

Copilot for Microsoft 365

Preparing Your Organization for Secure and Responsible AI Implementation

Generative AI has rapidly transformed the consumer landscape and is poised to drive significant productivity gains in the business sector. With the widespread availability of Microsoft 365 Copilot, companies need to prepare for the inevitability of Generative AI within their organizations and take a measured approach in order to minimize compliance risks while gaining competitive advantage from this technology.

As with any major technology roll-out, privacy, security and compliance teams must effectively balance Copilot requirements with wider business objectives, as generative AI introduces unique, novel and complex challenges. Furthermore because business objectives for promoting the use of this technology are contextual, there is no standard, one-size fits all deployment of Microsoft 365 Copilot.

To ensure Copilot handles sensitive corporate information, intellectual property, and personal data properly, robust Data Governance best practices are essential. Organizations must proactively safeguard data by considering classification labels, backend configurations and access

controls. Tailored privacy measures address specific requirements such as personal data detection and personal data access. Prioritizing the protection of sensitive data is crucial to avoid reputational damage and regulatory fines, as well as information misuse.

Legal and compliance teams benefit from a well-designed implementation of Microsoft 365 Copilot. By working with FTI Consulting, organisations have access to seasoned experts with deep knowledge of Artificial Intelligence, and managing evolving digital risks, including within highly regulated industries and sectors.

FTI Technology's M365 Copilot Services: *Copilot Implementation Methodology*

Assess & Plan

- Establish Copilot business case
- Identify key use cases and develop an adoption plan
- Copilot Implementation Readiness Assessment to prepare for Copilot
- Identify and map data within and beyond Copilot's reach
- Observations and Road Map
- User training and awareness planning

Design & Develop

- Proof of Concept/Pilot for specific use cases
- Discover, label, and protect data
- Strengthen security and information protection
- Develop and manage pilot program, including testing
- Pilot evaluation/Assess and mitigate risks uncovered during pilot
- AI Impact Assessment (regulatory and data privacy considerations)

Implement

- Settings recommendation and implementation
- Training and user adoption plan
- Awareness and change management
- Monitoring protocols
- Scaling and extensibility evaluation

FTI Technology’s M365 Copilot Services (continued):

As organizations extend and scale their use of Copilot, and introduce agentic AI through Copilot Chats, they may benefit from revisiting Purview Policies, expanding personnel training including on the ethical and responsible use of AI, and implementing formal monitoring and usage feedback mechanisms.

Establish Microsoft Purview Policies for Copilot

- Gain insights into user interactions
- Detect when unprotected, sensitive files are referenced in responses
- Develop policies to prevent data leakage and control potentially harmful or unethical actions

Copilot and AI Literacy and Advisory Services

- Build a foundational understanding of AI within the organization, and implement regulated training requirements
- Explore services opportunities around Copilot
- Identify value and benefits of Copilot
- Understand how Copilot is licensed and its baseline requirements

Support Ethical and Responsible Use of Copilot

- Develop responsible AI user guidelines
- Establish monitoring mechanisms to assess Copilot’s performance and uphold ethical standards in its interactions
- Conduct regular impact assessments to evaluate the outcomes and effects of Copilot on the organization

Trusted Global Leaders in Information Governance, E-Discovery, and Investigations

As part of FTI Consulting, FTI Technology offers deep experience in delivering tangible results in the context of investigations, litigation, mergers and acquisitions, regulatory and privacy issues, reputation management and restructuring. Our professionals, including forensic experts, corporate investigation specialists and technology and e-discovery professionals, are industry leaders experienced in many of the largest e-discovery matters of the past decade.

About FTI Technology

FTI Technology solves data-related business challenges, with expertise in legal and regulatory matters.

As data grows in size and complexity, we help organizations better govern, secure, find, analyze and rapidly make sense of information. Innovative technology, expert services and tenacious problem-solving provide our global clients with defensible and repeatable solutions. Organizations rely on us to root out fraud, maintain regulatory compliance, reduce legal and IT costs, protect sensitive materials, quickly find facts and harness organizational data to create business value. For more information, please visit ftitechnology.com.

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