Microsoft

EMPOWER YOUR MISSION:

A Safe Path for Nonprofits with Copilot

MAY 1, 2024

BDO®

Our Agenda Today

Drive Your Mission

Empower Your Team

Protect Your Brand (and outcomes!)

With You Today

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Drive Your Mission

IBDO

Your Nonprofit isn't the "Typical Commercial Business"

Your nonprofit exists for something greater than money.

Achieving **that** outcome is what everything else is for.

Nurture and Drive Relationships

Organize and Communicate

Realize Outcomes Efficiently

Nurture and Drive Relationships

75%

of event and P2P donors will continue supporting into the future

Organize and Communicate

42%

of nonprofit leaders list digital transformation among top three priorities for the next 12 months

Realize Outcomes Efficiently

94%

of nonprofit leaders did not feel they were using data effectively

Empower Your Team

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Empower the Mission with Microsoft Copilot

60%
of leaders say a lack of innovation or breakthrough ideas is a concern

64%
of people have struggled with finding time and energy to get their work done

70%
of people indicated they would delegate as much as possible to AI to lessen their workloads
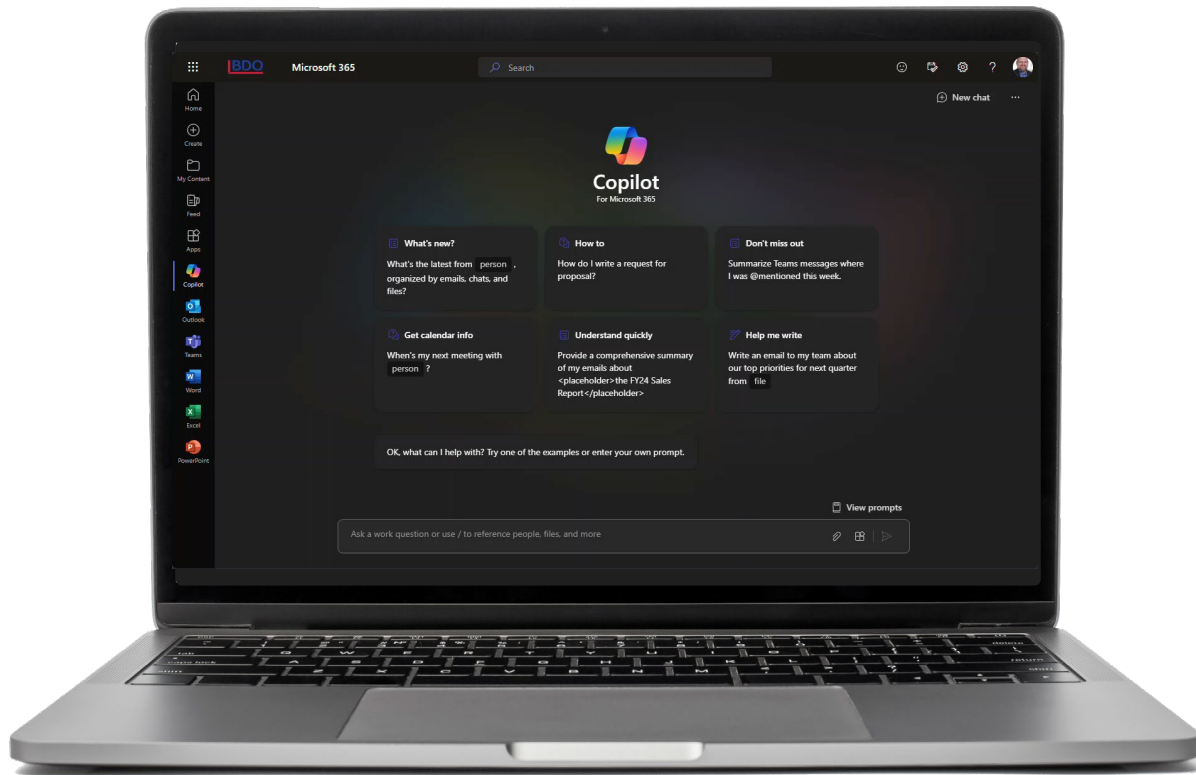
68%
said Copilot improved the quality of their work

70%
said Copilot made them more productive

77%
said they didn't want to give Copilot up

Nurture and Drive Relationships

Conduct Market Research

Build libraries of content from your organization and industry. Use copilot to drive rapid synthesis and summarization into targeted communications.

Create a Marketing Bill of Materials

Using source materials, generate drafts for emails, conversation guides, and presentation materials from within Microsoft Outlook, Word, and PowerPoint.

Personalized Donor Emails

Use past conversations to personalize an existing email format using the email draft and past conversations with the individual.

Communicate Results

Document and socialize responses to a variety of emails across donors, identifying common themes and remarks from many respondents.
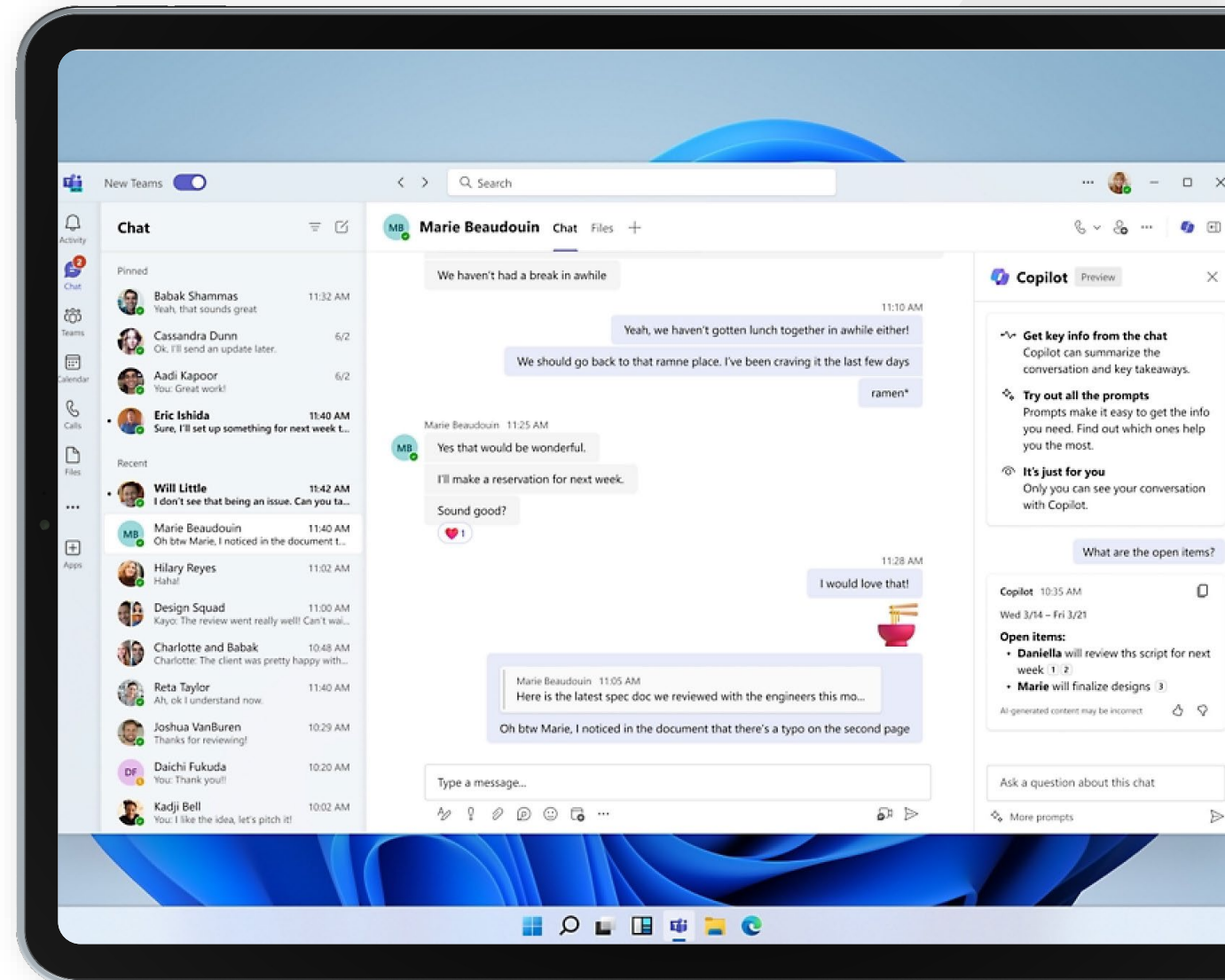
Organize and Communicate

Microsoft 365's strength has **always been** enabling your team to communicate and collaborate.

Teams Meetings

▶ Summarize the meeting so far when you join late

▶ Generate Meeting notes and Action Items

Summarize Email and Documents

▶ Speed access to context and efficient insights generation

▶ Fix the difficulty of "email archaeology"!

# Realize Outcomes Efficiently

Generate Project Plans

Analyze and synthesize from a collection of documents and planning meetings to generate an initial list of steps to complete a project.

Drive Service Style Motions

Use Copilot for Service to plan visits to your nonprofit clients, finding those partners and beneficiaries of your mission that have high long-term impact and/or additional needs.

Copilot For Finance

Accelerate impact and reduce cost through Copilot for Finance's dedicated financials engine, data reconciliation, and variances features.
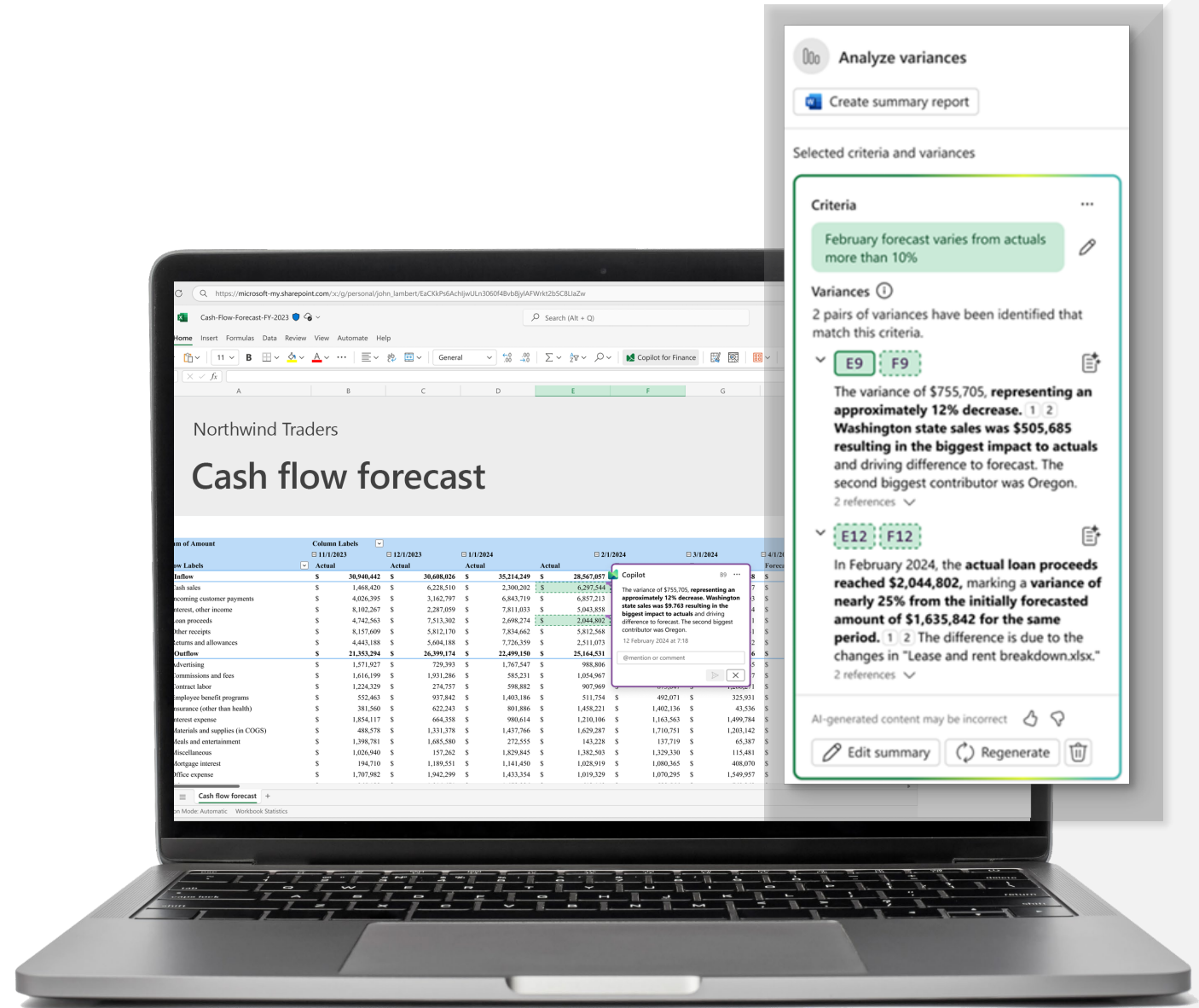
Streamlining to add Artificial Intelligence is Possible

Nonprofits **often have more informal data storage** which needs to be streamlined **first** to made Artificial Intelligence available safely.

WE CAN LEARN FROM BUSINESS:

66% of organizations have developed an AI strategy, with **36%** already implementing it.[2]

Data Locations	Compromised past 12 months	Most at risk
Cloud storage (e.g., Box, DropBox, Google Drive, OneDrive)	42%	54%
Emails/Instant messaging/Online meeting tools	31%	39%
Endpoints/devices	25%	36%
On-prem repositories/file shares/databases	24%	28%
Shadow IT and Shadow Data	21%	23%
Line-of-business applications	17%	25%

1. Measuring Risk and Risk Governance, Cloud Security Alliance (CSA), 2022
2. Microsoft data security AI research, Hypothesis, Mar 2023

EMPOWER YOUR MISSION: A SAFE PATH FOR NONPROFITS WITH COPILOT

Protect Your Brand

(and Protect Your Progress)

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AI-Enabled Applications

Privacy and Cybersecurity

- Privacy
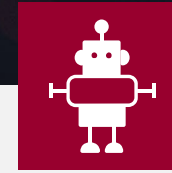- Identity
- Data Security
- Secure Cloud
- Incident Response

Responsibility and Accountability

- Acceptable Use
- Societal/ Market Impacts
- Regulatory Environment
- Accountability of Outcome

Misinformation and Inaccuracies

- Output Integrity
- Validation
- Intellectual Property Concerns

Bias and Discrimination

- Unintended Bias
- Unrecognized Patterns
- Market Fit

Regulations and Requirements

- Regulatory Alignment
- Governance of Programs

Security Concerns Associated with Using Artificial Intelligence

Insufficient visibility into your data, and the usage of AI applications can result in security and compliance challenges.
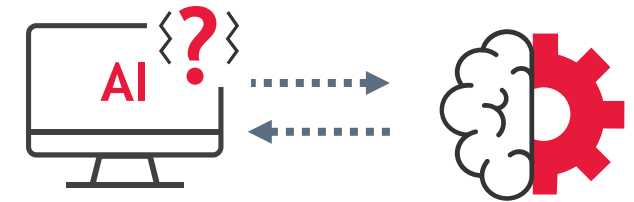

DATA LEAK

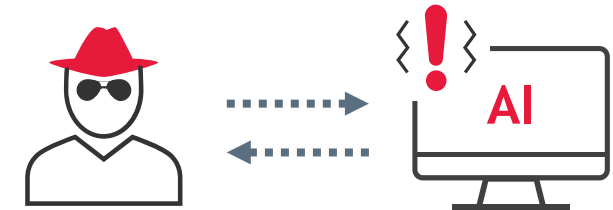Users may inadvertently leak sensitive information to AI Applications.
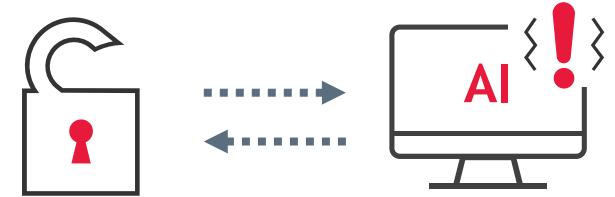
DATA OVERSHARING

Users may access sensitive data via AI apps they are not authorized to view or edit.

Non-Compliant Usage

Users use AI apps to generate unethical or high-risk content.

Microsoft's Approach to Copilot Puts Control in the Hands of Your Team

Manage overprivileged and risky users

Mitigate device risk

Prevent over exposure of data

Discover and control the use of AI apps
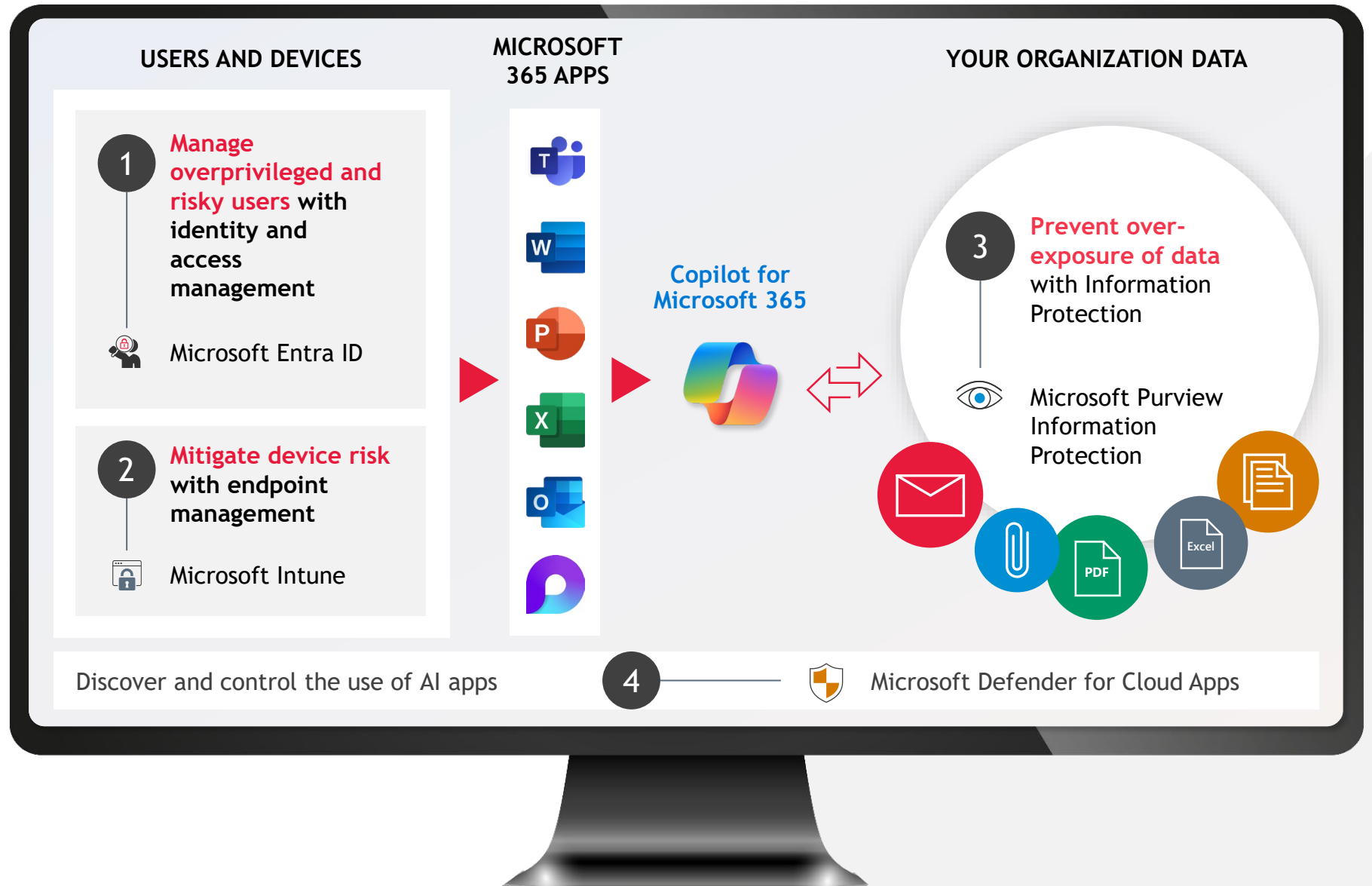
Microsoft Entra ID

Microsoft Intune

Microsoft Purview

Microsoft Defender

Microsoft's Approach to Copilot Puts the Controls in the Hands of Your Team

USERS AND DEVICES

1 **Manage overprivileged and risky users** with **identity and access management**

🔒 Microsoft Entra ID

2 **Mitigate device risk** with endpoint management

🔒 Microsoft Intune

MICROSOFT 365 APPS

Copilot for Microsoft 365

YOUR ORGANIZATION DATA

3 **Prevent over-exposure of data** with Information Protection

👁 Microsoft Purview Information Protection

Discover and control the use of AI apps — **4** — 🛡 Microsoft Defender for Cloud Apps

A Platform Approach

One central portal with access to data security, privacy and compliance tools

Your Team can Establish

Effective
Data Control

Rapidly Configured

Customized solutions that discover and classify data, and define security controls
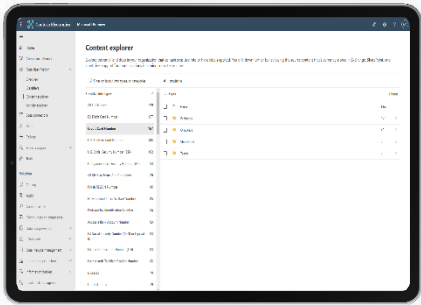
To Eliminate and Reduce Risk

Enterprise level detection, investigation, alerting and remediation leveraging automated controls
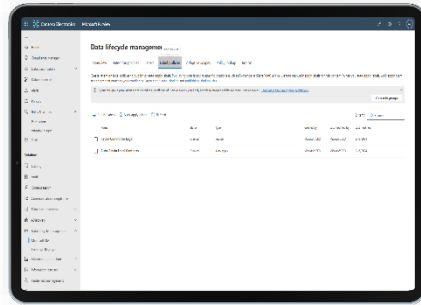
Use Microsoft Purview to Quickly Prepare for AI
Build the Habit of Continuous Assessment

Assess Data Estate

Proactive Data Management

Control Data Exposure

Operate and Improve

▶ Establish a baseline of what sensitive info you hold

▶ Talk to your business - what are they concerned about

▶ Set a definition of success – how do you know what good is?

▶ Do periodically as a habit

Use Microsoft Purview to Quickly Prepare for AI
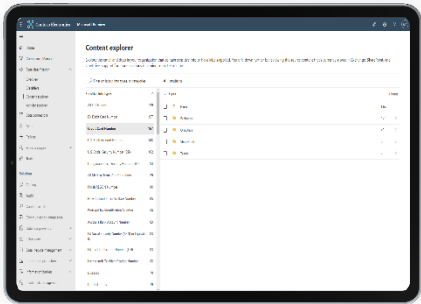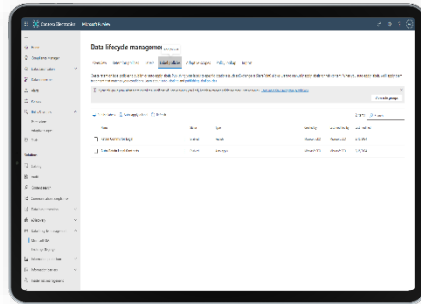## Proactive Data Management to Prune Risk from ROT

Assess Data Estate

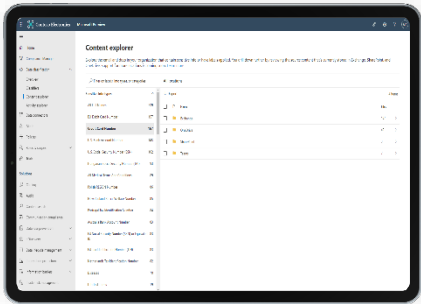**Proactive Data Management**

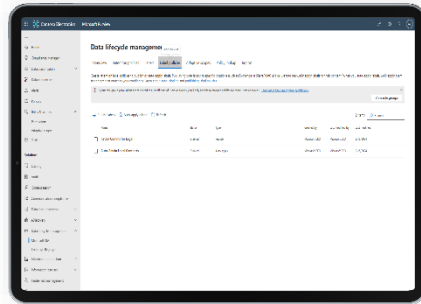**Control Data Exposure**

Operate and Improve

- ▶ Identify redundant, outdated, trivial data for removal
- ▶ Make it easy to protect the business – label for retention, label for removal
- ▶ Auto-recognize and label data at scale for review
- ▶ Keep what regulations say you must

Use Microsoft Purview to Quickly Prepare for AI

Reduce Risk by Controlling Data Exposure with DLP

Assess Data Estate

Proactive Data Management
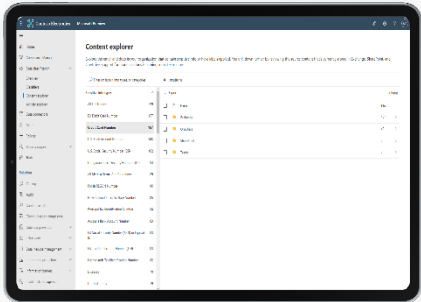
Control Data Exposure

Operate and Improve

- ▶ Use sensitivity types to control easily identifiable data
- ▶ Powerful AI backed Trainable Classifiers can help with difficult/variable formats
- ▶ Build a matrix that reflects what protection the business needs
- ▶ Enforce with a powerful platform

Use Microsoft Purview to Quickly Prepare for AI
Operate and Improve Over Time Internally or With Managed Services

Assess Data Estate
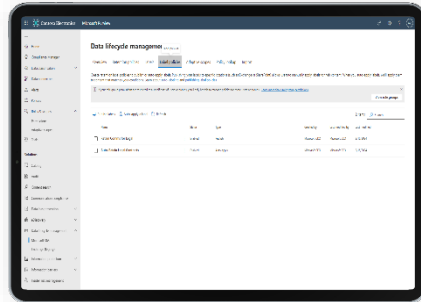
Proactive Data Management

Control Data Exposure

Operate and Improve

▶ Use a platform strategy to enrich good decisions on what risks to respond to with insider risk management and/or Sentinel

▶ Consider a managed service provider to raise maturity quickly

▶ Refresh discovery and policies regularly

Accelerate your Mission Today

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Get Started

DATA SECURITY

▶ Find and Evaluate Your Sensitive Data

▶ Set a foundation of effective Data Security with Microsoft Purview

▶ Extend data inspection and protection to other Cloud locations for sensitive data protection and inspection

AI SECURITY REVIEW

▶ Examine in-progress or deployed AI integrated applications with an assessment

▶ Evaluate missing controls, logging, and security operations consistency

▶ Address identified AI application risks through control enhancements

DESIGN WITH INTENT

▶ Use Microsoft's AI security guidance to train developers

▶ Evaluate AI application before initial release and periodically thereafter

▶ Do a well architected review at least annually of major/material applications

Assess Your Data Estate to Start Reducing Your Risk

DATA SECURITY ASSESSMENT
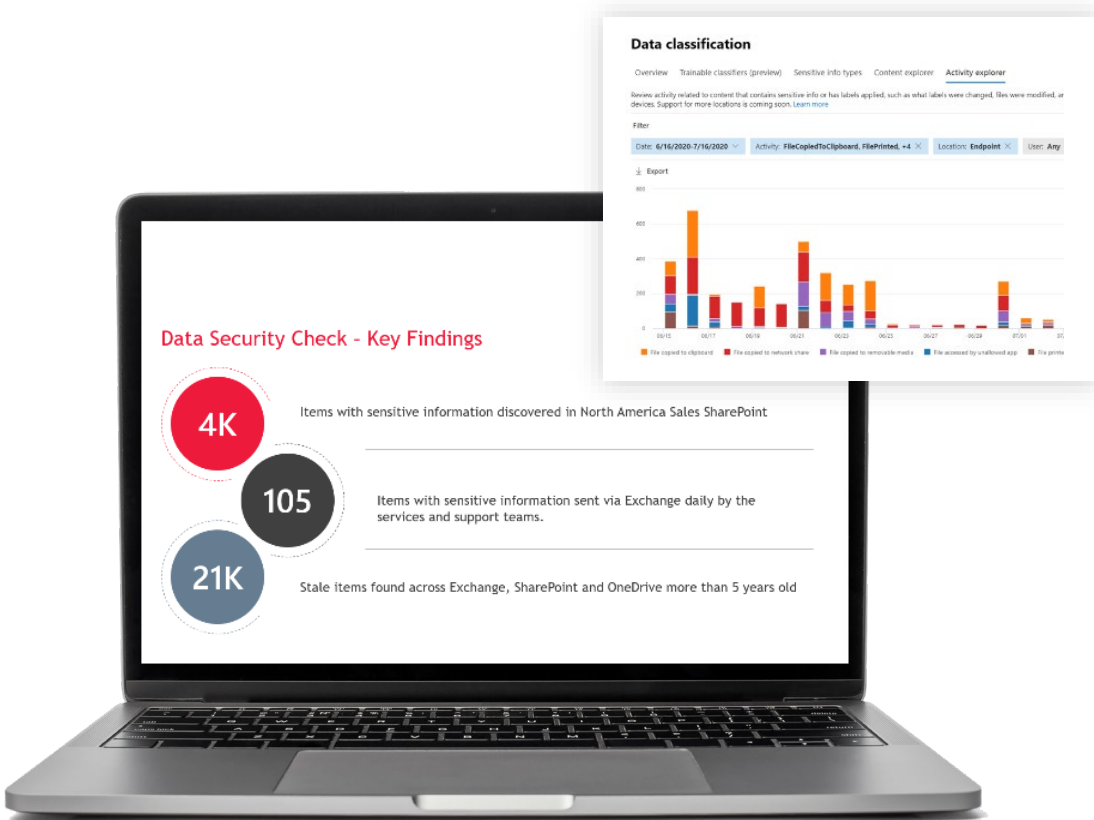
Discovery Session

Detailed assessment of your strategic objectives, influences, and priorities for risk management and regulatory compliance.

Data Assessment

Use Microsoft Purview to discover and rapidly assess sensitive data in the M365 and related environments. Optionally evaluate insider risk and risky communications.
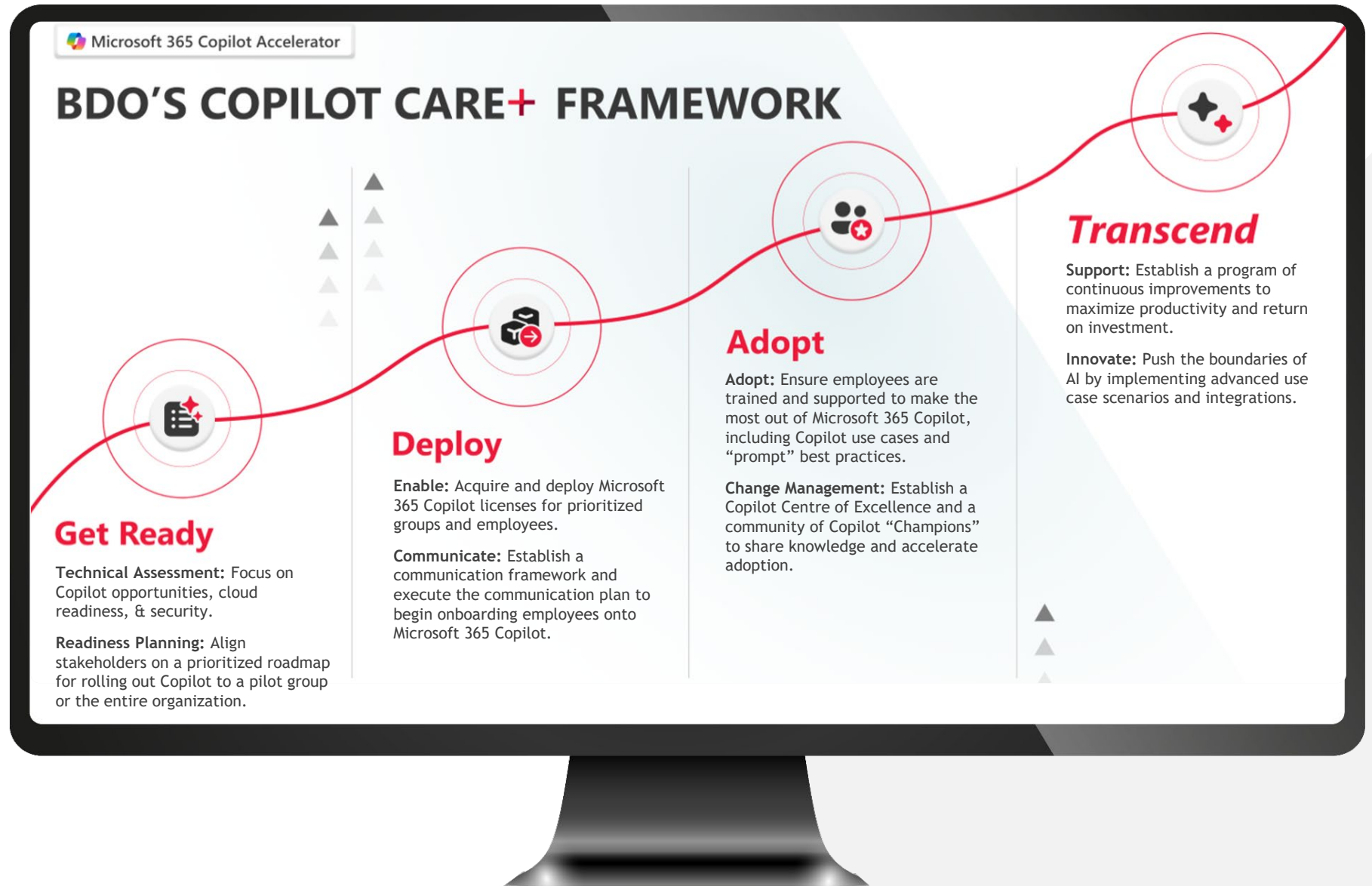
Analysis

Build a list of recommendations and actionable next steps that will help mitigate identified security and compliance risks in your production environment.

Roadmap

Provide a set of long-term recommendations in a roadmap with key initiatives and tactical next steps to reduce risk with new and existing capabilities.

Copilot Care+ Framework

Microsoft 365 Copilot Accelerator

BDO'S COPILOT CARE+ FRAMEWORK

Get Ready

Technical Assessment: Focus on Copilot opportunities, cloud readiness, & security.

Readiness Planning: Align stakeholders on a prioritized roadmap for rolling out Copilot to a pilot group or the entire organization.

Deploy

Enable: Acquire and deploy Microsoft 365 Copilot licenses for prioritized groups and employees.

Communicate: Establish a communication framework and execute the communication plan to begin onboarding employees onto Microsoft 365 Copilot.

Adopt

Adopt: Ensure employees are trained and supported to make the most out of Microsoft 365 Copilot, including Copilot use cases and "prompt" best practices.

Change Management: Establish a Copilot Centre of Excellence and a community of Copilot "Champions" to share knowledge and accelerate adoption.

Transcend

Support: Establish a program of continuous improvements to maximize productivity and return on investment.

Innovate: Push the boundaries of AI by implementing advanced use case scenarios and integrations.

Questions?

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About BDO USA

At BDO, our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes — for our people, our clients and our communities. Across the U.S., and in over 160 countries through our global organization, BDO professionals provide assurance, tax and advisory services for a diverse range of clients.

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