PREPARE FOR LANDING

Rapid Circle's ultimate checklist to guide and your organisation to get ready for Copilot

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What if you could have a personal assistant that could help you with any task, from coding to writing, from cybersecurity to reporting? What if this assistant could learn from your own style, preferences, and corporate knowledge, and offer you suggestions and insights that are tailored to your needs? And what if this assistant could save you time, boost your productivity, and enhance your quality of work?

Meet Copilot, the next-generation tool that uses Generative AI to revolutionise the way we work. Copilot is not just a simple autocomplete or spell-checker. It is a smart companion that can understand your context, goals, and intentions, and provide you with relevant and useful content that helps you achieve your desired outcomes.

Copilot can help you with several types of tasks, depending on your role and domain. For example:

- If you are a manager, Copilot can help you create compelling business cases or reports, by generating summaries, bullet points, or paragraphs that capture your key points and messages.

- If you are a security analyst, Copilot can help you find and mitigate threats, by providing you with insights and recommendations based on your data and environment.

- If you are a developer, Copilot can help you write code faster and better, by suggesting whole lines or functions that match your specifications.

But how do you get started with Copilot? How do you integrate it with your existing tools and platforms, such as Azure, Microsoft 365, Power Platform, and Dynamics? And how do you ensure that you use Copilot in a responsible and ethical way, respecting the privacy and security of your data and users?

In this whitepaper, we will answer these questions and more. We will introduce you to the concept and potential of Generative AI and show you how Copilot harnesses this technology to empower you and your organisation. We will also provide you with best practices and guidelines for getting ready to use Copilot effectively and safely and share some success stories and testimonials from our team, and our customers who are already seeing value from this innovation.

If you are ready to take your work to the next level, read this whitepaper today and discover how Copilot can help you achieve more, faster, and higher quality.

EXECUTIVE SUMMARY

Generative AI is transforming the way we create, collaborate, and communicate. Using Generative AI, Copilot is a powerful tool that uses blends AI with your corporate knowledge to help you work both smarter, and faster.

Whether you are a seasoned developer, defending your organisation from cyber security threats, or a manager building a business case or drafting a report, Copilot can aid you with suggestions, and insights to help you perform the best work of your career.

But how can you prepare yourself, your team, your organisation (and your IT environment) to take advantage of this innovation? And what are the best practices and guidelines for using Copilot that build on the foundations you have already built across Azure, Microsoft 365, Power Platform and Dynamics?

In this whitepaper, we will answer these questions and more, and show you how you can unleash the potential of generative AI in your organisation… and achieve what's next.

Generative AI is a branch of artificial intelligence that can create new content, such as text, images, code, or music, based on existing data and human input. It has the potential to transform most if not all industries, including education, healthcare, advanced manufacturing, and the public sector. Enabling new forms of creativity, productivity, and personalisation.

Specifically, Microsoft is using several of OpenAI's "Generative Pre-Trained Transformers" (GPT) models. This includes GPT3.5 and GPT-4, deep learning systems that can generate natural language and code from natural language. Copilot blends this with the Microsoft Graph to surface your corporate knowledge in a secure and compliant way.

It's going to change the way we work, will work, and evolve our business.

– Iona Varga, Rapid Circle, Netherlands

Microsoft's Copilot infuses the power of Generative AI across your organisation. For example, you can:

- Use Copilot in Microsoft 365 to unlock creativity and productivity,
- Microsoft Security Copilot to detect and respond to incidents,
- Microsoft Copilot Pro to ask questions and get relevant answers,
- Dynamics 365 Copilot to unlock more from your CRM or ERP,
- Sales Copilot to spend more time selling,
- GitHub Copilot to write better code or
- Copilot in Power Platform to automate processes using natural language and low or no code

To take advantage of the innovation of generative AI and Copilot, you need to prepare today:

- Understand the benefits and challenges of generative AI and Copilot for your business goals and use cases
- Assess the readiness and compatibility of your existing IT infrastructure, data sources, security policies, and governance frameworks
- Plan and implement the necessary changes and upgrades to your IT environment
- Train and educate their developers and end-users on how to use generative AI and Copilot effectively and responsibly
- Monitor and evaluate the performance and impact of Copilot on your business outcomes and employee satisfaction

In the rest of this whitepaper, Rapid Circle's Microsoft Cloud experts across Azure, Microsoft 365, Power Platform and Dynamics share their thoughts on how to help you in your journey towards efficient, effective, secure, and compliant use of this technology. Giving you, your team, and your organisation the upper hand.

The paradigm shift to AI is real, so organisations should start creating a strategy and framework for adoption.

– Shrushti Shah, Rapid Circle, India
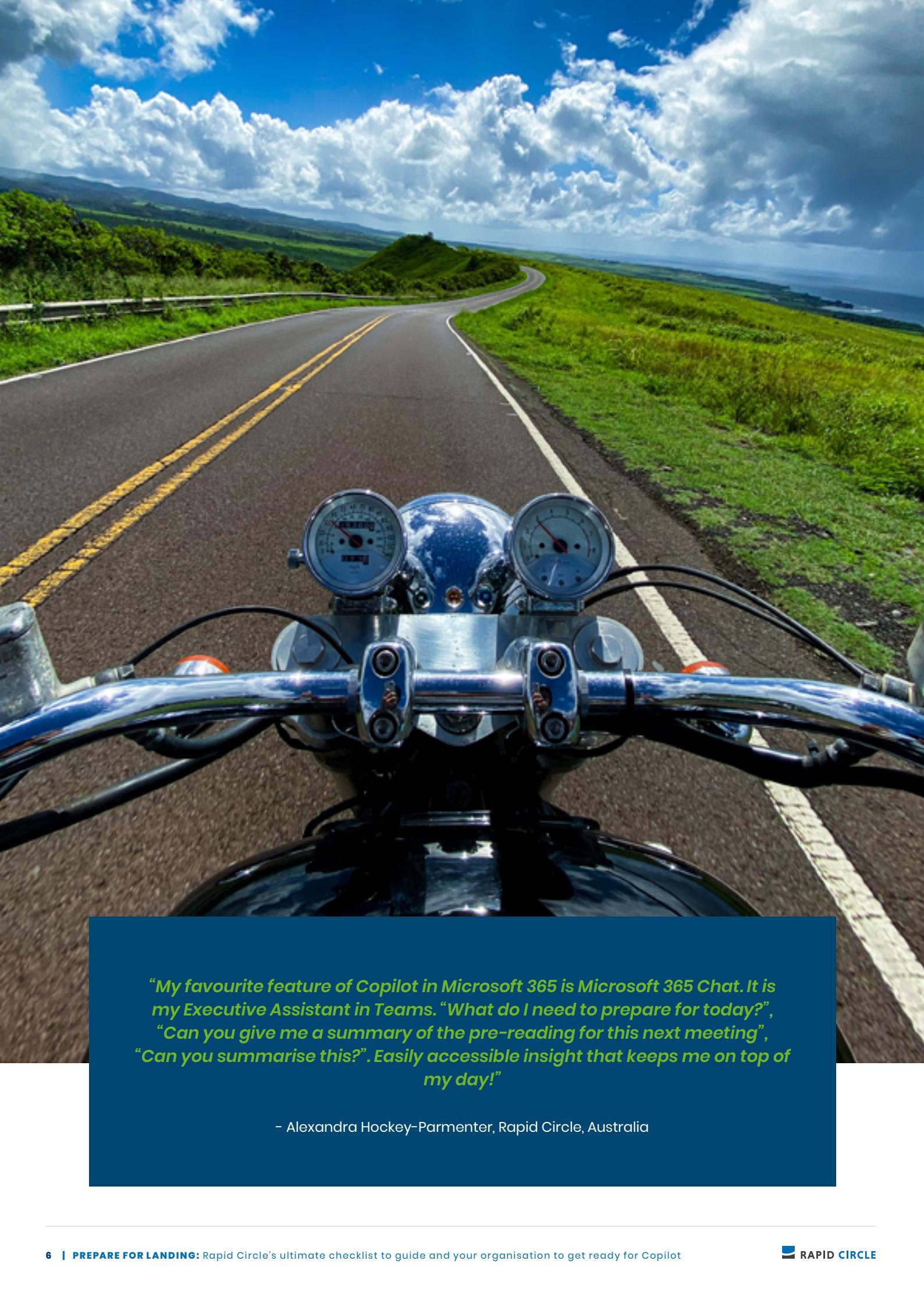
"My favourite feature of Copilot in Microsoft 365 is Microsoft 365 Chat. It is my Executive Assistant in Teams. "What do I need to prepare for today?", "Can you give me a summary of the pre-reading for this next meeting", "Can you summarise this?". Easily accessible insight that keeps me on top of my day!"

- Alexandra Hockey-Parmenter, Rapid Circle, Australia

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INTRODUCTION

WHAT IS GENERATIVE AI AND WHY IS IT IMPORTANT?

For many of us, our introduction to Generative AI was in late 2022 when ChatGPT become one of the fastest adopted consumer technologies since records began. The ability to be able to have our phone or browser think for us – be it to help write a Christmas message, summarise complicated topics into simple to understand language, or craft a poem for someone we care about.

Quickly, our attention turned to how we could use the power of Generative AI to help us be more efficient at work. Organisations around the world started to explore, using ChatGPT and other AI tools that flooded the market.

Many businesses and public sector organisations took it one step further. Establishing their own "internal ChatGPT" experiences using technology like Microsoft's Azure based Open AI infrastructure.

We are in the infancy of using AI, but we already know that AI is going to change the future of work. While many of us have experimented with consumer grade AI, we are on the cusp of seeing AI infused into our day-to-day work, and its productivity potential.

In a recent study published by Harvard Business School, knowledge or information workers using Large Language Models were able to:

- Do more: In fact, 12.2% more than on average,
- Faster: Tasks were completed requiring 25.1% less time,
- With higher quality: Work that was produced with the support of Large Language models was approximately 40% better than work created by those without.

We all had a 'gut feel' that AI was going to have a material impact on the way we work based on our own personal experiments with the technology in the workplace. We are now seeing peer-reviewed data to support those hunches.

Let's dive a little deeper and explore what AI means for us, and our organisations.

AI. IS IT ARTIFICIAL INTELLIGENCE OR ASSISTED INTELLIGENCE?

Artificial Intelligence is a broad topic area and can mean different things to different people. For some, it is a revolutionary approach bringing computing closer to (and exceeding) the abilities of human thought. For others, it is just humanity's ability to build systems that are REALLY good at statistics.

For the purposes of this paper and when exploring Copilot, it is helpful to focus our attention to another usage of the acronym AI. Instead of Artificial Intelligence, lets focus on "Assisted Intelligence."

This is the space in which technology like Copilot will have the biggest impact. Intelligence that assists people in your workforce, across both business and technical focused roles. An "electronic intern" that can take on time consuming tasks that you normally have to do – analysing, researching, writing, or designing – and allowing you to focus your energy and time on the outcomes you need to achieve.

WHAT IS COPILOT AND HOW DOES IT WORK?

Copilot refers to a broad range of Assisted Intelligence offerings from Microsoft that span each of the Microsoft Clouds. For example:

- Use Copilot in Microsoft 365 to unlock creativity and productivity,
- Microsoft Security Copilot to detect and respond to incidents,
- Microsoft Copilot Pro to ask questions and get relevant answers,
- Dynamics 365 Copilot to unlock more from your CRM or ERP,
- Sales Copilot to spend more time selling,
- GitHub Copilot to write better code, or
- Copilot in Power Platform to automate processes using natural language and no code

Copilot combines the power of large language models (LLMs) with your organisation's data to turn your words into the most powerful productivity tool on the planet. It works alongside popular Microsoft 365 apps in the Office suite to provide real-time intelligent help, enabling users to enhance their creativity, productivity, and skills. It helps your sellers and customer service agents get a deeper understanding of your customers, faster. It can also help your security analysts improve the security posture of your organisation, reduce, and react to threats faster.

Copilot can understand your intent, context, and goals, and provide you with relevant insights. For example, in the context of Copilot in Microsoft 365, it can help you find information, answer questions, generate content, format documents and create charts. Copilot can also learn from your feedback and preferences and adapt its suggestions accordingly. With Copilot, you can use the power of LLMs and the Microsoft Graph to enhance your work and skills.

Copilot works by using LLMs to generate natural language text based on your prompts, queries, or commands. LLMs are trained on a large corpus of text from various sources, such as books, websites and news articles. They can learn from the patterns and structures of natural language and produce coherent and relevant text for different purposes and contexts. It has learned how we communicate, from how we have communicated in the written form for generations.

But that just describes any Large Language Model – like ChatGPT. How is Copilot different?

Copilot integrates into your corporate environment in a safe and secure way. Ensuring that it can gain insight from your own data, information, and knowledge, as well as ensuring that your data, information, and knowledge is not used to train AI for other users or organisations.

To do so, Copilot leverages features of the Microsoft platforms you have already invested in. For example, Azure Active Directory (now known as Microsoft Entra ID) which describes the identity of people in your organisation, and the Microsoft Graph, which is a collection of your data across Microsoft 365 apps and services.

The Microsoft Graph includes data about your calendar, emails, chats, documents, meetings, contacts, and more. By accessing the Microsoft Graph, Copilot can personalise its suggestions and responses based on your data and preferences. For example, Copilot in Outlook can draft an email for you based on your earlier conversations or create a presentation for you based on your recent documents. To be clear, Copilot can only access documents & content that you have access to – it doesn't have unfettered access to your organisational data.

Let's dive into Copilot in Microsoft 365 for a moment, as this is how most people will experience Microsoft's Copilot experiences.

Copilot is integrated into Microsoft 365 in two ways:
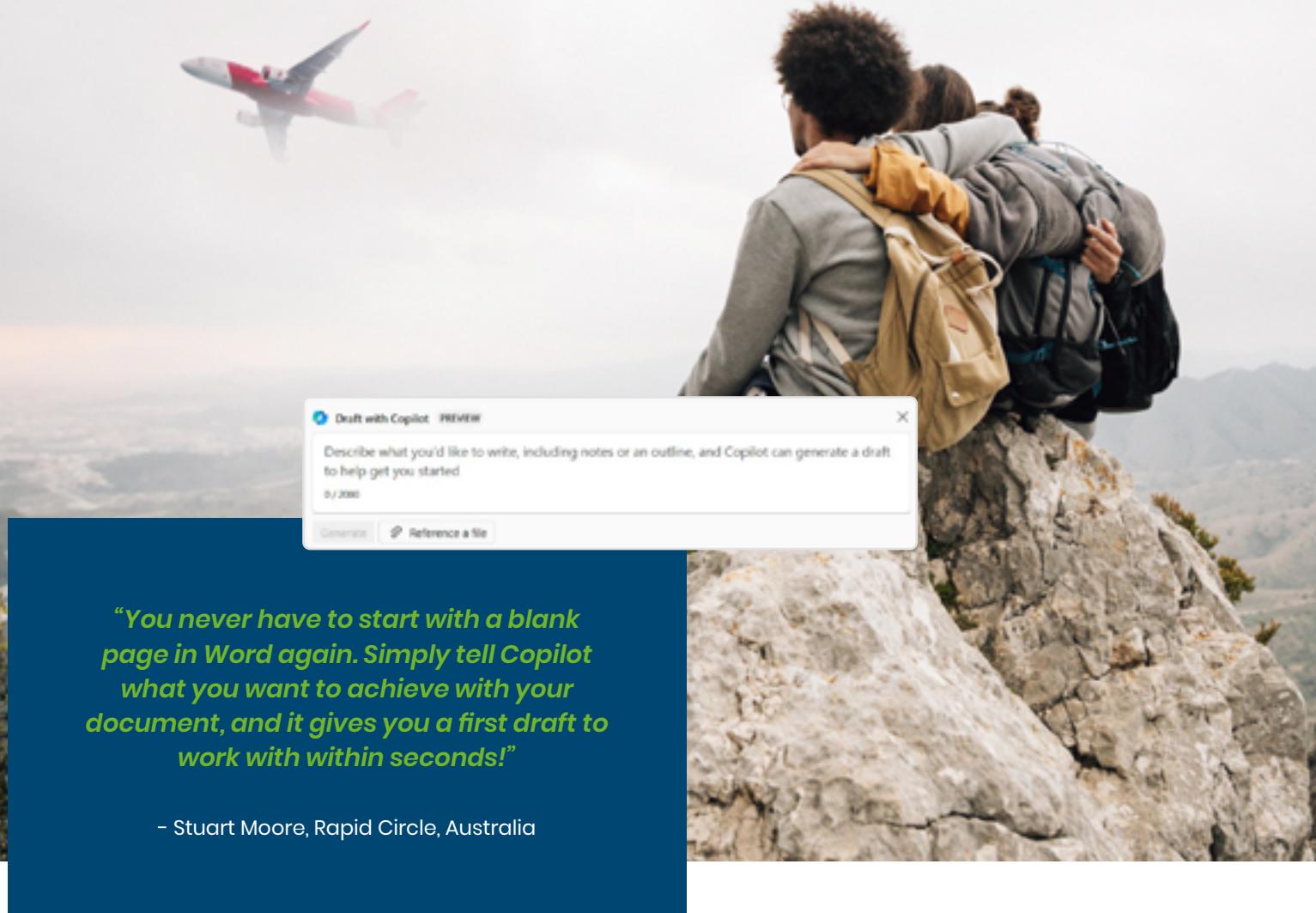
> *"You never have to start with a blank page in Word again. Simply tell Copilot what you want to achieve with your document, and it gives you a first draft to work with within seconds!"*
>
> – Stuart Moore, Rapid Circle, Australia

First, it works alongside you in the apps you use every day, on your laptop, iPad or phone. You can use Copilot to create, edit, summarise, rewrite, or format text in these apps with natural language commands or prompts. You can also get suggestions for different tones, styles, or arguments to improve your writing.

Secondly, Copilot works across the apps and your data in a new experience called M365 Chat. M365 Chat is an AI-powered chat for work that lets you do things you've never been able to do before. You can give natural language prompts like "tell my team how we updated the product strategy" and it will generate a status update based on your data from your Microsoft Graph.

Copilot is designed to help you work smarter and faster with the power of AI. It is not meant to replace human creativity or judgment, but rather to assist it. You are always in control of what Copilot generates and you can review, edit, or reject its suggestions as you see fit. Copilot also follows the same commitments to data security and privacy as Microsoft 365. Your data is encrypted at rest and in transit and you can manage your permissions and policies for Copilot through the admin centre.

WHAT ARE THE BENEFITS OF AND COPILOT FOR YOUR ORGANISATION?

- **Increased productivity and efficiency:** Generative AI and Copilot can help roles across your organisation to do more, faster, and with improved quality. Marketers can quickly develop draft versions of website or landing page copy. Finance Analysts can quickly review large datasets for trends and insights that could improve your decision making. Developers can save time and effort by automating repetitive and tedious tasks, such as writing boilerplate code, formatting, debugging, or testing. All so much faster than doing it manually. This can free up time for your people to focus on more creative and complex aspects of their work – where the human touch is both needed and helps place you above your competition.

- **Improved quality and reliability:** Copilot can help improve the quality and reliability of code, emails, reports, presentations. In parallel reducing the risk of reputational damage, technical debt, security breaches, or performance issues, and increasing customer satisfaction and trust.

- **Enhanced innovation and creativity:** Copilot can help your teams to enhance their innovation and creativity, by inspiring them with innovative ideas, solutions, or approaches, that they might not have thought of otherwise. This can enable your information or knowledge workers to explore new possibilities, experiment with different options, or learn new skills or technologies quickly.

- **Accelerated digital transformation and competitiveness:** Copilot can help your organisation accelerate its digital transformation and competitiveness, by enabling your people to use the latest advances in AI and cloud computing across Azure, Microsoft 365, Power Platform, or Dynamics. This can help organisations deliver more value to their customers, partners, or stakeholders, by offering more personalised, intelligent, or scalable products or services.

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- **Empowered collaboration and learning:** Copilot can help empower collaboration and learning, by easing knowledge sharing, feedback, or mentoring among your teams. This can help your people improve their skills or ability, learn from each other's experiences or perspectives, and solve problems together.

- **Copilot is designed to help you work smarter and faster with the power of AI.** It is not meant to replace human creativity or judgment, but rather to assist it. You are always in control of what Copilot generates and you can review, edit, or reject its suggestions as you see fit.
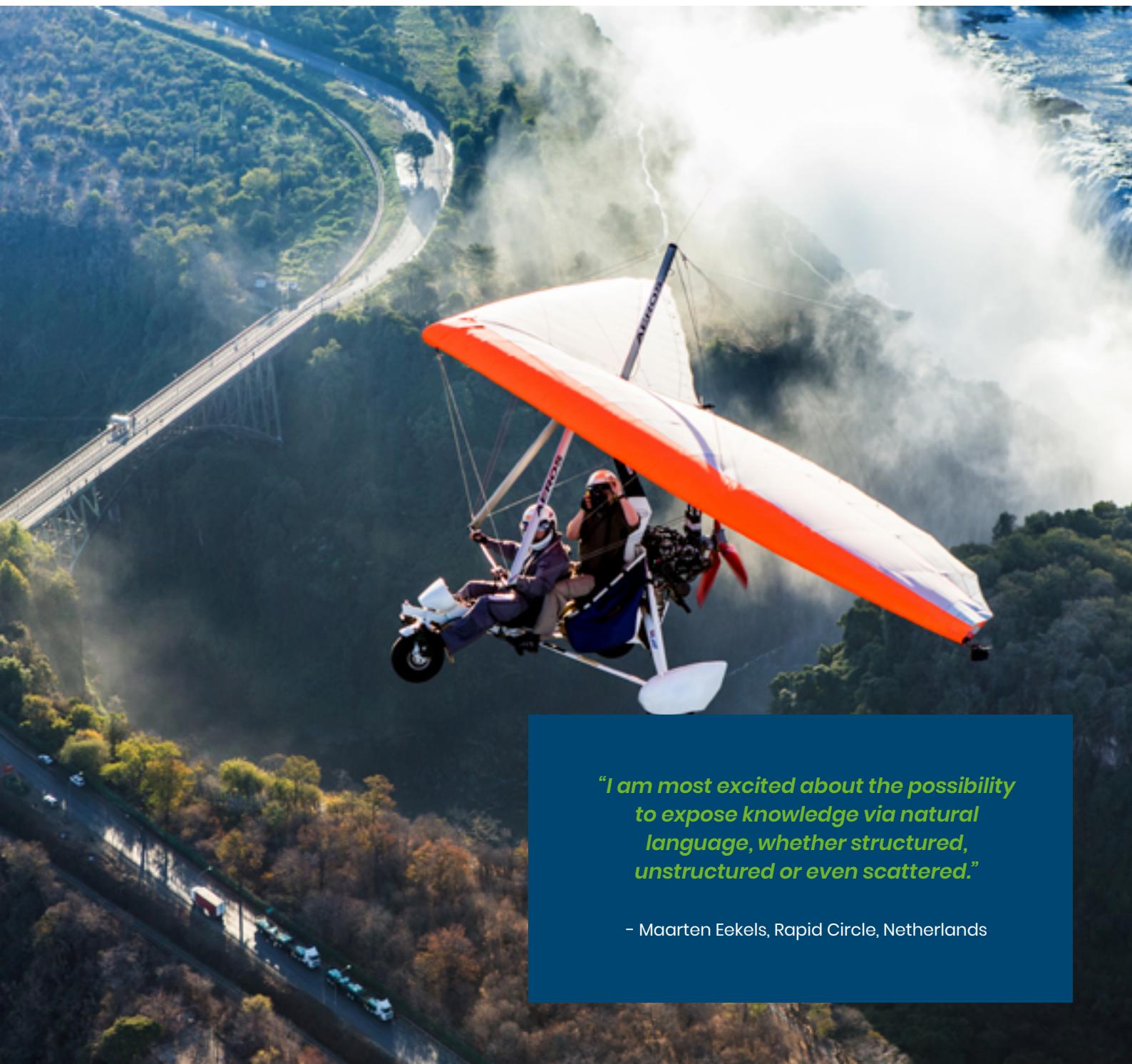
"I am most excited about the possibility to expose knowledge via natural language, whether structured, unstructured or even scattered."

– Maarten Eekels, Rapid Circle, Netherlands

ASSESSING HOW READY YOU ARE FOR COPILOT

No matter the AI you are using, the quality of the predictions, insights, or content composed will only be as good as the foundations you are building on. As you jump into using AI more often in your business, it is important to (in parallel) reflect on how well prepared:

There are three states of readiness for Copilot:

1. **Not ready** – your organisation is missing some of the prerequisite technologies to turn on Copilot
2. **Ready for Copilot** – your organisation has some of the prerequisite technologies, policies, and change management efforts in place to unlock some of the capability of Copilot
3. **Optimised for Copilot** – your organisation has a strong technical, governance, and security foundation to use the breadth of Copilot, blended with an even stronger cultural shift toward embracing the responsible use of AI within your organisation's context

Let's explore how to improve your readiness for Copilot.

YOUR IT ENVIRONMENT

IS YOUR CORPORATE KNOWLEDGE ALREADY WHERE COPILOT CAN SEE IT?

To unleash the potential of your corporate knowledge, it needs to be somewhere where Copilot can see it. For many organisations you will have already migrated to Office 365, with email being hosted in Exchange Online, and your files stored in SharePoint Online and OneDrive.

> **Recommendation**: If you have not done so, migrate your core productivity workloads to Microsoft 365

WHO HAS ACCESS TO THAT KNOWLEDGE, AND HOW ARE WE MANAGING PERMISSIONS?

Across many of the Copilot offerings from Microsoft, one key principle holds true. That Copilot will use "your existing permissions and policies to deliver the most relevant information". If someone can see the document today, Copilot will potentially deliver the information in that document to the individual. This may not look like a problem on the surface, however if you have data or information that is sensitive in nature, the fact that it is simply hidden in an obscure location today is not enough. Sensitive or confidential information that only a subset of your workforce should have access to needs to be locked down. Otherwise, Copilot will be able to see it and share it with people who should not have access today.

With that in mind, it is important to ensure that you are confident with your information and data governance posture – with particular emphasis on content management, and with the scope of roles administrative or otherwise that individuals might hold within Azure, Microsoft 365, Power Platform and Dynamics.

By making purposeful improvements to how you manage your data and content across Microsoft platforms, you will be better controlling for the risk of content or data oversharing. This includes but it not limited to ensuring that you have the right permissions set for sensitive data sources used by your leadership team, those engaged in due diligence activities for potential acquisitions, and product or trade secrets.

> **Recommendation**: Assess how you govern Microsoft 365, Azure, Dynamics 365, and Power Platform. Make appropriate changes to align with your organisations risk appetite

> **Recommendation**: Conduct a review of the permissions associated with key content stores, with a particular emphasis on sensitive content types

> **Recommendation**:Implement and use Sensitivity Labels to classify different content stores and documents across Teams and SharePoint

> **Recommendation**: Review your Data Governance maturity across People, Processes, Policies, and Technology

HOW TO CHECK THE COMPATIBILITY OF YOUR IT INFRASTRUCTURE, DATA SOURCES, SECURITY POLICIES, AND GOVERNANCE FRAMEWORKS FOR COPILOT?

Microsoft does supply some guidance here to help you increase your readiness for Copilot. However, this is a wonderful opportunity to get some fresh eyes on your environment to see if there are any blind spots that you are not currently aware of. Working with a Microsoft Partner like Rapid Circle to do a thorough assessment will help you build confidence and find potential remediation work needed. This will help you to better control for the risk of unintended issues introduced with Copilot – for example sensitive corporate information being assessable to your entire workforce (and now their digital assistants)

> **Recommendation**: Engage with your preferred Microsoft Partner (or Rapid Circle) to do an assessment of your readiness for Copilot

WHAT ARE THE TECHNICAL REQUIREMENTS AND PREREQUISITES FOR COPILOT?

The specific licensing and user account requirements vary depending on which Copilot you would like to work with. At a high level your organisation will not be "Copilot Ready" unless you can meet the following technical prerequisites:

For Copilot in Microsoft 365, users need to have an account with a Microsoft 365 E3 or E5 license assigned to it, and access to the Copilot in Microsoft 365 Early Access Program. This will then allow you or anyone else in your team with a Copilot in Microsoft 365 license to use generally use Copilot capabilities across Word, Excel, Outlook, PowerPoint, OneNote Whiteboard, and Loop to write documents, spreadsheets, presentations, notes or emails. Specifically, your workforce will need:

- Microsoft 365 Apps for enterprise deployed (and on the Current Channel),
- Azure Active Directory based account,
- OneDrive,
- New Outlook for Windows or Mac on the Desktop, Web, and/or mobile,
- Microsoft Loop and Microsoft Whiteboard turned on at tenant level (for Loop or Whiteboard specific Copilot scenarios).

For Security Copilot, users need to have a Microsoft Azure account with appropriate administrative roles assigned for conducting security investigations, and access to the Security Copilot preview.

Because Security Copilot integrates with and uses internal data from security systems including Microsoft Sentinel, Microsoft Defender, Microsoft Intune and other 3rd party security products, those systems also need to be configured to ensure the Copilot user has the appropriate permissions to use the data.

For Microsoft Sales Copilot, users need to have a Microsoft Azure account, and access to your Dynamics 365 Sales, or Salesforce instance. To make Sales Copilot available in Outlook, the tenant administrator needs to install the Sales Copilot Add-in from the Microsoft 365 admin centre. To make Sales Copilot available in Microsoft Teams, the tenant administrator needs to set up a policy in the Teams Admin Centre to install and pin the Sales Copilot app.

Beyond app installation, Meeting transcripts need to be turned on for Sales Copilot to automatically create meeting summaries, and server-side synchronisation of emails and appointments needs to be enabled.

For Dynamics Copilot, users need to have Microsoft Azure account with a valid subscription plan, a Dynamics 365 Sales instance with server-side synchronisation of emails and appointments enabled, and a license for Dynamics 365 Sales Enterprise or Dynamics 365 Sales Professional.

The Dynamics Copilot app installed on their devices, such as desktops, laptops, tablets, or mobile phones.

Dynamics Copilot integrates with Outlook and Teams to provide contextual insights, suggestions, and actions based on the user's email and calendar data. It also creates meeting summaries, captures action items, and updates records in Dynamics 365 Sales automatically. To enable these features, users need to: turn on meeting transcripts in Outlook or Teams settings, install the Dynamics Copilot add-in from the Microsoft 365 admin centre for Outlook users, set up a policy in the Teams admin centre to install and pin the Dynamics Copilot app for Teams users. And finally grant consent to Dynamics Copilot to access their email and calendar data in Outlook or Teams.

For Copilot in Power Platform before you can use the AI models or controls that rely on AI models, you need to make sure that your environment meets the following requirements:
Your environment region must be United States, your browser language must be English (United States), and you must have a Microsoft Dataverse database in your environment. You also need to enable AI Builder for your environment. To do this, sign into the Power Platform admin centre, go to Environments > [select an environment] > Settings > Product > Features, and turn on AI Builder preview models under the AI Builder section.

For GitHub Copilot, users need to have an individual GitHub account (if using GitHub Copilot for Individuals) or an organisation account (if using GitHub Copilot for Business).

Your users will also need to install the GitHub Copilot extension for Visual Studio Code, which is the only supported editor for now. Once configured, you can then use copilot to write code in any of the supported languages, such as Python, JavaScript, TypeScript, Ruby, Go, C# and C++

YOUR POLICIES & PEOPLE

Whilst Copilot and other AI technologies have the potential to improve individual, team, and organisation wide work practices, it will only be as good as how well your team are to unlock the power of it.

Organisations need to build a culture of responsible use of AI – where individuals are empowered to embrace emerging technologies to help them deliver on their professional responsibilities, whilst not exposing the organisation to higher risk.

There are several things that you can start now to help you bring your workforce on your AI journey,

Establish clear policies and guidelines for using AI in general, and specifically Copilot. You should define the scope, purpose, and limitations of using Copilot in your organisation. For example, you should specify when and where Copilot can be used, what types of projects and tasks it can help with, and what ethical and legal standards it must adhere to. You should also communicate these policies and guidelines to your people and ensure that they understand and agree to them.

Provide adequate training and support. Help your people to learn how to use Copilot effectively and efficiently. Depending on the context, this could include how to formulate clear and precise natural language queries, how to evaluate and select the best suggestions from Copilot. You should also provide them with resources and tools to help them confirm and build more trust in output from AI powered sources.

Monitor and review the usage and performance of Copilot. You should keep track of how your workforce are using Copilot and how it is affecting their productivity and quality of work. Collect feedback on their experience and satisfaction with AI tools that support their work. Use this information to find any issues or risks that may need to be addressed or mitigated.

Encourage responsible and ethical use of all AI, including Copilot. Remind your end-users that Copilot is not a magic solution that can replace human judgment and creativity. Emphasise that they are still responsible for the code they write, the documents they publish, the decisions they make, and the outcomes they produce. Urge them to respect the intellectual property rights, privacy rights, and security standards that your organisation needs to align to (either by your policy or regulation/legislation where you operate)

Foster a culture of learning and innovation. You should inspire your workforce to use AI technologies like Copilot as a tool to enhance their skills and knowledge, not to avoid them. Encourage them to explore new possibilities and opportunities, but also to challenge themselves and learn from their mistakes. Celebrate their achievements and successes with technology like Copilot and recognise their efforts and contributions beyond it.

"*While creating AI models, engineers should keep in mind the principles of Responsible AI to avoid any kind of bias. Also building an enterprise level AI solution to query enterprise related information as people tend to get any/all information using public AI models which can lead company data leakage, and this can be a security concern.*"

- Maarten Eekels, Rapid Circle, Netherlands

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HOW TO TRAIN AND EDUCATE YOUR TEAM TO USE COPILOT EFFECTIVELY AND RESPONSIBLY?

If you are clear about the specific guardrails your organisation has about the responsible use of AI (and Copilot), the best way to help your team unlock the power of Copilot is to help them get practical experience with the technology as early as possible.

One place to start which will give your workforce the opportunity to develop practical skills to use assistive intelligence like Copilot is helping them become great "Prompt Engineers".
We all know from our experiences online that the results you get from a web search can vary depending on the quality of the search terms you use. The same occurs when using tools like Copilot. Helping your people to craft a great "Prompts" for Copilot, will improve the results they see in return, and ultimately increasing the utility and satisfaction of the technology.

Allowing your people to try out prompts in a training context (vs just listening to you talk about how to write a great prompt) will help the people using Copilot in your organisation provide fast feedback, in the context of things that they care about. Ultimately accelerating their understanding of how to craft a great prompt for Copilot.

WHAT MAKES A GREAT PROMPT?

Prompts are the inputs that you give to Copilot to trigger its suggestions. They can be words, phrases, sentences, or code fragments that describe your intention, problem, or goal. Prompts are crucial for getting the most out of Copilot, just like having clear instructions is crucial for ensuring an intern delivers what you need them to do. Prompts guide the generation process and influence its output quality.

Our team at Rapid Circle have been exploring what makes a great prompt for Copilot. Based on our experience there are five different attributes of a great Copilot prompt:

CLARITY

The first and most crucial factor for creating a good prompt is clarity. You want to make sure that your prompt is clear, concise, and specific about what you want Copilot to do. Avoid vague, ambiguous, or overly general prompts that could lead to multiple interpretations or irrelevant suggestions. For example, instead of writing "create a table", write "create a table that includes a summary row with totals for each column". This way, you give Copilot more information and context about your desired output and reduce the chances of getting unwanted or incorrect results.

In Copilot for Word, your prompt can be up to 2000 characters in length. Make sure you use that space to clearly articulate exactly what you are trying to achieve.

COMPLETENESS

The second factor for creating a good prompt is completeness. You want to make sure that your prompt covers all the essential aspects of your task or problem and does not leave out any vital details or requirements. For example, if you want Copilot to generate a presentation for you, you should share the style of presentation, the suggested audience, the key talking points, the type of visuals etc. This

way, you give Copilot a complete specification of your task, and increase the chances of getting a functional and accurate solution.

CONSISTENCY

The third factor for creating a good prompt is consistency. You want to make sure that your prompt generates the same style, syntax, and conventions as your existing work, so it is easier to integrate. For example, if you are writing marketing copy that is conversational, make sure prompt generates output that matches that style, vs professional or academic writing. This way, you give Copilot a consistent framework to work with, and ensure that its suggestions are compatible and coherent with the document you are working on.

CREATIVITY

The fourth factor for creating a good prompt is creativity. You want to make sure that your prompt is not too restrictive or limiting but allows some room for exploration and innovation. Allowing you to unlock the divergent thinking that Copilot could provide for you. For example, instead of writing "create this graph with the data series in ascending order", write "create a graph that displays this data in an interesting way". This way, you give Copilot some freedom and flexibility to generate different solutions, and potentially discover new or better ways of doing things.

COLLABORATION

The fifth and final factor for creating a good prompt is collaboration. You want to make sure that your prompt is not a one-way communication, but a two-way dialogue between you and Copilot. For example, instead of writing "write a press release about our new product ", write "Imagine you are a PR professional, let's work together to write a press release our new product". This way, you are structuring your prompt in a way to give Copilot a sense of partnership and involvement in your project. Even though Copilot isn't really 'taking ownership' per se, this mindset helps you craft better prompts.

THE NUMBER ONE SKILL REQUIRED TO MAXIMISE THE VALUE OF COPILOT?

CRITICAL THINKING

Copilot might help you do things faster, but if you are doing the wrong things, faster, Copilot will work against you. There is a need to critically reflect on both the input, the sources used, and the output of the tool. This means that working with Copilot requires you and your workforce to regularly apply a high level of critical thinking.

Let's start with a definition. Critical thinking is the ability to analyse, evaluate, and synthesise information from various sources and perspectives, and to apply logic and reasoning to solve problems and make decisions.
Critical thinking is essential for using Copilot effectively, because it helps you to:

- Define your problem or goal clearly and precisely. You need to have a clear understanding of what you want to achieve with Copilot, and how to frame your prompt in a way that communicates your intent and expectations. A good prompt is specific, relevant, and concise, and avoids ambiguity, vagueness, or bias.
- Assess the quality and reliability of the generated content. You need to be able to judge whether the content that Copilot produces is accurate, relevant, coherent, and consistent with your problem or goal. You also need to be aware of the limitations and potential risks of Generative AI tools and Large Language Models, such as data bias, ethical issues, or plagiarism. You should always verify the source and credibility of the information that Copilot uses, and check for errors, inconsistencies, or gaps in the content.

- Improve and refine the generated content. You need to be able to edit, revise, and improve the content that Copilot generates, and to provide feedback and guidance to Copilot to help it learn and improve. You should not accept the content as it is, but rather use it as a starting point or a suggestion, and apply your own creativity and expertise to enhance it. You should also be open to exploring different options and alternatives that Copilot may offer, and to experiment with different prompts and parameters to optimize the results.

Proactively developing and applying your critical thinking skills, you can leverage the power and potential of Copilot, and use it as a valuable partner and assistant in your work. Copilot is not a replacement for your human intelligence and creativity, but rather a tool that can augment and enhance them. To get the most out of Copilot, you need to think critically and collaboratively, and to treat Copilot as a co-pilot, not a pilot.

> **Recommendation**: Ensure that your People & Culture or Recruitment team are actively screening for people with demonstrated critical thinking skills.

> **Recommendation**: Ensure that the learning and development plans of people who are likely to use Copilot include activities that help them improve their critical thinking skills.

EXAMPLES OF COPILOT USE CASES?

Whilst many of us may see obvious use cases for Copilot, the reality is that depending on your role, industry, and type of work you do, the use case for Assistive Intelligence powered by Copilot will vary. To help you start to think about how Copilot could help you, lets dive deeper into how Copilot in Microsoft 365 could make an impact for team leaders or managers in your organisation

COPILOT IN MICROSOFT 365 – FOR MANAGERS AND DECISION MAKERS

Copilot shines in Outlook. It allows you to quickly understand the key things you need to know from the deluge of email you get every day. Summarise the contents of the pre-reading you have for your meeting with a simple prompt, allowing you to be more confident you have a firm grasp on the important talking points for the meeting.

You can save time and effort by letting Copilot write or complete your emails and messages. For example, ask Copilot to write a follow-up email to a client after a meeting, and it will suggest a polite and professional email that summarises the main points of the meeting and proposes the next steps. You can ask Copilot to write personalised messages to their contacts, such as birthday wishes, thank-you notes, or invitations.

Copilot can help you create and edit content in Microsoft 365 applications, such as Word, PowerPoint, Excel, and Outlook. It can suggest text, images, charts, tables, and other elements based on your input and context. It can also help you with tasks such as formatting, summarizing, translating, and proofreading.

When it comes time for you to prepare your reports, you can simply type or speak a few keywords or sentences about the topic you want to cover, and Copilot will generate relevant content for you. Imagine opening Word, but instead of a blank page

where you have to start writing, you start with relevant content that you can start editing.

For instance, you can ask Copilot to create a report on the latest sales performance, and it will suggest text, charts, and images that show the key metrics, trends, and insights. You can also edit and customise the content as you wish or ask Copilot to make changes for you.

If your role is data heavy, you can use Copilot to generate and manipulate data in Excel or Power BI. For instance, ask to create a budget spreadsheet for your project, and Copilot will suggest a template with the formulas, categories, and formatting. Ask Copilot to perform calculations, create charts, or find insights from your data. For example, to compare the revenue of various products or regions, and it will generate a chart that shows the comparison and highlight the key findings.

When it comes to presenting your ideas, Copilot can create and enhance your slideshows. For example, suggest to Copilot that you want to create a presentation on a new product launch, and it will suggest slides with the product features, benefits, pricing, and testimonials, based on documentation you already have saved in your OneDrive, or in a SharePoint site. Copilot can add animations, transitions, or audio to your slideshow. One of our favourites - Copilot can add a voice-over narration to the slideshow that explains each slide – perfect to accelerate the development of internal training presentations to share on your Intranet or improving the accessibility of your presentations.

Finally, you can learn and explore innovative ideas with Copilot. You can ask M365 Chat to help you discover new information and skills in various domains. For example, to teach you how to use a new feature in Microsoft 365. Copilot will provide a step-by-step tutorial with screenshots and tips. Users can also ask Copilot to answer their questions or curiosities about any topic. For example, a user can ask Copilot what the history of artificial intelligence is, and it will provide a brief overview with links to more resources.

HOW TO MEASURE AND OPTIMISE THE PERFORMANCE AND IMPACT OF GENERATIVE AI AND COPILOT ON YOUR BUSINESS OUTCOMES AND USER SATISFACTION?

One of the main challenges of using generative AI in business settings is to quantify its value and impact. How can you measure the return on investment (ROI) or success of using Copilot in your organisation? It is a similar challenge that has plagued organisations for decades. How do we measure the ROI of a telephone? How do we measure the ROI of a laptop vs a PC? How do we measure the ROI of training?

The easiest way to get a sign of a productivity technology's impact is to talk about time savings. But that does not give you a bigger understanding of what positive impact modern technologies like Copilot are making on your organisation. In this section, we will discuss three possible ways to approach this question: by measuring the productivity gains, the quality improvements, and the user satisfaction.

First, you can measure the productivity gains by comparing the time and effort needed to complete a task with and without Copilot. For example, if you use Copilot to create a presentation on a new product launch, how much time did you save compared to creating it from scratch or using a template? How many slides did Copilot generate for you, and how much editing did you need to do? You can also compare the number and frequency of tasks that you can do with Copilot, such as creating reports, documents, emails, or learning new skills.

Second, you can measure the quality improvements by evaluating the accuracy, relevance, and creativity of the content generated using Copilot. For example, if you use Copilot to help you analyse data, how well did it summarise the key trends? How correct and up to date was the information that Copilot retrieved from your data sources? How effective were the graphs or charts created in communicating the key insights from the data?

Third, you can measure the user satisfaction by surveying the users of Copilot on their experience and preferences. For example, if you use Copilot to create a business case for a new capital investment, how satisfied were you with the process and the outcome? How easy and intuitive was it to use Copilot and interact with M365 Chat? How confident and comfortable were you with the content generated by Copilot? How likely are you to use Copilot again or recommend it to others? You can also collect suggestions and ideas from the users on how to improve Copilot and make it more useful and enjoyable.

The most impactful way to measure and share success based on your use of Copilot? Simply capture the story of how individuals or teams are improving their workflow using the AI infused into their everyday apps. Short case studies, testimonials, or examples of how people are using Copilot will go a long way to proving its impact. And help lift awareness and understanding of how to better apply the technology in the future.

> **Recommendation**: Ensure you capture feedback on your Copilot journey, with particular emphasis on capturing stories from your people regarding: how they are applying Copilot to make an impact in their part of the organisation.

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CONCLUSION

WHAT ARE THE KEY TAKEAWAYS FROM THIS WHITEPAPER?

In summary what did we cover?

- Generative AI, powered by Large Language Models has the potential to transform how we do business
- Copilot is a suite of "Assistive Intelligence" products from Microsoft. They act as an 'electronic intern' to support people across your workforce to research, analyse, understand, and create
- You need some good foundations to ensure people aided by Copilot can make the most of it. For the biggest win, make sure your day-to-day business (email, calendar, communication, documents, spreadsheets etc) are all taking place on or in Microsoft 365

- Copilot is only as good as the information you have access to (and sometimes we need to make sure Copilot doesn't know too much – especially confidential of sensitive information)
- Just like an Intern, how you ask Copilot to work with you will have a significant impact on the results you get. A strong focus on building a responsible AI culture and equipping your workforce with skills like Prompt Engineering will help you see a real impact in the long term.

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CONCLUSION

WHAT ARE THE NEXT STEPS FOR YOUR ORGANISATION TO ADOPT & EMBRACE COPILOT?

Where to from here? First, use our Copilot checklist. The recommendations listed throughout this whitepaper are the key items you need to consider preparing your organisation for its "assisted intelligence" Copilot journey. A handy checklist, just like the one a Co-Pilot of a plane would use is attached as an appendix to this whitepaper.

IT IS TIME TO GET READY FOR COPILOT

In summary, based on our experience using Copilot across our business, and in guiding organisations in their use of Copilot throughout Microsoft's Early Access Programs… there are three key questions you need to answer when it comes to unlocking the value of Assisted AI in your business.

1. **First** are the foundations we have in place today ready for an AI future?
2. **Second** where does it make sense to apply AI to help us to deliver better outcomes today?
3. **Third** how do we prepare and support our workforce to create an impact with Copilot?

To help you answer all three questions, Rapid Circle can be your guide.

Work with us to assess your current readiness to unlock the power of AI with tools like Copilot with our Copilot Readiness offers. Then connect with one of our experts to explore with you the potential that AI brings to your key business processes, customer and employee experiences, and ultimately the way your organisation delivers on its mission.

Learn more about how we can help you on your Copilot journey at www.rapidcircle.com/copilot.

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YOUR COPILOT CHECKLIST

> If you have not done so, migrate your core productivity workloads to Microsoft 365

> Assess how you govern Microsoft 365, Azure, Dynamics 365, and Power Platform. Make appropriate changes to align with your organisations risk appetite

> Conduct a review of the permissions associated with key content stores, with a particular emphasis on sensitive content types

> Implement and use Sensitivity Labels to classify different content stores and documents across Teams and SharePoint

> Review your Data Governance maturity across People, Processes, Policies, and Technology

> Engage with your preferred Microsoft Partner (or Rapid Circle) to do an assessment of your readiness for Copilot

> Plan for and deliver a comprehensive change management program to build a culture of responsible AI use that accelerates business performance.

> Ensure that your People & Culture or Recruitment team are actively screening for people with demonstrated critical thinking skills.

> Ensure that the learning and development plans of people who are likely to use Copilot include activities that help them improve their critical thinking skills.

> Ensure you capture feedback on your Copilot journey, with particular emphasis on capturing stories from your people regarding: how they are applying Copilot to make an impact in their part of the organisation.

ABOUT RAPID CIRCLE

At Rapid Circle we help you achieve what's next, by creating impact with the Microsoft Cloud: Azure, Microsoft 365, Power Platform and Dynamics. Through our Advisory, Managed Service, and Project engagements, we guide our customers towards:

> Becoming a data informed organisation, that
> Delivers innovative digital customer experiences, that is
> Consistently improving, enhances, and automates its business processes,
> With the right tools to empower its people to achieve more
> Whilst operating in a secure and complaint way, all
> Built on a responsive, flexible infrastructure

Are you ready for what's next?
Visit www.rapidcircle.com to learn more and talk to one of our Cloud Pioneers today"