



AI Copilot Readiness

Your Path to Copilot Success

Learn how to deploy Microsoft Copilot securely and effectively in your organization, from strategy to execution.

Industry experts guide your Copilot deployment journey



Ivan Shore

VP OF SALES & MARKETING
Bit by Bit

Ivan brings 28 years of sales leadership to client relationships. Known for clarity and rapid communication, he played a key role in enabling remote-work transitions during COVID-19. As our resident "Master of Fun," Ivan combines business acumen with creative engagement.



Julie Hodges

DEVELOPMENT EXECUTIVE
Microsoft

Julie Hodges is a Microsoft Copilot Specialist and Microsoft 365 expert at Ingram Micro, the world's largest Microsoft distributor. With nearly 20 years in IT distribution sales, she works closely with Microsoft product teams to help organizations adopt AI solutions, optimize Copilot, and improve efficiency, collaboration, and business outcomes globally.

THE CHALLENGE

Understanding Adoption Barriers & New SMB Pricing

Historical Hesitation: SMBs have historically hesitated on AI adoption, examining specific concerns around cost, security, and ROI that create decision paralysis.

New SMB Pricing: Microsoft's new SMB pricing structure (**\$21/month per user**, or \$18/month at promotional rates) fundamentally changes the economics of AI adoption.

Enterprise AI for SMBs: This pricing tier was specifically designed for organizations with 15-500 employees, making enterprise-grade AI accessible without enterprise-level budgets.

This 30-minute webinar provides a strategic roadmap from planning to execution focusing on:

Security

Deployment

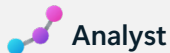
Real ROI

Get proactive
overviews of your day



Copilot
Chat

Analyze
budget Spend



Analyst

Prepare for
a customer meeting



Researcher

Create
strategy papers



Researcher

Create
interview guides



Researcher



Where Copilot wows

Never take meeting
notes again

Copilot in
Teams Meetings

Catch up on
missed meetings

Copilot in
Teams Meetings

Quickly
find content

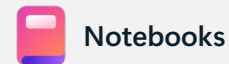


Copilot
Search

Be prepared
for every meeting

Copilot in
Teams Meetings

Quickly onboard onto
new roles or projects

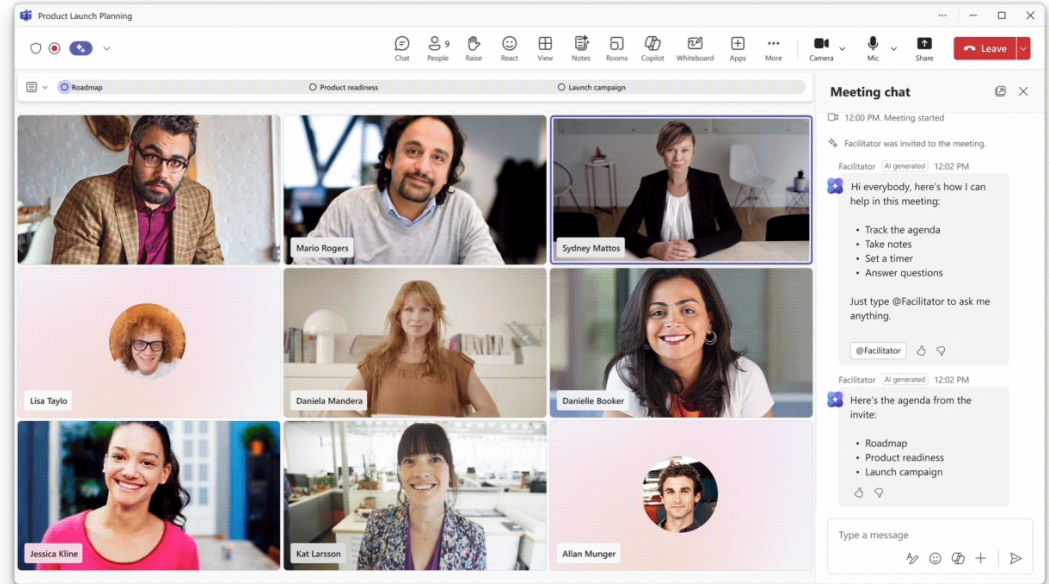


Notebooks

Facilitator

A meeting agent that drives the agenda, captures notes, and simplifies follow ups

- Shares agendas, visual timelines, and reminders to **keep meetings on track**.
- **Generates real-time notes** that captures input from all participants and instantly answers questions to drive better collaboration
- Tracks task, drafts documents, and records key decisions across every discussion to **simplify follow-up**.



Copilot's Early Impact at Microsoft

Customer service

11.5%

faster case resolution

Sales

9.4%

higher revenue per seller for one business group

Marketing

21.5%

increase in conversion rates on Azure.com

Finance

60%

reduction of case resolution time in cash collections

Legal

5%

reduction expected in external spend for regulatory work in 2025

Human resources

42%

greater accuracy in answering questions through employee self-service

IT

36%

increase in the self-help success rate for employees in one experiment

Top 10 to try first with Microsoft 365 Copilot

▲ Foundational skills for new users



1

Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

- Draft an email with notes and action items from [meeting](#)



2

Summarize an email thread

– get quickly caught up to a long, complex email thread.

- Click on the Summarize icon



3

Draft email

– personalize the tone and length.

- Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

- Give me a bulleted list of key points from [file](#)



5

Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

- Tell me what's new about [topic](#) organized by emails, chats, and files?



6

Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

- Suggest 10 compelling taglines based on [file](#)



7

Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

- Generate three ways to say [x]



8

What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

- What did [person](#) say about [topic](#)



9

How do I ...

– let Copilot help you build or fix formulas in Excel.

- How do I sum values that are greater than 0?



10

Translate a message

– with business becoming increasingly international, it's important to be able to read or write messages in other languages.

- Translate the following text into French:

For more prompts, visit the Copilot Prompt Gallery at: aka.ms/prompts

Top Security & Governance Concerns

Data oversharing
and data leaks

80%

of leaders cited leakage of sensitive data as their main concern¹

Identification of
risky AI use

41%

of security leaders cited that the identification of risky users based on queries into AI was one of the top AI controls they want to implement²

AI governance and
risk visibility

84%

Want to feel more confident about managing and discovering data input into AI apps and tools²

What Does Copilot Have Access To?

Microsoft 365 data that describes the patterns of productivity, identity and security in an organization, accessed through a unified API endpoint.



Removing the first big blocker

Microsoft is built on trust

1

Your data **is**
your data

2

Your data **is**
not used to
train or enrich
foundation
AI models

3

Your data and
AI models **are**
protected at
every step

4

Our Customer
Copyright
Commitment

Core Principles of Enterprise Data Protection in Copilot

PROTECTION PILLAR	DESCRIPTION
Security	Encryption at rest and in transit ensures data confidentiality across Copilot experiences.
Privacy	Prompts and responses are not used for model training, ensuring user and organizational privacy.
Access Control	Copilot enforces existing identity permissions and sensitivity labels throughout interactions.
Compliance	Supports GDPR, HIPAA, and organizational retention and auditing policies.
Boundary Enforcement	All data remains inside the Microsoft 365 service boundary to prevent unauthorized exposure.

Professional Services Copilot ROI Client Communications



The Challenge

Legal and financial services teams spend 4-7 hours weekly drafting compliant client communications, summaries, and follow-up documentation.

Advisors and attorneys must personalize updates, document guidance, and maintain audit-ready records without slowing client service.

Copilot Solution

Copilot generates client-ready updates, matter or portfolio summaries, and compliant documentation using CRM, knowledge, and workflow data.

- ✓ Supports legal and financial services workflows
- ✓ Responds to routine client questions

Real ROI

Value delivered per professional.

2 Hours

Time Savings / Week

\$4,500

Annual Value / Professional

Faster Client Responses

Retention Bonus

Nonprofit Copilot ROI Donor Communications



The Challenge

Nonprofit teams spend 4-6 hours weekly drafting donor updates, grant summaries, and board-ready communications with limited staff capacity.

Program notes, fundraising data, and compliance reporting often live in separate systems, creating extra administrative burden.

Copilot Solution

Copilot drafts donor and grant communications, summarizes program outcomes, and assembles stakeholder updates from CRM and program data.

- ✓ Creates stewardship and grant documentation faster
- ✓ Responds to routine donor questions

Real ROI

Value delivered per nonprofit leader.

2 Hours

Time Savings / Week

\$3,800

Annual Value / Leader

More Time for Mission

Capacity Bonus

Onboard & engage

Be intentional with seat assignments and define success criteria



Copilot brings AI value across **lines of business**

- 1 Review which departments have the highest Microsoft 365 usage data, starting with Teams meetings and PowerPoint.
- 2 Concentrate licenses across entire teams or departments to start.
- 3 Use the [Scenario Library](#) to identify top use cases and the key metrics you would like to improve in that functional area.

All roles

- Improve meetings
- Content creation
- Manage daily agenda
- Summarize information
- Generate ideas

HR

- Cost per hire
- Employee turnover
- Compliance risk reduction
- Benefit usage
- Onboarding time

Marketing

- Leads created
- Brand value
- Cost per lead

Operations

- Customer retention
- Product time to market
- Supply chain efficiencies

IT

- Outstanding support tickets
- Application downtime
- Departmental spending

Sales

- Number of opportunities
- Close rate
- Revenue per sale
- Customer retention
- Time to close




Finance

- Accelerate cash flow
- Spend on ERP system
- Risk reduction
- Departmental spending

Foundation for Success: **Assess & Prepare**

Phase 1

Assess Your Readiness




-  **Security & Compliance:** MFA status, DLP policies, data classification
-  **Workflow & Use Cases:** Identify high-ROI processes and repetitive work
-  **Team & Licensing:** Adoption readiness, past rollouts, executive sponsorship

Why This Phase Matters

Establish a baseline, identify security gaps, and prove projected ROI before deployment.

Phase 2

Prepare Your Environment

-  **Security Hardening:** Implement MFA, DLP rules, clean up permissions
-  **Pilot Preparation:** Select tech-savvy users with repetitive work
-  **Communication:** Announce pilot, set expectations, prevent frustration




Why This Phase Matters

Prevent costly security issues and ensure pilot success before full deployment.

Proving Value: Pilot & Scale

Phase 3

Pilot and Prove ROI




-  **Role-Specific Training:** Hands-on workshops tailored to roles, not generic "how-to" webinars
-  **Active Measurement:** Document daily time savings, user satisfaction, and quality metrics
-  **Validate ROI:** Compare actual results against initial projections

Why This Phase Matters

Pilot users become internal champions. Documented results eliminate resistance before full rollout.

Phase 4

Scale Based on Value

-  **Mentorship:** Pair new departments with pilot champions to share best practices
-  **Customization:** Tailor prompts and training to specific departmental workflows
-  **Continuous Improvement:** Monthly usage reports and quarterly optimization reviews

Why This Phase Matters

Strategic pacing ensures high adoption. Scale too fast and users get overwhelmed; too slow and momentum dies.

EXCLUSIVE OFFER

Complimentary 30-Minute Copilot Readiness Consultation

Schedule a 1-on-1 strategy session with the **Bit by Bit** Copilot experts to discuss your organization's specific path to AI adoption.

- ✓ Assess your current infrastructure
- ✓ Identify immediate ROI opportunities
- ✓ Address security and compliance concerns

Scan to Schedule



Visit Us Online

www.bitxbit.com

Email us Here

info@bitxbit.com

Q & A

Thank you for joining us today!

KEY TAKEAWAY

Successful Copilot deployment requires strategic planning, a strong security focus, and phased execution to maximize ROI and minimize disruption.

Next Steps

Deployment Support

Contact our team to schedule your AI Readiness Consultation and begin planning your Copilot Program.

Follow-up Resources

You will receive an email this week with the webinar recording, slide deck and a link to your complimentary AI Readiness Consultation

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