



The Copilot countdown:

Preparing your organisation
for Microsoft 365 AI.



Introduction

As New Zealand's organisations patiently wait for Microsoft 365 Copilot to become available, this is the ideal moment to ensure you are fully prepped for its arrival. "The Copilot Countdown" is crafted to give you a practical head start in the world of Artificial Intelligence (AI). Rather than playing the waiting game, we offer you 10 essential tips to shape your organisation for the future. When Copilot hits the market, your enterprise won't just be ready; it'll be at the forefront, reaping all the benefits AI brings.

Getting prepared

1. Secure the right Microsoft Foundation license for Copilot

Microsoft Copilot licenses serve as supplementary additions, designed to complement existing Business Standard, Premium, E3, or E5 licenses. Opting for the E5 license unlocks the full potential of Copilot, providing access to its most advanced features and capabilities.

2. Assess your current use of Microsoft 365

The more you harness the Microsoft 365 suite, the more impactful Copilot becomes. Leveraging SharePoint for collaborative document management, OneDrive for personal file storage, and adopting Teams for communication and meetings are essential steps. These integrations unlock Copilot's sophisticated features like real-time transcription, efficient note-taking, and proactive action item generation.

If your current setup involves a traditional file server or external tools like Zoom for communication, transitioning to Microsoft 365 is not just an upgrade; it's a consolidation that primes your organisation to take full advantage of Copilot's capabilities.

3. Ensure data security – audit your SharePoint permissions

When Copilot is enabled within your system, it will respect existing SharePoint and Teams permissions. This functionality can inadvertently highlight any flaws or misconfigurations in your permissions setup, potentially exposing sensitive information. To prevent any security breaches, it's crucial to perform a meticulous review of your SharePoint permissions before integrating Copilot.

Additionally, maintaining data security requires that your IT provider or team has a solid process for managing permissions.

4. Keep your Microsoft Office current: upgrade to the latest 'new' Outlook when available

To fully utilise Microsoft Copilot, it's essential to operate with the most current Microsoft Office version provided through a Microsoft 365 subscription, rather than relying on outdated standalone or shared licenses from Office 2016 or 2019. These older versions do not support Copilot. Ensuring that your Office applications are regularly updated is key, which means having confidence in your IT provider's robust upgrade practices. Additionally, it's important to note that Copilot is only compatible with the "New Outlook," which, as of now, is still in preview mode.

5. The need for individual devices and licenses

In today's interconnected workspace, the practice of sharing devices or accounts can present significant challenges, particularly when adopting advanced tools like Microsoft 365 Copilot. Shared usage inherently limits the personalised capabilities of Copilot, as the AI is designed to learn and adapt to individual user behaviour and preferences. This could result in a confused or suboptimal experience when the AI encounters mixed signals from multiple users. To harness the full power of Copilot, each user must operate on a dedicated device with an individual license and access to personal Teams, SharePoint, and OneDrive accounts.





6. Enable Microsoft Loop and enjoy the benefits it offers

To fully utilise Copilot, it's important to first enable Microsoft Loop. Understanding that Loop is a prerequisite for Copilot, we recommend that you don't just stop at activation. Dive into the features that Loop offers and make the most of this tool. It's designed to streamline collaboration and increase efficiency, so taking the time to explore and integrate Loop's functions can lead to significant time savings for your team.

7. Discard the notebook – move to OneNote

Switching to OneNote for notetaking enhances Copilot's productivity power. It centralises your data for easy access and analysis, allowing Copilot to turn notes into actions and summaries efficiently, boosting your workflow.

8. Jumpstart your team's AI integration journey with Bing Chat Enterprise

While awaiting Copilot's arrival, assemble an 'AI Champions' team to explore AI tools like Bing Chat Enterprise. Their early adoption will pave the way for seamless AI communication and provide valuable insights to inform leadership on strategic investments and integration.

9. Integrate AI into your policies

Update your IT and Privacy policies to include AI tools like Copilot. Address ethical issues, like their impact on people and the planet, and put strong security in place to keep data safe. Be clear with your customers about how you use AI with their data, especially if you work directly with consumer information.

10. Prepare your business case for Microsoft 365 Copilot adoption

When preparing a business case for the integration of Microsoft 365 Copilot, it's essential to underscore its potential to significantly enhance productivity and decision-making within your organisation. At an estimated cost of US \$30 per user, the investment can be justified by the anticipated improvements in efficiency and the reduction of time spent on routine tasks. You should include use cases/ testimonials from your AI Champions in this document referencing the real gains they have seen using AI tools.

With the insights from this e-book, you're equipped to dive into the transformative potential that Microsoft 365 Copilot offers. To fully embrace this change, support is key. Should questions arise or if you need a hand in prepping for Copilot, including an AI Health Check, get in touch. We're here to ensure you sail smoothly into the AI-enhanced future.

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