BELIEVE • TRUST • INVEST

BEFORE YOU INVEST IN

COPILOT

READY
SECURE
MEASURABLE

What Every Business Leader Needs to Know

TODAY'S WEBINAR + LIVE Q&A | OCT. 6, 2026 | 11:00–11:45 AM ET

Practical guidance on readiness, security, ROI, adoption and the right first pilot.

Copilot

Meet the Speakers

Practical business guidance paired with current Microsoft Copilot expertise.



BRETT WALTERS

Owner & Vice President
TeamMIS

Brett has spent more than 20 years helping Indianapolis-area businesses use technology to grow, improve operations, strengthen cybersecurity, and reduce risk. As Owner and Vice President of TeamMIS, he brings a practical business perspective on AI readiness, technology strategy, data governance, and security. During the webinar, Brett will help business leaders understand the most common mistakes organizations make when evaluating and deploying Copilot, how to assess readiness, and how to align AI investments with measurable business outcomes.



JULIE HODGES

Microsoft Copilot Development Executive
Ingram Micro

Julie is a Microsoft-trained and certified Copilot expert for business. She brings a practical, Microsoft-aligned perspective on how organizations can evaluate Copilot, connect its capabilities to real business workflows, prepare for adoption, and approach deployment in a structured way. During the webinar, Julie will help business leaders understand where Copilot can create value, what organizations should consider before rolling it out, and how to align the technology with measurable business needs

Today’s Decision Framework

Five questions leaders should answer before approving a Copilot investment.

VALUE	Where can Copilot create measurable value?
READINESS	Is the Microsoft 365 environment ready?
PROTECTION	How will data access and governance be controlled?
PILOT	What should a focused first pilot look like?
EVIDENCE	How will results be measured before scaling?

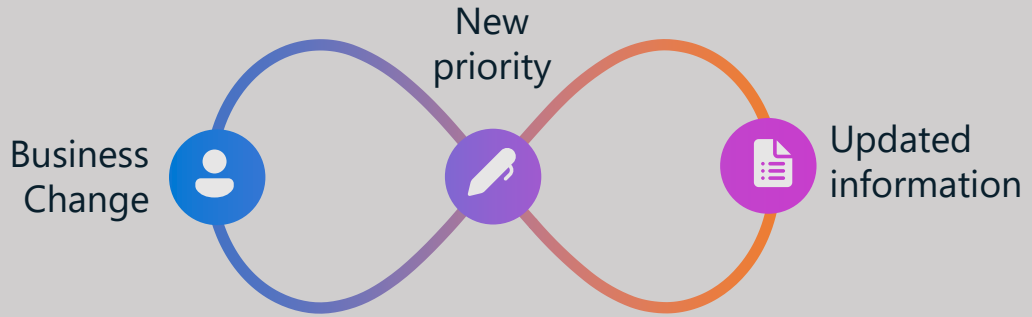
Most AI only sees snapshots – but work happens in context: Work IQ

AI today



Connectors see fragments of data

How work actually happens



Continuous, evolving, connected

Skills and Tools

Provides specialized instructions to customize Copilot and agents to deliver tailored experiences optimized for specific tasks.

Context

Uses memory to learn from your unique style, preferences, habits, and workflows, understanding your work patterns over time.

Data

Combines everyday work with external data, including M365 signals and LOB data to give Copilot real-time understanding.

The intelligence layer that personalizes Copilot to you and your organization

Where Copilot Creates the “Wow”

High-value experiences show up when Copilot is applied to recurring work across Microsoft 365.

Immediate analysis, pattern explanation and findings Excel	Analyze budget spend Analyst	Prepare for a customer meeting Researcher	Get proactive overviews of your day Copilot Chat	Create interview guides and strategy papers Researcher
Never take meeting notes again-your personal AI assistant Facilitator in Teams Meetings	Catch up on missed meetings Copilot in Teams Meetings	Quickly find content Copilot Search	Be prepared for every meeting Facilitator in Teams Meetings	Onboard into new roles or projects Notebooks

Start With the Business Outcome

Define the workflow and expected result before licenses are assigned.

BUSINESS DRIVER

Choose a costly, repetitive or delay-prone problem worth solving.

SUCCESS MEASURE

Agree on time, quality, responsiveness, adoption or risk measures before the pilot.

PRIORITY WORKFLOW

Start where work already happens across Microsoft 365.

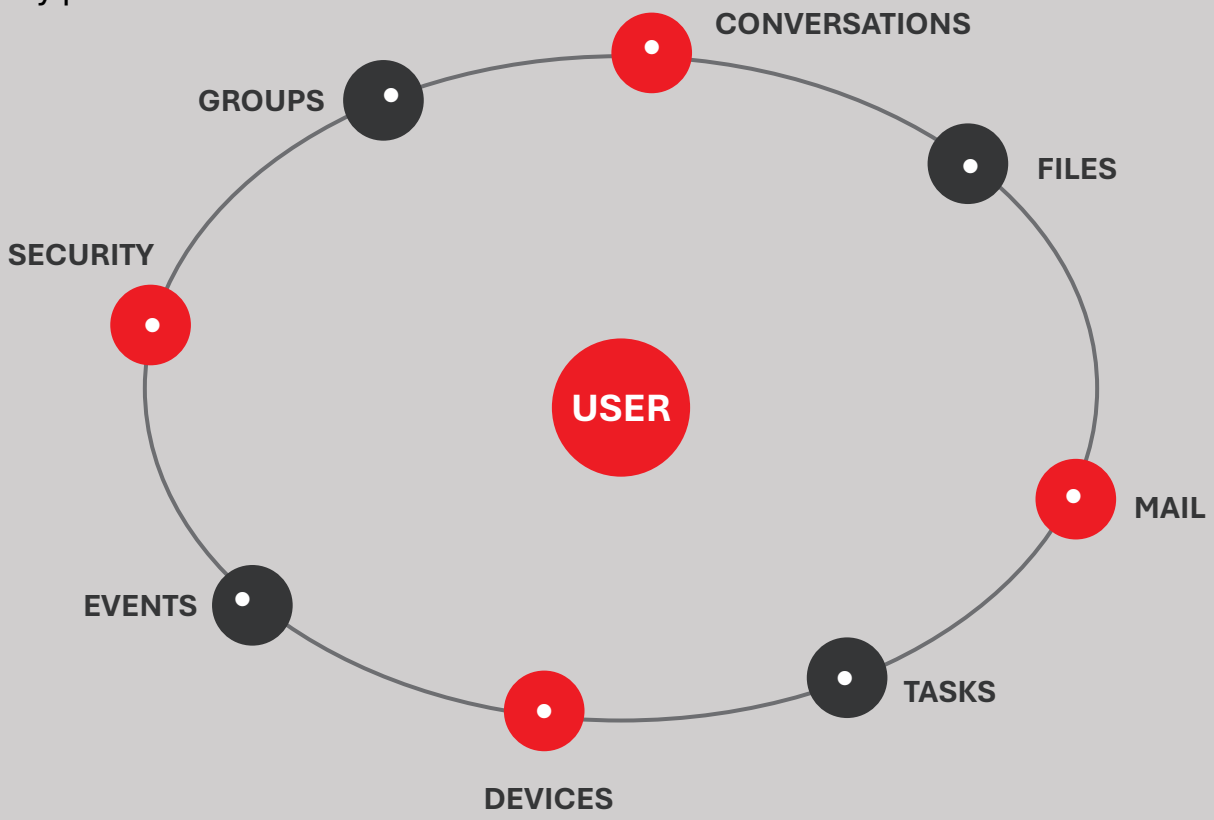
What Does Copilot Have Access To?

Copilot can work with Microsoft 365 content a user is already permitted to access.

ACCESS FOLLOWS THE USER

Copilot uses Microsoft 365 context such as conversations, files, mail, tasks, devices, events, security signals and groups. Results are grounded in the signed-in user's existing access.

Copilot DOES NOT bypass permissions.



Built on Trust

Microsoft 365 Copilot is designed to work within your organization's existing security, identity and compliance controls.

1

YOUR DATA STAYS YOUR DATA

Business data remains within the organization's Microsoft 365 environment.

2

NOT USED TO TRAIN FOUNDATION MODELS

Prompts, responses and business data are not used to train foundation AI models.

3

PROTECTED AT EVERY STEP

Existing permissions, identity controls and information-protection policies continue to apply.

4

CUSTOMER COPYRIGHT COMMITMENT

Microsoft provides its Customer Copyright Commitment for eligible Copilot use.

Is Your Environment Ready?

Copilot respects existing access, making permissions and sharing practices more important.

PERMISSIONS

Review overshared sites, broad links, guests and sensitive folders.

IDENTITY

Confirm MFA, account hygiene and appropriate access controls.

DATA

Classify sensitive information and remove obsolete content.

GOVERNANCE

Define acceptable use, retention, DLP and monitoring expectations.

Secure and Govern

Tools to secure and govern your Copilot use

Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot from processing sensitive files

Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and interactions
- Dynamically apply security policies based on risky actions

Secure

Govern AI use to meet regulations & policies

- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Govern

Flexibility to choose the best model for the job

OpenAI

Latest OpenAI models available across Microsoft 365 Copilot.

Anthropic

Anthropic Claude models available in Researcher, Copilot Chat, and expanding across M365 apps.

Within Microsoft 365 Copilot

Copilot Studio

Over 11,000 models in the Microsoft Foundry for custom-build agents in Copilot Studio.

For custom-built agents

Why Copilot Pilots Disappoint

Most problems begin with planning, governance, training or measurement.

NO OUTCOME

Licenses were purchased without defining what should improve.

SCATTERED SEATS

Isolated users cannot create team-level momentum or usable evidence.

DATA RISK

Broad access and weak governance undermine confidence.

GENERIC TRAINING

Users need role-specific workflows and examples.

NO BASELINE

Leadership receives opinions instead of evidence.

SCALE TOO FAST

Resolve pilot friction before expanding access.

The Right First Pilot

Small enough to control. Representative enough to prove value.

1	**SELECT**	Choose a team with recurring work and an involved manager.
2	**PREPARE**	Confirm permissions, policies, training, support and baseline measures.
3	**USE**	Focus on two or three workflows with clear prompts and outputs.
4	**MEASURE**	Track adoption, time, quality, feedback and exceptions.
5	**DECIDE**	Resolve friction and choose whether and where to expand.

A Conservative ROI Conversation

Use a credible baseline that the pilot can test.

30 EMPLOYEES

One hour saved per person per week produces 1,560 recovered hours annually.

MEASURE FIRST

Document today's time, quality, delay and rework before testing.

VALUE CAPACITY

Redirect recovered time toward customers, revenue, quality or capacity.

USE A RANGE

Treat the pilot as evidence gathering, not a productivity guarantee.

The TeamMIS Readiness Conversation

A limited-scope next step for leaders evaluating Copilot.

BUSINESS FIT

Identify priority roles, workflows, use cases and measurable outcomes.

DATA + RISK

Review broad access, oversharing, guests, links and information protection.

PILOT ROADMAP

Recommend users, prerequisites, training, measures and decision points.

Your Next Step: Make the Copilot Decision With Evidence

Ready to make the Copilot decision with evidence

SCAN TO SCHEDULE

A TeamMIS Copilot readiness and data risk assessment

Q&A

Four questions to help connect today's framework to your organization. Scan to continue the conversation

1. Which business workflow should we prioritize for our first Copilot pilot?
2. What should we review in Microsoft 365 before assigning Copilot licenses?
3. How should we measure value and adoption during a 30-day evaluation?
4. What are the biggest mistakes organizations make when rolling out Copilot, and how can we avoid them?

Thank You!

We will email you this deck and the webinar recording withing the next 1-2 days

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