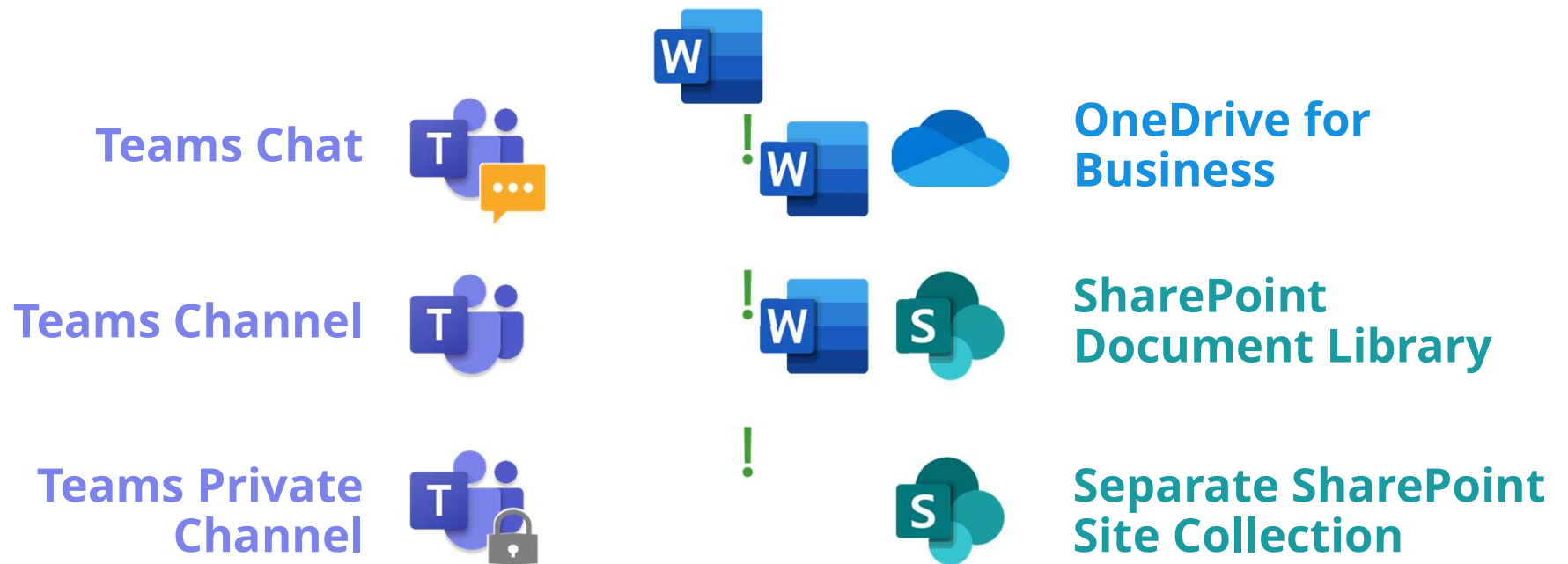


40,000+ possible identity permissions
are available across key cloud platforms

>50% of these permissions are
high-risk, capable of causing **catastrophic
damage** if used improperly

*“it is becoming increasingly difficult for
organizations to know **who has access to
what data** across platforms”*

High Risk Data Sprawl

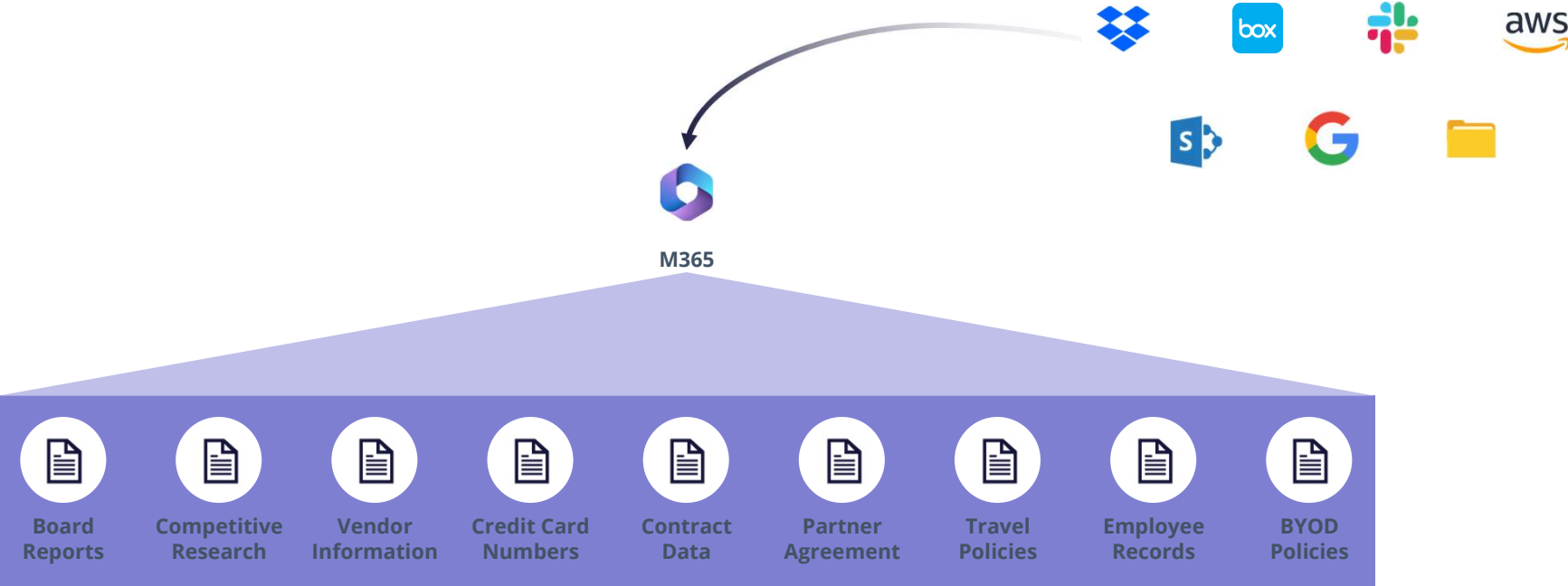


Multiple Copies/Versions saved through development

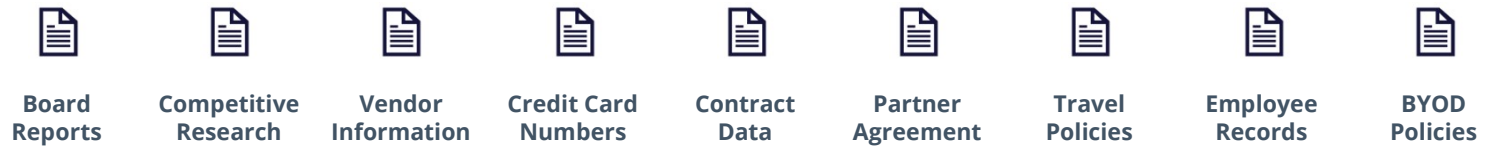


Workspace Governance

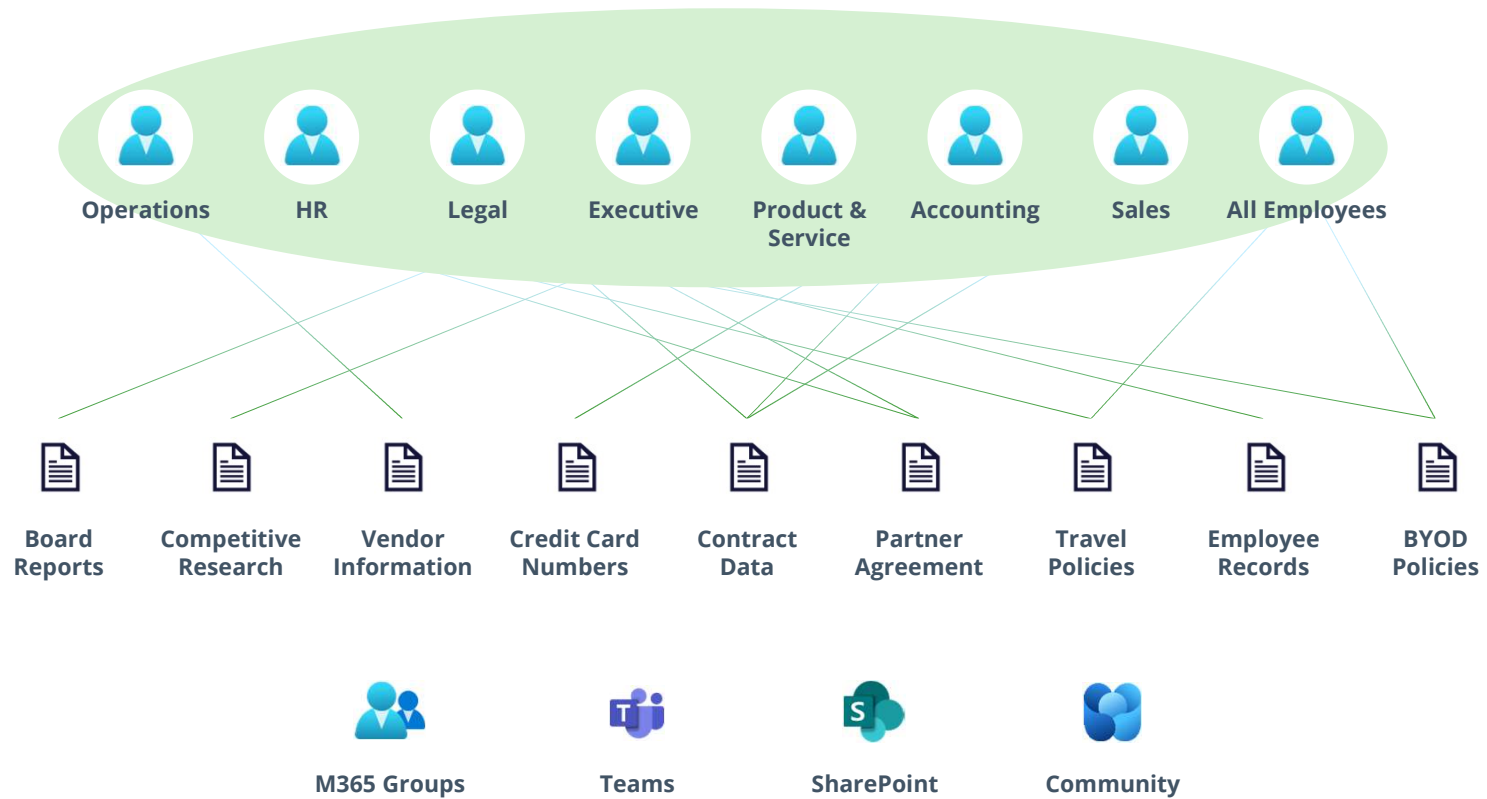
1. Understand the data you have today



2. Plan Defined Groups and Data Access










2. Plan Defined Groups and Data Access



3. Have a plan for each workspace.



4. Have a policy for each workspace type

	 Board Group	 Sensitive Teams	 Project Teams	 External Teams	 Public Sites	 Sensitive Sites	 IT Dept Community
Privacy	Private	Private	Private	Private	Public	Private	Public
Membership	Closed	Closed	Requested	Requested	Open	Closed	Open
External Access	No	No	No	Yes	No	No	No
Sensitive Data	Yes	Yes	Yes	Yes	No	Yes	No
Sharing Links	No	No	No	No	Yes	No	Yes
Permission Inheritance	Enforced	Enforced	Enforced	Enforced	Monitored	Enforced	Open



Demonstration



Copilot insights and adoption score

Microsoft 365 admin center

Search for users, groups, settings, and actions


Home > Adoption Score > AI assistance

AI assistance PREVIEW

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

How is this score calculated?

The AI assistance score indicates the extent of Copilot actions being taken by people in the organization using Microsoft 365 and breaks the actions down into two categories: Summarize and create. The scores are averaged within each category, and then averaged across the whole organization.

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

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.

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.

3

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



Questions



Thank you





THE POWER OF BEING UNDERSTOOD ASSURANCE | TAX | CONSULTING

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