Copilot Readiness Journey

Microsoft 365 Copilot readiness journey

Assess your customers' AI-readiness!

Copilot journey

Ready for Microsoft 365 Copilot
Minimum required to enable Copilot across users

Workstreams can run in parallel

Optimized for Microsoft 365 Copilot
Highly recommended and focused on data compliance, preventing over-sharing, and potential internal data leakage

TD SYNNEX
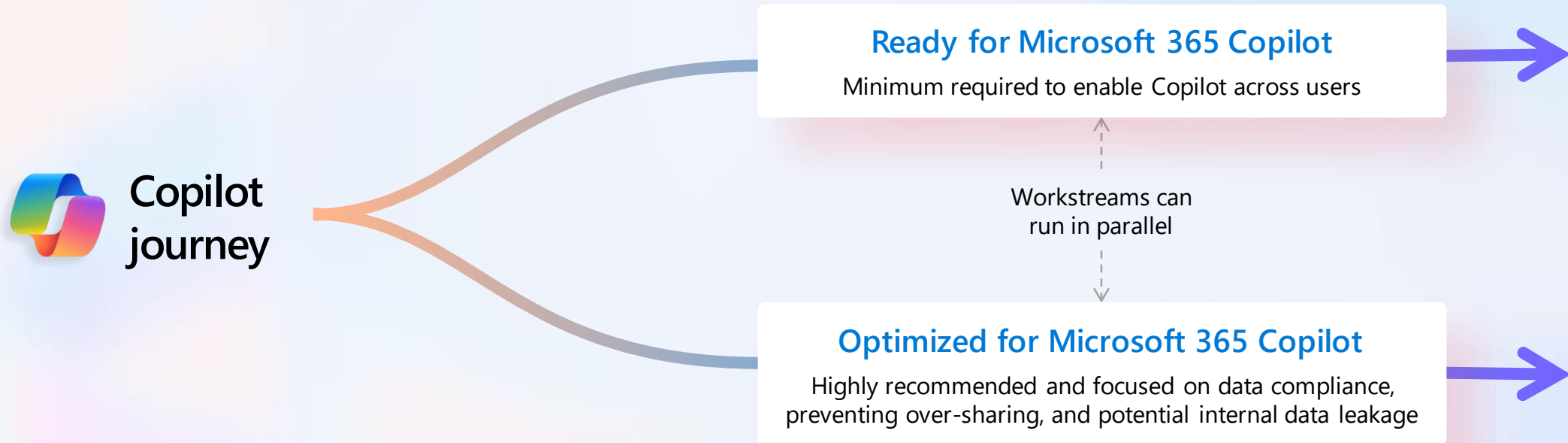
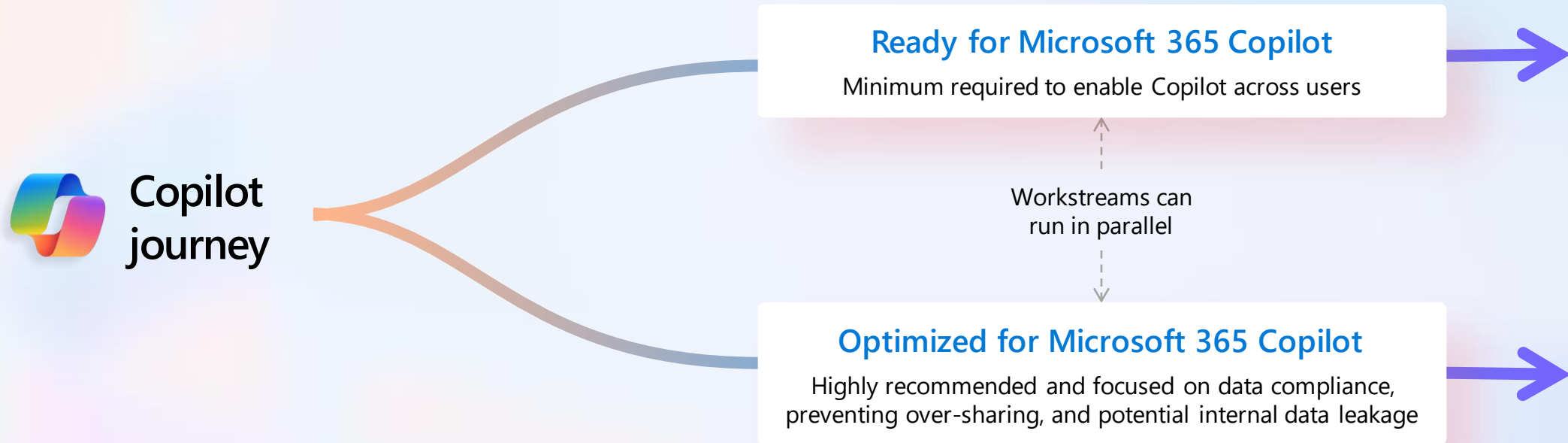# How to get ready for Microsoft 365 Copilot

✓ Enterprise customers: Microsoft 365 E3/E5 or Office E3/E5
SMB: Microsoft 365 Business Premium or Business Standard

✓ Microsoft Entra ID

✓ Some features (file restore, OneDrive management, etc.) require a OneDrive account

✓ WebSockets (wss://) allowed to endpoints in ID #46 in the section for Microsoft 365 Common and Office Online

✓ Update Channels: Microsoft Copilot follows standard practice for deployment and updates

✓ Outlook: Users need to be using the new Outlook for Windows or MacOS. Classic Outlook support in February.

✓ Teams: Users must be using Teams desktop or the web app. Both current and new versions of Teams supported[2]

✓ Loop: Tenants must have Loop enabled. Learn more how to enable Loop. Manage Loop Workspaces.

✓ Review policy settings for connected experiences, otherwise Copilot will not work in M365 Apps

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Optimized for Microsoft 365 Copilot

✓ Information Protection Labelling: [Learn about sensitivity labels - Microsoft Purview (compliance)](#)

✓ Semantic Indexing: [Semantic Index for Copilot: Explained by Microsoft](#)

✓ SharePoint Site Restrictions Configured: [Restrict SharePoint site access - SharePoint in Microsoft 365](#)

✓ Access Reviews: [Review your access to groups & apps in access reviews - Microsoft Entra](#) and [Review link sharing](#)

✓ Data Loss Prevention: [Learn about data loss prevention - Microsoft Purview (compliance)](#)

✓ Retention Policies: [Learn about retention policies & labels to retain or delete - Microsoft Purview (compliance)](#)

✓ Feedback: [Enable all feedback settings for Microsoft 365 Apps](#)

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An opportunity to upsell MW Premium SKUs

Baseline data controls

**Copilot +
Office 365 E3 or
Business Standard**

Multi-factor Authentication
with security defaults

Manual sensitivity labels
for Copilot generated content
(Office only)

Core data controls

**Copilot +
Microsoft 365 E3 or
Business Premium**

Conditional Access
policies based on identity, device,
location, & network

Manual sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

Endpoint management
capabilities

Best in class data controls

**Copilot +
Microsoft 365 E5**

User/session risk
and access control

Automatic sensitivity labels
for **non-Microsoft** documents
(e.g., pdf)

Discover and evaluate the
risk of 400+ **AI apps** & implement
controls to for their use at work

Prompt Engineering

Types of Prompts

Getting started with **M365 Copilot**

Learn: You want Copilot to teach you about a newly assigned technical topic or internal project that is unfamiliar to you.

Create: You want Copilot to write something new for you, such as a slogan, a caption, a story, etc.

Summarize: You want Copilot to condense a long text into a shorter one, such as a summary, an abstract, a headline, etc.

Transform: You want Copilot to change the format of a deliverable so you can make it consumable for your leadership team.

Edit: You want Copilot to improve the quality or readability of a text, such as grammar, spelling, punctuation, etc.

Analyze: You want Copilot to extract or provide some information or insight from a text, such as keywords, topics, sentiment, business-related data set, etc.

Essential Ingredients of a Good Prompt

A prompt is a short text that you write to ask M365 Copilot to do something for you, such as creating, summarizing, editing, transforming, analyzing, or catching up! A good prompt is like a recipe that tells Copilot what ingredients to use and how to combine them.

Get the most out of Microsoft 365 Copilot by writing precise prompts using this formula

Goal	+	Context	+	Tone	+	Source
What do you want from Copilot?		*What is the context in which you are trying to achieve this objective?*		*What tone do you want in the output?*		*What is the data source?*
"I want a list of 3-5 bullet points to prepare me..."		*"...for an upcoming meeting with Customer X, focused on their current state and what they're looking to achieve."*		*"Respond with enough detail to provide deep context..."*		*"...and focus on email and Teams chats over the last couple weeks."*

How do we help you to succeed?

CENTRE OF EXCELLENCE

Global **blackbelt team** providing value to our TD SYNNEX countries, enabling partners delivering **digital transformation** to their customers

aws · Hewlett Packard Enterprise · Red Hat · Google · Microsoft

Vendors

CoE

TD SYNNEX Technical Communities

Enabled partners

TD SYNNEX CoE & Services Offer

TD SYNNEX

Pre-sales
(Free)

- Deep technical expertise to support sales deals
  (Modern Work, Azure, Business Apps)

- Ready to join session with you or your customer

- Basic Architecture Design and Validation

- Best practices, new trends, pricing and feature recommendation

Professional Services
(Paid)

- Expertise and resources to implement any Microsoft solution

- Microsoft Certification and Custom trainings

- POC Implementation & Support

- SAP on Azure Services

- Automation Services
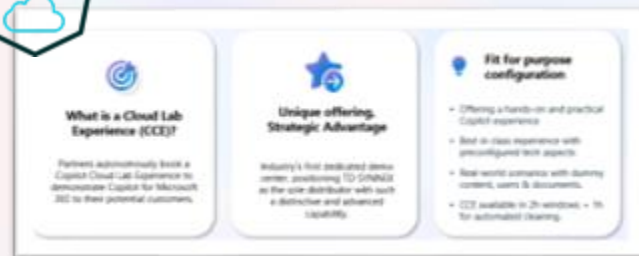
Things only TD SYNNEX can offer

Sharing with the channel our experience implementing and using AI

Copilot CloudLab Experience

Demo-based

- Demonstrate Copilot in an isolated tenant without fear of oversharing
  - Unique offering
  - Strategic Advantage
- Hands-on experience for your customers
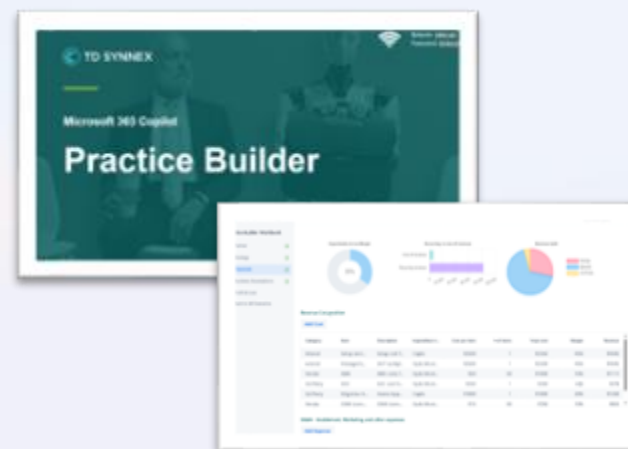
Prepare Customer tenant for Copilot

We do it with you, or for you

- Copilot Readiness Assessment
  - Pre-requisites check
  - Identifying potential blockers
- Remove blockers and fulfill pre-requisites
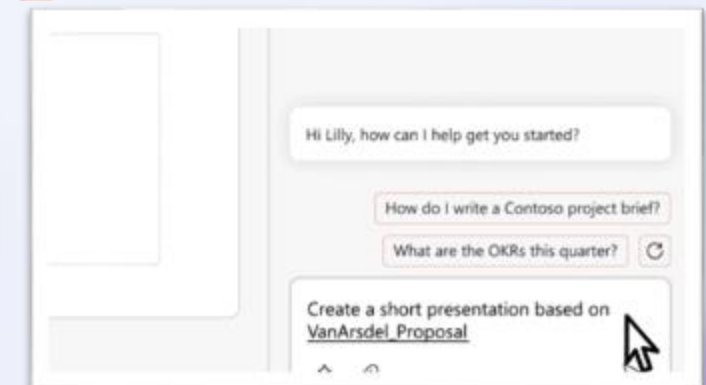- Implement Copilot optimization features

End-Customer Copilot Adoption Workshop

Workshop-based

- 1-day end-customer workshop
- Increasing adoption through prompt engineering
- Hands-on customer experience
  - Role-based everyday tasks
  - Creative and inspiring scenarios
- We provide Copilot license!

Thank you