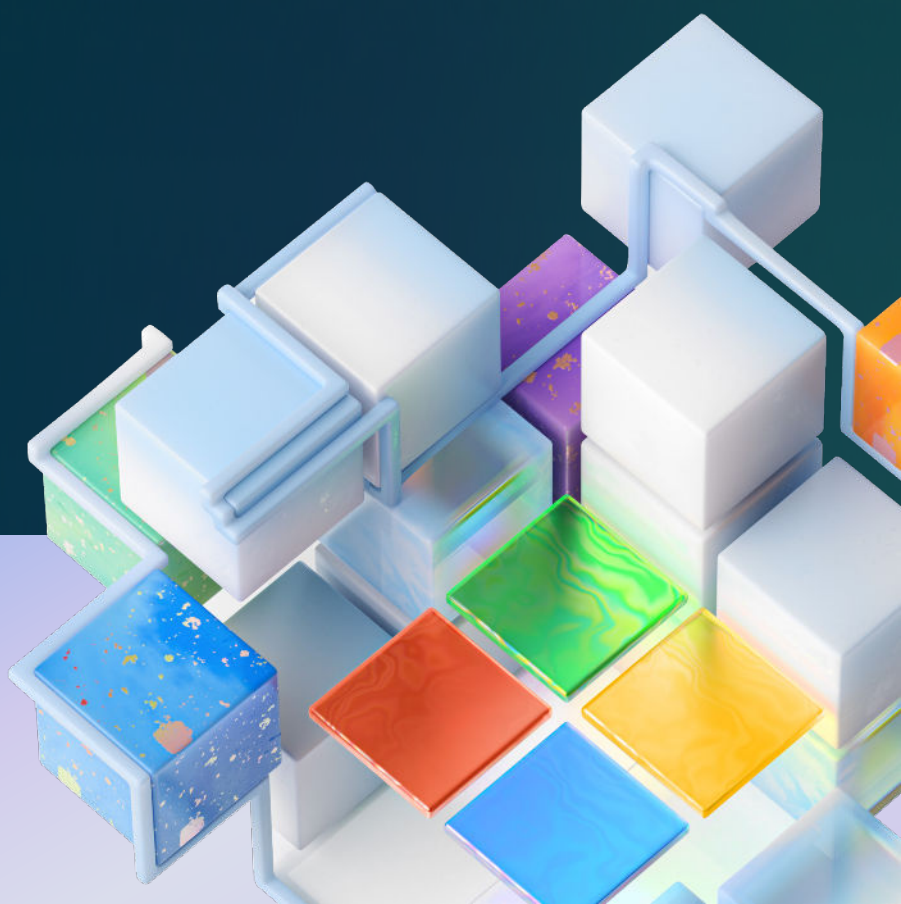TD SYNNEX

Get Ready for AI

with Microsoft 365 Copilot

A COMPREHENSIVE GUIDE

Copilot

Adopting AI at scale: **A Journey, Not a Sprint**

Embarking on the journey of integrating Microsoft 365 Copilot into your organization is not just about acquiring licenses; it's a strategic move that requires careful planning and preparation. This guide aims to provide TD

SYNNEX partners with a comprehensive roadmap to ensure a smooth adoption of Microsoft 365 Copilot, leveraging the transformative power of Artificial Intelligence (AI) for enhanced productivity and efficiency.

The process review

Before diving into the specifics of Microsoft 365 Copilot adoption, it's crucial to outline the broader context of AI integration. Two fundamental questions should guide your organization's approach:

? What are your **goals** for using AI?

? What are the **pain points** that AI can address?

To simplify this complex journey, we've designed a **practical 3-step guide** to navigate through the AI adoption process:

1
Establish the
Foundations

2
Get Ready
for AI

3
Spearhead the
AI Transformation

1 Establish the **Foundations**

Solid foundations are essential for a successful AI adoption journey.

For many organizations, technical challenges may hinder the smooth adoption of Copilot. Cloud adoption, technical debt, and legacy systems can act as roadblocks. Microsoft 365 Copilot interacts with the applications millions of users use (Microsoft 365) while leveraging corporate data residing on SharePoint, One Drive and your Microsoft Cloud tenant by extension.

Therefore, adopting these technology solutions becomes the bedrock of any Copilot implementation.

Ensure the adoption of essential technologies, including:

| Microsoft 365 Business Premium | Microsoft Intune | Microsoft Entra ID | Microsoft SharePoint | Microsoft Teams |

Addressing these challenges requires a strategic update in the organization's security and data strategy.

Zero Trust Principles in Action

Verify explicitly with identity and endpoint management

Use least privileged access for application and data management

These principles lay the groundwork for Copilot implementation, ensuring a secure and well-managed environment. Before proceeding, tick these foundational boxes to set the stage for a seamless AI integration.

2 | **Get Ready** for AI

🛡 Security: A Pillar of Readiness

Delving further into the "Get Ready for AI" phase, it's essential to emphasize the critical role of security. As organizations gear up to leverage Copilot, envision the profound impact it can have on operations. The ability to prompt Copilot for detailed insights, such as the top 20 accounts' buying behavior and margin performance over the last two years, holds immense potential.

However, with great potential comes great responsibility. Without a robust security posture, the consequences of sensitive information falling into the wrong hands can be severe.

This phase requires organizations to go beyond standard security measures and embrace advanced solutions.
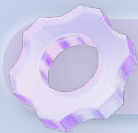
Security Measures

M365 Business Premium with Defender for Endpoint

A comprehensive security solution that provides advanced threat protection across endpoints.

Privileged Identity Management

Elevate security by adopting a privileged identity management strategy, limiting access to critical data and functions to only those who require it.

⚙ Data Strategy: The Foundation of AI-Driven Insights

In the context of AI, data isn't just a byproduct; it's the lifeblood that fuels the generation of meaningful insights. Without a robust data

strategy, organizations may find it challenging to unlock the full potential of generative AI.

Data Strategy Components

Data Classification

Classify data based on sensitivity and importance, creating a structured foundation for Copilot to operate effectively.

Sensitivity Labels

Apply sensitivity labels to documents, ensuring that Copilot can discern the importance and confidentiality of each piece of information.

These measures not only enhance security but also lay the groundwork for Copilot to provide accurate and valuable insights, ensuring that the organization is ready

to provide accurate and valuable insights, ensuring that the organization is ready to harness the full power of AI.

3 | Spearhead the **AI Transformation**

As organizations prepare to spearhead the AI transformation with Copilot, it's essential to understand the nuanced phases of adoption. TD SYNNEX's own experience with Copilot has revealed a strategic approach, implemented in waves, that allows organizations to learn their way into an AI-powered future. With foundational elements in place, it's time to spearhead the AI transformation. Copilot is not just an IT tool; it's a cultural shift requiring involvement across all departments, especially executives and C-levels.

Adoption Phases

Tech POC: Validating Impact

The Tech Proof of Concept (POC) is the initial phase where organizations validate how Copilot positively impacts individual productivity. This involves deploying Copilot in controlled environments to understand its capabilities and assess its potential benefits.

Organic Efficiencies: Identifying Opportunities

Following a successful Tech POC, organizations move on to identifying business units, functional areas, or specific use cases that are prone to be streamlined with AI. This phase involves building AI competence within the organization and laying the groundwork for broader adoption.

Transformational Efficiencies: Rethinking Operations

The final phase is marked by a holistic transformation of the way the business operates. This is only possible when the organization fully embraces AI. It involves rethinking workflows, processes, and business operations to align with the capabilities and potential of Copilot.

In the AI revolution, integration goes beyond the internal capabilities of Copilot.

Leading SaaS Providers

Explore plugins for Microsoft 365 Copilot, expanding knowledge through graph connectors and automation engines for deeper AI integration.

Seize the AI Revolution with TD SYNNEX

Microsoft 365 Copilot has the potential to redefine the way you work, offering solutions to manage information overload, streamline processes, enhance communication, and boost creativity. TD SYNNEX, in its commitment to AI, shares its learning and support to help partners build their Copilot capabilities.

Unique Insights and Enablement

Explore unique workshops, guides, Practice Builder, Digital Enablement, and more.

As TD SYNNEX partners, seize this outstanding opportunity to fast-track success and embrace the era of an AI-powered IT!

This guide, coupled with our unparalleled knowledge, sets the stage for a transformative AI journey.

Let's make AI work for you!

🔵 TD SYNNEX