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How to secure and productize Copilot

A readiness guide for MSPs looking to introduce strategic AI roadmaps into their service offerings.

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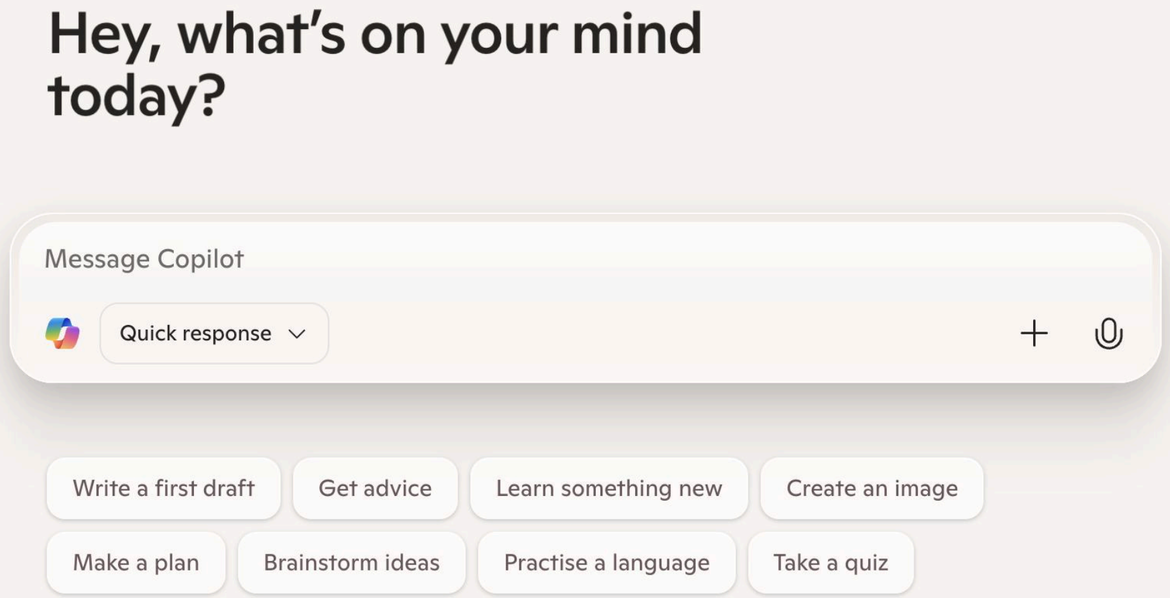
The rise of AI

As an MSP, it's your job to help customers achieve their business goals by leveraging technology. The days of break-fix are now far behind you. Modern customers look to their service providers to deliver strategic IT roadmaps and value-add initiatives that will help them achieve the business outcomes they really care about. Now more than ever, AI is at the heart of this.

Since the release of ChatGPT in 2022, when AI arguably hit the mainstream, the capabilities of AI have evolved significantly.

AI is now a true enabler of modern work, boosting productivity, increasing efficiency, and enabling creativity. AI adoption is no longer reserved for your most tech-savvy customers: more and more businesses across industries are now leveraging the potential of AI. In fact, according to Microsoft, 70% of employees say they would delegate as much work as possible to AI if it meant lightening their workload.

You need to be prepared to support your customers as they embrace this new way of working.

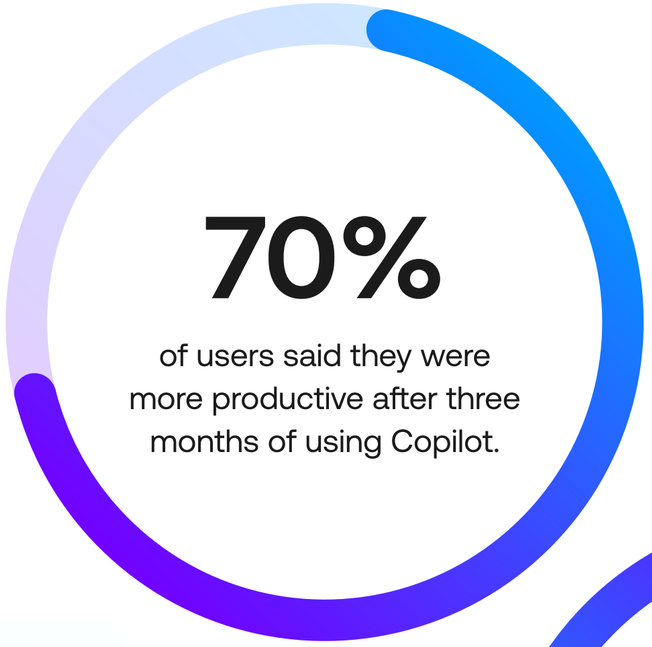


Why productize Copilot?

Microsoft has released its own AI tool, Copilot. Copilot connects to an organization's data, meaning it can sift through information contained in user documents, emails, meetings, chats, and calendars to generate advanced responses. Copilot is described as an AI assistant, and it really is just that. It can be used for key business tasks such as summarizing meetings, generating ideas, creating content, and asking questions.

Microsoft has now started a major marketing drive for Copilot, so it’s only a matter of time before your customers start asking about it. And it should come as no surprise that they’ll ask. Copilot is a shiny new AI toy with powerful productivity capabilities and natural integration into the Microsoft 365 environment.

Productizing Microsoft Copilot and integrating it into your service offering will help you unlock new revenue streams and meet customer expectations. But truly understanding how to help customers get ready for Copilot and get the most out of it will help you differentiate in a crowded and fast-paced MSP landscape.





If you want to **stand out**, positioning yourself as a **Copilot leader** who can guide your customers through the **adoption journey** is essential.

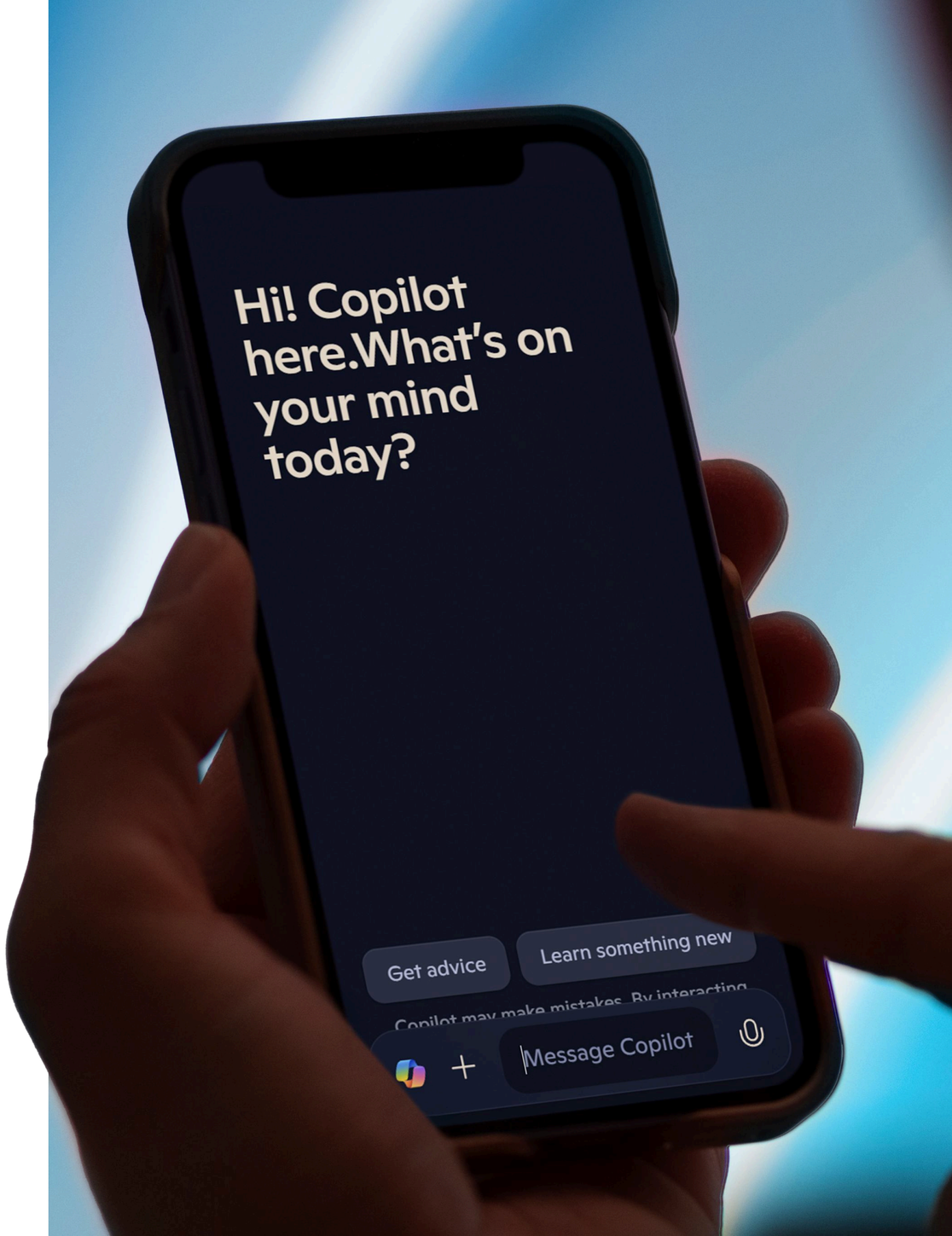
The inherent risks of Copilot

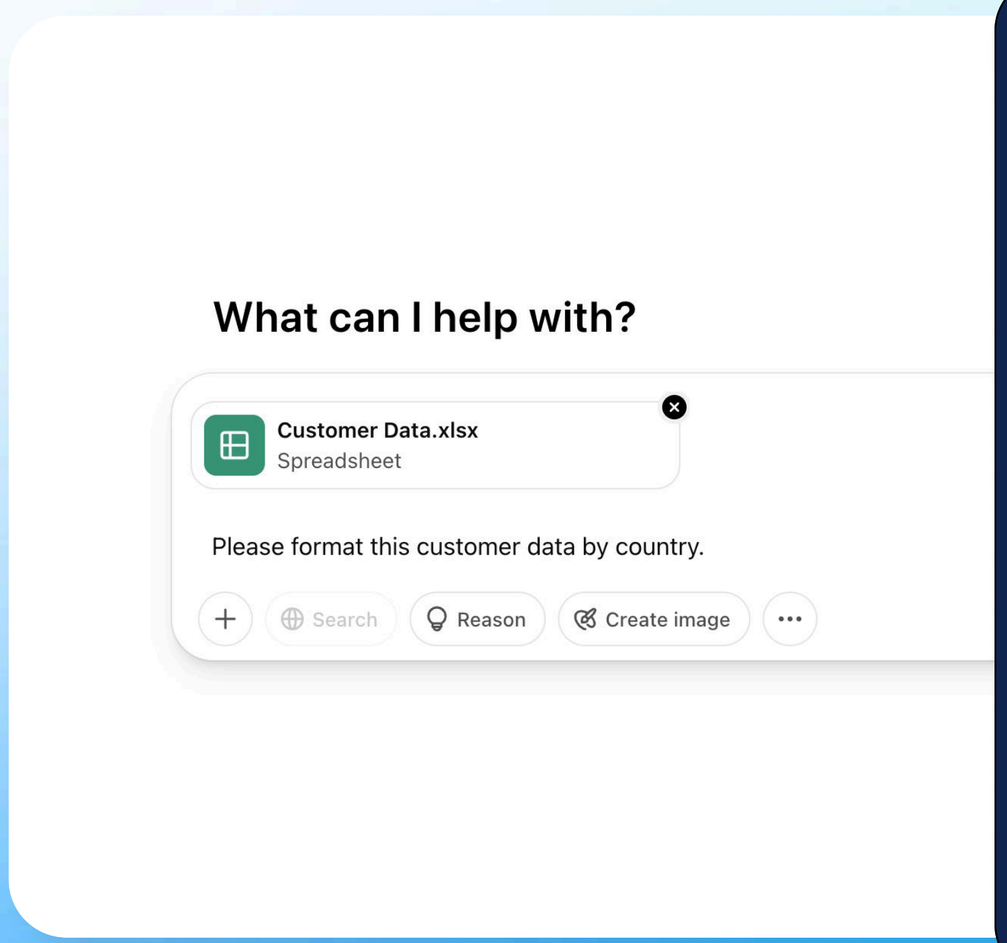
Copilot draws upon an organization's internal data to form the basis for its answers. This means that comprehensive data access controls and security are essential when setting up and rolling out Copilot for your customers.

Without proper controls in place, anyone within an organization would be able to access sensitive company data. Just imagine the most junior employee asking Copilot what the CEO's salary is and being given the answer...

If your customer's company then faces a security breach, this sensitive company data could be maliciously exploited and provide the basis for blackmail.

Because of this, securing Copilot at scale is one of the most important things you can deliver.





The security benefit of Copilot: shadow AI

Despite the risks of Copilot, it has a significant security benefit over other AI tools on the market. It is not at risk of being used for shadow AI.

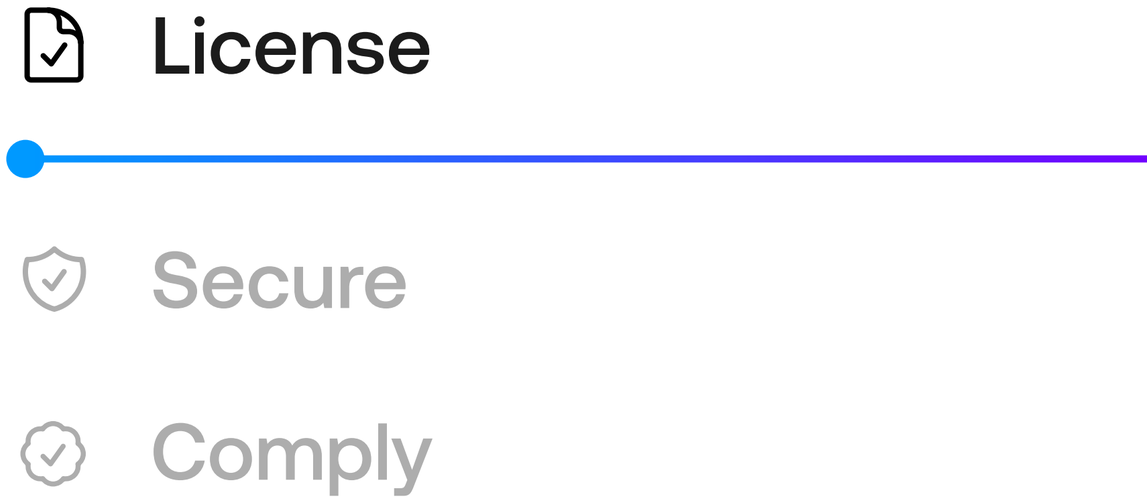
Shadow AI refers to the unauthorized use of AI tools or applications within an organization. As interest in AI has spiked, it is likely that your customers' employees have already started to use tools like ChatGPT at work. This means that sensitive data, personally identifiable information, or intellectual property could be submitted into these platforms without your customers knowing.

As Copilot is an isolated instance of AI per-business, your customers don't need to worry about data being leaked to shadow AI.

Employees want to use AI, and it is inevitable that they will. If your customers are allowing the use of tools like ChatGPT already, it is actually better for them to facilitate Copilot adoption instead as it is ultimately more secure. You can emphasize this when productizing Copilot.

Understanding the steps for Copilot adoption

Before you can productize Copilot, you need to get your own house in order and understand what's needed to roll out Copilot successfully for your customers.



License

Understand Copilot licensing and pricing

Organizations with less than 300 users need Microsoft 365 Business Premium licenses to get Copilot as an add on. Organizations with more than 300 users need Microsoft 365 E3 as a minimum.

The cost will vary depending on your customers' business size and usage needs.
You should familiarize yourself with Copilot licensing requirements and how they align with different business sizes before you begin discussing Copilot adoption with customers.

Once you are ready to begin the conversation:

Assess and discuss how your customers' Copilot usage might expand as their needs evolve and put initial plans in place for later scalability.

Consider bundled offers with other Microsoft 365 Business Premium security services.

Help customers decide which users will get Copilot seat assignments.

Top tip

Employees who use Microsoft 365 products the most will be best positioned to benefit from a Copilot license.

Secure

Carry out security assessments

Rolling out Copilot at scale all comes back to a secure environment. Before you can sell Copilot, you need to thoroughly review your customer's data access policies and assess the strength of their security environment. If you uncover any weaknesses, remediation must be your priority before rollout is a possibility.

Ask yourself the following questions:

- How secure is my customer's Microsoft 365 tenant?
- Am I adhering to any specific compliance requirements my customer has?
- Have I established governance policies to safeguard sensitive data when deploying Copilot?
- Does my customer have specific role-based access controls in place across their organization and Microsoft 365 environment?
- How am I ensuring that my customer's data is backed up in case of accidental or malicious deletion?

Comply

Create a technical integration plan for customer rollout

Once you have assessed licensing and security, you are ready to make a plan for technical rollout.

Step 1

Confirm that your customer's current Microsoft 365 setup is compatible with Copilot.

Step 2

Restrict Copilot's vision during a pilot test so it doesn't access sites that are known to be sensitive.

Step 3

Run pilot tests with a small group of users so you can identify and remediate any issues before rolling out Copilot across the wider company.

How to productize Copilot as a service

Now that you understand what you need to do to start offering Copilot to customers, you can begin to productize it. This is the final step before you can start speaking to customers about your shiny new Copilot service formed with security at its heart! Here's how you can get started:

Understand your customers' needs

When getting started with productization, consider your customer landscape. Who makes up the majority of your customer base? Are you mainly working with a particular industry? Think about how Copilot could benefit your particular customers and use tailored use cases to convey the value of your service.

Create a service description

Remember, when productizing Copilot, you shouldn't just be selling its inherent value. That's Microsoft's job. Of course, you can talk about the productivity potential and how it will benefit your customers, but be sure to add your own spin on it. Your value comes from your people and their specific knowledge and expertise, not the power of the Microsoft license. Emphasize your USPs and why customers should adopt Copilot with you alongside them as a strategic IT partner.

Consider your pricing model

When setting your pricing, first carry out market research so you can see how you compare to your competition. Find the balance between remaining profitable and making yourself stand out from the competition. Consider the additional value you are offering through your particular Copilot service and weigh this against any outgoing costs to set the perfect pricing for you.

AI as a Service

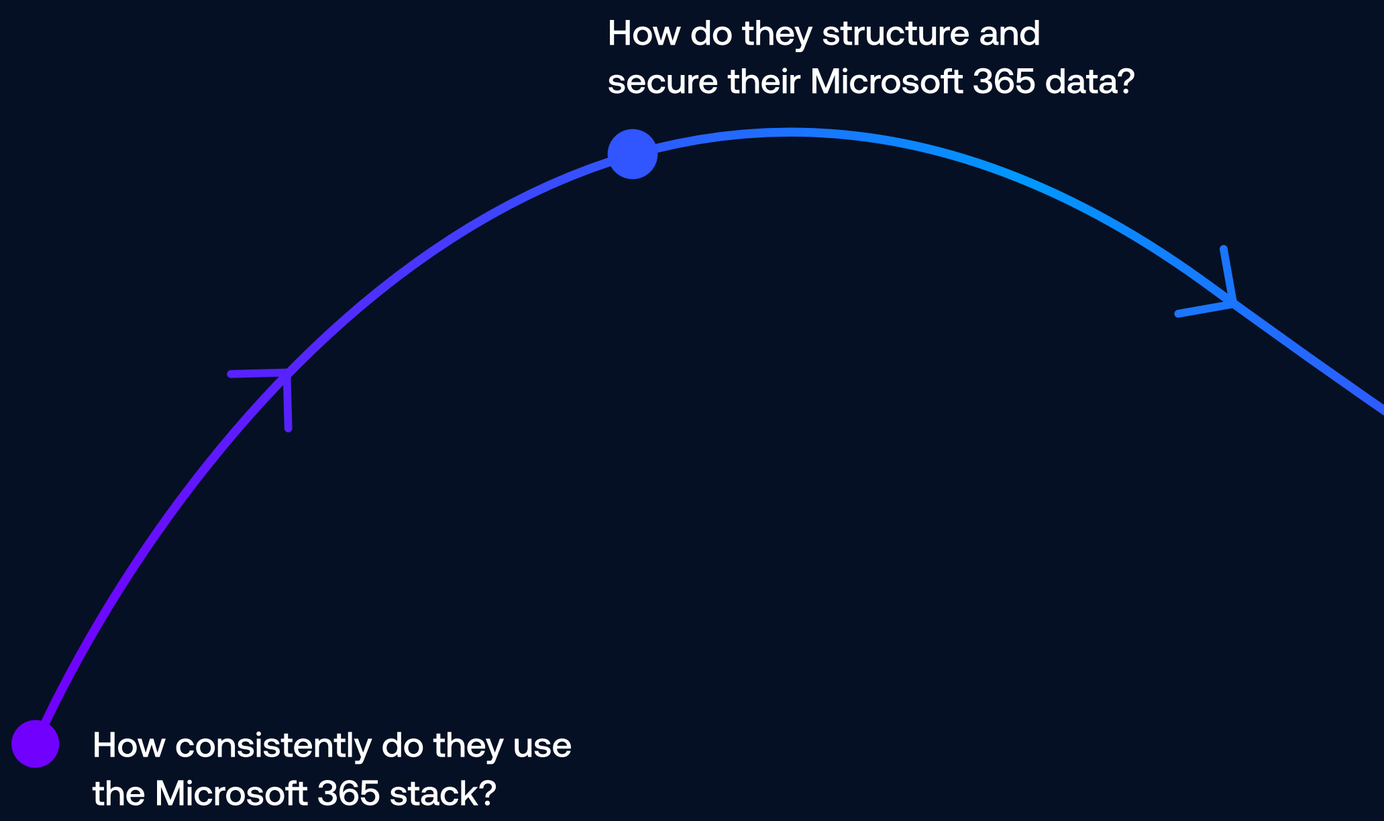
You could consider offering Copilot as part of an AI as a Service (AIaaS) package. After initial rollout and set up, you could continue to charge a monthly maintenance fee for ongoing hardening, training, and monitoring. This will help you to increase the profitability of your Copilot service.

How to assess if your customers are ready for Copilot

Copilot might seem like a golden ticket to productivity, but it simply won't work for businesses which lack the technical structure and AI maturity required to reap the benefits.

Not all your customers will be ready for Copilot. If a business has a misconfigured, disorganized, or underutilized Microsoft 365 environment, using Copilot will just highlight issues.

Productizing Copilot isn't about forcing rollout as quickly as possible across your customer base. To see positive results, you need to be strategic and guide customers through a tailored AI roadmap. As a trusted IT partner, you should be helping customers to understand whether they are actually ready for Copilot, by asking the following questions:





When you approach the roll out in this way, you can use Copilot to open wider conversations about your customers' data management, security posture, and overall Microsoft 365 strategy. This will allow you to continue to show value across your customers' entire IT infrastructure.

How to help your customers get ready for Copilot

If your customers aren't yet ready for Copilot, you can help them get there.

Audit 365 environments

Copilot doesn't work effectively if it doesn't have enough data to draw answers from. By auditing your customers' Microsoft 365 environment, you can advise whether they are using the 365 stack enough to make Copilot a useful tool for them.

You can then discuss ways they could be getting more out of their Microsoft 365 licensing and explain how to use different tools to achieve business outcomes they care about. For instance, they could start using Loop to collaborate seamlessly on projects and execute deliverables faster or leverage Teams to streamline communication and create organized channels to share the most relevant insights.



Review data access and security

Copilot is like an iceberg. Your customers only see the tip – the impressive productivity benefits Microsoft market so well. But beneath the surface, many threats are lurking. Before you can offer your customers the productivity benefits of Copilot, data and security must come first.

You need to proactively review your customers' Microsoft 365 environments to ensure that their security posture is up to scratch. Make sure that your customers have established content management practices and data governance in place. Carry out a thorough audit of their security policies, including data access conditions, retentions controls, and sensitivity labels. These can be managed and updated centrally and rolled out across their Microsoft 365 environment.

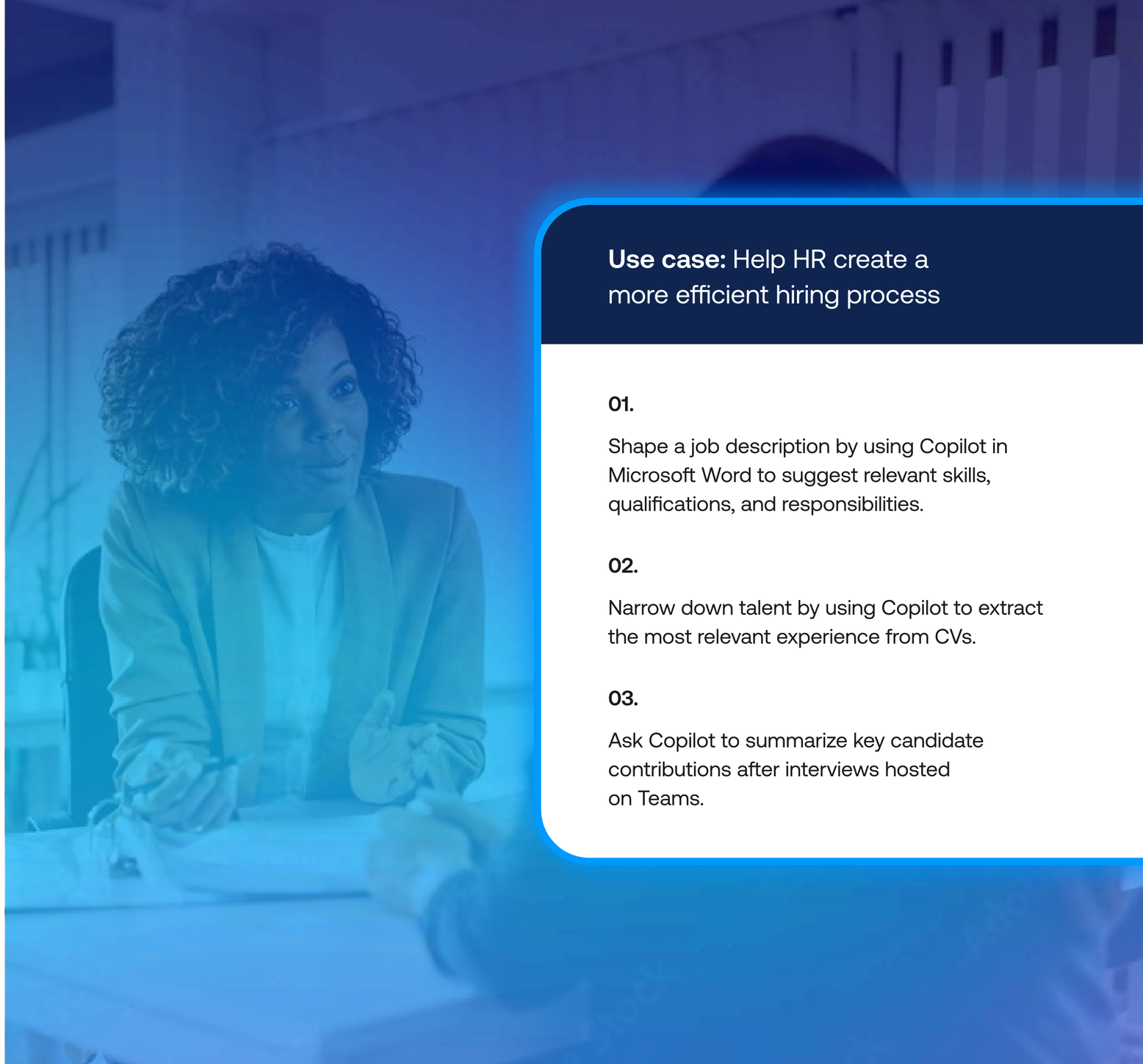
If you uncover any misalignments or security gaps, you can remediate before introducing Copilot. This is a good chance to upsell the security potential of a Microsoft 365 Business Premium license, as it provides your customers with access to tools like Entra ID for identity access management, Purview for data security, and Defender for ransomware and device protection.



Create an AI roadmap

For Copilot adoption to be effective, it must be intentional. Work collaboratively with your customers to define their goals and desired business outcomes. This will shape how they use AI in their business.

Being intentional with seat assignments will help Copilot rollout to be more effective. Help your customers to identify key business issues and define use cases for Copilot that help to solve these challenges. It can also be helpful to assign Copilot seats across a specific area of the business. Let's look at some examples:



Use case: Help HR create a more efficient hiring process

01.

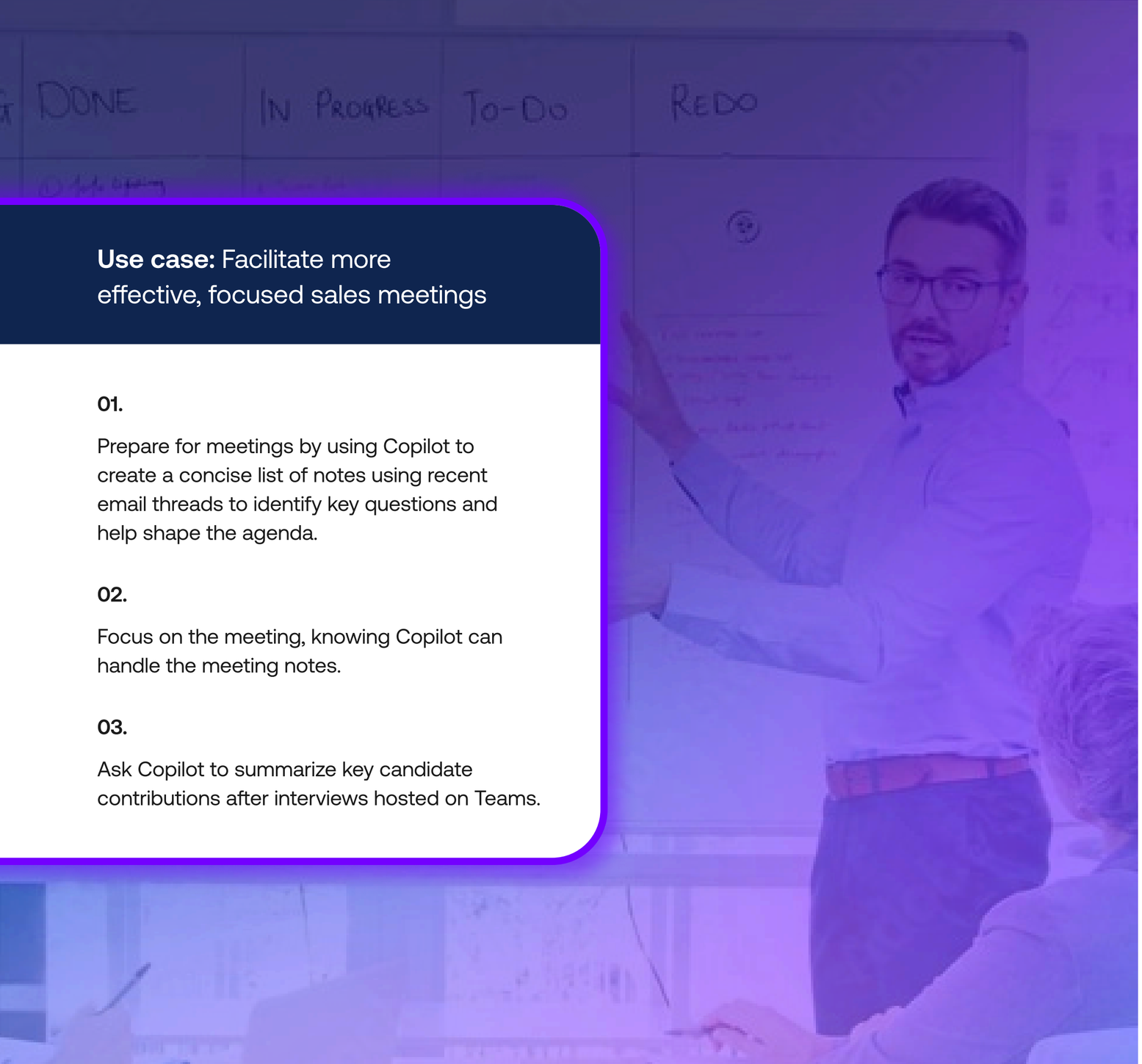
Shape a job description by using Copilot in Microsoft Word to suggest relevant skills, qualifications, and responsibilities.

02.

Narrow down talent by using Copilot to extract the most relevant experience from CVs.

03.

Ask Copilot to summarize key candidate contributions after interviews hosted on Teams.



Use case: Facilitate more effective, focused sales meetings

01.

Prepare for meetings by using Copilot to create a concise list of notes using recent email threads to identify key questions and help shape the agenda.

02.

Focus on the meeting, knowing Copilot can handle the meeting notes.

03.

Ask Copilot to summarize key candidate contributions after interviews hosted on Teams.

From there, you can identify Copilot champions to lead the way with adoption. A small group of employees can test Copilot, showcase the potential, and drive wider adoption by becoming advocates.

Talk to your clients about who could become their Copilot champions, emphasizing that those already making the most of their 365 licenses will be best positioned to benefit from Copilot.

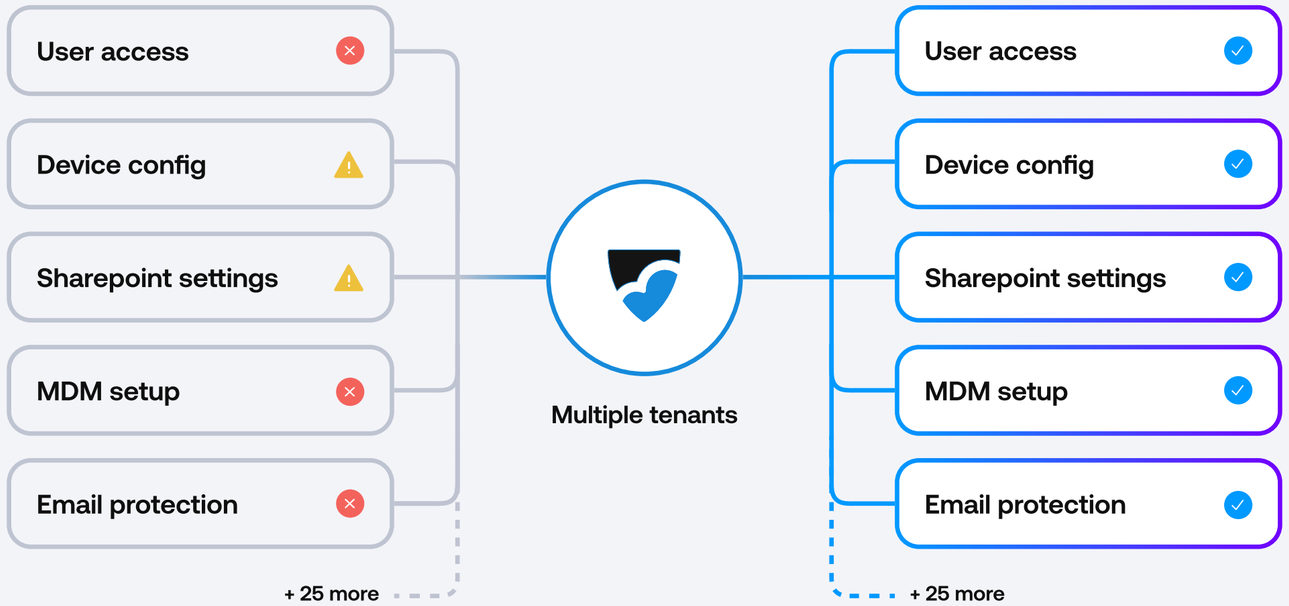
Secure Copilot at scale

As we've mentioned, securing the Microsoft 365 environment and establishing strong data access policies are essential steps when getting your customers ready for Copilot.

Configuring and managing security policies across multiple tenants can be an extremely manual and time-consuming process, particularly if you want to start rolling out Copilot at scale across your customer base.

By utilizing Microsoft 365 management tools like inforcer, you can start preparing to deliver Copilot at scale by standardizing security policies across multiple tenants. Align customers to your latest baseline standards, winning back valuable time and resources to focus on strategic Copilot roadmaps, knowing that all future files will be protected by your new, strengthened policies.

But the journey to Copilot starts inside your MSP. You need to start having conversations with customers about their AI maturity before you can begin rollout at scale.



Assess your customers' Copilot readiness

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Ready to start having Copilot conversations with your customers? Download our Copilot Readiness Checklist to help guide your discussions, assess your customers' AI maturity, and identify the next steps in their Copilot adoption.

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