



Accelerate AI transformation with Microsoft 365 Copilot + agents

Last update, November 2025



The small business reality...

53%

Say they don't have enough
time or energy to keep up
with work¹

45%

Say that expanding team
capacity through digital
labor is a top priority in the
next 12-18 months¹

80%

Say that their employees
are currently bringing
their own AI tools to work
(BYOAI)²

¹ Source: 2025 Work Trend Index Annual Report

² Source: 2025 Work Trend Index Annual Report

The most secure AI solution for your business

More value at a price designed for small and medium-sized businesses

Secure AI Business Solutions

Best-in-class
productivity



+ more

**Microsoft 365 Business
Premium**



AI built for work



**Microsoft 365 Copilot
Business**



Enterprise-grade
security



**Microsoft Purview Suite for
Business Premium**

Accelerate AI transformation with Microsoft 365 Copilot + Agents



Business impact of using Microsoft 365 Copilot

up to

6%

increase in net revenue

up to

20%

reduction in operating
costs

up to

25%

acceleration in new-hire
onboarding

Business impact of using Microsoft 365 Copilot



Microsoft 365 Copilot Business

AI built for work

\$21

(up to 300 seats)

Copilot Chat

- Secure web-grounded AI chat & agents
- AI-powered Create (standard access¹, limited functionality)
- Reason over open files in Microsoft 365 apps²
- Pay as you go custom agents grounded in your data
- GPT-5 Standard access¹



Chat

- Work-grounded
- AI-powered Search
- AI-powered Notebooks
- AI-powered Create (priority access¹, full functionality)
- GPT-5 Priority access¹

Copilot in Microsoft 365 apps

Advanced skills and in-app editing

Comprehensive agent access

- Pre-built Microsoft agents
- Analyst & Researcher advanced reasoning agents
- Custom agents grounded in your data³

Advanced Mgmt. & Analytics

¹ Learn about standard and priority access [here](#). ² Available in Word, Excel, PowerPoint, Outlook, and OneNote. ³ Applies to assistive agents built by you on the Microsoft 365 Copilot agent platform deployed on Microsoft 365 surfaces

Why Microsoft 365 Copilot?

AI built for work



Get more value with
one simplified
solution



Run your business
with confidence



Built-in security you
can trust

Get more value with one simplified solution

Single solution

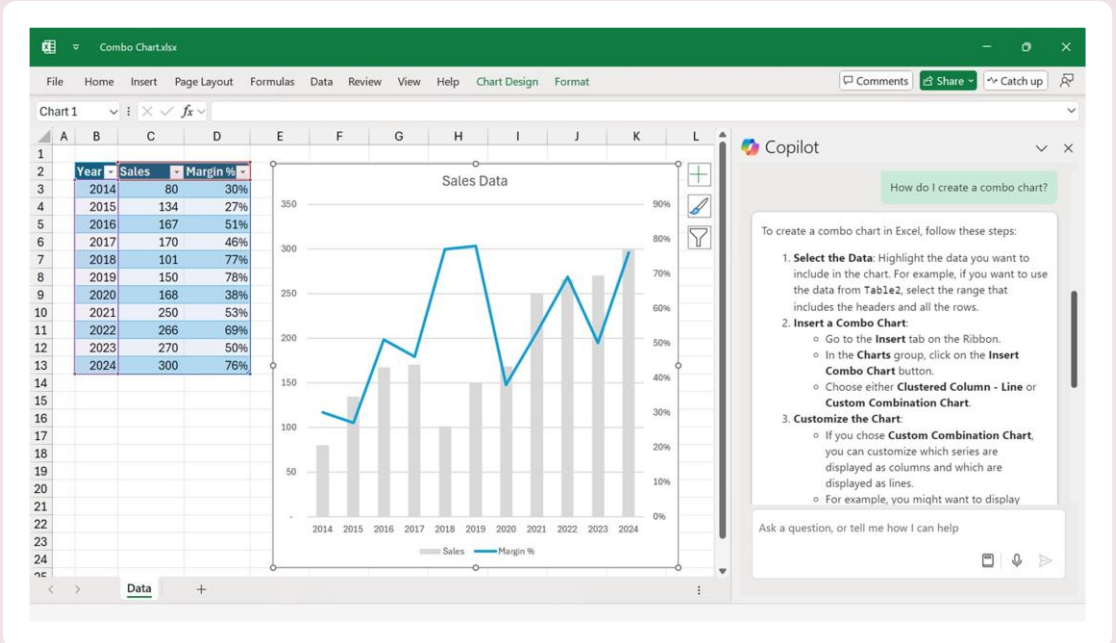
One AI solution that works across your business and is included with your Microsoft 365 Business plan

Connected experience

Copilot works across familiar apps like Teams, Outlook, Word, Excel and PowerPoint, no context-switching required

Unified interface

The Copilot app unifies chat, search, apps and agents in a single, easy-to-navigate experience



Microsoft 365 Copilot helps you save time and work smarter without extra steps or complexity

Run your business with confidence

Relevant context

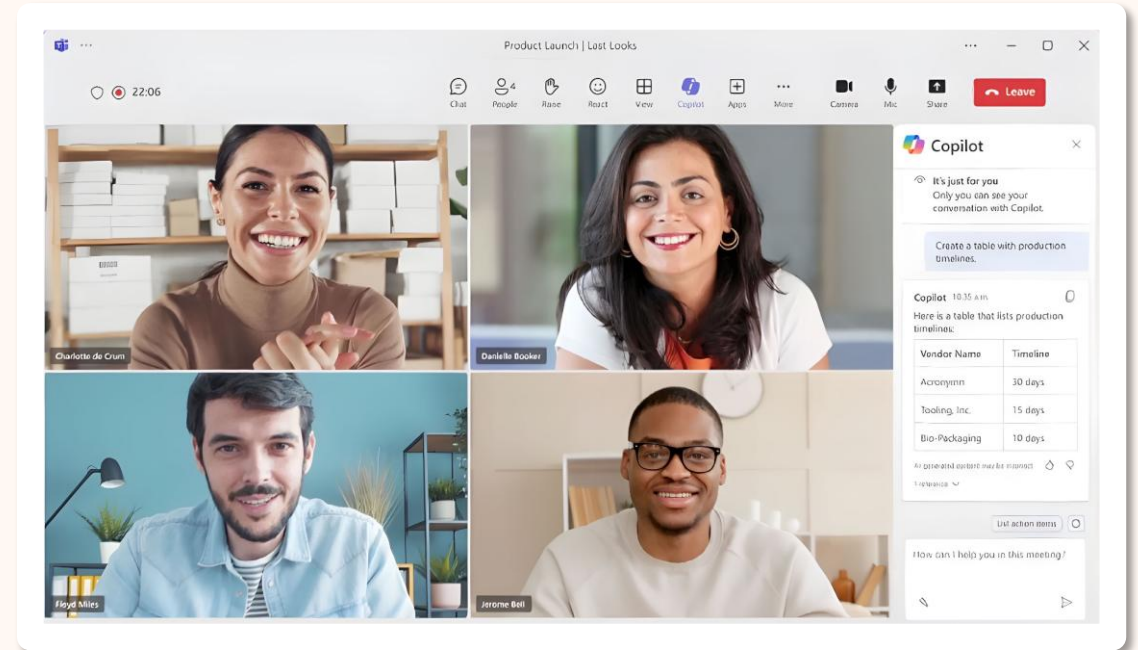
Copilot is grounded on your work data across calendars, emails, chats, documents and meetings to improve relevance and accuracy

Ability to customize

Add your own data and build your own custom agents with minimal coding experience required

Role-based solutions

Get tailored AI experiences across various roles like Sales, HR, and Marketing



Microsoft 365 Copilot helps you run your business more efficiently

Built-in security you can trust

Protect sensitive data

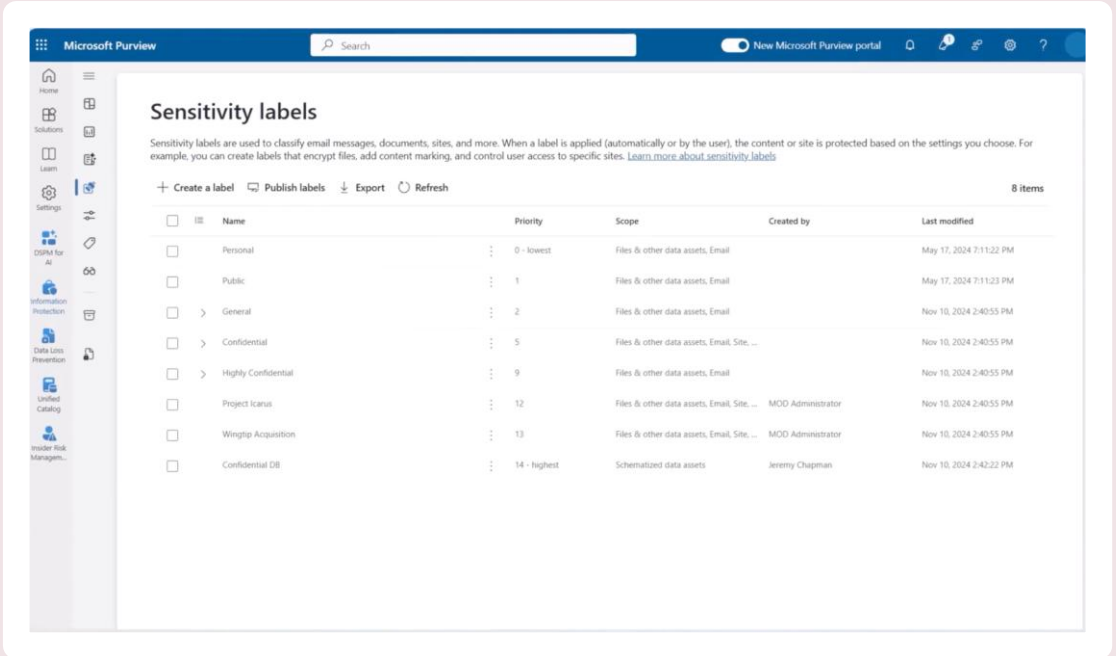
Copilot follows your existing security, privacy, and compliance settings

Allow your data to stay with you

Only surfaces what users have permission to access; never used to train foundation models

Adopt AI safely

Reduce oversharing and keep your business data governed and protected



Microsoft 365 Copilot is built on Microsoft's trusted cloud, so your business data stays safe and private

Get proactive
overviews of your day



Copilot Chat

Analyze
budget spend



Analyst

Prepare for
a customer meeting



Researcher

Create
strategy papers



Researcher

Create
interview guides



Researcher



Where Copilot wows

Never take meeting
notes again



Copilot in
Teams Meetings

Catch up on
missed meetings



Copilot in
Teams Meetings

Quickly
find content



Copilot Search

Be prepared
for every meeting



Copilot in
Teams Meetings

Quickly onboard onto
new roles or projects



Notebooks

Secure and govern Copilot and Agents use





Copilot + Agents



Microsoft Purview

Secure

Honors your existing permissions

Protects against data loss and insider risk

Assess oversharing risks and apply recommended corrections

Govern

Supports your lifecycle policies and audit requirements

Detect and investigation non-compliant and unethical usage

Guided assistance to remain compliant with AI regulations

A complete solution for enterprise-ready AI

Tools to secure and govern your Copilot + Agents use



Address oversharing concerns

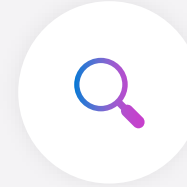
- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot + Agents from processing sensitive files

Secure



Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and interactions
- Dynamically apply security policies based on risky actions



Govern AI use to meet regulations & policies

- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Govern

Gain visibility into overshared content

Identify potentially overshared sites and files



Sites and files
with sensitive data



Data shared
broadly



Frequently
accessed data

Prioritize highest impact risks

Risk assessment

High
Risk

Medium
Risk

Low
Risk

Example

A site contains
documents
with credit
card numbers



Everyone in the
organization
can access the
site's content



175 unique users
accessed the site's
content last week



High Risk:
Prioritize
remediation

Remediate excessive permissions and apply oversharing protections



Prepare

Fix existing oversharing risks

- Restrict user and/or Copilot + Agent access to risky sites while remediating identified oversharing risks
- Act on policy suggestions to mitigate oversharing risks
- Prevent Copilot + Agents from processing certain sensitive files and from using them in responses if required
- Remove organization-wide site access as needed



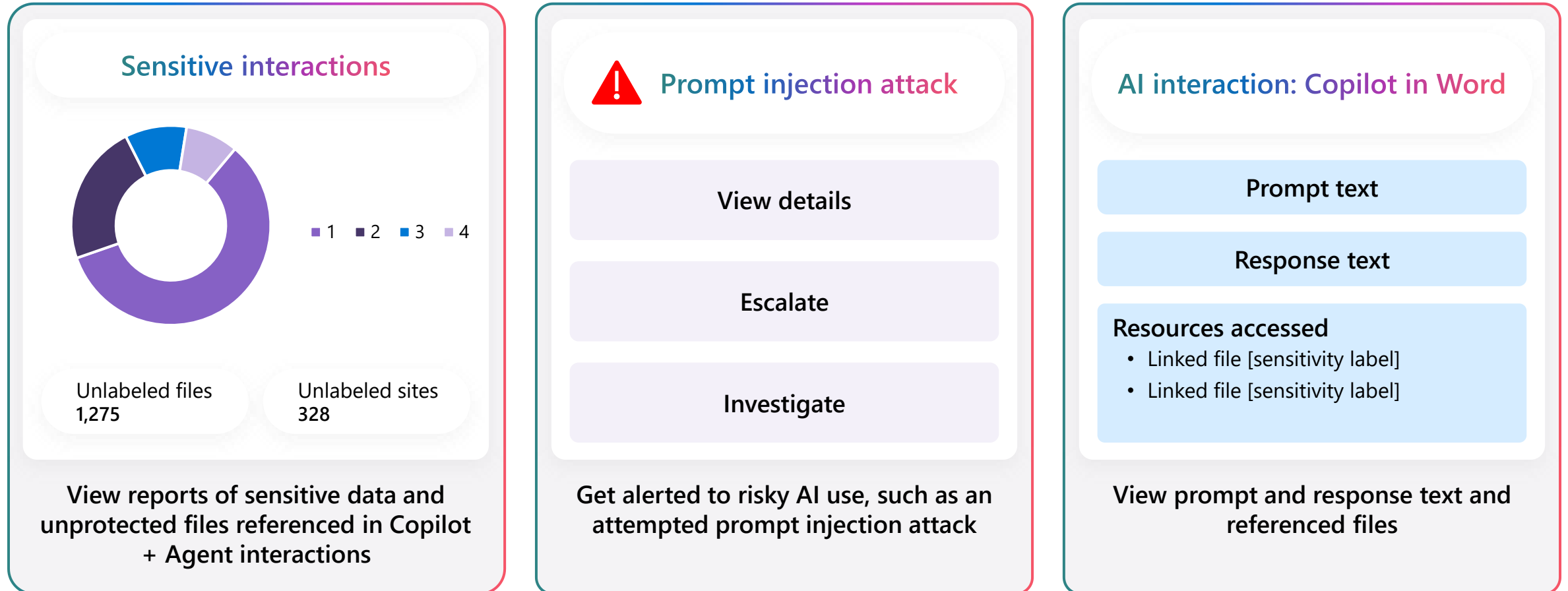
Operate

Monitor for new oversharing risks

- Get notifications when new oversharing occurs with options for remediation
- Further secure sensitive data through file level access controls and Data Loss Prevention policies
- Improve Copilot+ Agent responses by archiving or deleting unneeded content

For detailed guidance see: aka.ms/Copilot/OversharingBlueprintLearn

Get alerts and reports of risky behavior and AI use



Proactive alerts, real time reports, and visibility to possible risks

Protect sensitive files and Copilot + Agent interactions

Document contains **sensitive merger information**



Auto-label as **Mergers and acquisitions**

Detect when content contains sensitive data and auto-apply protections

Copilot, please summarize **Merger document.docx**



Here is the summary of your document...



Copilot, create a new document with this summary



Copilot response and Copilot created documents inherit sensitivity labels and protections

Admin creates policy to prevent Copilot access for files labeled as **Mergers and acquisitions**

Copilot, please summarize **Merger document.docx**



This document is currently protected, so I can't provide details about its content

Optionally, block Copilot access to sensitive files

Protect files even if they are moved or downloaded

Dynamically apply security policies based on risky actions

A user performs a series of risky actions

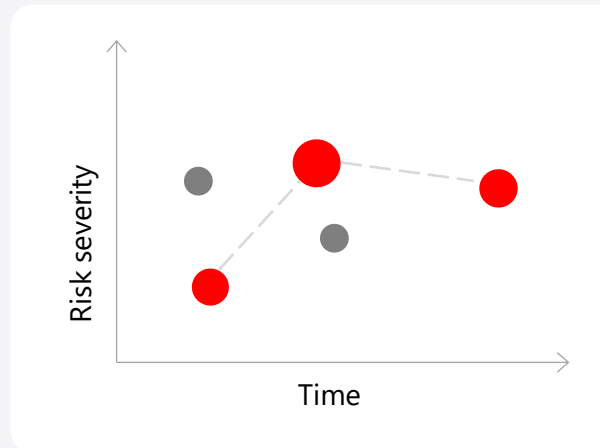


Actions deviate from usual pattern of behavior

- Has a series of risky interactions via Copilot or an Agent
- Downloads 100s of files containing sensitive data



Identifies the sequence of events as a risky pattern



Uses AI for risk analysis



Automatically adds the user to more strict security policies



Block actions until investigated

- Can't access content in sensitive sites
- Prevent sharing or downloading content
- Block from deleting content

Balance productivity and risk mitigation

Audit interactions, enforce lifecycle policies and legal holds

AI interaction: Copilot in Word Audit log entry

Date/time

User

Detailed event data

And more

Audit Copilot + Agent interactions to access detailed log information

Retain for
6 months
then delete

Copilot
interaction

Delete after
90 days

Meeting
recording
and transcript



Enforce retention and deletion policies
for interactions and meeting recordings
+ transcripts



 Legal hold

Include a user's Copilot and Agent
prompts and responses in a legal hold

Investigate for compliance and ethical violations



Copyright violation
Insider trading
Corporate sabotage
Regulatory collusion
And more

Receive an alert if a possible compliance or ethical violation occurs and start an investigation

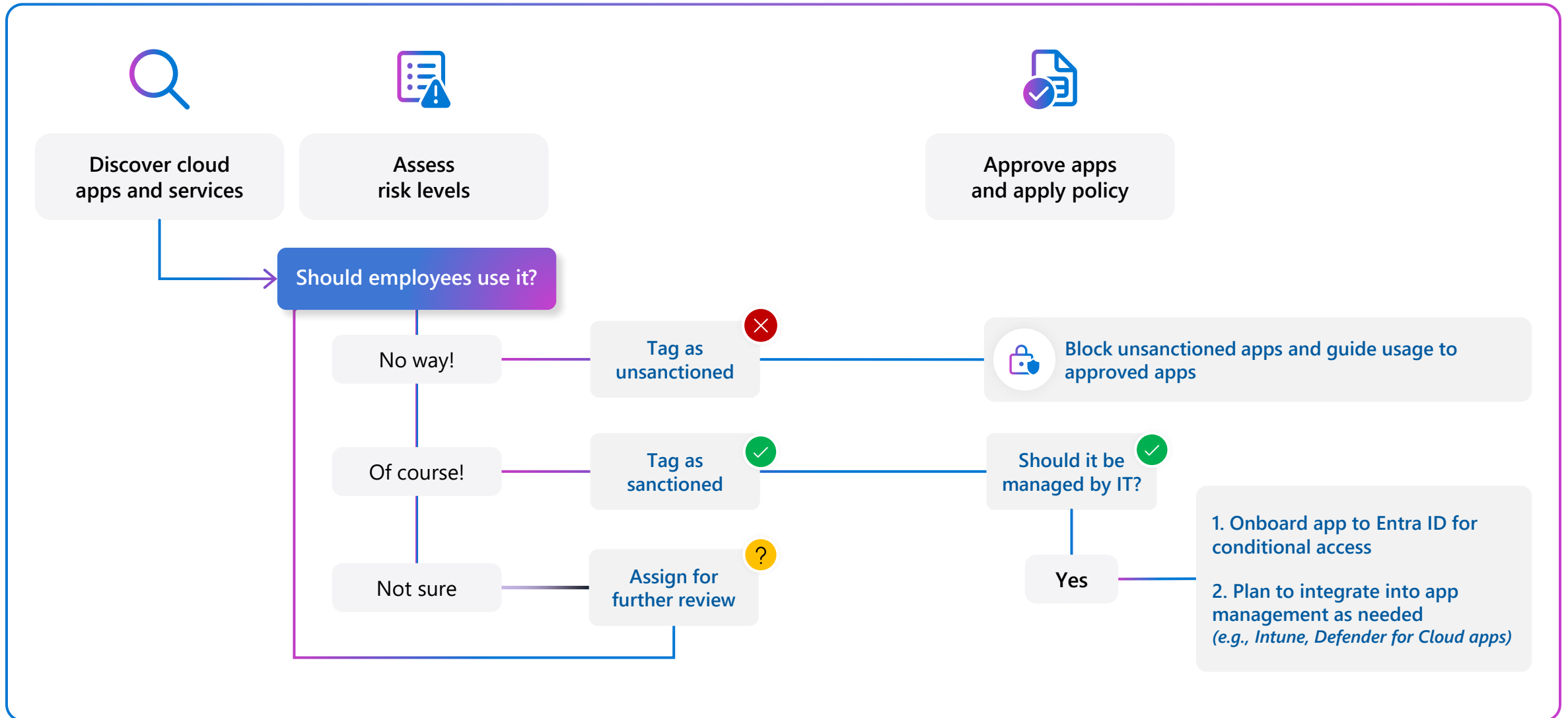


Perform an admin search for litigation or an investigation and include Copilot and Agent generated content

EU AI Act
NIST AI Risk Management Framework
ISO standards 42001 and 23894

Assess and track adherence to regulatory frameworks

Discover and manage apps in your environment



Thank You

