BDO DIGITAL

Leveraging Copilot and Fabric for Organizational Efficiency

SEPTEMBER 18, 2024

AI: The Gamechanger
WEBCAST SERIES

BDO®

With You Today

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Learning Objectives

▶ Identify the functionalities and benefits of Microsoft 365 Copilot

▶ Describe how AI-driven insights and automation in Microsoft 365 Copilot can enhance team productivity

▶ Explain Copilot's interface through a demonstration of the technology

▶ Discuss how to leverage Microsoft Fabric to enhance the capabilities of Microsoft 365 Copilot

Microsoft 365 Copilot

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Microsoft Work Trend Index
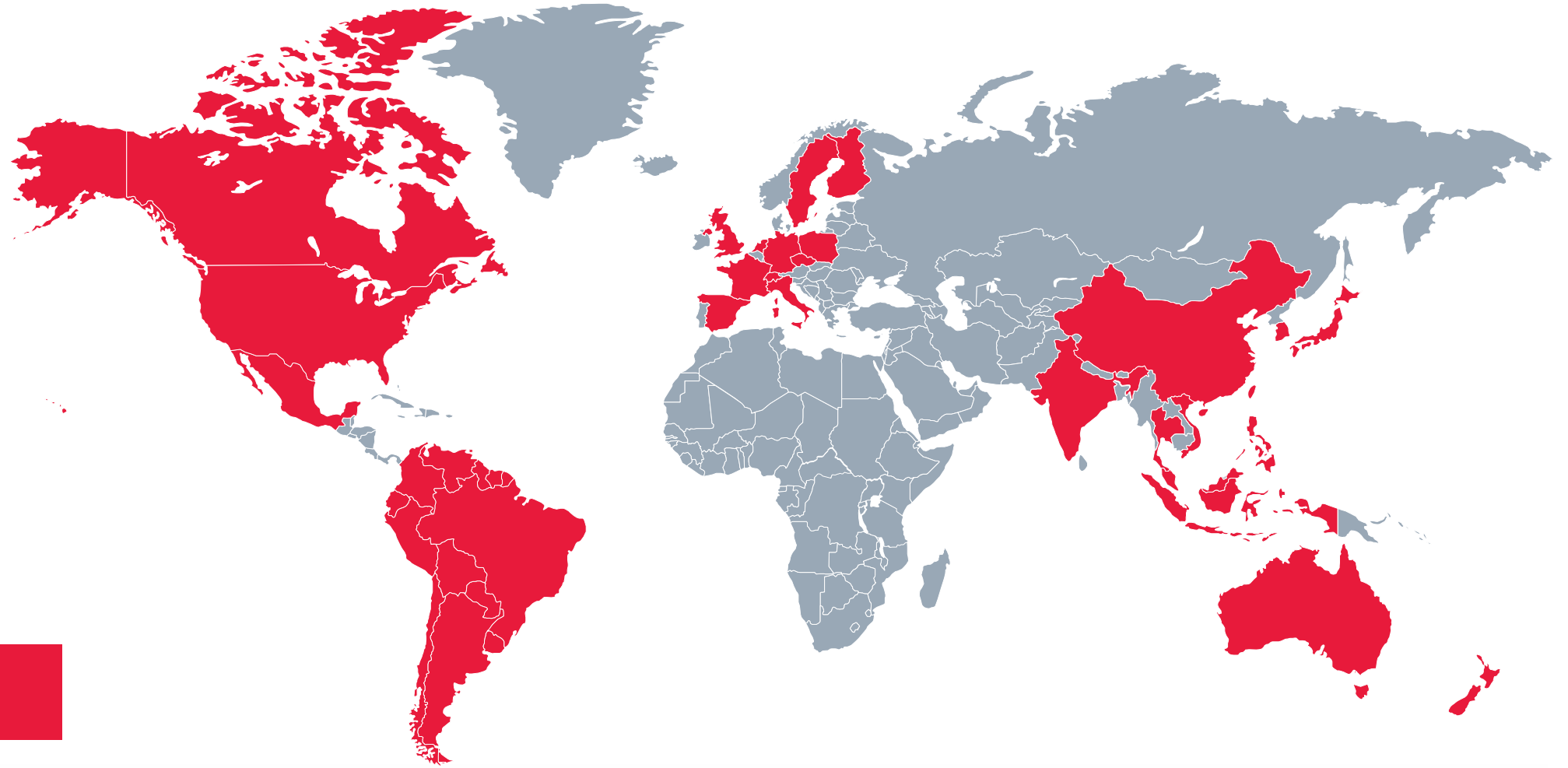
aka.ms/wti

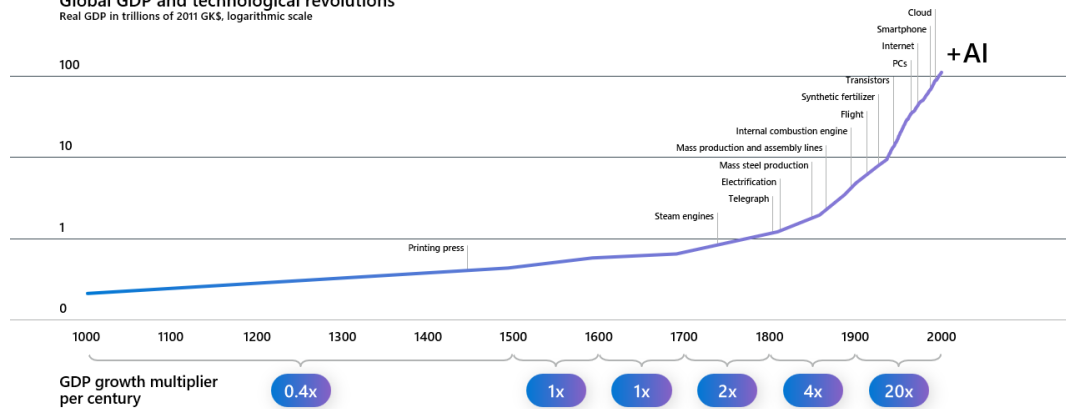**31,000** people

31 countries

Microsoft 365, LinkedIn,
Glint People Science + academic research

AI Technology and Impact
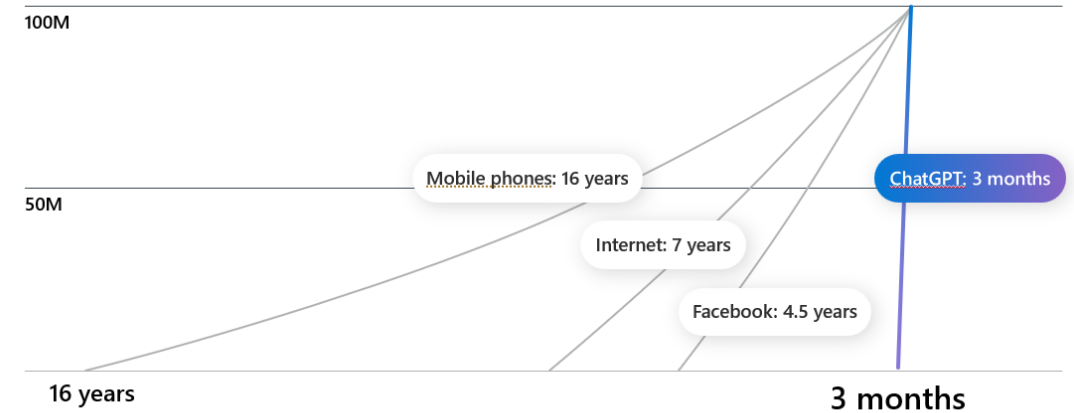
Impact of AI more than past 3 Industrial Revolutions

Global GDP and technological revolutions
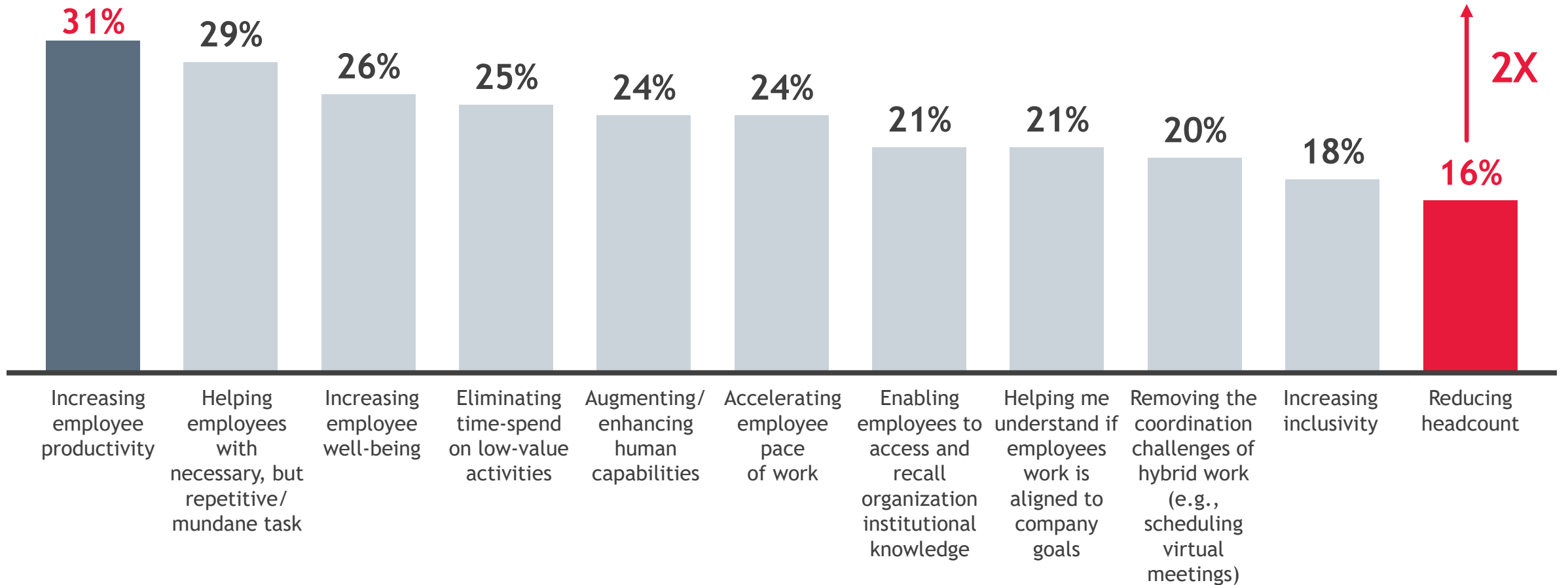Real GDP in trillions of 2011 GK$, logarithmic scale

Cloud
Smartphone
Internet
PCs
+AI
Transistors
Synthetic fertilizer
Flight
Internal combustion engine
Mass production and assembly lines
Mass steel production
Electrification
Telegraph
Steam engines
Printing press

100
10
1
0

1000 1100 1200 1300 1400 1500 1600 1700 1800 1900 2000

GDP growth multiplier per century

0.4x   1x   1x   2x   4x   20x

Source: Maddison Project, Ourworldindata

Generative AI technology is here

Time for AI to reach 100M users:

100M
50M
16 years

Mobile phones: 16 years
Internet: 7 years
Facebook: 4.5 years
ChatGPT: 3 months

3 months

What Leaders Want From AI

Category	Percentage
Increasing employee productivity	31%
Helping employees with necessary, but repetitive/mundane task	29%
Increasing employee well-being	26%
Eliminating time-spend on low-value activities	25%
Augmenting/enhancing human capabilities	24%
Accelerating employee pace of work	24%
Enabling employees to access and recall organization institutional knowledge	21%
Helping me understand if employees work is aligned to company goals	21%
Removing the coordination challenges of hybrid work (e.g., scheduling virtual meetings)	20%
Increasing inclusivity	18%
Reducing headcount	16%

2X

What Employees Want From AI

86% Finding info and answers

80% Summarizing meetings and action items

79% Analytical work

76% Admin tasks

73% Creative work

70% Planning their day
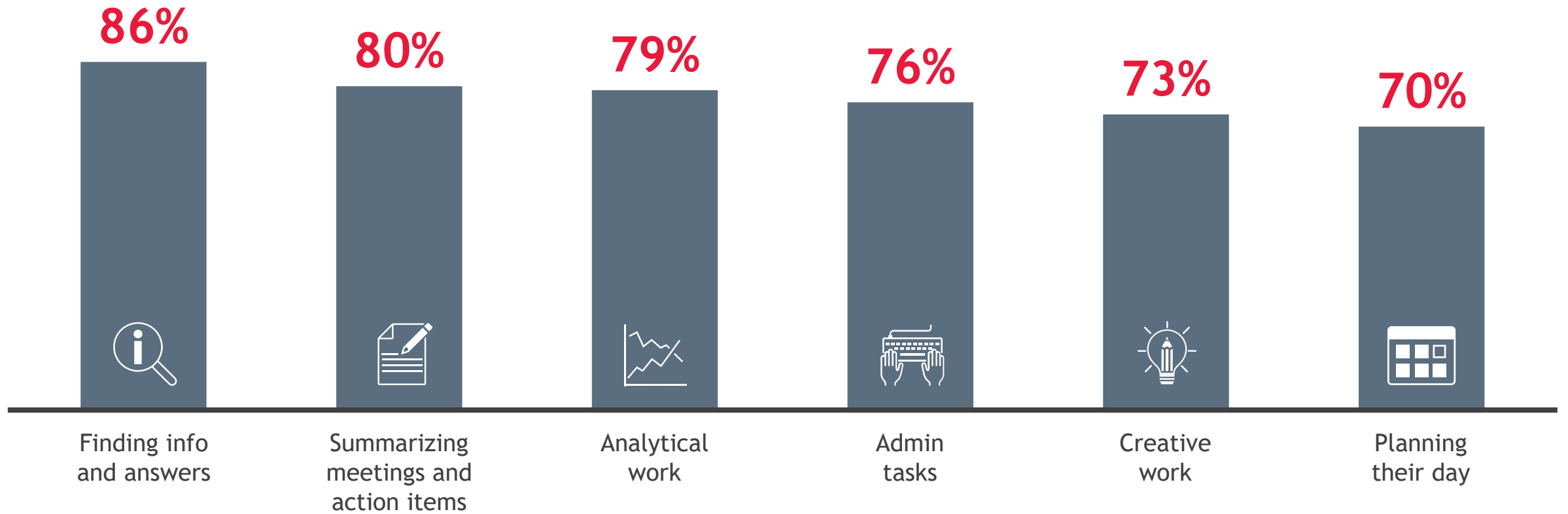
Employees Need AI Skilling

82%

of leaders say employees will need new skills to prepare for AI

30% — Analytical judgement

29% — Flexibility

27% — Emotional intelligence

24% — Creative evaluation

23% — Intellectual curiosity

22% — Bias detection and handling

21% — AI delegation (prompts)
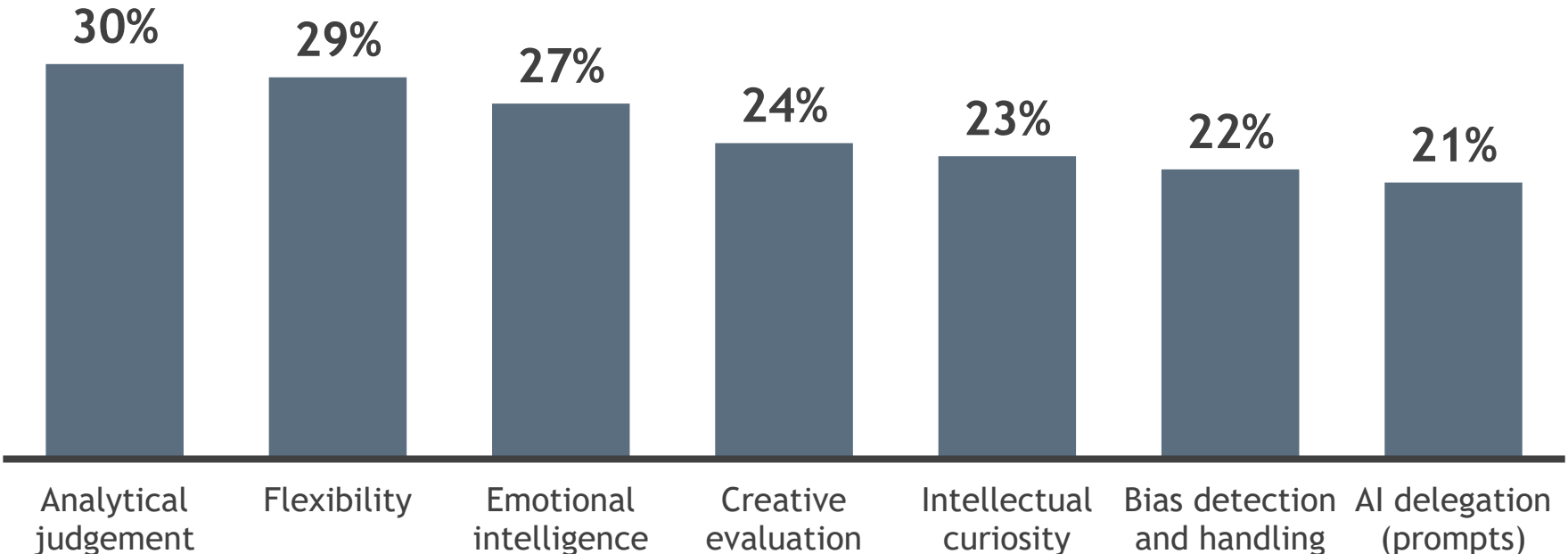
79% year-over-year increase in the number of LinkedIn job postings in the U.S. that reference "GPT" or "GAI"

Continue your Microsoft 365 Journey

IBDO

Lead in the Era of AI with the Microsoft Cloud

The most trusted and comprehensive cloud

▶ Your data is **your** data

▶ Your data is **not** used to train the foundation AI models

▶ Your data is **protected** by the most comprehensive enterprise compliance and security controls
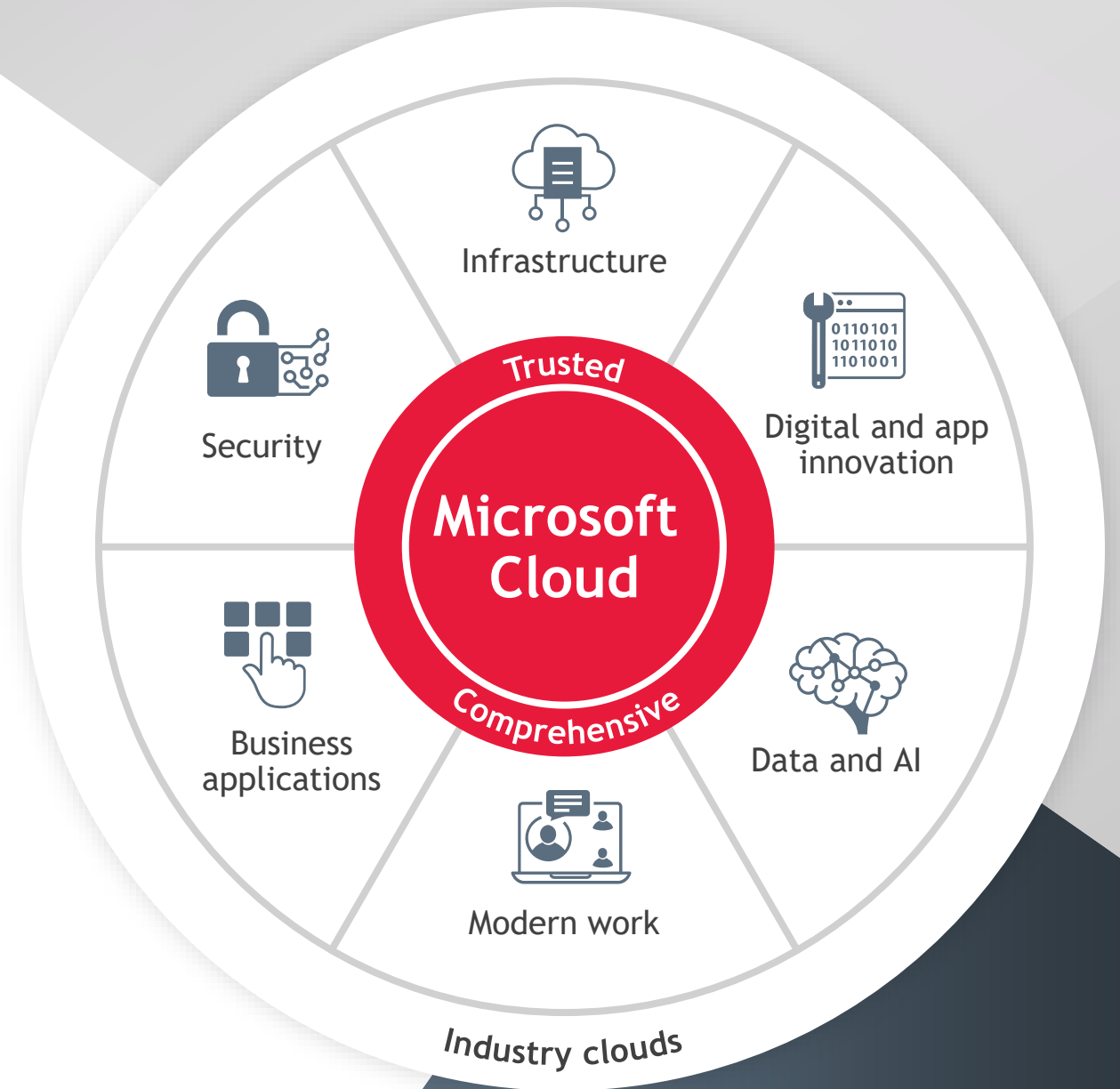
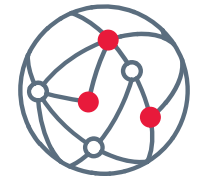# Introducing Microsoft 365 Copilot

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Microsoft 365 Copilot

NATURAL LANGUAGE

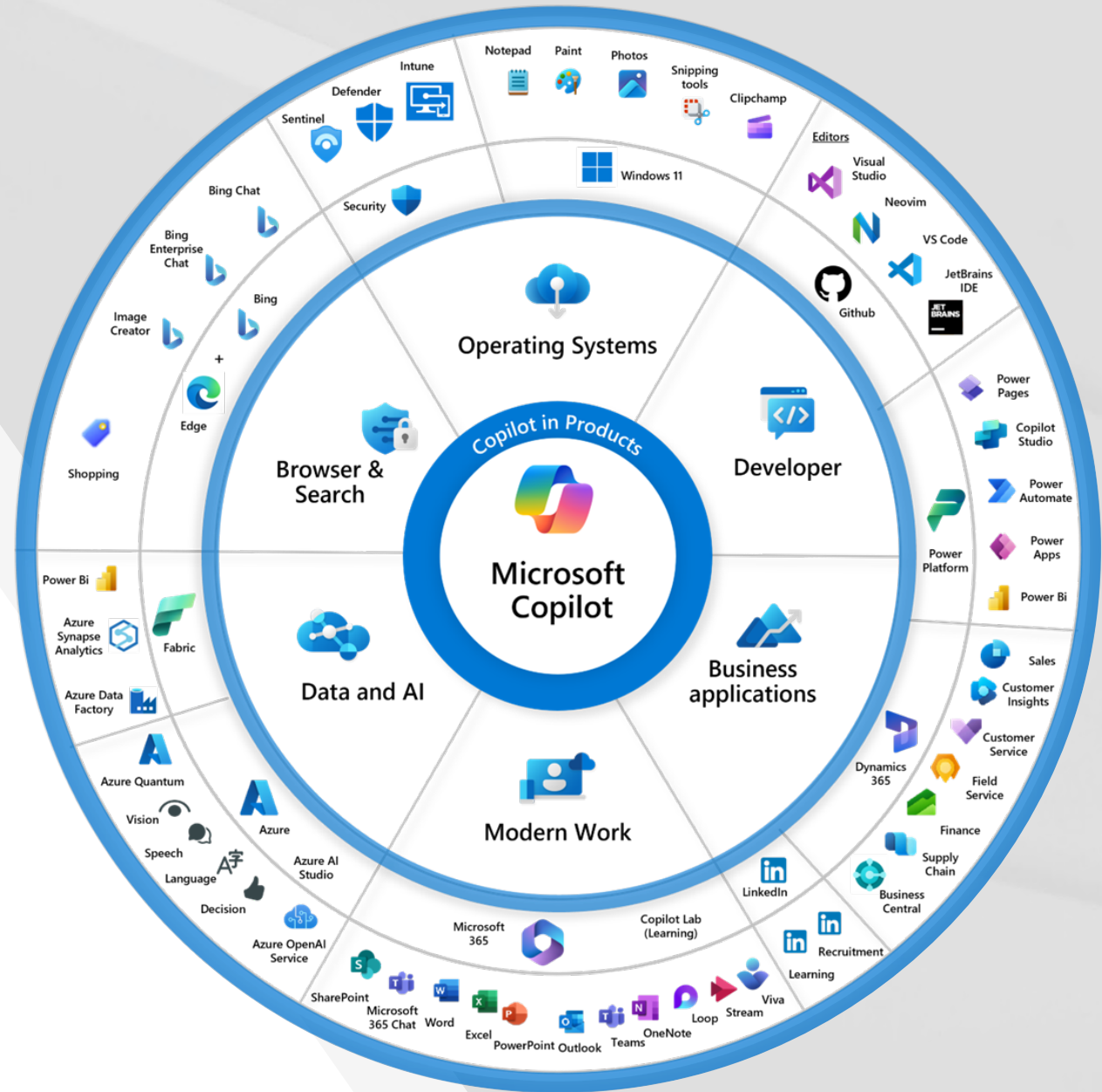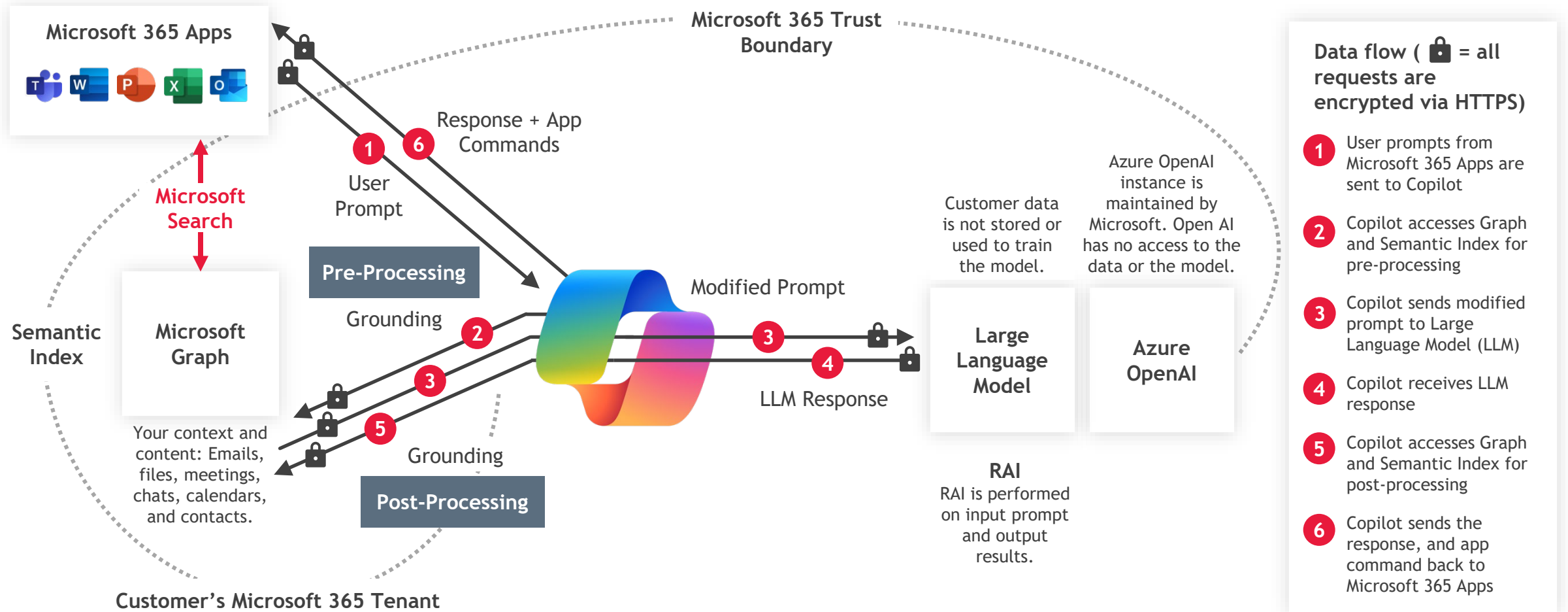**Large Language Models** + **Microsoft Graph - Your Data -** + **Microsoft 365 Apps** + **The Internet**
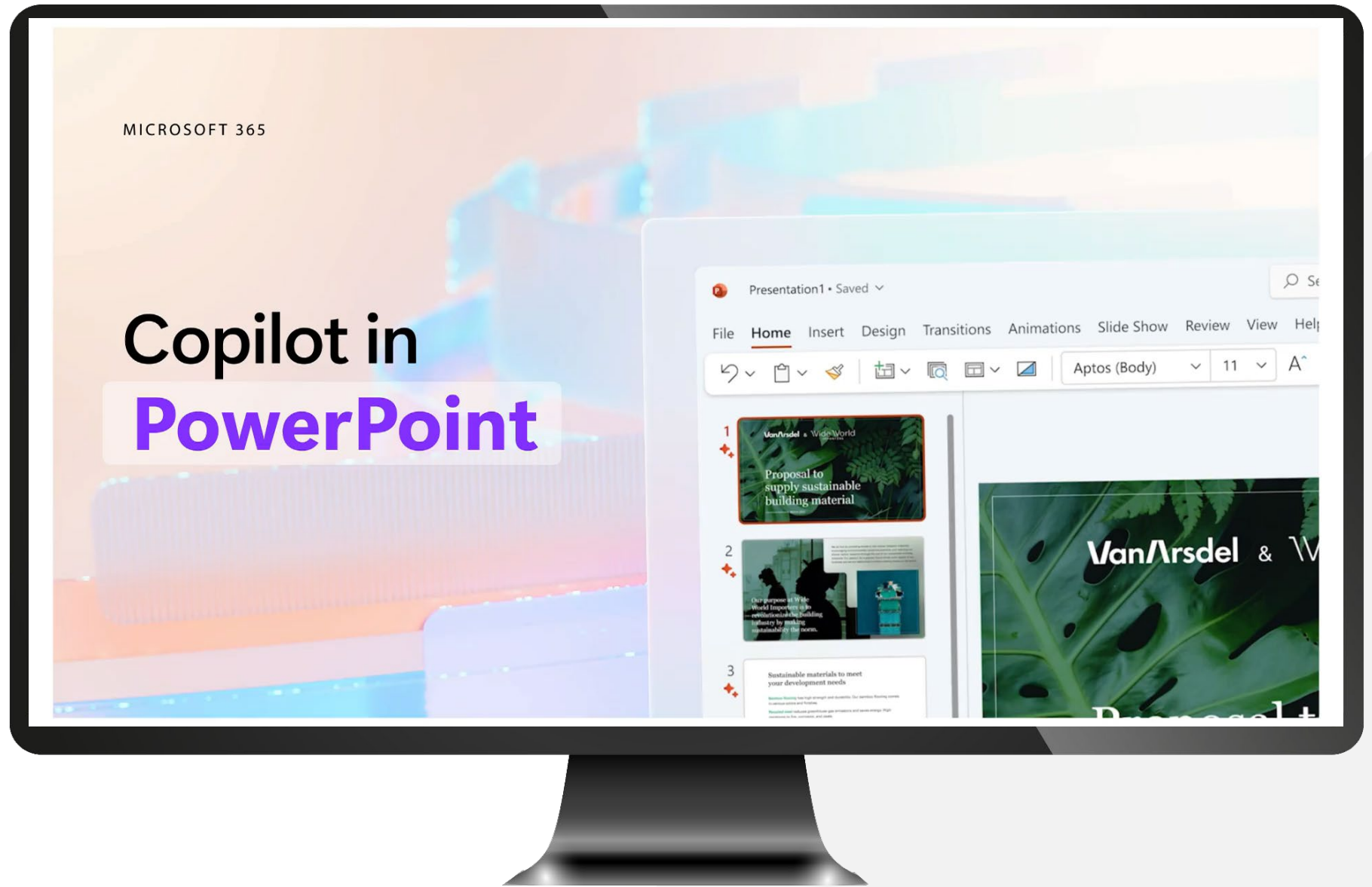
A Copilot for Every Microsoft Experience

Microsoft 365 Copilot

Microsoft 365 Apps

Microsoft Search

Semantic Index

Microsoft Graph

Your context and content: Emails, files, meetings, chats, calendars, and contacts.

Microsoft 365 Trust Boundary

1 **6** Response + App Commands

User Prompt

Pre-Processing

Grounding **2**

3

Grounding **5**

Post-Processing

Modified Prompt **3**

LLM Response **4**

Customer data is not stored or used to train the model.

Azure OpenAI instance is maintained by Microsoft. Open AI has no access to the data or the model.

Large Language Model

Azure OpenAI

RAI
RAI is performed on input prompt and output results.

Customer's Microsoft 365 Tenant

Data flow (🔒 = all requests are encrypted via HTTPS)

1 User prompts from Microsoft 365 Apps are sent to Copilot

2 Copilot accesses Graph and Semantic Index for pre-processing

3 Copilot sends modified prompt to Large Language Model (LLM)

4 Copilot receives LLM response

5 Copilot accesses Graph and Semantic Index for post-processing

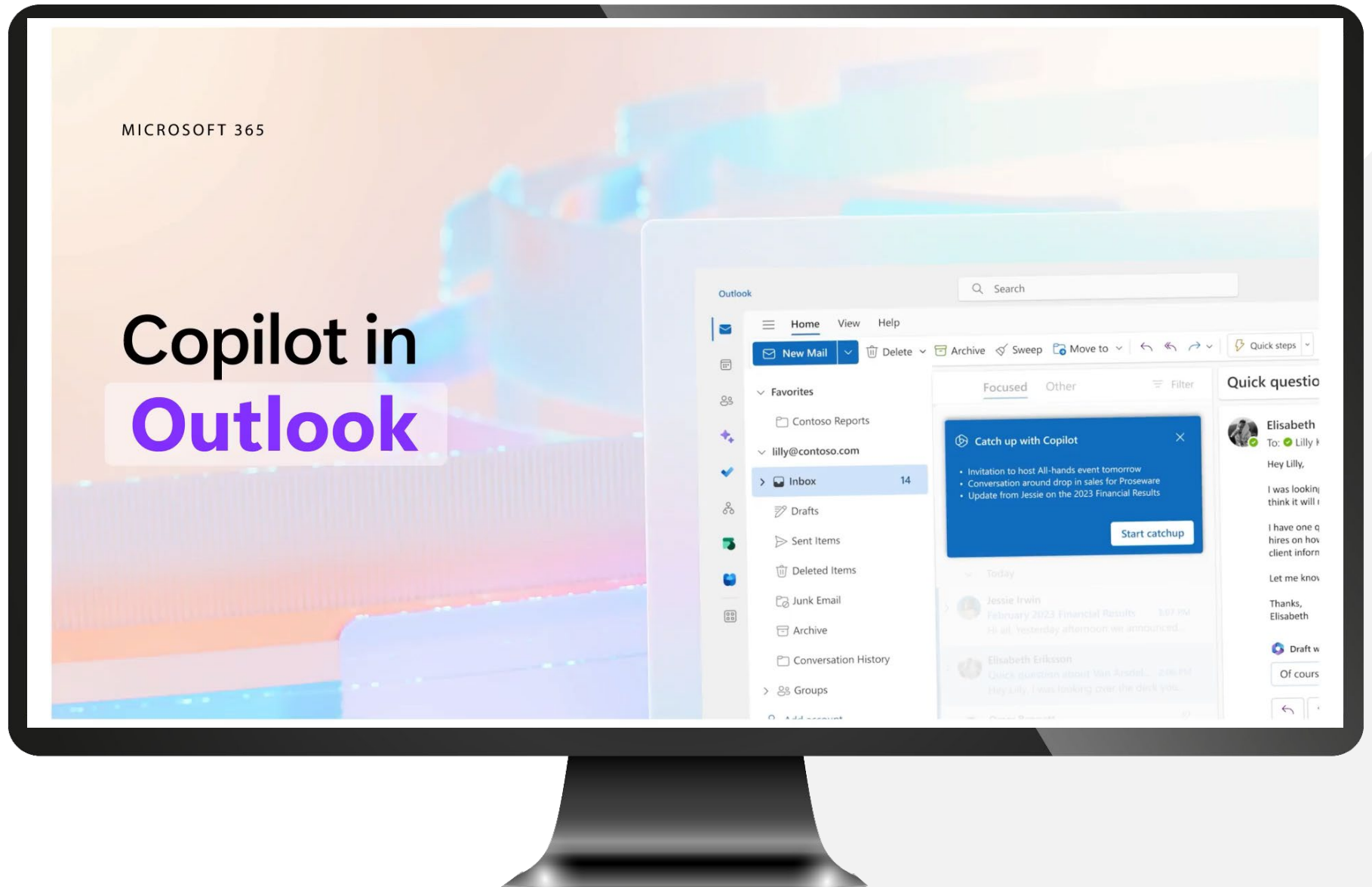**6** Copilot sends the response, and app command back to Microsoft 365 Apps

See Microsoft 365 Copilot in Action

|BDO®

Copilot in PowerPoint

Copilot in Outlook

Copilot in Teams Meetings
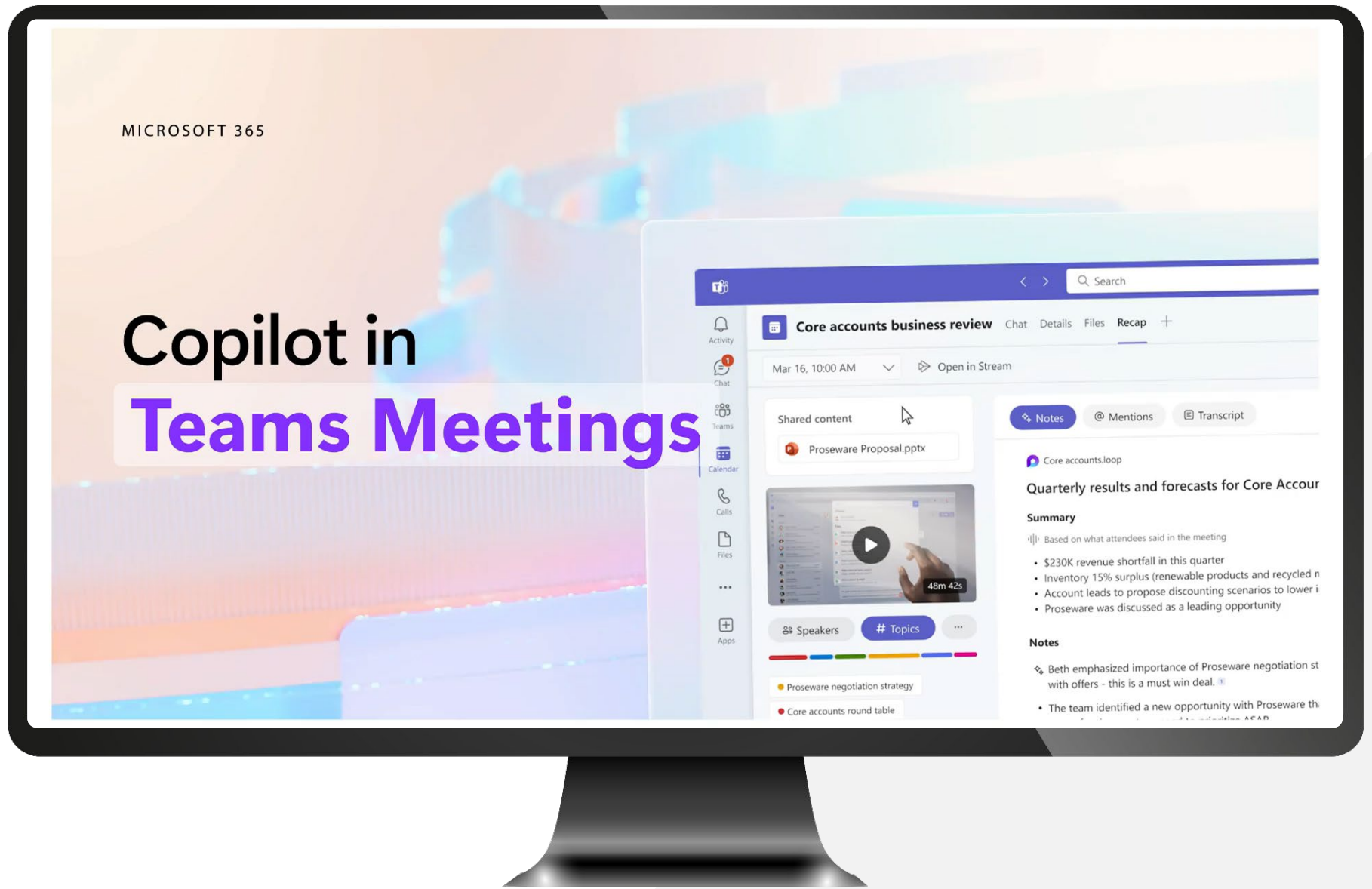
A Day in the Life of Copilot

LEVERAGING COPILOT AND FABRIC FOR ORGANIZATIONAL EFFICIENCY

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A DAY IN THE LIFE OF YOUR
Recruiting Manager

Recruiter Omar is responsible for sourcing new employees.

Craft the job description: Starting from a blank document, Omar (he/him) prompts **Copilot**:

> **Generate a job description** for a senior animation designer role, based on design team core responsibility list.

Job description goes to the web and is posted!

Summarize interview notes: Lots of talented designers apply! Omar invites an experienced candidate, Maya (she/her), to a virtual phone screen via Teams. Maya accepts.

During the meeting, Omar turns on transcription. No need to take notes. When the meeting is over, Omar turns to **Copilot**:

> **Summarize notes** from this interview. How many years of experience did Maya mention she had?

Interview notes are ready pass to the hiring manager.

Draft the offer: After a follow-up call, the hiring manager agrees. Maya is the right designer for the role. Using Copilot, Omar spins up an offer letter:

> **Draft an offer letter** to Maya with a start date of March 16th. Include details on our benefits package.

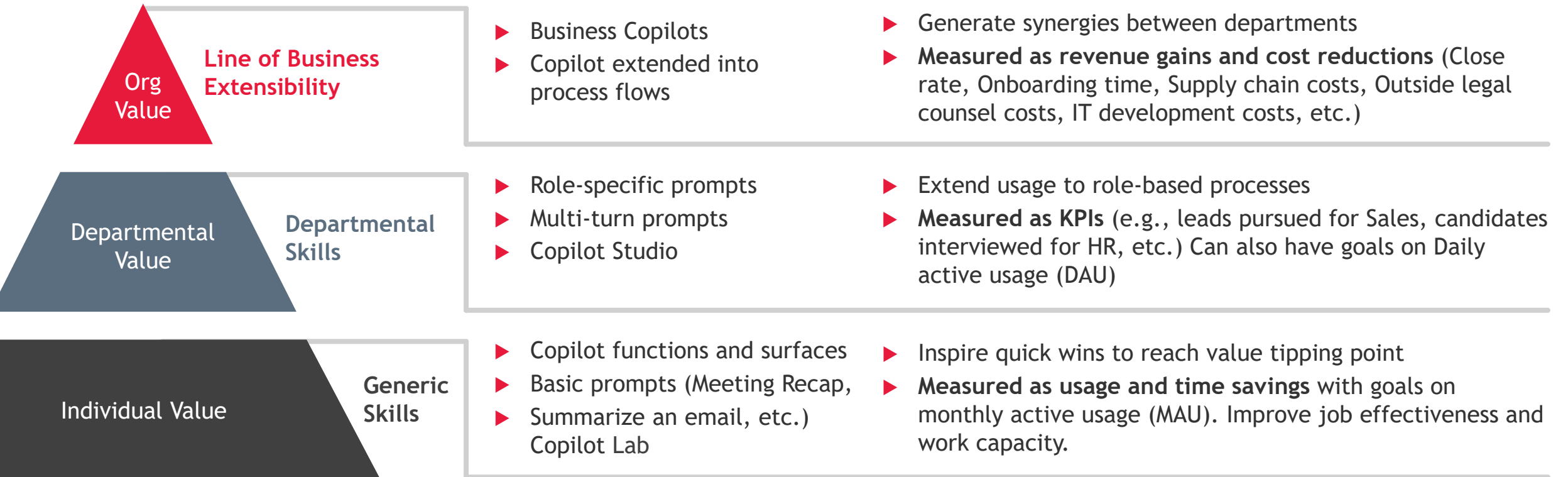**Copilot** in Outlook with help him send the letter—fast.

Humm...the email tone isn't quite as welcoming as it should be. With a click, Omar has a friendly email, he reviews it, and sends!

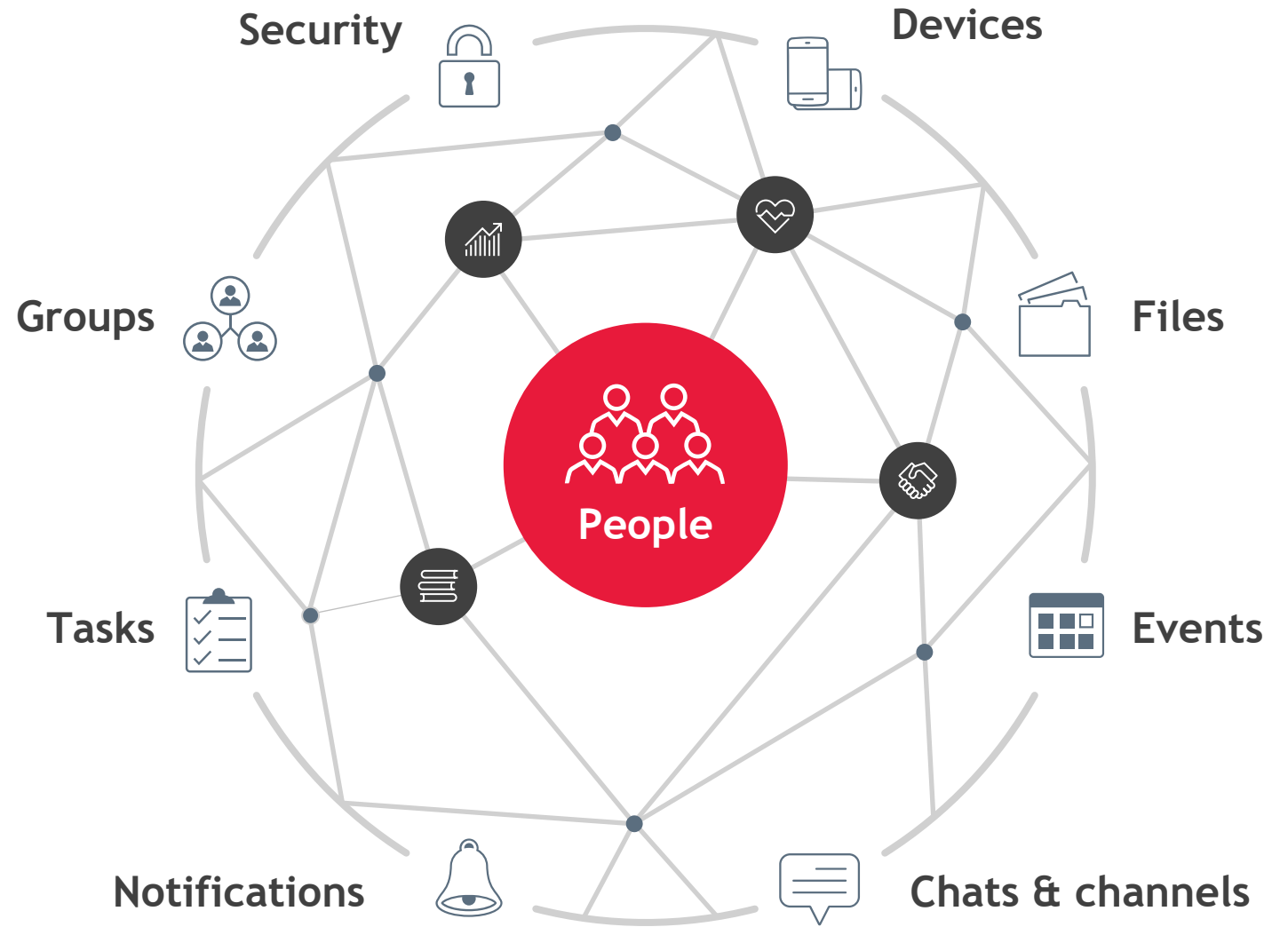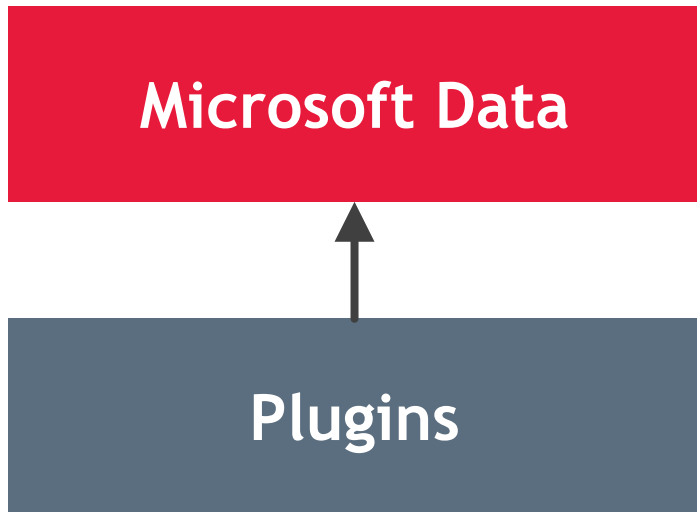# Getting Ready for your AI Transformation Journey Today

BDO

Copilot Value Journey

Grow value from a base of solid usage and individual productivity by optimizing departmental processes and impacting the metrics that are important to your organization.

Org Value — Line of Business Extensibility

- Business Copilots
- Copilot extended into process flows

- Generate synergies between departments
- **Measured as revenue gains and cost reductions** (Close rate, Onboarding time, Supply chain costs, Outside legal counsel costs, IT development costs, etc.)

Departmental Value — Departmental Skills

- Role-specific prompts
- Multi-turn prompts
- Copilot Studio

- Extend usage to role-based processes
- **Measured as KPIs** (e.g., leads pursued for Sales, candidates interviewed for HR, etc.) Can also have goals on Daily active usage (DAU)

Individual Value — Generic Skills

- Copilot functions and surfaces
- Basic prompts (Meeting Recap, Summarize an email, etc.) Copilot Lab

- Inspire quick wins to reach value tipping point
- **Measured as usage and time savings** with goals on monthly active usage (MAU). Improve job effectiveness and work capacity.

Your Data in Microsoft 365

Microsoft Data

Plugins

Security

Devices

Groups

Files

People

Events

Tasks

Notifications

Chats & channels

Microsoft Fabric

BDO

87%

of organizations believe AI will give them a competitive edge

Microsoft is Embedding **Generative AI** Across Experiences

Security Copilot — **Bing Chat** — **Microsoft 365 Copilot** — **Power Platform Copilot** — **Dynamics 365 Copilot** — **Windows Copilot**
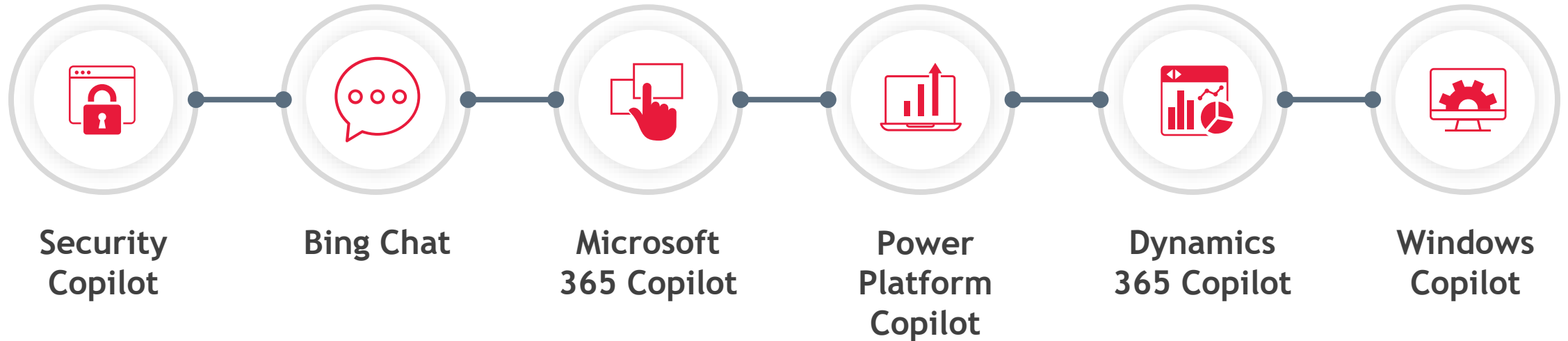
But the True Competitive Advantage Will Come From Custom AI Experiences

Hyper-personalization
Better sales and marketing

Speech analytics
Better analytics and service

Build your own copilot and Q&A
Your data. Your apps. Your people
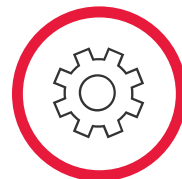
Content generation
New products and services

Enterprise chat
Better knowledge mining

Creating Your Own Custom AI Requires...

Powerful AI Models

A unified platform to explore, build, test, deploy, and monitor generative AI applications

Clean data—lots of it

A single platform for your data gravity across your organization to ground your AI on your data

Analytics is Complex and Fragmented

▶ Every project has many subsystems

▶ Every subsystem need a different class of product

▶ Products often comes from multiple vendors

▶ Integration is complex, fragile and expensive

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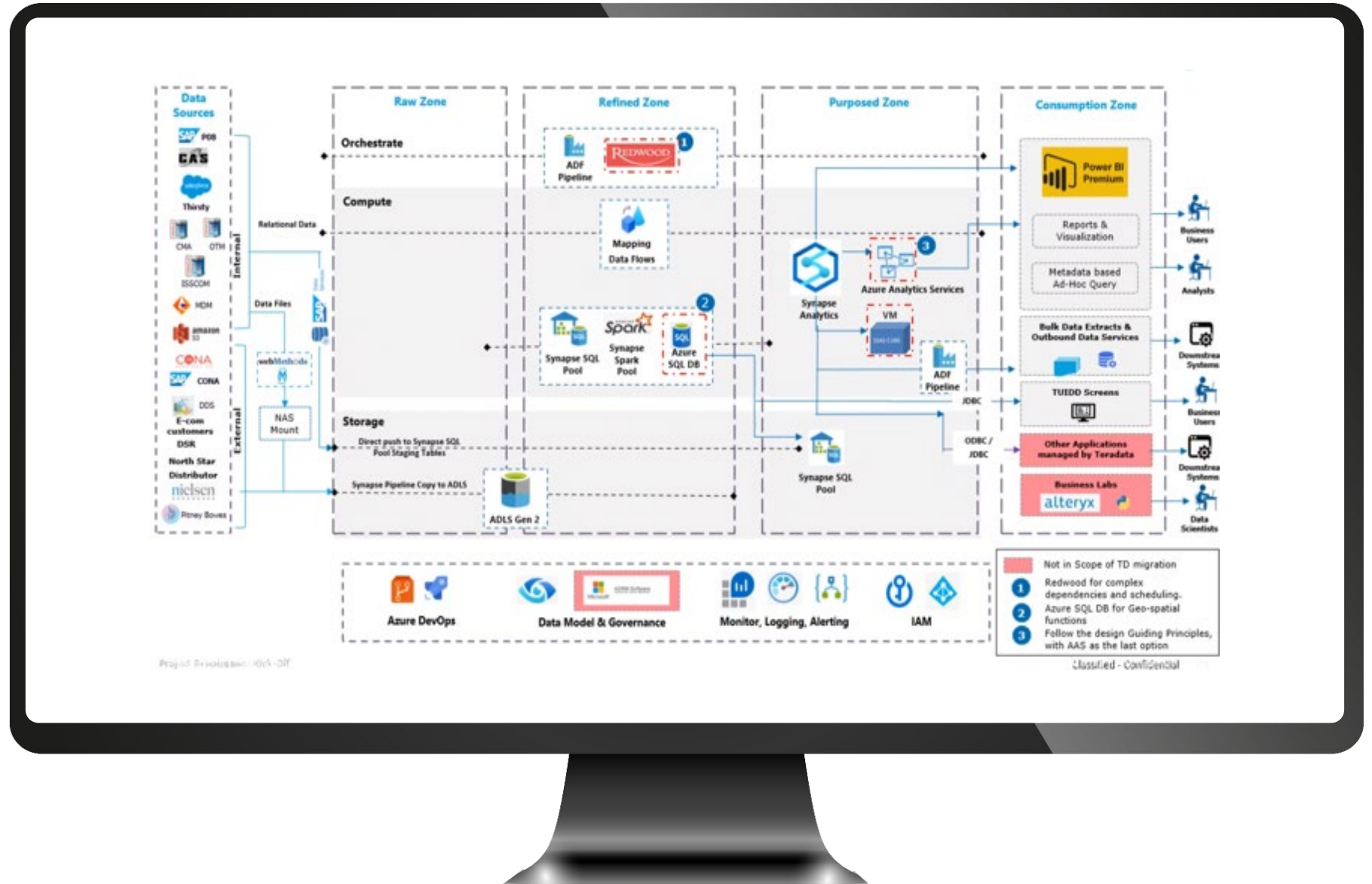
> *I am the Chief Data Officer and don't want to be the Chief Integration Officer.*
>
> - Every CXO, Every Enterprise

MS Azure Had All the Tools...
But Far Too Complex

- ▶ Many Products
- ▶ Different Experiences
- ▶ Proprietary and Open
- ▶ Dedicated and Serverless
- ▶ PaaS and SaaS
- ▶ Different Business Models
- ▶ Steep Learning Curves
- ▶ High Integration Effort

Purview

Power BI

Kusto

Data Factory

Azure AI

Synapse DW

Synapse Spark

In Comes...

Microsoft Fabric

The data platform for the era of AI

Microsoft Fabric

THE DATA PLATFORM FOR THE ERA OF AI

Complete Analytics Platform

▶ Everything, unified

▶ SaaS-ified

▶ Secured and governed

Lake centric and open

▶ OneLake

▶ One Copy

▶ Open at every tier

Empower Every Business User

▶ Familiar and intuitive
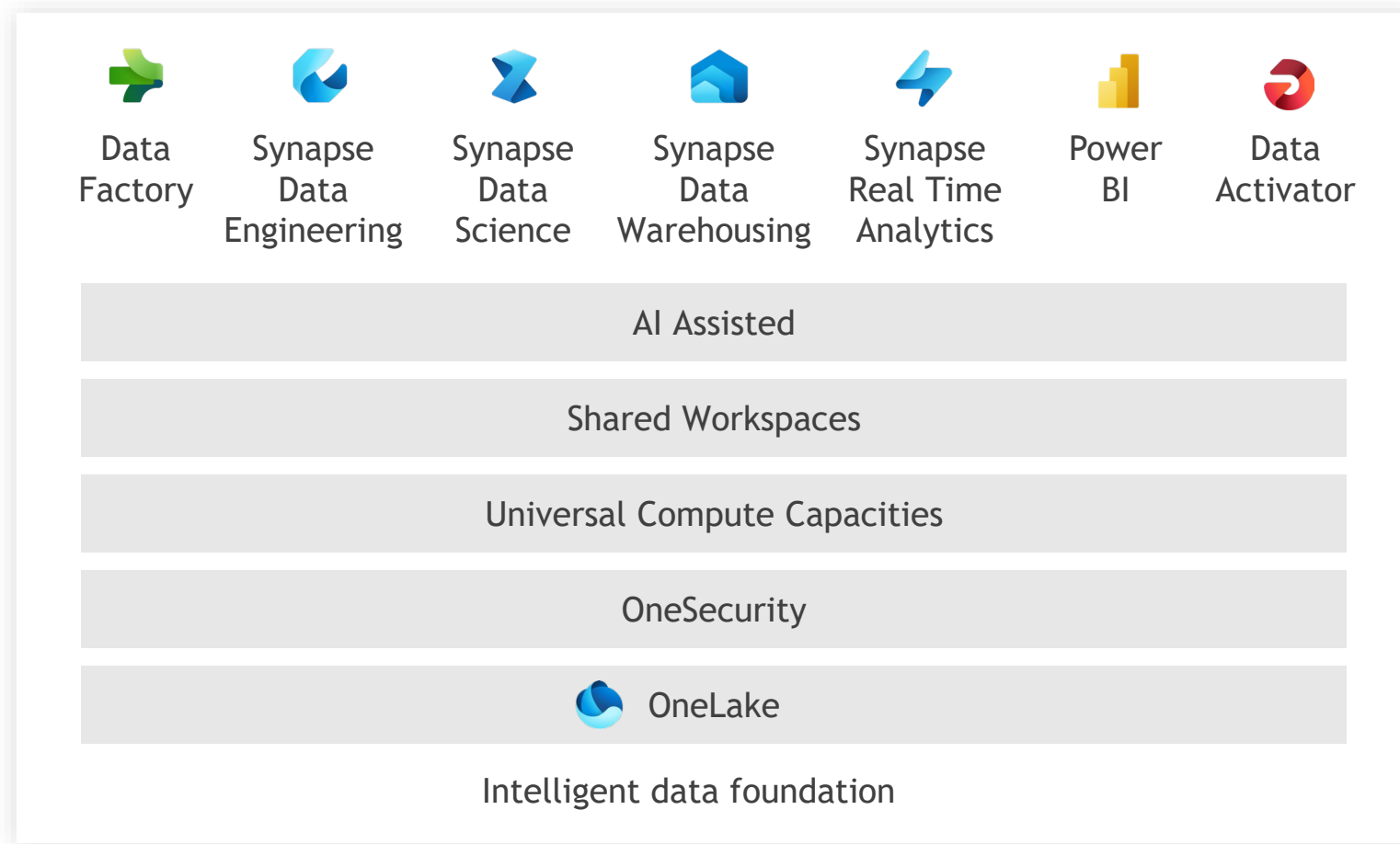
▶ Built into Microsoft 365

▶ Insight to action

AI Powered

▶ Copilot accelerated

▶ ChatGPT on your data

▶ AI driven insights

# Microsoft Fabric

THE DATA PLATFORM FOR THE ERA OF AI

Complete Analytics Platform

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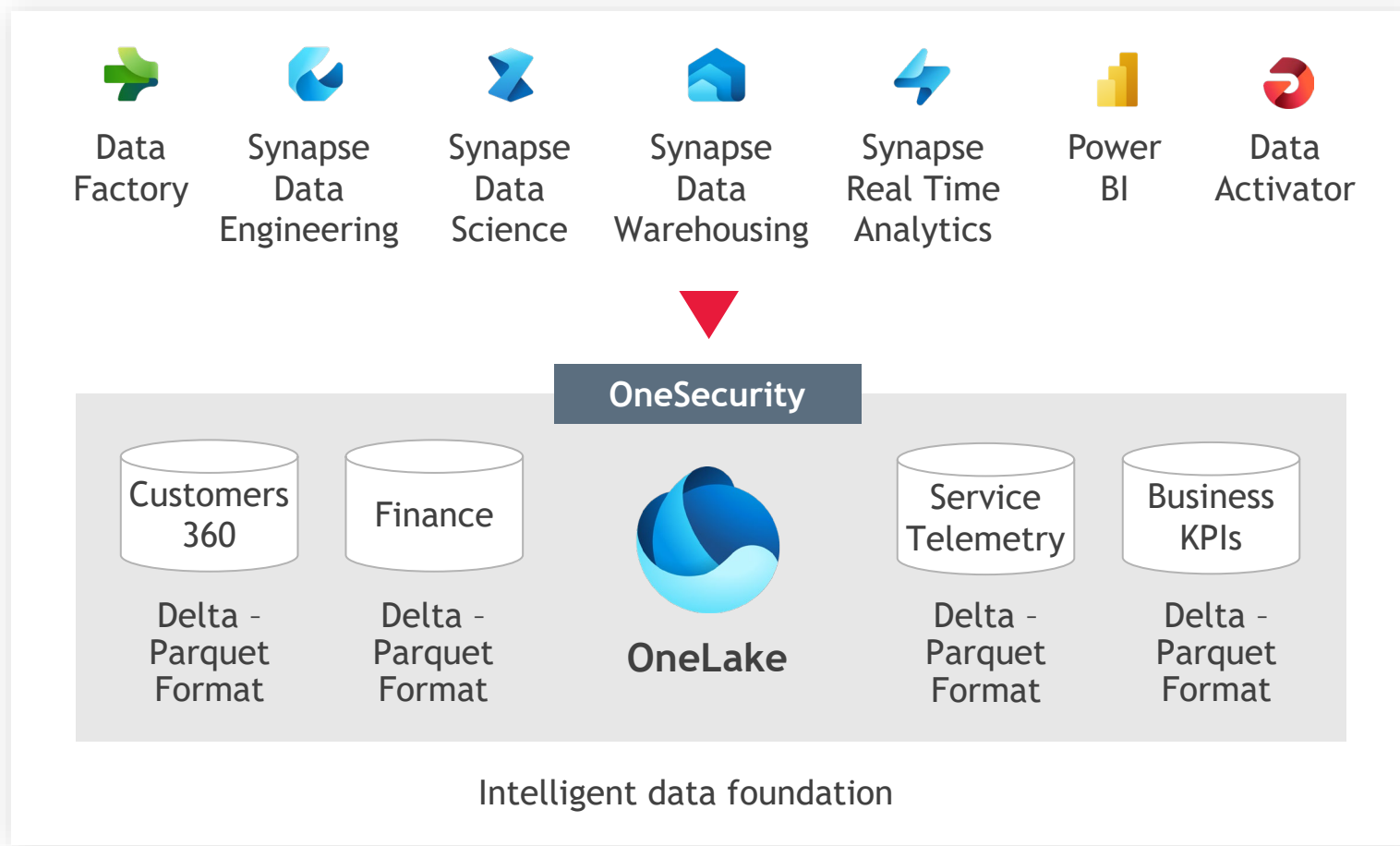
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Microsoft Fabric

THE DATA PLATFORM FOR THE ERA OF AI

Data Factory	Synapse Data Engineering	Synapse Data Science	Synapse Data Warehousing	Synapse Real Time Analytics	Power BI	Data Activator

AI Assisted

Shared Workspaces

Universal Compute Capacities

OneSecurity

OneLake

Intelligent data foundation

Single…

▶ Onboarding

▶ Sign-on

▶ Navigation model

▶ UX model

▶ Workspace organization

▶ Collaboration experience

▶ Data Lake

▶ Storage format

▶ Data copy for all engines

▶ Security model

▶ CI/CD

▶ Monitoring hub

▶ Data Hub

▶ Governance & compliance

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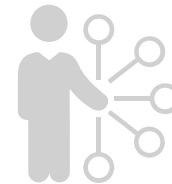
Empower Every Business User

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OneLake for all Data
"THE ONEDRIVE FOR DATA"

Data Factory	Synapse Data Engineering	Synapse Data Science	Synapse Data Warehousing	Synapse Real Time Analytics	Power BI	Data Activator

OneSecurity

Customers 360	Finance	OneLake	Service Telemetry	Business KPIs
Delta – Parquet Format	Delta – Parquet Format		Delta – Parquet Format	Delta – Parquet Format

Intelligent data foundation

- ▶ A single SaaS lake for the whole organization. All the compute engines store their data automatically in OneLake

- ▶ Provisioned automatically with the tenant

- ▶ All workloads automatically store their data in the OneLake workspace folders

- ▶ All the data is organized in OneLake in an intuitive hierarchical namespace. It is directly accessible by all the engines without needing any import/export

- ▶ The data in OneLake is store in Delta – Parquet, an open standards format, is the storage format for all tabular data in Analytics vNext

- ▶ All the compute engines have been fully optimized to work with Delta Parquet as their native format

- ▶ A shared universal security model is enforced across all the engines

- ▶ The data is automatically indexed for discovery, MIP labels, lineage, PII scans, sharing, governance and compliance
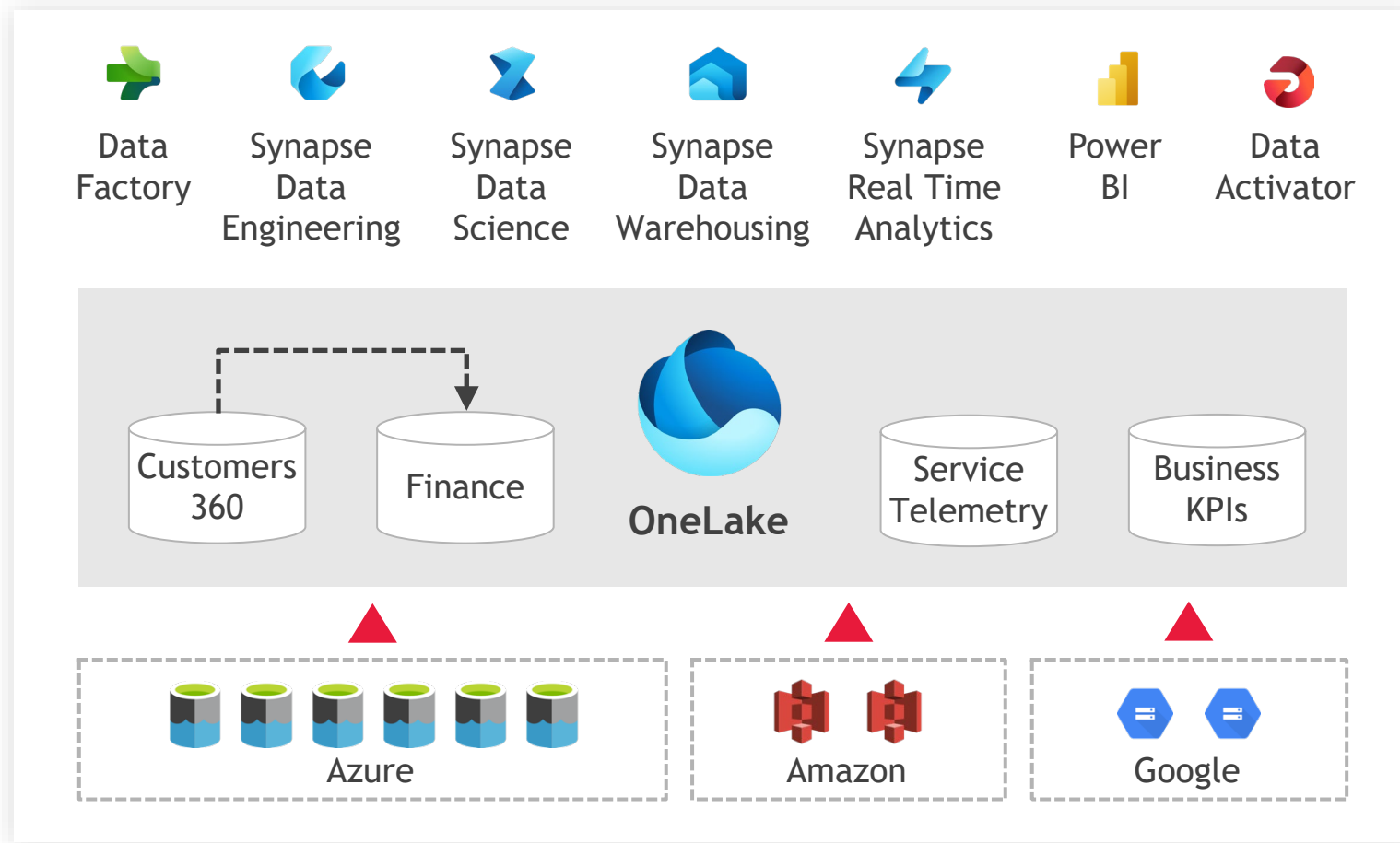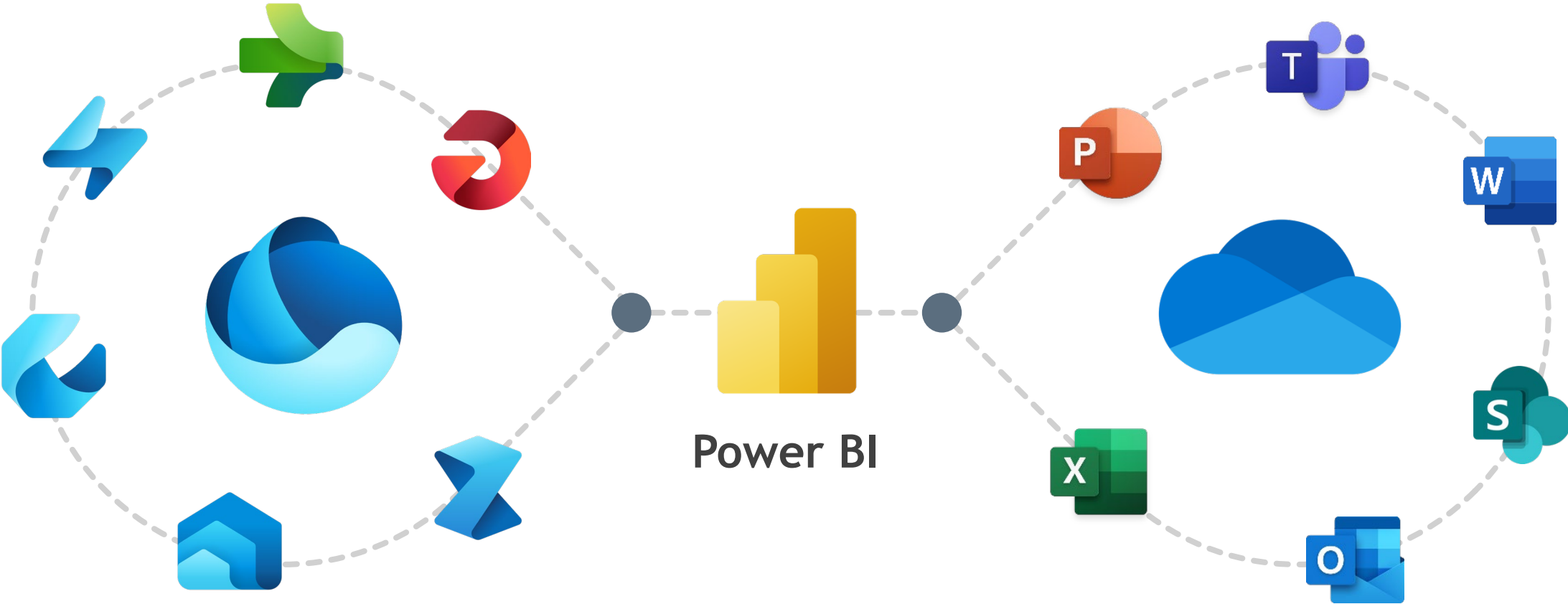
Loading full MS Sales to Synapse vNext

15 MINUTES TO LOAD 20 TB
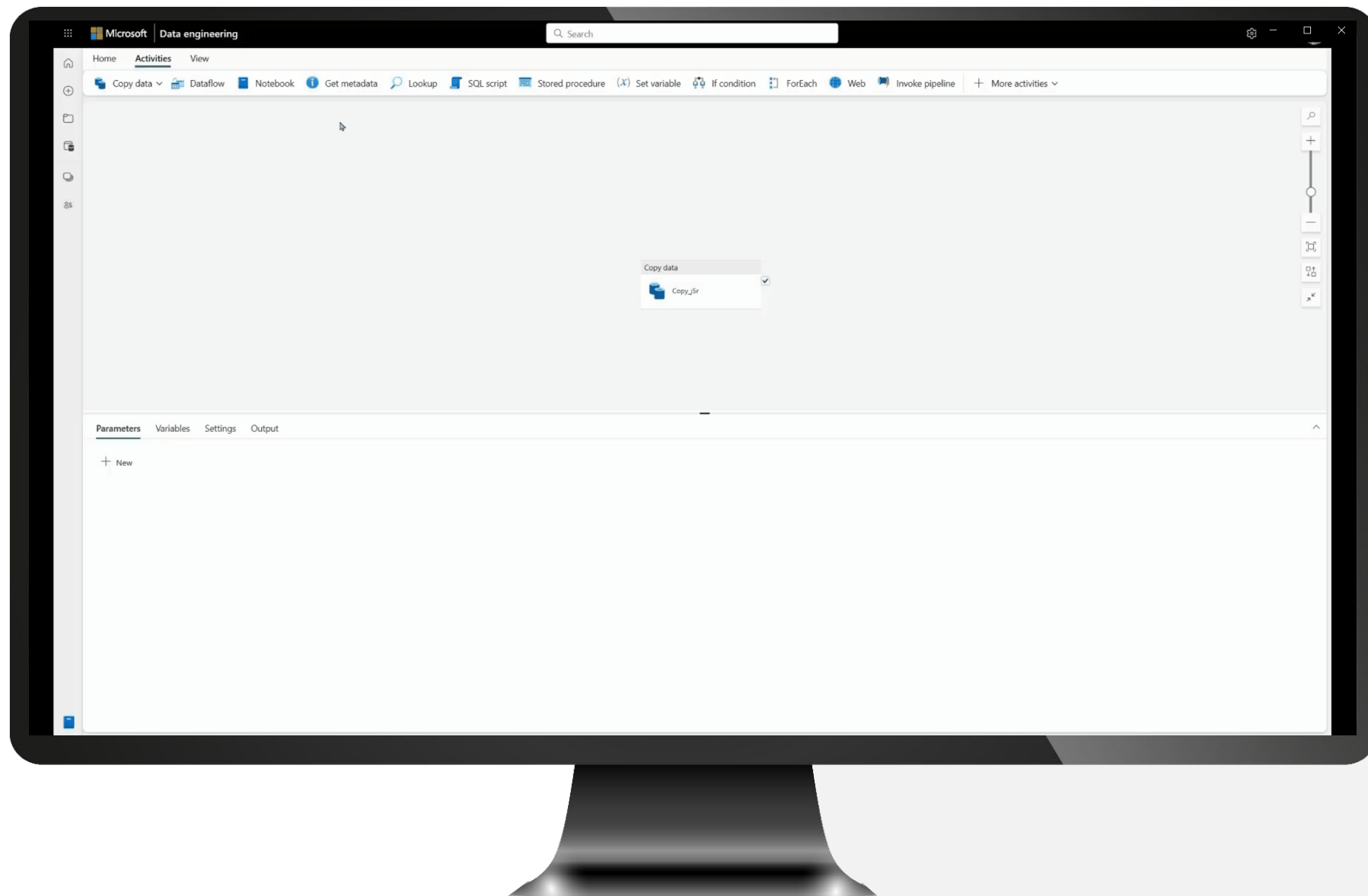
Taking One Copy to the Next Level
SHORTCUTS

- ▶ Sharing data in OneLake is as easy as sharing files in OneDrive, removing the needs for data duplication

- ▶ With **shortcuts**, data throughout OneLake can be composed together without any data movement

- ▶ Shortcuts also allow instant linking of data already existing in Azure and in other clouds, without any data duplication and movement, making **OneLake the first multi-cloud data lake**

- ▶ With support for industry standard APIs, OneLake data can be directly accessed by any application or service

Microsoft Fabric
THE DATA PLATFORM FOR THE ERA OF AI

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Lake centric and open

▶ OneLake

▶ One Copy

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Empower Every Business User

▶ Familiar and intuitive

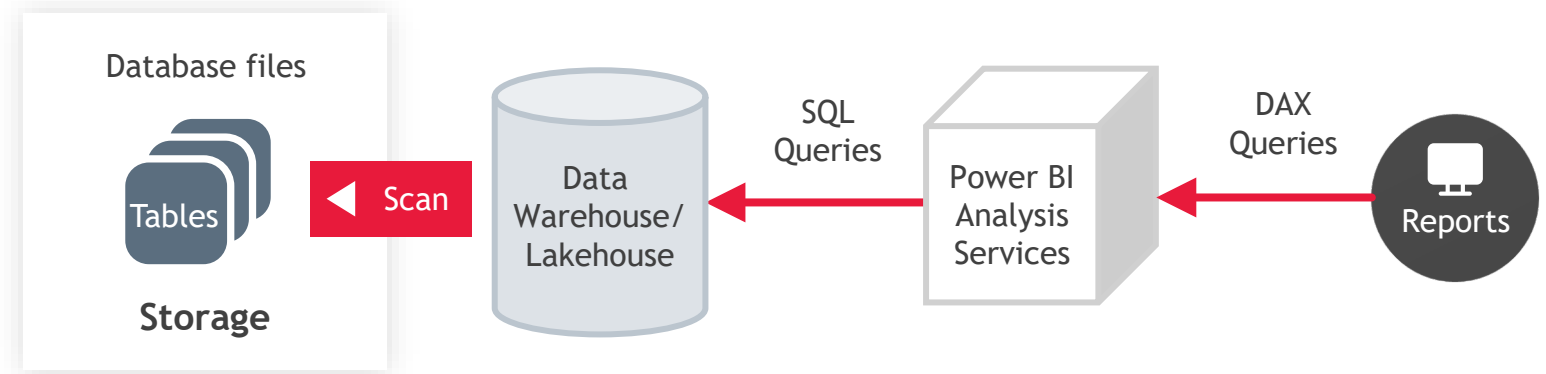▶ Built into Microsoft 365

▶ Insight to action

AI Powered

▶ Copilot accelerated

▶ ChatGPT on your data
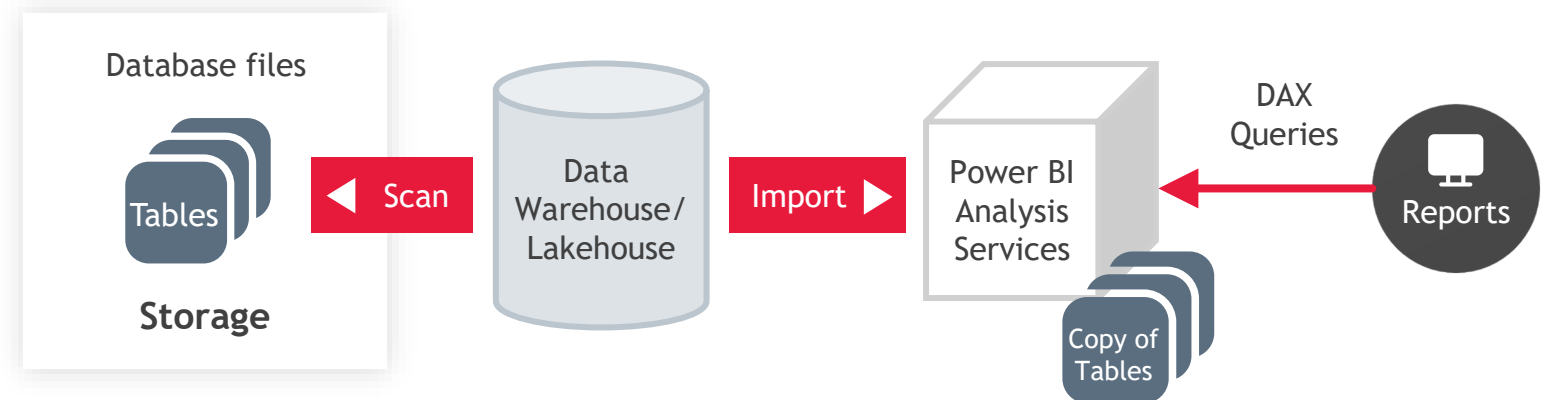
▶ AI driven insights

Unified Data Culture
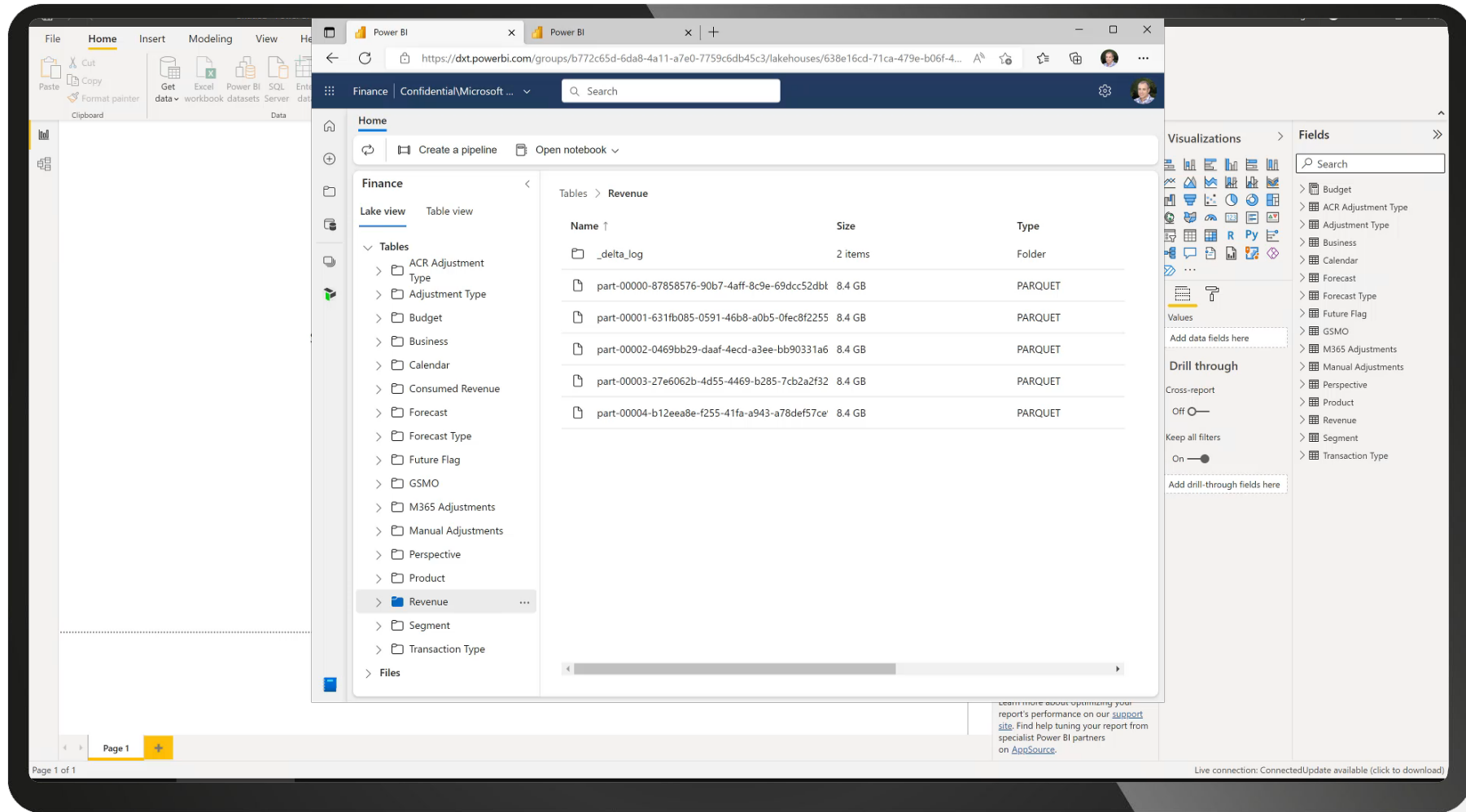

Power BI

"Direct Query Mode"
Slow, but real time

Database files

Tables

Storage

Scan

Data Warehouse/ Lakehouse

SQL Queries

Power BI Analysis Services

DAX Queries

Reports

"Import Mode"
Latent & duplicative but fast

Database files

Tables

Storage

Scan

Data Warehouse/ Lakehouse

Import

Power BI Analysis Services

Copy of Tables

DAX Queries

Reports

"Direct Lake Mode"
Perfect!

Parquet/Delta Lake

Tables

OneLake

Data Warehouse/ Lakehouse

Scan

Power BI Analysis Services

DAX Queries

Reports
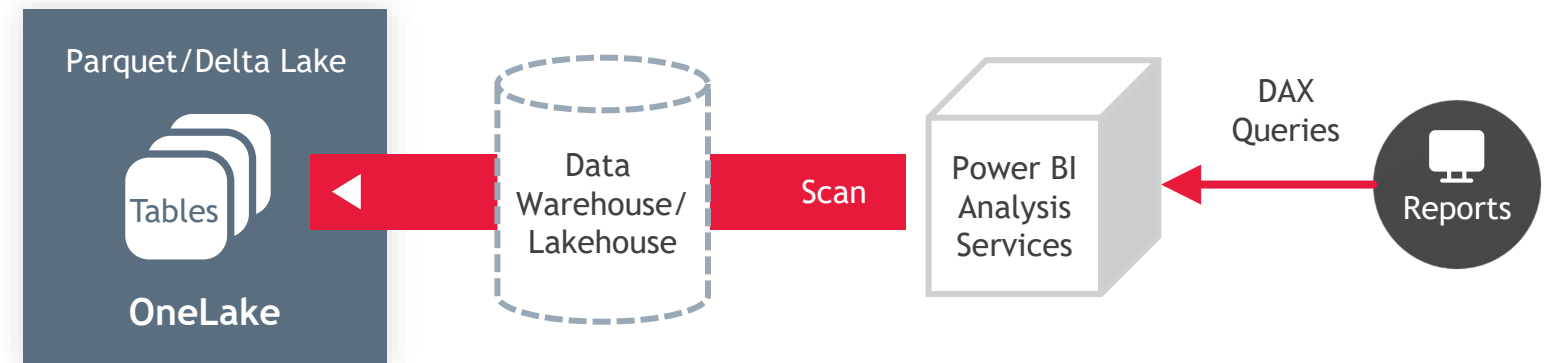
Announcing Real-Time Intelligence

Real-Time Intelligence in Microsoft Fabric

Best-in-Class Connectivity

Real-Time Hub

Process

Analyze

Monitor

Act
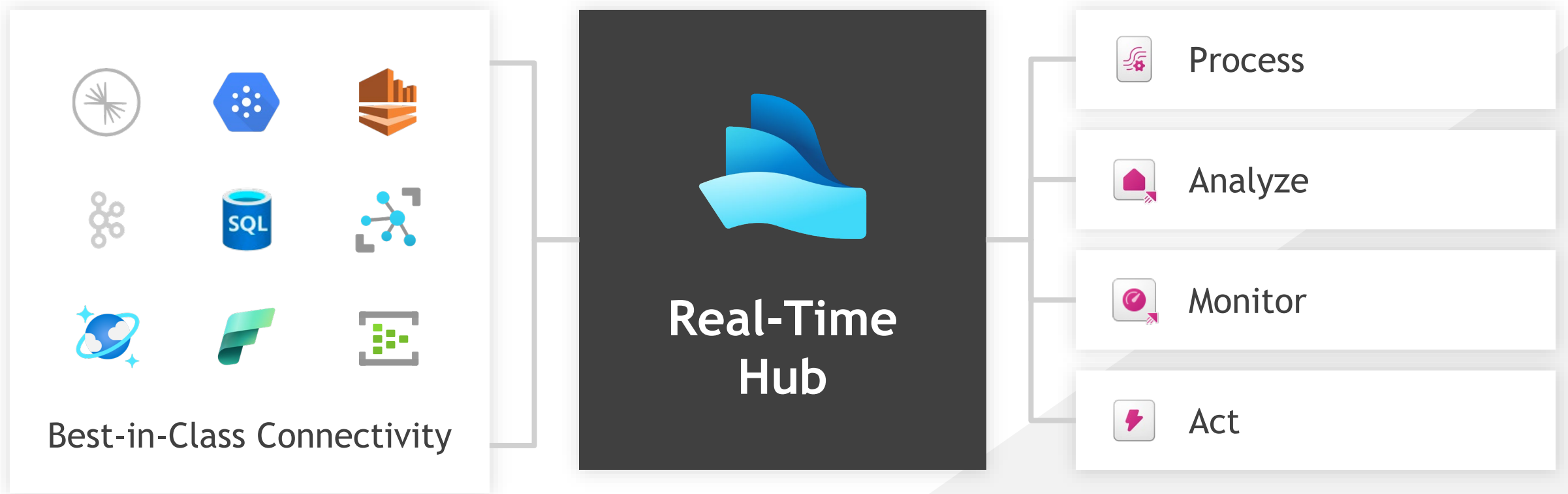
AI-Powered Intelligence
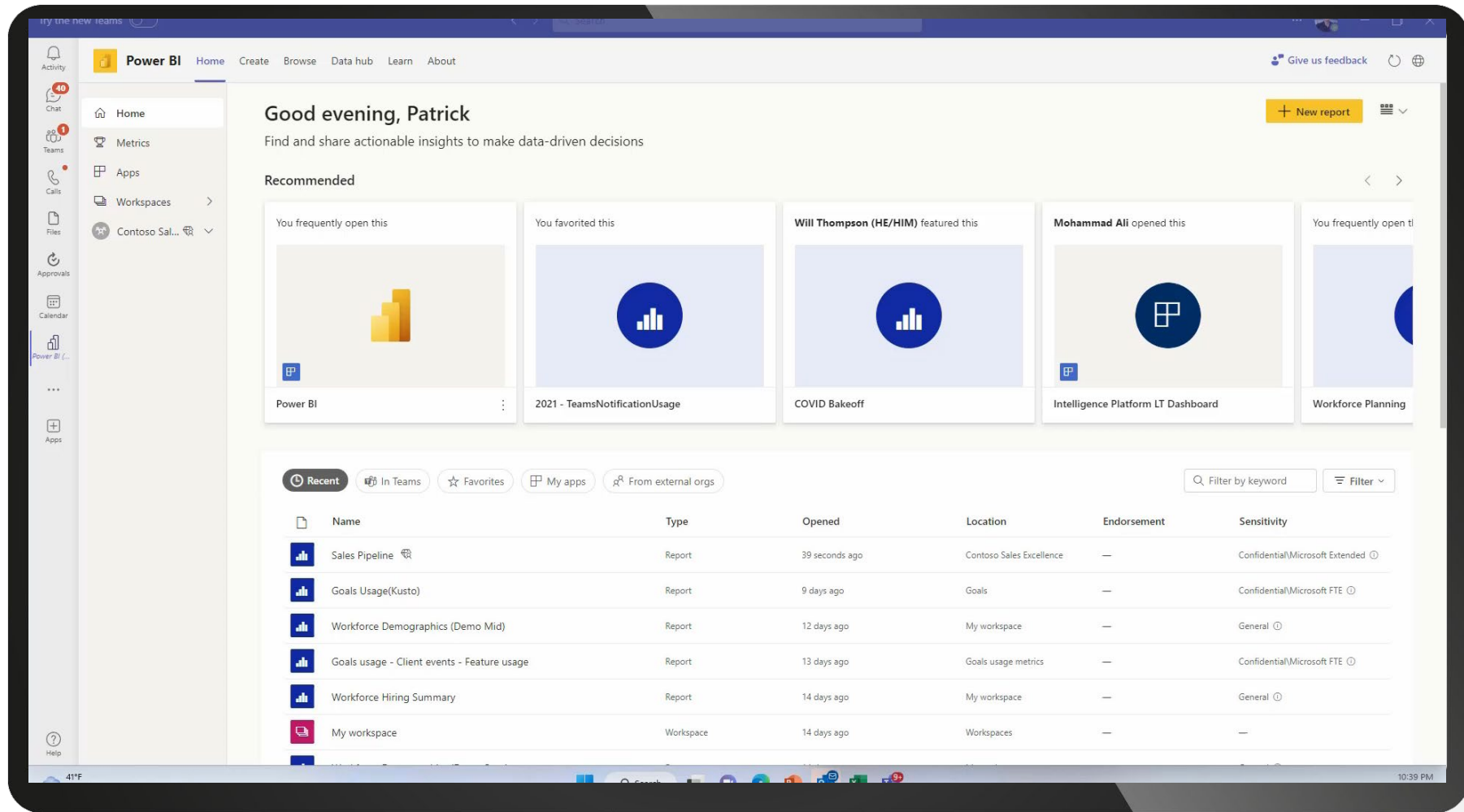
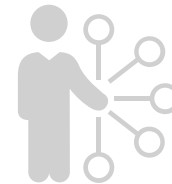LEVERAGING COPILOT AND FABRIC FOR ORGANIZATIONAL EFFICIENCY

Office Integration

BDO

LEVERAGING COPILOT AND FABRIC FOR ORGANIZATIONAL EFFICIENCY

Microsoft Fabric

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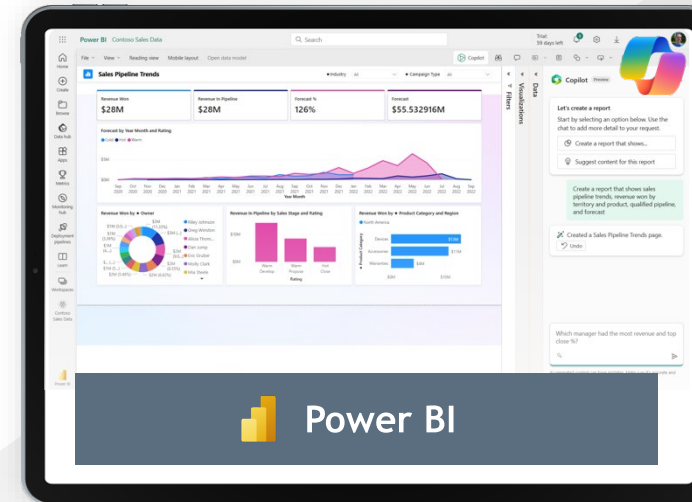▶ One Copy

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Empower Every Business User
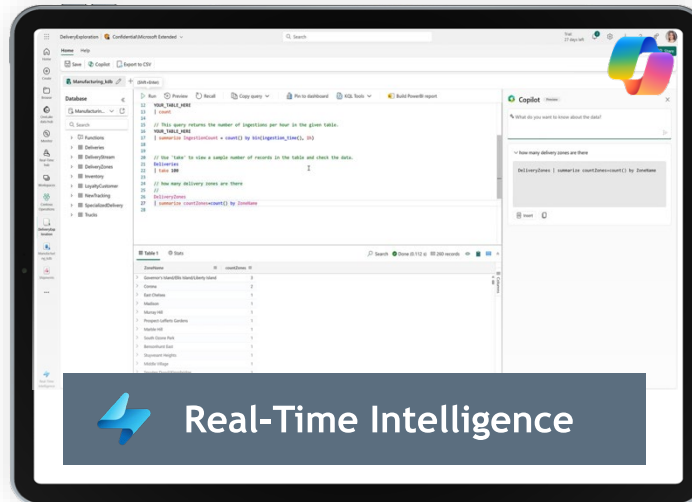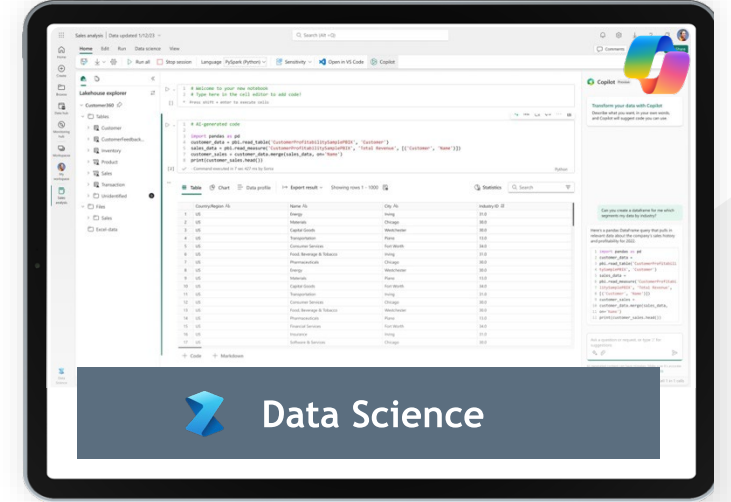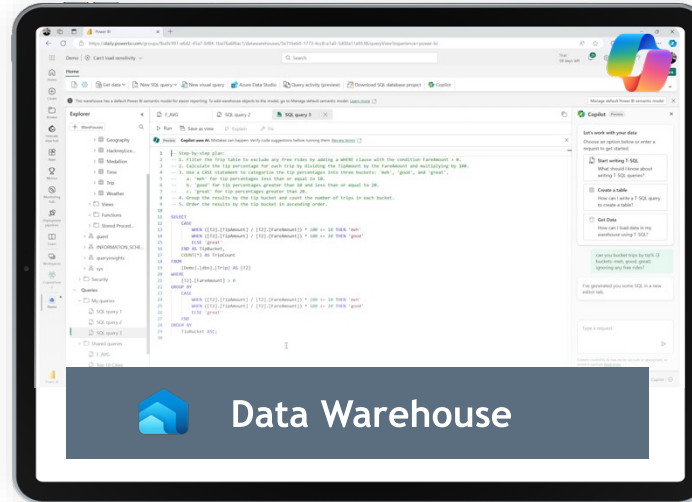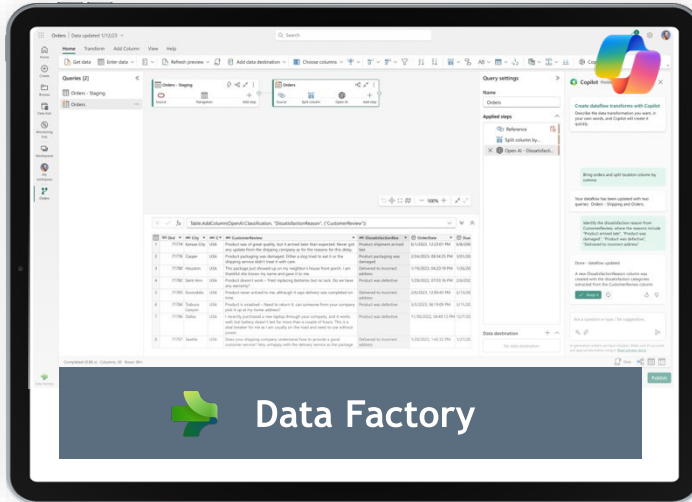
▶ Familiar and intuitive

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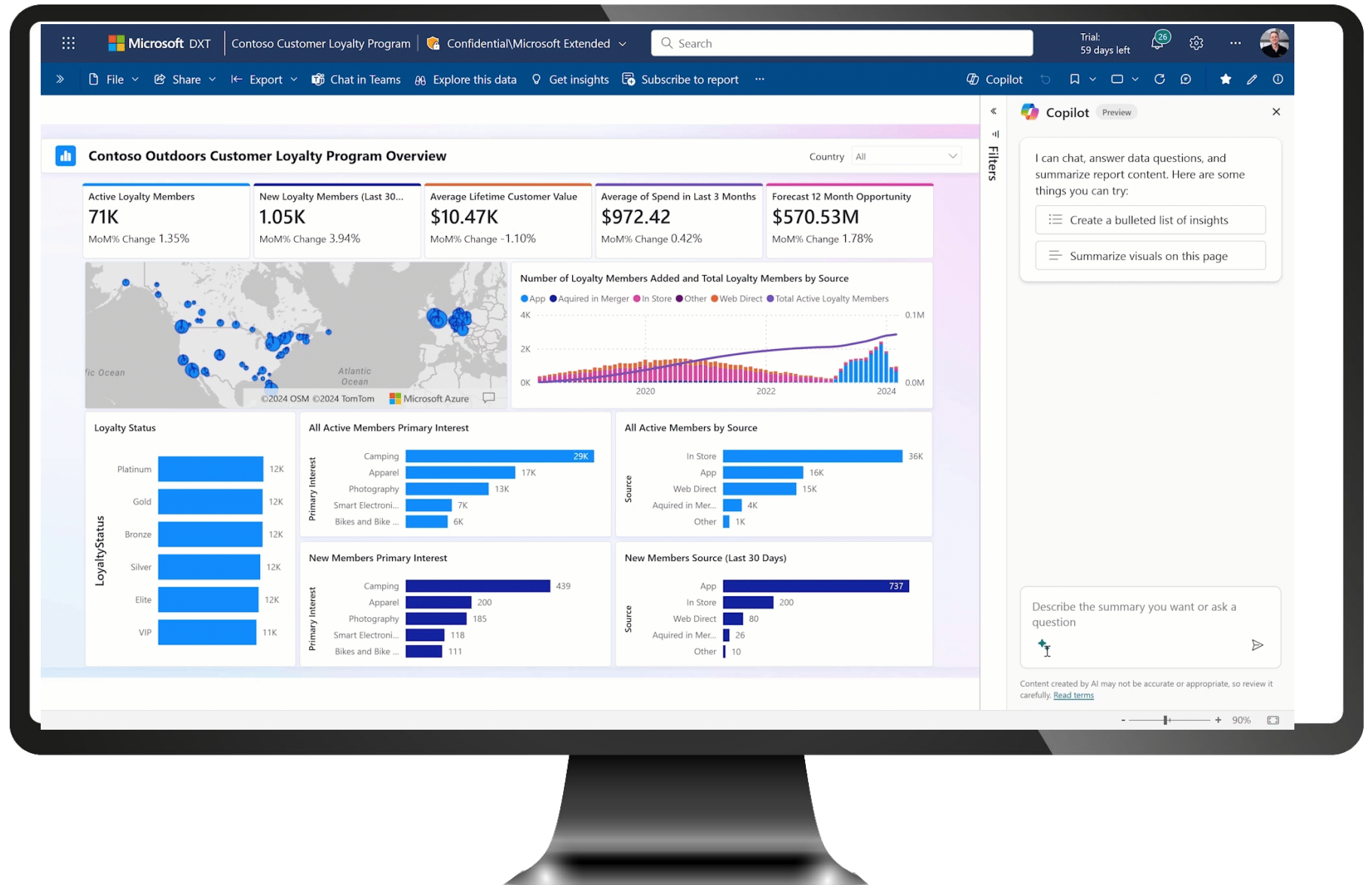**AI Powered**

▶ Copilot accelerated

▶ ChatGPT on your data

▶ AI driven insights

Copilot Integrated in Every Microsoft Fabric Experience

Data Factory

Data Warehouse

Data Science

Real-Time Intelligence
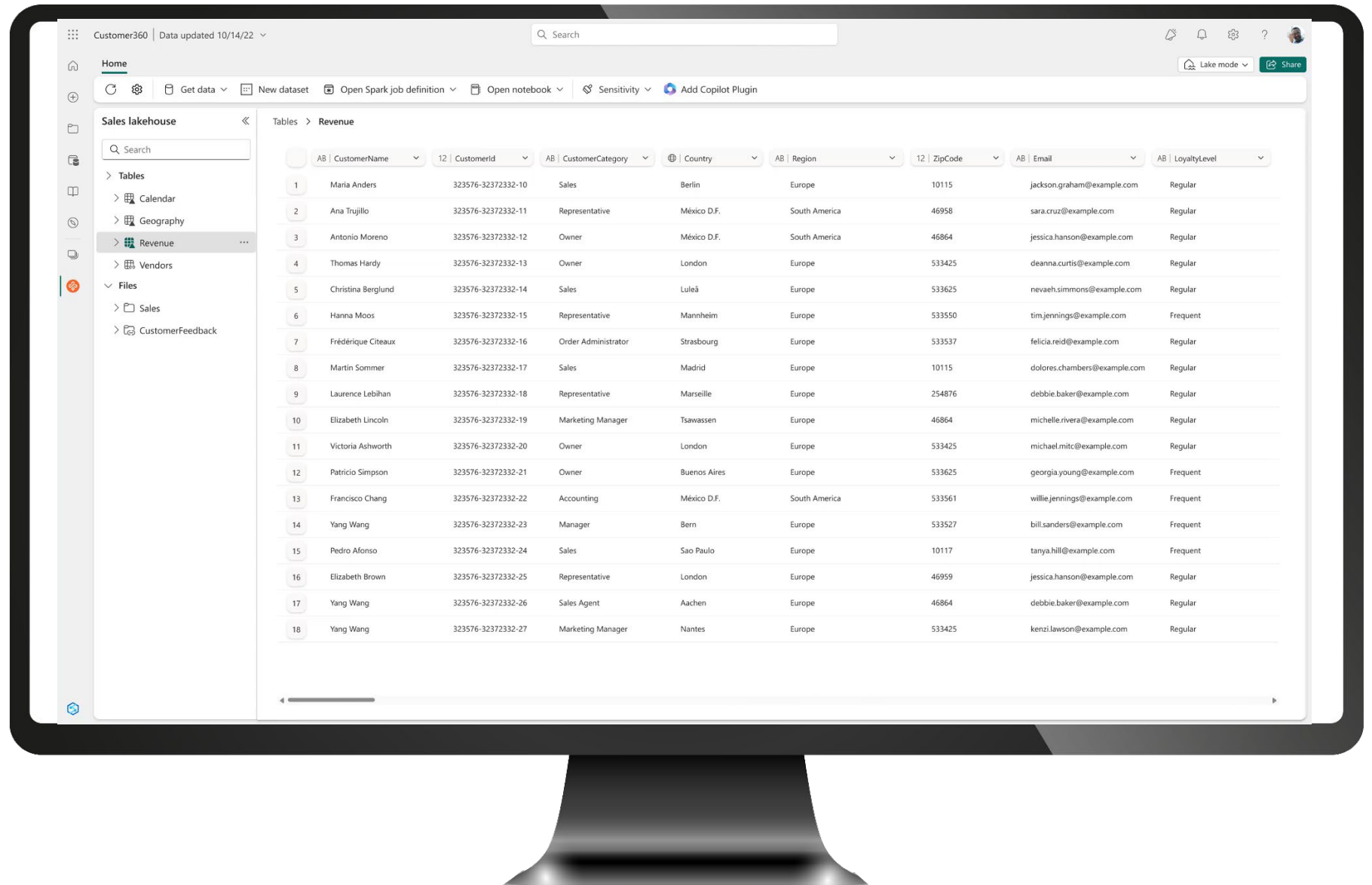

Power BI

AI POWERED
AI Driven Insights

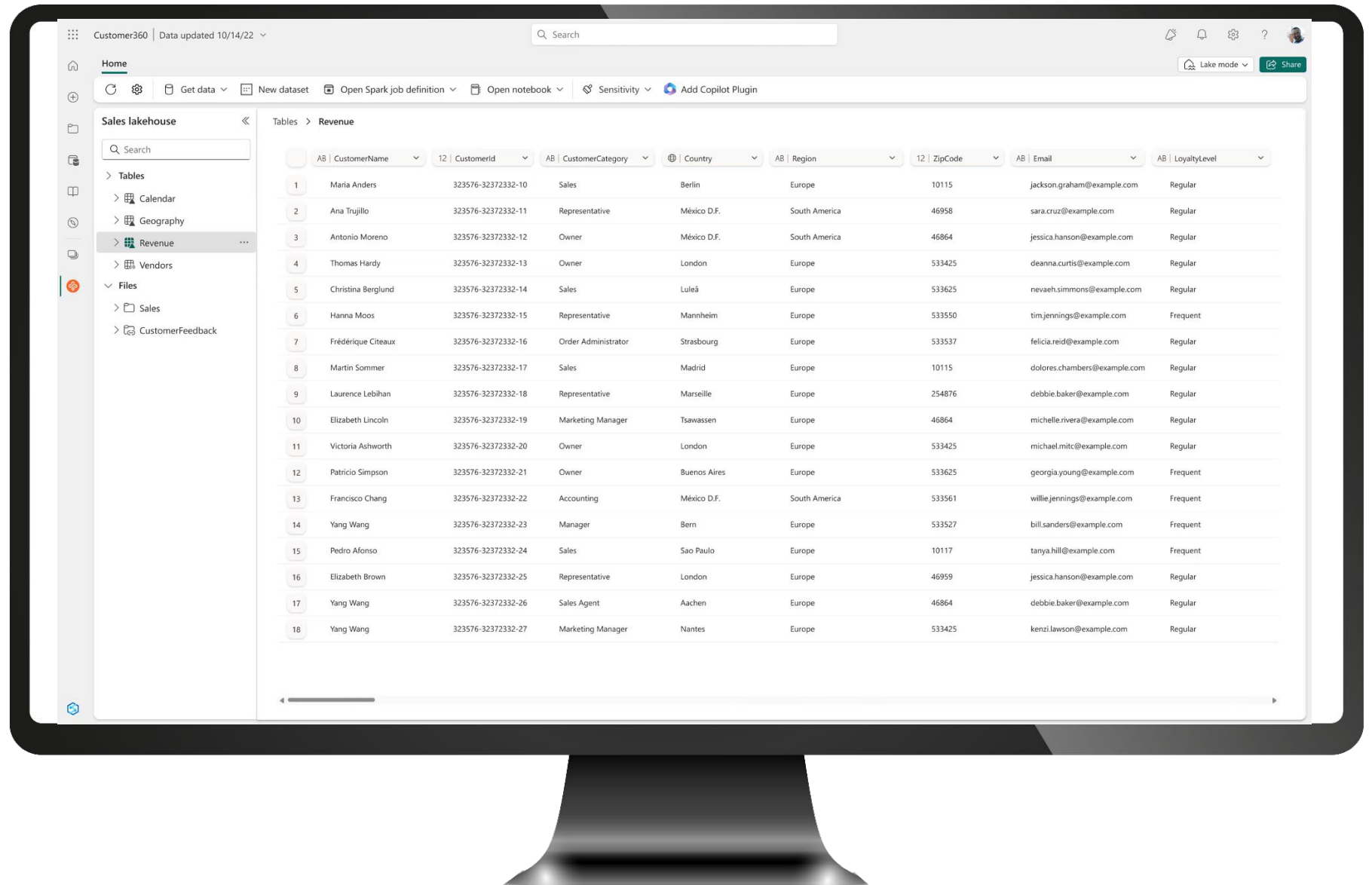# Custom Copilots on Your Data

Demo

IBDO®

Demo

Demo

Getting Started

IBDO

Microsoft Fabric Proof-Of-Concept

Microsoft Fabric provides a comprehensive, unified ecosystem to help you improve time to insight and drive faster value realization.
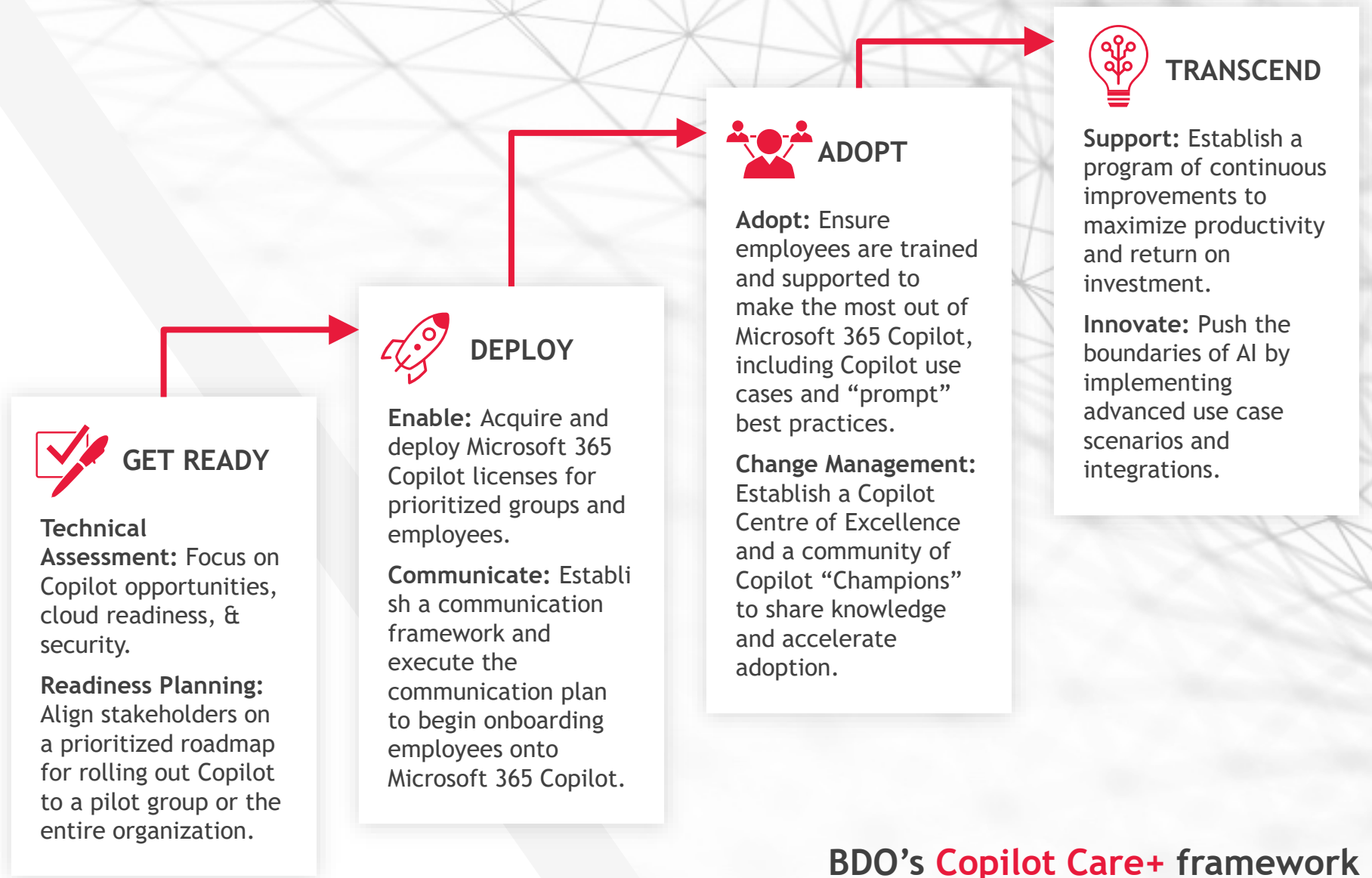
BDO'S PROOF-OF-CONCEPT APPROACH COVERS:

DISCOVERY	Review existing reporting landscape, identify key reports, and analyze data sources to understand dependencies and complexities.
SETUP	Provision a dedicated Fabric Capacity, establish connectivity between data sources and OneLake, and set-up data ingestion pipelines.
INTEGRATION	Cleanse, transform, and harmonize data to create a Unified Semantic Model for self-service analytics.
VALIDATION	Develop interactive dashboards and reports, validate the PoC, and provide a roadmap for further expansion and integration.

KEY DELIVERABLES

1 Comprehensive Proof-of-Concept showcasing Microsoft Fabric's transformative capabilities

2 Unified Semantic Model as a single source of truth, enabling self-service analytics and reducing data silos.

3 Roadmap for further expansion and integration of Microsoft Fabric within the organization

BDO's Copilot Readiness Assessment

- ▶ Use Case Discovery
- ▶ "Art of the Possible"
- ▶ Technical Readiness Assessment (Data and Security Posture Review)
- ▶ ROI Analysis/ Recommendations
- ▶ Leadership and Employee Readiness Planning
- ▶ Establish Change Management Plan

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.

BDO's Copilot Care+ framework

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BDO DIGITAL

Achieving Secure
& Responsible AI

WEDNESDAY, OCTOBER 9, 2024
1:00 – 2:00 PM ET

MORE INFORMATION ▶

Thank You!

Questions?

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