AI Copilot Report

Exclusive analysis of the August 2024 AI Copilot Digital Summit examining the future of AI, Copilot

Featured executive & product leadership from Microsoft, AI MVPs, and Expert Users analyzed in this report

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AI Copilots: The Lightning Bolt of the Cloud Wars

While AI and machine learning have been in production environments for several years, it is amazing to consider how far the ChatGPT and Microsoft relationship has come in the last two with the explosion of Copilot innovations.

This analysis is based on findings from the AI Copilot Digital Summit that ran at the end of August 2024, featuring Microsoft AI executives, Copilot Studio, Data and Copilot for Security product leaders, users sharing real-world use cases, and Microsoft AI Copilot MVPs defining how they are building and using Copilots in production.

If you are considering, new to, or optimizing a Copilot for your business, this report will detail some of the biggest learnings from the digital summit and serve as a powerful tool in your journey to using these assistants to reimagine your business, processes, and even your role in your industry.

I had the privilege of being the Dynamic Communities and Cloud Wars Analyst on this summit and, based on several hours of discussions with thought leaders, below are several of my biggest take-aways (the report dives much deeper on each of these):

- Copilots are having impact in a range of use cases today but the even bigger opportunity — where companies are only beginning to scratch the surface — is in reimagining core processes (think sales and customer service) and vertical industries (think healthcare and financial services). Learn more in the section on Donald Kossmann, VP of Business Copilots at Microsoft.

- A big factor in this reimagination is the way that AI, when combined with cloud services, enables companies big and small to decentralize intelligence, so employees engaging directly with customers and stakeholders can use the intelligence to create happy, loyal customers.

- AJ Joshi, Copilot for Security product leader and CISO Chris Hughes, share compelling evidence that Copilots can revamp the way cybersecurity works, removing or dramatically downsizing the struggle to process massive quantities of alerts and notifications of varying quality. However, they stress that there are two sides of the AI security coin that need to be considered — how Copilot for Security can enable better data protection, and how AI in general creates a broader threat landscape

- Understanding the difference between the SaaS-based Copilot Studio and the guardrails it enables for companies creating their own Copilots in a Low Code/No Code environment vs. the Azure AI Studio, where the world can be your oyster to imagine new LLM apps — but it comes with some risks that only a pro developer will be able to mitigate. Both Dewain Robinson, Microsoft Copilot Studio product leader, and AI MVP Prashant Bhoyar dissect these realities through their unique perspectives and expertise.

- Dataverse product leader James Oleinik describes the importance of speed, accuracy, governance, and access control with the data that is driving business today, and the Low Code/No Code role of Copilot Studio combined with Dataverse.

- Success with Copilots feeds on itself and proofs of concept pave the way to enterprise rollouts that enable reimaginations — but this is not without some serious organizational change management effort and the right partners to help get you there. Mark Sinnott and Dallas Burnworth of Zones outline their experience in working with Microsoft's Prachi Mishra, pre-sales solution engineer, and Microsoft Copilot MVP Geoff Ables defining their successful Copilot for Sales POCs where employees saw the light and quickly came back for more copilot functionality.

- Furthering the Copilot for Sales analysis, Microsoft AI MVP Chris Cognetta describes the app his company has developed called Dialogue Copilot; check out the impact it is having in driving revenue and dazzling customers.

- Microsoft executive Alfredo Ramirez describes a series of innovative use cases that Microsoft Copilot customers have been bringing to production and hints at the future of AI, as well as its impact inside the walls of Microsoft.

Our online event, and the highlights presented in this report, serve as a curtain raiser for an even deeper, more expansive live event — AI Copilot Summit NA — taking place March 17-19, 2025, at the Torrey Pines Hilton in San Diego, CA.

We look forward to seeing you there and continuing this amazing AI journey where Copilots have truly become the lightning bolt in the Cloud Wars, and Microsoft is making it rain. One promise: things are going to look a lot different than they do today, so you can't afford to miss this event.

John Siefert

Report Sections

Microsoft Distinguished Engineer Donald Kossmann (right) with John Siefert

Why & How Copilots Impact
Business, Processes, and Revenue

Copilots are delivering major wins for customers – from answering questions about emails and documents to reviewing FAQs and historical chats to formulating answers – but visionary leaders are sketching a more ambitious future. And that's not in the distant future.

When combined with cloud technology, Copilots create a scalable framework that enables reimagination of businesses and their core processes: from customer service applications to revenue-driving functions to doctor-patient interactions in the healthcare industry.

The "next level of real big value" beyond digital assistant functionality will be realized through integration customer-facing applications, predicts Donald Kossmann, Distinguished Engineer and VP of Business Copilot and AI at Microsoft.

In customer service, for example, Copilots can help agents focus on conversing with customers at the same time they retrieve information and help solve problems efficiently by reviewing similar, past issues. That frees the customer from the typical holding pattern that occurs in engagements without Copilots. The impact on agents: they want to help and now they can do so while simultaneously focusing on social interaction with the customer. This all translates to higher satisfaction levels for the customer and the agent.

Industry- and role-specific Copilots are having significant impact as well. For example, patient management systems augmented by Copilots are improving patient interactions in healthcare – a strong example of Copilots' vertical-industry functionality. Kossmann notes that a Copilot can facilitate a strong focus on patient-doctor discussions. "It can provide and generate all the documentation based on that discussion, be compliant, follow all the rules, and then maybe also follow up."

Revenue Impact

Copilots are beginning to impact critical revenue-driving functions such as sales.

An internal Copilot use case at Microsoft is a prime example. As the 50-year-old company reinvents itself with Copilots, it finds compelling opportunities such as a Copilot working with its Viva Insights analysis software, explains Alfredo Ramirez, General Manager of Go-to-Market and Strategy for BizApps at Microsoft. That combination uncovers opportunities for sellers to spend less time internally in favor of customer-facing interactions. "If my sellers spend 10% more of their time with customers, that's going to lead to this many opportunities, this much pipeline, and you extrapolate that to the top line," Ramirez says.

Alfredo Ramirez, General Manager of Go-to-Market and Strategy for BizApps at Microsoft (left), with John Siefert

A Copilot can't get more strategic than helping sellers drive revenue.

Microsoft's customer engagement goes well beyond delivering Copilot products. "It's more like a co-creation process with customers," Ramirez describes, with a focus on how Microsoft can help customers "drive the most impact through transformation in your process and leveraging AI that will ultimately change how you run your business, how your customers see you, or how your products land in market."

Over time, Kossmann expects Copilots to gain more "senses," similar to the evolution of smartphones with GPS and sensors. This will enhance Copilots' capabilities without compromising privacy, especially in business scenarios where data protection is critical.

Zones, Microsoft, and C5 Insights leaders detail the Zones Copilot project

Copilot for Sales:
From Pilot to Production at Zones

IT services provider Zones tested and deployed Microsoft Copilot for a sales-use case while proactively building an ROI analysis to document its progress and success. Zones' experience offers powerful learnings for companies looking to move from pilot to production and understand the steps needed to manage that journey.

Zones serves as another tangible example of customer benefits following those shared in the opening section of this report.

"Zones is always looking for ways to optimize sales productivity, gain efficiency, and drive higher value. The timing of this particular project worked out great because we're in the middle of a larger transformation, moving all of our business processes to Dynamics 365 CE for Sales, as well as other ERP changes," explains Mark Sinnott, director of sales operations and enablement at Zones.

Zones engaged Microsoft and C5 Insights to help deploy AI and Copilot.

Proof of Concept Methodology

Zones wanted to move swiftly so C5 Insights put in place an accelerated, four-week proof-of-concept process that included six training sessions.

Zones received significant positive feedback about the utility of features available to sellers in that test phase. Survey respondents reported saving a minimum of 45 minutes of operational activity from the tested features alone. This "got us excited about seeing what the possibilities were with all the features," says Dallas Burnworth, manager of digital adoption at Zones.

The qualitative feedback around the experience of sellers and the improvement that the tools are creating in their work – interacting with customers, writing emails, taking notes and recordings – was that users wanted to expand Copilot usage. "We've made the decision to go to about 600 more users as an immediate next step," Sinnott says.

Future Roadmap

Zones aims to put a roadmap in place for the next 18 to 36 months to ensure it continues to realize value from AI and its investment in the technology.

"Their vision for the future revolves a lot around AI," notes Geoff Ables, Managing Partner of C5 Insights and a Microsoft MVP. There are a number of valuable outcomes from this investment, "and tailoring their AI to make it a unique differentiator, not just what's available out of the box, is an incredibly important area that they want to explore."

AI Copilot Digital Summit | An AI-first digital event complement to the **AI Copilot Summit NA** physical event running March 2025.

CongruentX CTIO and Microsoft MVP Chris Cognetta and John Siefert

AI copilot SUMMIT NA

March 17-19, 2025
San Diego, CA
copilotsummitna.com

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Innovation Spotlight:
Copilots Save Time, Increase Revenue for Sales Teams

If there's any one function that can't afford to burn cycles capturing, entering, or looking for data, it's the sales organization, where time that's not spent selling is time that's not well spent.

That's why it's so noteworthy that salespeople are freeing up as much as half a day's time each week using Copilot technology.

"We're seeing salespeople gain four to six hours a week in deploying Copilot. But we're also seeing revenues increase," says Microsoft MVP and CongruentX CTIO Chris Cognetta. In fact, the results he's describing align with early gains that IT service provider Zones is reporting in the accompanying section, which details its experience moving from pilot to production with Microsoft Copilot in a sales use case.

Noting that his company's early involvement with "conversational intelligence" evolved into its product called Dialogue Copilot – powered by Microsoft Copilot – Cognetta says "the real-world

impacts are amazing." Beyond the time savings and revenue increases, Copilots are reducing data collection and data friction, while changing behavior within sales organizations.

CongruentX's Dialogue Copilot began with the idea of pulling data from customer conversations into the CRM system. "By recording the conversation and using AI playbooks that we have, I'm able to not only map out a sales process, but any process, and then pull the elements into your CRM so your opportunities are updated, your stages move automatically, your notes, your pain points, all of those are updated," Cognetta says. The result: giving the salesperson time back to work on more deals.

AI copilot
PRECONFERENCE

Returning for a second year, the Copilot AI Summit Preconference at Community Summit North America will bring together leadership from Microsoft, users, partners, and MVPs that are defining the GenAI future.

The full-day preconference will feature keynotes, panel discussions, tutorials, fireside chats, use-case analysis, innovation profiles, and more. All registered attendees will receive breakfast and lunch.

BOOK EARLIER FOR EXTRA SAVINGS

- Register by September 22nd - **$799**
- Register Between September 23rd - October 13th - **$999**
- Registration Available at the Event - **$1199**

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AI Copilot Digital Summit — An AI-first digital event complement to the **AI Copilot Summit NA** physical event running March 2025.

Dewain Robinson, Principal Program Manager, Copilot Studio at Microsoft and John Siefert

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Building Your Own Copilots:
When to Use Copilot Studio and When to Use Azure AI Studio

Some members of the Microsoft community have expressed uncertainty when it comes to understanding differences between Copilot Studio and Azure AI Studio. This section details both platforms to provide greater clarity on their functionality and differentiation, optimal use cases, and other deployment considerations, tapping insights from two high-level experts:

• Dewain Robinson, Principal Program Manager, Copilot Studio and Conversational AI at Microsoft

• Prashant Bhoyar, a Microsoft AI and Business Applications MVP

Copilot Studio enables users to create their own Copilots but also to build and run them on an end-to-end basis. "When you think about Copilot Studio, a lot of people think about the authoring canvas, or authoring Copilots and things of that nature. That's kind of the misnomer when it comes to this product because it's actually an end-to-end Copilot-building platform," says Robinson. This includes everything from the creation process to hosting, to DevOps, and even reporting.

One of Copilot Studio's most important capabilities is conversational orchestration. Robinson explains that when developers are looking to call APIs for certain functions, ask follow-up questions, and get the context of conversations, Copilot Studio can be a powerful asset.

Bhoyar adds that he recommends use of Copilot Studio for those users or developers that need a custom Copilot up and running fast. He recommends focusing on use of out-of-the-box functionality for quick results.

Contrast the functionality detailed in the preceding discussion with Azure AI Studio, which allows pro developers to use different AI models while creating custom prompts and creating custom implementations of AI models.

Prashant Bhoyar, Microsoft AI and Business Applications MVP

The combination of Azure AI Studio and related Azure AI services enable scenario-specific customization and integration into existing systems. "A good example: maybe you want to have a Copilot that all it does is generate RFP responses. And so that's what you do inside of Azure AI Studio," Robinson says.

Core Use Cases

Robinson recommends how and where users should get started for the greatest impact with Copilot Studio. "Everybody seems to think that the place to start is with employees, and that's the lowest return on investment," he said.

That's because employees' data is difficult to secure, it's low volume and of low quality. Instead, he says, the best place to start is with an application that deals with public data. "You get into public data that's been published, that's been sanitized. When you publish data to your website, you have a data-publishing process to make sure that that data is good," he said, "and there's a quality-of-service type of thing."

AJ Joshi, Copilot for Security Product Leader at Microsoft, and John Siefert

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The Impact of AI on Security:
Threat Landscape Expansion
& Copilot for Security

One of the most promising use cases for Copilot technology is in the cybersecurity discipline, where AI can be employed to discover and protect applications that are being used at the same time it can streamline and automate processing of vast amounts of data for overwhelmed security pros.

Application of AI Copilot technology in these cybersecurity use cases is occurring against the backdrop of an attack surface that's expanding, at least in part, because of the explosion in AI apps. This section presents insights into how Microsoft Copilot for Security equips security execs to protect their data, operate more efficiently, and exert control as the attack surface expands.

Microsoft recommends that security pros begin with a discovery process to inventory the apps in use, their intent, users accessing them, compliance considerations, and other factors. When it comes to AI apps, for context, Microsoft Defender has 400 plus AI apps that customers can discover through the system, reinforcing the notion of the burgeoning threat landscape. This inventory, of course, is critical in an era where Shadow IT has morphed into Shadow AI.

Once the app inventory is in place, Copilot for Security protects all those apps – and the data they manage. Through its cybersecurity business, Microsoft processes 70-plus-trillion security signals daily, and it uses that threat intelligence to ground the Copilot's LLM engine on security and provide a security-specific orchestrator that leverages its partnership with OpenAI, explains AJ Joshi, Copilot for Security Product Leader at Microsoft.

Security pros can use natural language to perform reverse script analyses, searching for malicious scripts. They can also receive incident summaries, impact analyses, and recommendations to perform remediation from Copilot for Security. "Rather than going through 50 different alerts, and then understanding what that incident was, you can quickly get a summary of an incident," Joshi says.

Copilot for Security offers both embedded experiences within tools — including Microsoft Defender and Microsoft Intune endpoint management — as well as standalone experiences for a complete view across device management, identity, and threat detection.

A security pro can use Copilot for Security to understand the impact of a Common Vulnerability and Exposure (CVE), identify affected entities, and receive recommended remediation steps.

CISO perspective

Despite initial skepticism about Copilot for Security, Chris Hughes, CISO and CEO of Aquia, says he finds the technology promising and now considers it "part of the future of cybersecurity."

CISO Chris Hughes and John Siefert

Microsoft's approach — integrating with its security applications as well as third-party services — offers important benefits. It looks "really promising" to apply AI to help address talent shortages, resource constraints, and offload laborious manual activities.

Hughes shared usage tips for customers. He equates Copilot for Security to a muscle: "you have to exercise it to build proficiency." To effectively use new technologies, he advises experimenting with them using non-sensitive, low-risk data to build that proficiency.

James Oleinik, Product Management Director, Microsoft Dataverse, and John Siefert

How Dataverse & Copilot Studio Work Together for Efficiency, Data Governance

Microsoft Copilot Studio combined with Dataverse — the company's enterprise data platform for Copilot — is helping citizen developers ensure data accuracy and governance when developing low-code/no-code applications that connect to corporate data sources.

Dataverse's underlying premise is one of enabling any user to build data-driven products in the Power Platform environment. When it comes to Dataverse and Copilots, the company wants to make it dead simple for customers to bring data from Dataverse into a Copilot environment.

"In a world of business Copilots and business agents, we want to enable anyone to be able to build and we want them to be able to bring their data in. It should be as easy as Excel to bring data in to be a part of a knowledge base of a Copilot," says James Oleinik, Director of Product Management, Microsoft Dataverse.

To make those efficient connections, Microsoft currently offers 1,200 Copilot connectors. For example: a customer looking to connect to ServiceNow to create or update a service ticket doesn't have to go and find their own API definitions since there's already a connector. All the user needs to specify is where the data lives, the action that needs to be called, or the data they're looking to upload, and the connector handles the details.

When using Dataverse with Copilot, a user or developer can:
- Go to Copilot Studio, upload a file, and then have the file enabled for GenAI indexing and Q&A
- Upload an Excel file that becomes part of a structured table that gets tracked and orchestrated by Copilot

Simplicity Drives Adoption

Oleinik says there are low-code "rebels" in most teams that want to create automation that makes life easier for themselves and teammates. With appropriate guardrails, these rebels can fuel organizational change and business innovation.

"Eventually there's enough usage and enough problems being solved that the organization says, 'Wow, there's something here and I want to go adopt it for business-critical workloads. I want to go all in on this'."

And Microsoft is, indeed, providing guardrails:
- Flexibility to set up data loss prevention (DLP) policies
- Control over which APIs and connectors can be used
- Setting data as read only or blocking certain actions from being initiated

The combination of Copilot and Dataverse is giving citizen developers simple, efficient, secure tools to build apps that let them fully capitalize on the value of their corporate data.

AI copilot
SUMMIT NA

An AI-first event to define the opportunities, impact and outcomes possible with Microsoft Copilot for mid-market & enterprise companies

March 17-19, 2025
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"Given the rapid evolution of AI tools like Microsoft Copilot, there's a deluge of information that can be overwhelming and difficult to navigate. At the same time, there's a noticeable gap in structured training and reliable resources that can help users to effectively harness this potentially powerful new technology. I'm very pleased to see Dynamic Communities, the organizers behind Community Summit North America, take the initiative to launch a new Summit focused on Copilot. I'm already making plans to be there!"

TONY UPHOFF
Pipeline360
Powered by Integrate
PRESIDENT

"Understanding the power of AI Copilots is crucial for business executives today. These advanced tools are not just augmenting human capabilities-they are revolutionizing decision-making, driving efficiency, and unlocking new levels of innovation. Understanding how to harness the power of Copilots isn't just about staying competitive; it's about keeping pace in a rapidly evolving business landscape."

Day 1
- **7:00** Breakfast
- **8:30** Microsoft Keynote: How AI Agents are Defining the Future
- **9:15** Use Case Panel: Copilot for Sales
- **9:45** Academic View Chapman University
- **10:15** Coffee Break
- **10:30** Copilot Studio vs Azure AI Studio
- **11:15** Is your data ready for AI?
- **12:00** Lunch and Networking
- **1:30** Copilot Break Out Rooms
- **4:30** Networking and Reception "Show Floor"

Day 2
- **7:00** Breakfast
- **8:30** AI + Cloud: The Reimagination Machine
- **9:15** Industry Copilots Panel Discussion
- **10:00** Coffee Break
- **10:15** Co-Creating Copilots: Partners, Customers & Microsoft
- **11:00** Copilot for Security
- **11:45** Lunch and "Show Floor"
- **2:00** Break Out "How To" Rooms
- **4:00** Closing Keynote

Early Bird Price: $799.00
Sales end on Oct 17, 2024

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www.copilot.summitna.com

Look Ahead: AI Copilot Summit NA in 2025

We trust that you've gotten fresh, timely insights from this report analyzing our Copilot AI Digital Summit, which brought together the brightest minds in the fastest moving tech sector: AI Copilots. We've highlighted use cases delivering results today, the next phase of use cases that companies are targeting, and big-idea innovations that will come next in areas including Copilot development, cybersecurity, and data management. It's no wonder that Microsoft reports that 60% of Fortune 500 companies are now using Copilots.

With all things AI, it's critical that customers, partners, and even product suppliers recognize that the pace of change is unprecedented. It's going to take work and collaboration by all stakeholders in the AI ecosystem to keep each other informed, honest, and focused on results.

The team behind AI Copilot Summit is committed to driving deep conversations to meet that mandate.

We're pleased to invite you to the next chapter in our ongoing series of AI Copilot events: AI Copilot Summit NA, taking place March 17-19, 2025, in San Diego.

AI Copilot Summit NA will immerse attendees in AI-first innovation, education, and training to define the opportunities, impact, and outcomes possible with Microsoft Copilot for mid-market and enterprise companies.

We look forward to seeing you there.

Meantime, we continue to build out a daily flow of analysis, tutorials, how-to information, and insights from the best minds in AI Copilots.

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