

TRACE3 | CLOUD SOLUTIONS GROUP

# Copilot for M365 Adoption Accelerator

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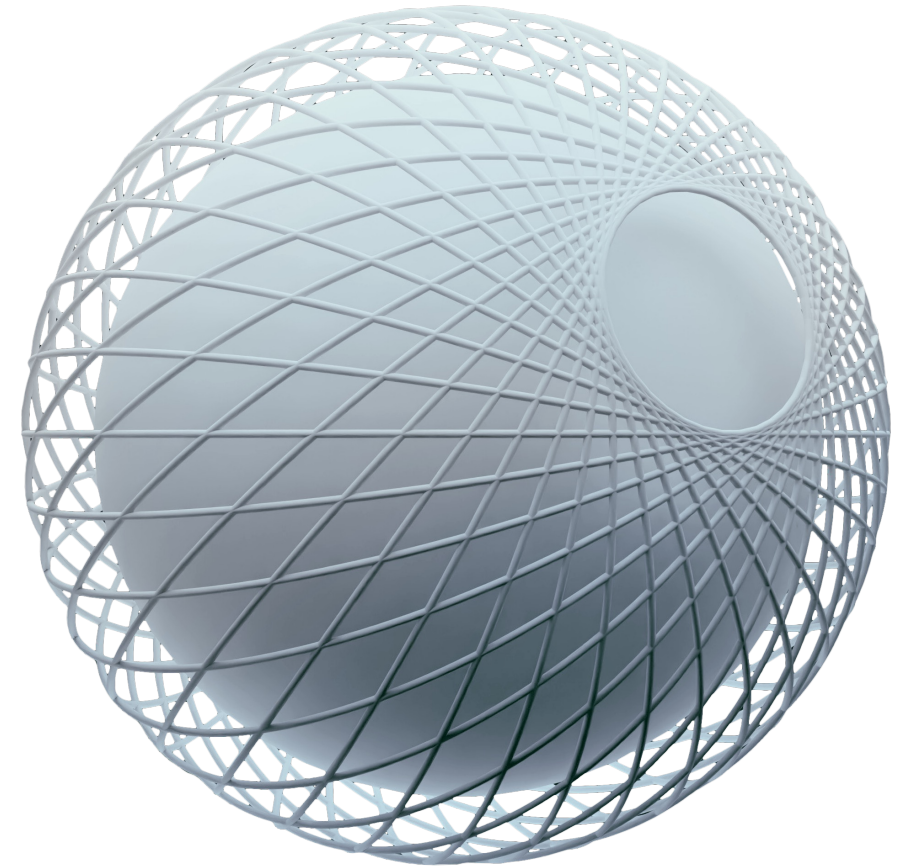
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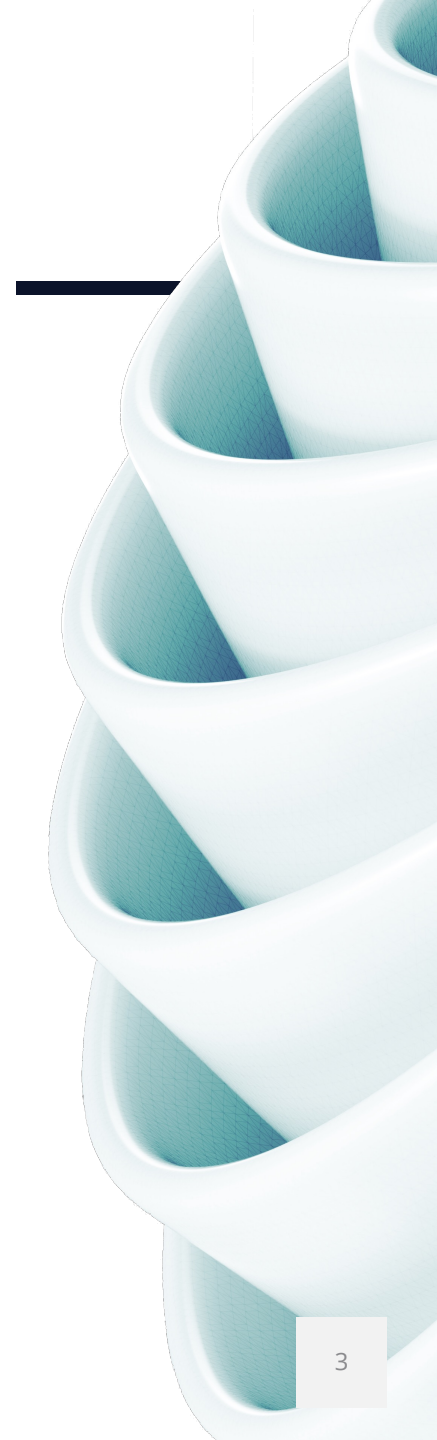
# Challenge and Solution

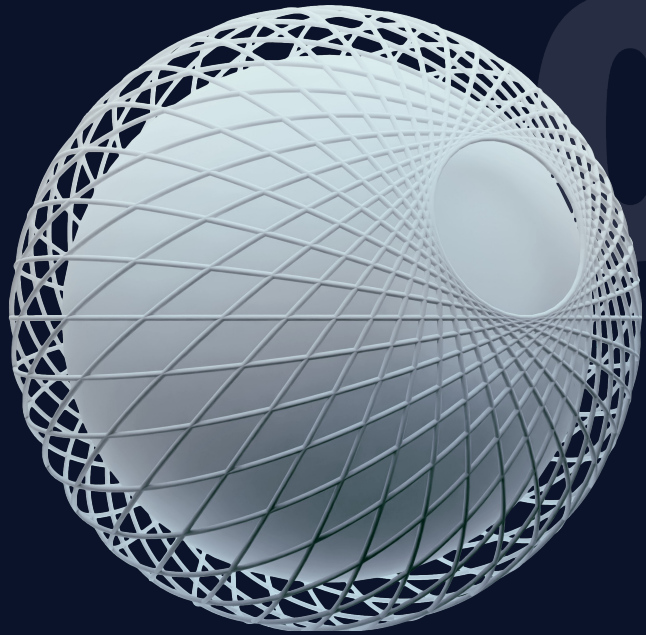
## THE CHALLENGE

Successful adoption campaigns require a clear vision, strategy, and detailed planning in addition to the right mix of technical, business & program management expertise

## THE SOLUTION

Trace3 experts will develop a comprehensive Copilot adoption strategy, execute a pilot program and equip your organization for a successful production release, accelerating time to value, maximizing return on investment, and increasing user satisfaction





# Ready, Set Go! - Trace3's Copilot Adoption

# Obstacles To Successful Copilot Adoption

Missing or poorly operationalized security capabilities  
(Data Security, Data Governance, IAM, etc.)

Lacking vision and strategy on how Copilot is to be used  
beyond basic use cases

Poor SharePoint Data Management practices

Poor or nonexistent end user engagement strategy

Missing or poorly operationalized AI Governance  
program

Lacking a functioning community of practice

Lacking management, optimization & extensibility  
strategy – plugins, integrations, management and risk

Ineffective end user training results

## READY

Develop a solid foundation with a comprehensive plan for secure, strategic deployment of Copilot M365

- Current state readiness and data security posture assessment
- Establish Center of Excellence, Champions and Pilot group
- Education and envisioning workshops to align capabilities with business needs and develop a user centric adoption strategy

## SET

Empower key stakeholders with training, testing and development of artifacts ensuring successful pilot program

- Key stakeholder onboarding, training, testing and use case validation
- Develop onboarding guides, training artifacts, best practices, FAQs, & communication templates
- Collaborate with key stakeholders to develop necessary policy, standards, process, basic platform configuration & tuning

## GO

Drive pilot success with a focus on user engagement, enablement, training, and capturing the value of Copilot for M365

- Onboarding and training of pilot group & White Glove support for designated personnel
- Office hours support for best practices, prompt sharing, and FAQs
- Identification of success stories and development of value realization story related to increased productivity

**Trace3's expert-level Technology, Cloud, Security, AI, Governance, Risk, and Compliance professionals will accelerate your Copilot for M365 program by developing an adoption strategy inclusive of a CoE, champions team, user engagement, use case development, security by design, training, pilot program execution and support enabling secure, efficient and responsible AI Transformation**

## Copilot COE Roles & Responsibilities

Role	Responsibilities	Department	Team Member(s)
Executive Sponsor	Send Copilot Launch announcement. Help identify and prioritize top HR needs. Connect with Security, HR and IT leaders across the organization. Actively participate in and use the Copilot capabilities to help drive and reinforce adoption.	Human Resources	Jane Doe
Department Leads	Represent department needs to support scenario and use case development Attend train the trainer sessions and become subject matter expert of Copilot Co-develop applicable departmental documentation	Human Resources Sales Marketing IT Finance	Jane Doe John Doe Jon Smith Jane Smith
Security Lead	Define security and compliance requirements for Copilot Co-develop Copilot administration standard Support data security posture and technical review (security) assessments	Information Security	Jack Doe

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Develop  
COE and  
establish  
R&Rs

Ready

## CENTER OF EXCELLENCE

Identify stakeholders, develop charter, define R&Rs

## EDUCATE & ENVISION

Education and envisioning workshops with Copilot COE on key capabilities and business scenario/use case prioritization

## ADOPTION STRATEGY

Value realization framework, measurement and reporting plan, engagement & training strategy

Educate &  
Envision

### Where your employees need help

#### Meetings

"Receiving the information I need" is the number one reason employees join a meeting.  
Only 1 in 3 employees think they would be missed if they couldn't join most of their team meetings.  
58% of employees say it's difficult to brainstorm in a virtual meeting.

#### Information

62% of employees say they struggle with spending too much time searching for information in their workday.  
A heavy email user will spend the equivalent of an entire workday - 8.8 hours - per week in email.

#### Getting Started

68% of employees say they don't have enough uninterrupted focus time during their workday.  
67% of employees say they don't have enough time to reset between work tasks.  
Feeling uninspired is ranked one of the top productivity disruptors by employees.

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## Scenario Examples

Knowledge Worker	Productivity	Skills
Generate summary of document x	Respond to email in outlook with a certain tone	Review business results and summarize key trends
Write a draft email about a topic x	Create a table of pros and cons for topic x	Analyze sales report from last month
Get a new coworker up to speed on project x	Summarize emails missed while out sick, flag important items	Provide a gap analysis based on x documents
Create a presentation based of this word document	Identify decisions made and suggest next steps in a meeting	Develop a RACI for this process

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Develop  
scenarios and  
use cases

READY

# M365 DATA SECURITY POSTURE ASSESSMENT

## DISCOVER, INVENTORY, CLASSIFY

Discover, inventory, classify and contextualize sensitive data within the cloud, specifically related to the M365 Platform.

## ANALYZE, CORRELATE, CONTEXTUALIZE

Analyze data inventory, elements, and context of data (type, compliance, etc.) and correlate with M365 posture

## DATA SECURITY POSTURE ASSESSMENT

Surface and identify risk to data stored within cloud environment by detection of toxic combinations of risk

## PRIORITIZED REMEDIATION RECOMMENDATIONS

Develop prioritized remediation roadmap based on risk and aligned to MS best practices, industry standard frameworks and compliance requirements

**Datstores**

916 Datstores

Cloud Provider | Infrastructure | Account | Data Class | Advanced Filters

DATSTORE	ACCOUNT	DATA SENSITIVITY	SENSITIVE RECORDS	DATA
active-clients MSSQL on RDS	stark-datalake eu-central-1	Very Sensitive	940.3K	Personal   Financial   IT & Security
Emily Taylor/GoogleDrive My Drive	stark.com	Sensitive	586.7K	Personal   Financial   Business & IP +1
Phil's OneDrive OneDrive	Stark M365 Main tenant	Sensitive	583.5K	Financial   IT & Security   Personal +1
keybox PostgreSQL on RDS	marketing-reporting us-east-1, us-west-1, us-east-2, eu-...	Very Sensitive	564.9K	Financial   Personal   IT & Security
stark-mongodb MongoDB on EC2	stark-labs-prod us-east-1	Very Sensitive	549K	Health   Personal   Business & IP
hr-germany-old MSSQL on RDS	stark-datalake eu-central-1	Very Sensitive	523.6K	Personal   Financial   Business & IP +1

Discover and Inventory Sensitive Data

Classify and Contextualize Sensitive Data

**Data Explorer**

119 data classes

Account | Data Category | Identifiable Data | Data Subject Role | Advanced Filters

DATA CLASS	CONTEXT	SENSITIVITY	TOTAL RECORDS	ISSUES
US SSN	Identifiable   Customer data   Hashed +5	Very Sensitive	1.1M	8   18   44   11
Credit Card Number	USA   Identifiable   Employee data	Very Sensitive	636.4K	13   24   28   14
National Drug Code	Patient data   USA   Identifiable	Very Sensitive	556K	0   10   2   2
Password	Customer data   Identifiable   Hashed +1	Very Sensitive	337.9K	11   3   16   13
US Driver's License	Customer data   USA   Synthetic	Very Sensitive	330.1K	2   11   18   16
Authentication Token	Identifiable   Customer data	Very Sensitive	252.2K	0   2   2   5
EU Debit Card Number	Employee data   EU   Masked	Very Sensitive	184.5K	6   8   10   2

Identify, Prioritize and Remediate Data Risk

**Issues**

Open (365) | Ignored (10) | Resolved (79)

365 issues in 33 policies

Severity | Policy | Account | Datstore | Advanced Filters

POLICY	ISSUES	SEVERITY
Unencrypted credit card numbers Encryption	13 Issues	CRITICAL
Publicly exposed PII in S3 bucket External Exposure	3 Issues	CRITICAL
EU citizen PII stored in unapproved country Data Dispersion	14 Issues	CRITICAL
Credentials in plain text Encryption	16 Issues	CRITICAL
Sensitive data in non-production environments Data Dispersion	10 Issues	CRITICAL



**Microsoft 365 Copilot:**  
The art and science of prompting

**1. Tell Copilot what you need**

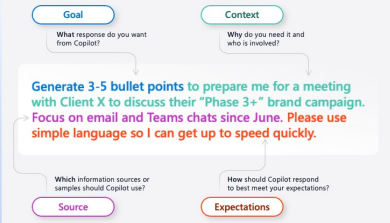
There are many types of prompts you can use depending on what task you want done.

- **Learn about projects and concepts:**  
"What is [Project X] and who are the key stakeholders working on it?"
- **Edit text:**  
"Check this product launch rationale for inconsistencies."
- **Transform documents:**  
"Transform this FAQ doc into a 10-slide onboarding guide."
- **Summarize information:**  
"Write a session abstract of this [presentation]."
- **Create engaging content:**  
"Create a value proposition for [Product X]."
- **Catch-up on missed items:**  
"Provide a summary of the updates and action items on [Project X]."

**Prompts** are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

**2. Include the right prompt ingredients**

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.



Training & Testing

SET

**EARLY ADOPTER ONBOARDING**

Prerequisites check including, licensing and software.  
Onboarding, training and testing of basic functionality and features

Testing of stakeholder specific scenarios, as defined in envisioning workshops

**EARLY ADOPTER ONBOARDING**

Development of Copilot COE artifacts including, but not limited to onboarding guides, training artifacts, best practices, FAQs, communication templates, etc.

**TECHINICAL & SECURITY READINESS**

Collaborate with key personnel on development of policy, standards, process and or platform configuration to address roadmap remediation requirements prior to Go phase.

COE Artifacts

**Stick to the important stuff...let Copilot help with the rest**

Copilot is now a part of the apps that you use everyday. It works alongside you to help with tedious or repetitive tasks, so you can get your most important work done, faster and easier.

**Catch up** on team Teams meetings you missed in a fraction of the time

**Jumpstart** the creative process of drafting a word document

**Transform** a document into a PowerPoint presentation

**Collate information and insights** across your content using Microsoft Copilot.



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**Top 5 Copilot Readiness Recommendations**

- 1 Data Security**

  - Remediate high risk findings from data security posture assessment (see report)
  - Operationalize sensitivity labels with MIP, classify and label data within M365
  - Introduce DSPM capabilities for M365, integrate with MIP and implement least privilege
- 2 Data Hygiene**

  - Cleanup of ghost datastores identified by data security posture assessment (see report)
  - Operationalize retention labels for records management in M365 platform
  - Consider redesign of logical information architecture to improve Copilot results
- 3 Identity & Access Management**

  - Eliminate standing access for privileged SharePoint and Global Admin roles and require MFA for role activation
  - Implement SharePoint site access reviews inclusive of justification, revocation, etc.
  - Implement conditional access policies to include risky sign-ins and users
- 4 Data Governance**

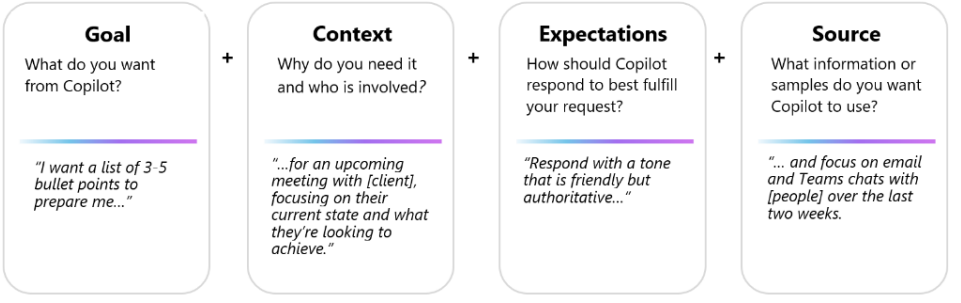
  - Assign data stewards to oversee preparation and data quality aspects of SharePoint team sites
  - Update/refine policies and procedures to incorporate and align with cloud native tooling capabilities
- 5 End User Training**

  - Provide training to end users on acceptable use, best practices, data governance and data security requirements
  - Develop and train users on organizational standards relating to structure of sites, folders and taxonomy

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Collaboration with staff on security remediation



Best Practices

Office Hours & White Glove Sessions

Country	Customer	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS
France	VanArsdel	Biodegradable Cleaning Products	Low	4345	\$10	\$352	\$1,529,440	\$15,294	\$1,514,146	\$
USA	VanArsdel	Biodegradable Cleaning Products	Low	4245	\$10	\$352	\$1,484,240	\$14,842	\$1,479,298	\$
Australia	VanArsdel	Biodegradable Cleaning Products	None	4124	\$10	\$352	\$1,451,648	\$0	\$1,451,648	\$
Mexico	VanArsdel	Biodegradable Cleaning Products	Medium	3954	\$10	\$332	\$1,391,808	\$83,508	\$1,308,300	\$
France	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	4902	\$10	\$127	\$628,904	\$6,289	\$622,615	\$
France	Contoso Pharmaceuticals	Recycled Can	Low	4903	\$5	\$127	\$622,681	\$6,227	\$616,454	\$
Canada	Proseware	Natural Personal Care Products	Low	1954	\$270	\$302	\$589,108	\$5,901	\$584,207	\$
Canada	Proseware	Biodegradable Cleaning Products	High	1990	\$220	\$302	\$600,980	\$84,137	\$516,843	\$
USA	VanArsdel	Compostable Food Packaging	Low	1254	\$3	\$380	\$476,520	\$4,765	\$471,755	\$
USA	Proseware	Natural Personal Care Products	Medium	1485	\$224	\$302	\$442,430	\$26,546	\$415,884	\$
USA	Proseware	Sustainable Snack Packaging	Medium	1410	\$120	\$302	\$425,820	\$25,549	\$400,271	\$
Australia	Proseware	Natural Personal Care Products	Medium	1399	\$224	\$302	\$413,438	\$24,806	\$388,632	\$
USA	VanArsdel	Compostable Food Packaging	Medium	1052	\$3	\$380	\$399,760	\$23,986	\$375,774	\$
Canada	VanArsdel	Compostable Food Packaging	Low	980	\$312	\$380	\$372,400	\$3,724	\$368,676	\$
Australia	Proseware	Sustainable Snack Packaging	Medium	1298	\$120	\$302	\$391,996	\$23,520	\$368,476	\$
Australia	VanArsdel	Compostable Food Packaging	None	954	\$3	\$380	\$362,520	\$0	\$362,520	\$
Canada	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	2785	\$110	\$127	\$353,695	\$3,537	\$350,158	\$

# GO

## PILOT GROUP ONBOARDING

Pilot group prerequisites check including, licensing and software.  
Onboarding and training of Copilot for M365 including, but not limited to initial per application usage of features, best practices, dos and don'ts

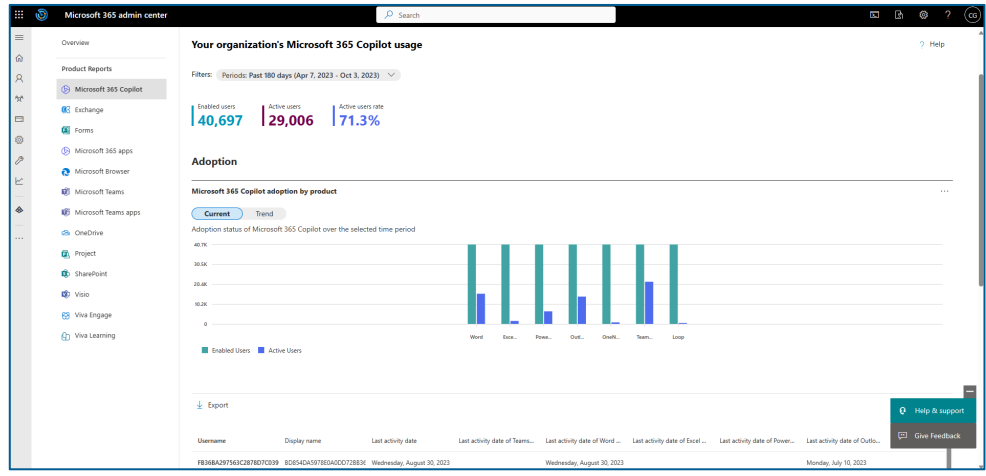
Stakeholder specific usage scenarios, as defined in envisioning workshops

## PILOT GROUP SUPPORT

White glove sessions, onboarding and training sessions, as required

Office hours for support and prompt sharing

Pilot group feedback gathering



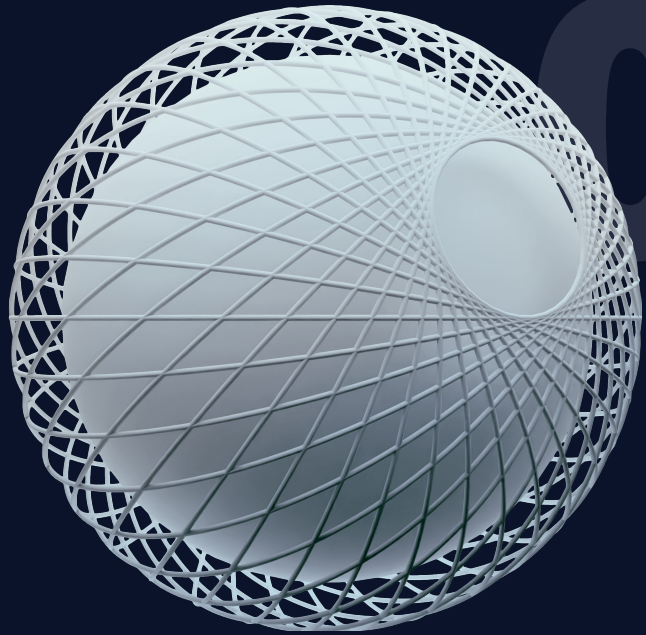
Reporting

## PILOT REPORTING

Service usage review, health and support monitoring

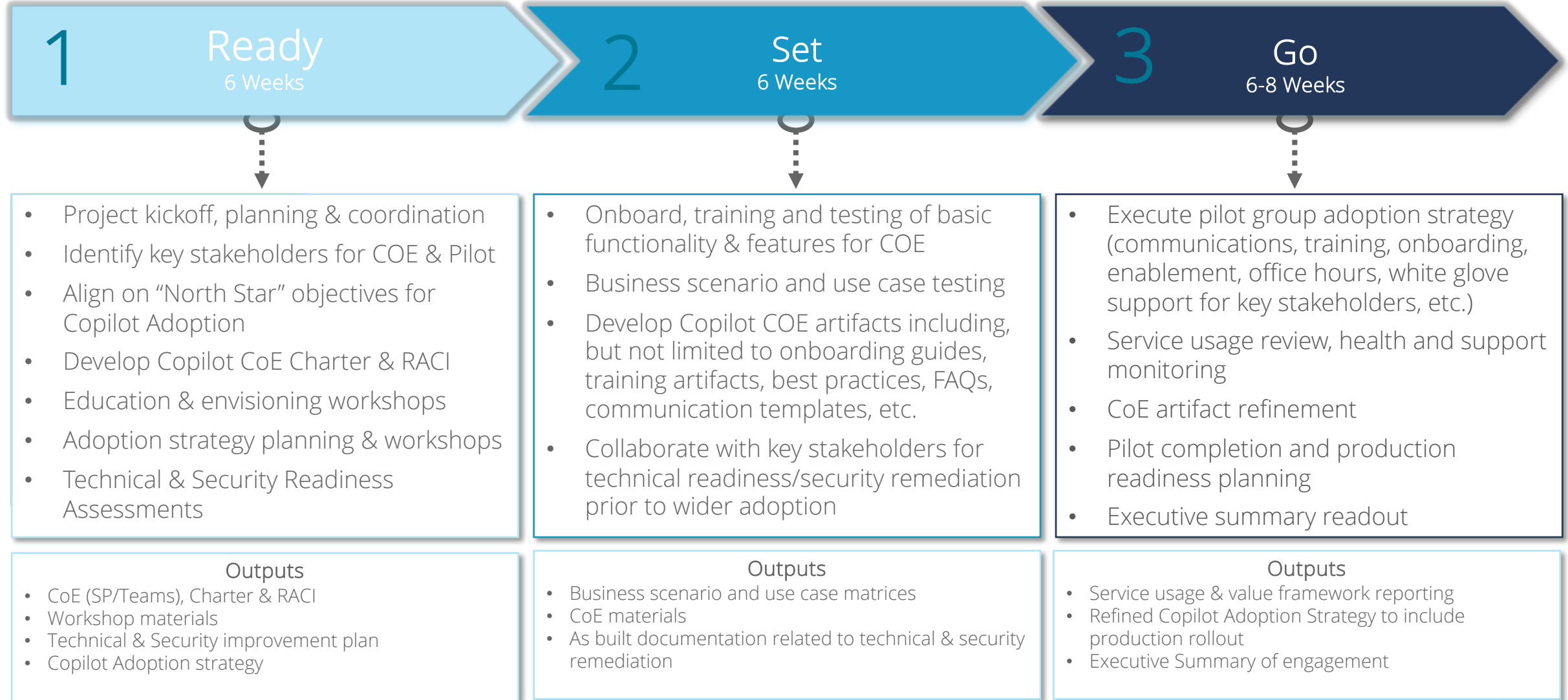
Identification of success stories related to Copilot

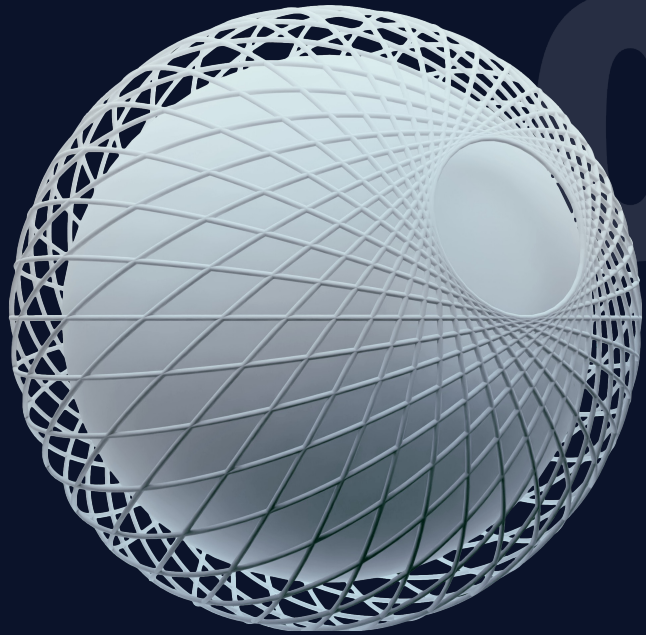
Updates and refining to COE artifacts and relevant documentation created in previous phases.



# Trace3's Approach To Copilot Adoption

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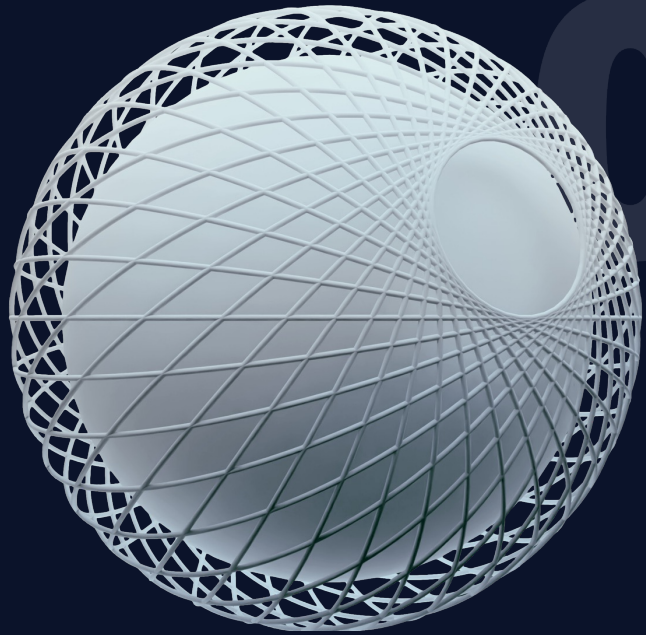


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# Questions



# Thank You!



# Trace3 Overview

# At Trace3, we believe:

All possibilities live in technology

## PREMIER PARTNER

We are the premier technology solutions provider for enterprise and commercial clients. Trace3 provides access to emerging tech from Silicon Valley coupled with elite engineering that drives end-to-end solutions in cloud, data and analytics, security, and the data center.

## INNOVATION

Trace3 empowers executives and their organizations with technology innovation to keep pace with evolving business needs and give them a competitive advantage.

## TRACE3'S VISION

Our vision statement is to always be an innovator in the industry, with commitment to business value realization for our clients.



# Trace3's Highly Differentiated Business Model

## EMERGING TECHNOLOGY

- Innovation embedded in Trace3 DNA
- Unique venture capital ecosystem
- Unmatched insight into new technology

## ELITE ENGINEERING

- Significant investment in consulting and engineering talent
- Elite vendor partnerships and loyalty to the client
- Best-in-class service and delivery execution

## CLIENT INTIMACY

- Regional model built to optimize client intimacy
- Thousands of clients across all industries
- Early client access to emerging technology



# Trace3's Suite of Products and Services

## SOLUTIONS

- Cloud
- Cloud Security
- Data Privacy
- Security & Networking
- Data & Analytics
- GenAI Strategy, Adoption & Governance

## SERVICES

- Professional Services
- Assessment and Advisory Services
- Managed Services
- Management Consulting
- Project and Program Management

## ENABLEMENT

- Innovation Insights
- Emerging Vendors
- Research Engine
- Venture Relations
- Technical Certifications
- Engineering Talent
- Local Resources
- Vendor Partnerships
- Executive Services
- Client Experience Portals

# Trace3 Capabilities Overview



**TRACE3**

**\$2B+ Revenue**

**5,500+ Clients**

**60 Top Tier VC Partners**

**4500+ Tech Solutions**

**1200+ Employees**

### Cloud Security Governance & Strategy

Develop a pragmatic approach to your Cloud Security Program informed by industry standard frameworks and best practices

### Data Security & Privacy

Develop and operationalize data security and privacy programs at the speed and scale of cloud

### Cloud Security Reference Model

Holistic and Systematic approach your Cloud Security ecosystem

### Cloud Security Tooling Rationalization

Assess existing technology investments, align emerging tech, and rationalize to key use cases

### Cloud App Modernization, Migration, & Security

Bring cloud security into app development and integration practices and program elements

### Cloud DevOps and DevSecOps

Build an SDLC focused champions program, driving security throughout development

### Offensive Security in the Cloud

Red teaming exercises against current state cloud environments and controls

### Cloud Security Operations, IR, and SOAR

Enhance pre-breach and post-breach practices and operations

### Advanced Cloud Consulting Services

Access the best of Trace3 through flexible engagement structures

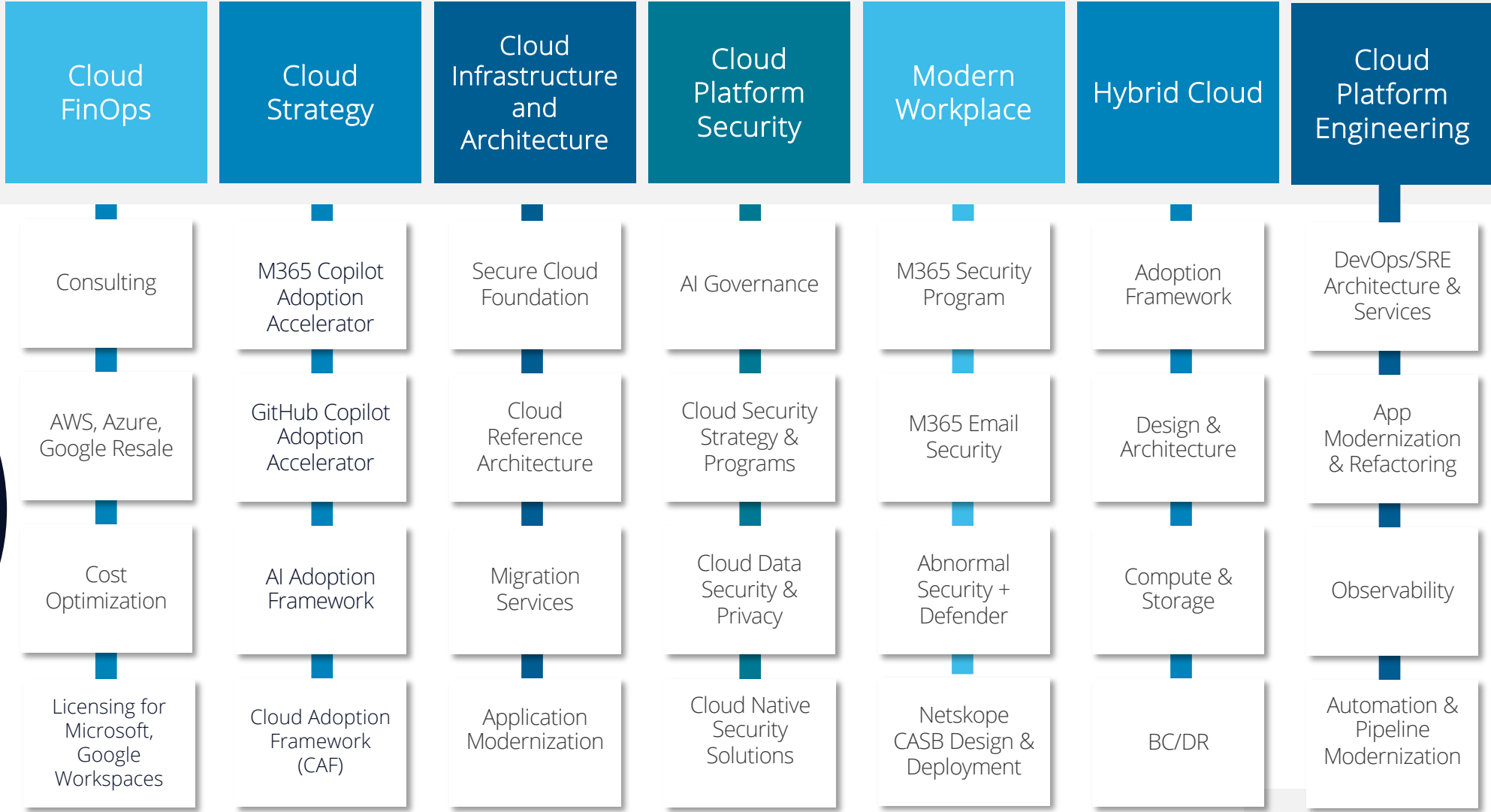
### Cloud Identity and Access Management

Design and build environment-wide identity and access management architecture

# Cloud Security Fusion Team

# Cloud Solutions at Trace3

World Class  
Cloud  
Consulting



# Security Services at Trace3

Securing  
how you do  
business.

