Microsoft

August Americas Partner Insider Call

Develop. Sell. Grow.

Agenda

| Topic	Speaker
Welcome, Polls & Insider Scoop	Helane Cohen Communications Strategy Lead, Microsoft Americas, GPS
Microsoft Partner Program Update FY25	Taylor McAlear Partner Program Manager of the Microsoft AI Cloud Partner Program
Copilot Licensing Deep Dive	Shubham Choudhary Partner Solutions GTM Lead - Modern Work (Copilot)
Restricted SharePoint Search M365	Marie Quigg Director, Americas Modern Work SMB GTM.

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Partner Insider Call!

[Microsoft Events - Americas
Partner Insider Call Sept Edition](#)
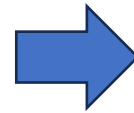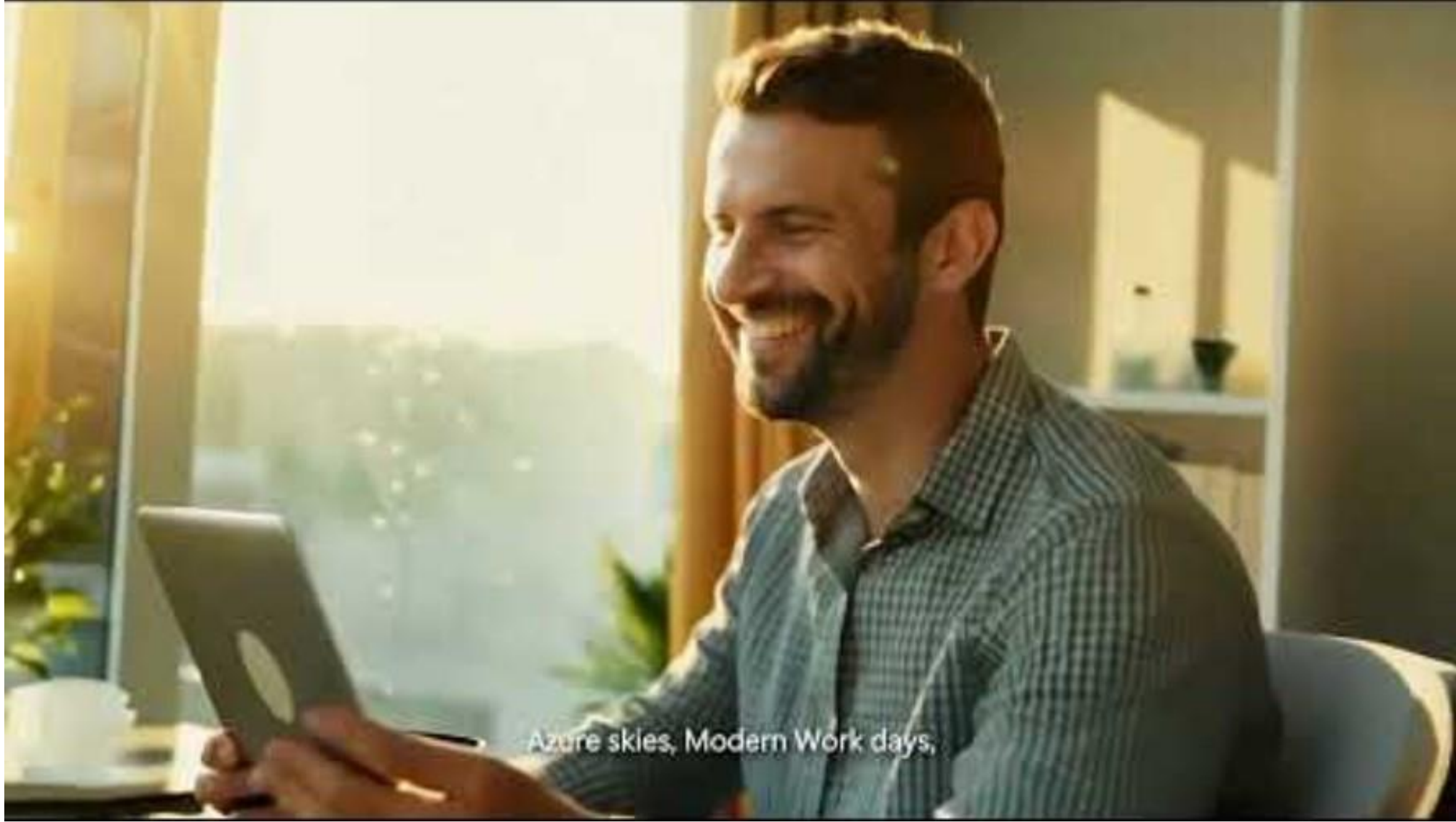
Mark Your Calendar:
September 4, 2024 @ 10:00 AM PT

Join the call for a Copilot demo and Co-op guidance

If you missed any calls before July 2024!!
[Americas Partner Insider CallLATAM Partner One (microsoft.com)](#)

Azure skies, Modern Work days,

NO SLIDES ATTACHED

New in FY25

NO SLIDES ATTACHED
AI Stories with Microsoft Partners

Tune in to **meaningful conversations** that combine the expertise of **Microsoft leaders** and the inspiring **stories of partners.**

SIMPLIFY

BUILD COMMUNITY

INSPIRE

NoSlidesAttached.com

Insight

REPLY VALOREM

‹epam›

BlueVoyant

LANTERN

GigXR

| Episode Guide	Release
Unlocking AI conversations with COO Heather Deggans (feat. Insight Canada)	Jul. 10
Moving faster everyday with Copilot for Microsoft 365 (feat. Valorem Reply)	Jul. 10
Focusing on what you do best with Copilots for Sales & Service (feat. EPAM)	Jul. 24
Responding to threats in minutes, not hours with Copilot for Security (feat. BlueVoyant)	Aug. 7
Fueling your data with Microsoft Fabric (feat. Lantern)	Aug. 21
Building or extending Copilots (feat. GigXR)	Sep. 4

Available wherever you get your podcasts

#MSFTAmericasPartner #AiStoroes

Public Announcement

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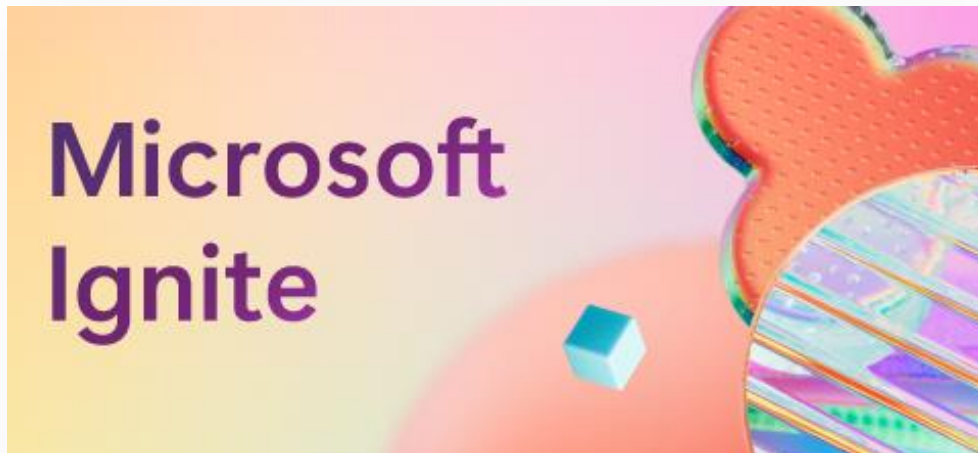
November 19-22 in Chicago, IL
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Public Announcement

Microsoft

Hybrid Cloud Partners

Welcome to the Microsoft Hybrid Cloud Partners podcast, where we explore the latest opportunities to enhance your profitability and prepare for the future with AI. Join our hosts, Fede Pacheco and Adam Burke, as they delve into inspiring stories from industry peers and innovative solutions for scaling your business profitably.

For exclusive resources and to become part of our community, visit dco.microsoft.com
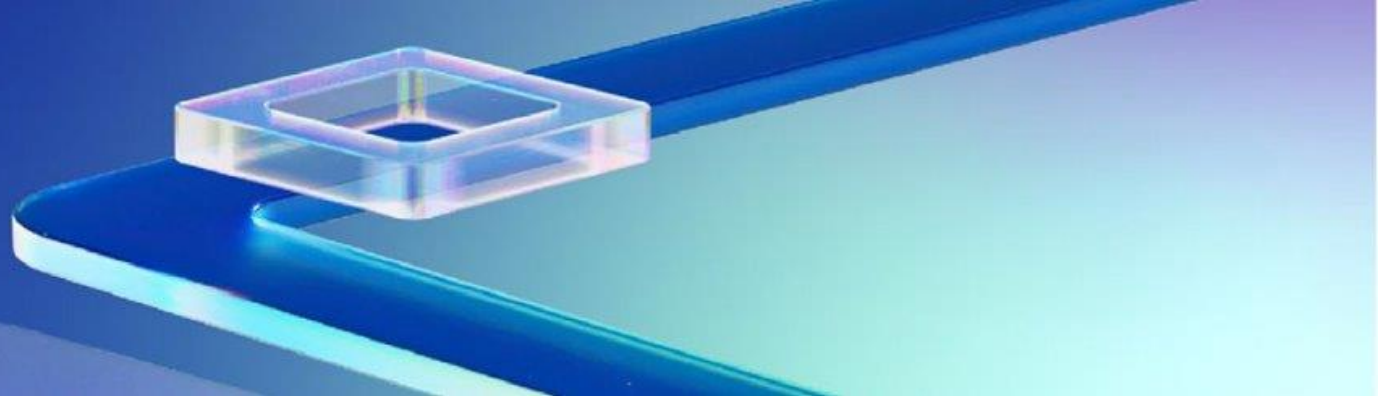
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Microsoft AI Create for ISVs
Making the art of the possible, practical

Innovative **virtual event series** designed to help ISV partners navigate the paradigm shift created by AI and accelerate their AI journey with Microsoft.

AI Create for ISVs | Business Track
August 19-22, 2024

- **Uncover the Business Value of AI:** Learn how to prioritize use cases for maximum impact.
- **Gain Insights from AI Pioneers:** Navigate business transformation with principles that drive success.
- **Master AI Marketing Strategies:** Discover best practices for bringing AI solutions to market, including buyer behavior and effective positioning.
- **Design Your AI Blueprint:** Integrate AI into your business strategy for robust transformation and growth.

Audience: Partner Marketing, Product Marketing & Management, Alliance Leads

Register Today | https://aka.ms/AICreate-BusinessTrack

AI Create for ISVs | Technical Track
September 9-12, 2024

- **Create AI plugins in Microsoft Copilot Studio:** Explore how to use AI Plugins to extend Microsoft Copilot or create custom Copilot extensions.
- **Integrating ISV Apps with Microsoft Fabric:** Learn how to seamlessly build products and services on top of Microsoft Fabric.
- **Design Your Own Copilot:** Learn how to create custom copilots with Azure AI, on your data.
- **Unleashing AI Superpowers: Task Automation with Agents:** Build Gen AI solutions and LLM workflows with multi-agent conversation frameworks.

Audience: Software Developers and Engineers, Product Development & Management

Register Today | https://aka.ms/AICreate-TechnicalTrack

Azure

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FY25 Americas Partner Communications Taxonomy

Our goal is to include a "Taxonomy Thread" in every communication we share including email, social post, presentations, etc. to help you, the Partner understand what the communication is about easily.
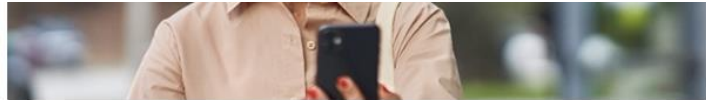
Example: #MSFTAmericasPartner #Services #Sales #Mktg #ProgramOfferUpdate #GrowSkills

Category	Description	Taxonomy							
Partner Type (Always)	Services & solutions the partner commercializes	AllPartners	ISV	CSP	Services	Telco	GSS	MSP	
Partner Role (1)	Partner role	AllRoles	Exec	Tech	SalesAndMktg	SupportAndOperations	ProfServices	Developer	AllianceMgr
Message Type (2)	Message type	PartnerProgram	Event	News	Deadline	ProgramOfferUpdate	WinFormula	BestPractice	DoingBizwMSFT	SuccessStory
Solution Area (3a)	Microsoft's solution area	CrossSolution	ModernWork	BizApps	Azure	Security	Surface		
Partner Stage (3b)	Stage of journey		NewtoMSFT	UnderstandBenefits	LearnSolutionAreas	GrowSkills	GoToMarket	GeneratePipeline	AccelerateDeals	GrowYourBiz
Microsoft Brand (4)	Regional taxonomy	MSFTAmericasPartner	LATAM	Canada					
Customer Segment	Customer segment		Enterprise	SMC	SMB				
Industry	Industry focus	AllIndustry	StateAndLocalGov	Retail	EDU	MFG	HealthcareAndLifeScience	FinancialSvcs	Energy
Additional	Additional taxonomy	QuestionforGroup							

Communications Taxonomy Examples

Americas Email

Social

Announcement / One Pagers (Top Corner)

Featured Content (Opening slide)

Americas Partner Blogs

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[Blog de socios de América | Microsoft](#)

[Blog de parceiro das Américas | Microsoft](#)

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Americas Partner Blogs

Date	Published Blog Link	Date	Published Blog Link
6/11	⭐ Top Stories: June 11, 2024 | Microsoft	7/22	Americas Partner Skilling News: July 2024 Issue | Microsoft
6/14	Americas Partner Enablement News: June 2024 Issue | Microsoft	7/23	⭐ Top Stories: July 23, 2024 | Microsoft
6/18	⭐ Top Stories: June 18, 2024 | Microsoft	7/30	Bulletproof partners with Senserva to innovate security solutions for Microsoft customers | Microsoft
6/25	⭐ Top Stories: June 25, 2024 | Microsoft	8/1	Hybrid Cloud Partners: Rackspace saves $40M in TCO | Microsoft
6/27	Congratulations to the 2024 Microsoft Americas Partner of the Year Awards winners and finalists | Microsoft	8/6	Top Stories: August 6, 2024 | Microsoft
7/11	Introducing the podcast – No Slides Attached: AI Stories with Microsoft Partners | Microsoft	8/8	FY25 Co-op: Start earning and spending your eligible co-op funds today | Microsoft

Also available in French, Spanish, and Portuguese from the blog menu: ⬛ Microsoft | **Americas Partner Blog** Americas Partner Insider Hub Connect on Social ⌄ Languages ⌄

Bringing the full power of Copilot to more people and businesses

Microsoft AI Cloud Partner Program

Taylor McAlear

Partner Program Manager, Microsoft AI Cloud Partner Program

Partner Audience: All
#Co-Sell #CrossSolution #GoToMarket

in Taylor McAlear | LinkedIn

Develop. Sell. Grow.

Microsoft

MAICPP | Benefits Update and Legacy Benefits End of Sale

Benefits offerings designed for you

Microsoft is evolving our benefits offerings to provide you with the tools and support you need to continue to lead the way in the shifting tech landscape. This includes adding more than 20 benefits across several Microsoft AI Cloud Partner Program offerings starting January 22, 2025. These benefits include Microsoft Copilot products, Microsoft GitHub, and Microsoft Defender for Endpoint.

As part of this evolution, we are giving advance notice that Microsoft will no longer sell Microsoft Action Pack, Microsoft Learning Action Pack, or legacy silver/gold benefits starting January 22, 2025. Instead, you can continue to access product, support, and advisory benefits through differentiated offerings that provide you with more choice when tapping into benefits that meet your business goals.

Explore how you can drive purpose-built growth with offerings like partner benefits packages, Solutions Partner designations for solutions areas, Solutions Partner* with certified software** designations, and ISV Success.

Partners with an eligible active legacy silver/gold purchase status as of January 21, 2025, will be eligible for the remainder of the FY25 CSP incentive term (January 22, 2025, to September 30, 2025).

Timetable of events

- **August 6, 2024: Advance notice of transition plan for legacy benefits and details on the benefits additions to current benefits offerings*****

    - Microsoft will release a [blog post](#) and supporting [FAQ](#) that details the transition of the legacy benefits (Microsoft Action Pack, Learning Action Pack, and legacy silver/gold benefits) and the benefits being added to the partner benefits packages, Solutions Partner designations, and specializations.

- **January 21, 2025: Last day to purchase/renew legacy benefits offerings**

    - On January 22, 2025, partners with Microsoft Action Pack, Learning Action Pack, or legacy silver/gold benefits will no longer be able to purchase or renew these offerings.
    - Benefits renewed on or before January 21, 2025, will be active for 12 months after their renewal date. These benefits will no longer be available for purchase or renewal after this time.

- **January 22, 2025: General availability of new benefits in select offerings*****

    - On January 22, 2025, partners will gain access to the added benefits (including Microsoft Copilot for select offerings) to applicable partner benefits packages, Solutions Partner designations, and specializations.

For full details on the evolution of benefits—including the new benefits being added to offerings and the transition of legacy benefits—please go to the [blog](#) and [FAQ](#).
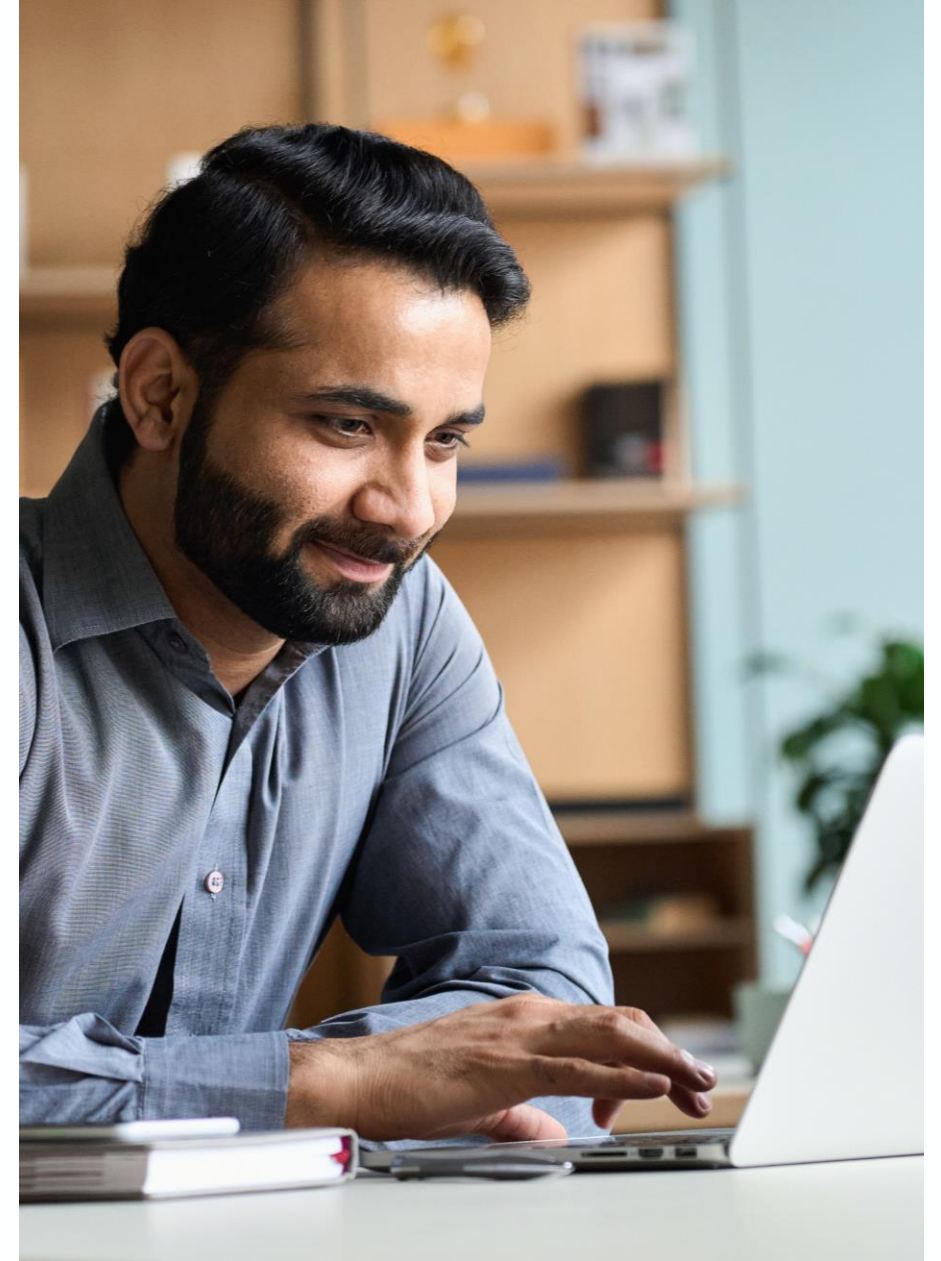
Highlighted New Benefits for Partners

SKU Additions	Explore Partner Launch Benefits	Build Partner Success Core Benefits	Strengthen Partner Success Expanded Benefits	Differentiate Solution Partner Designation	Depth Differentiation Specializations
Copilot for M365			2 seats	5 seats *(MW partners only)*	← +5 to 15 seats *(MW partners only)*
Copilot for Sales			2 seats	5 seats *(BizApps partners only)*	← +5 to 15 seats *(BizApps partners only)*
Copilot for Finance			2 seats	5 seats *(BizApps partners only)*	← +5 to 15 seats *(BizApps partners only)*
Copilot for Service			2 seats	5 seats *(BizApps partners only)*	← +5 to 15 seats *(BizApps partners only)*
Copilot for Security					$5k to 15k credit PAYGO *(Security partners only)*
GitHub Copilot					$4.6k to 23.4k credit PAYGO *(Azure partners only)*
Entra ID P2	5 seats	15 seats	35 seats	100-200 seats	← +30 to 150 seats
Defender for Endpoint P2	5 seats	15 seats	35 seats	100-200 seats	← +30 to 150 seats
GitHub Enterprise					$2.5k to 12.6k credit PAYGO *(Azure partners only)*
Benefit Package Cost	$345 USD	$895 USD	$3995 USD	$4730 USD	← + no additional fee

*Seats and credits within the offers listed on this page are additive

Partners with Action Pack

For partners with an existing Action Pack or Learning Action Pack, we recommend the Partner Success Core Benefits and Partner Success Expanded Benefits packages, depending on the size and needs of your organization. These benefits are designed to enhance your cloud and AI capabilities and help you grow your business. Purchase a package now and, starting January 22, 2025, gain access to key product licenses which may include Microsoft Copilot products, Microsoft GitHub, or Microsoft Defender for Endpoint.

In addition to partner benefits packages, partners who develop software are encouraged to explore ISV Success, which provides additional benefits designed to expand development capabilities and accelerate your time to market.

Partners may purchase or renew Action Packs until January 22, 2025, and keep those benefits until they expire one year later. Note that, while legacy benefits offerings will not provide access to updated benefits, our supported offerings empower you to do more, with more than 20 products that represent the latest innovations.

For more specific details, including steps learning partners should take as a result of these changes, review the FAQ.

Partners with legacy silver benefits

For partners with legacy silver benefits, we recommend Partner Success Expanded Benefits, a comprehensive package designed for organizations that are ready to expand even further and deepen their partnership with Microsoft. Purchase a package now and, starting January 22, 2025, gain access to key product licenses which may include Microsoft Copilot products, Microsoft GitHub, or Microsoft Defender for Endpoint.

In addition to partner benefits packages, partners who develop software are encouraged to explore ISV Success, which provides additional benefits designed to expand your development capabilities and accelerate your time to market.

Depending on your business growth and goals, you may also choose to pursue a Solutions Partner designation. Attaining a designation provides you with a portfolio of tailored benefits and helps you stand out to customers in the marketplace.

You may renew your legacy silver benefits until January 22, 2025. Note that, while legacy benefits offerings will not provide access to updated benefits, our supported offerings empower you to do more, with more than 20 products that represent the latest innovations.

Partners with an eligible active legacy silver/gold purchase status as of January 21, 2025 will be eligible for the remaining duration of the FY25 CSP incentive term (January 22, 2025-September 30, 2025).

Partners with legacy gold benefits

Partners with legacy gold benefits can access purpose-built benefits and stand out in the marketplace with a Solutions Partner designation. Solutions Partner designations can help distinguish your organization's broad technical capabilities and experience delivering customer success, and you can [work toward attaining one](#) today. When you become a Solutions Partner for solution areas, you'll receive a portfolio of benefits specific to your solution area, a customer-facing badge to display in your marketing assets, and resources to help promote your record of customer success.

To supplement your Solutions Partner designation benefits—or to access the benefits you need while you work to qualify for a designation—you can also purchase one or more [partner benefits packages](#). For partners with legacy gold benefits, we recommend [Partner Success Expanded Benefits](#), a comprehensive package designed for organizations that are ready to expand even further and deepen their partnership with Microsoft. Purchase a package now and, starting January 22, 2025, gain access to key product licenses which may include Microsoft Copilot products, Microsoft GitHub, or Microsoft Defender for Endpoint.
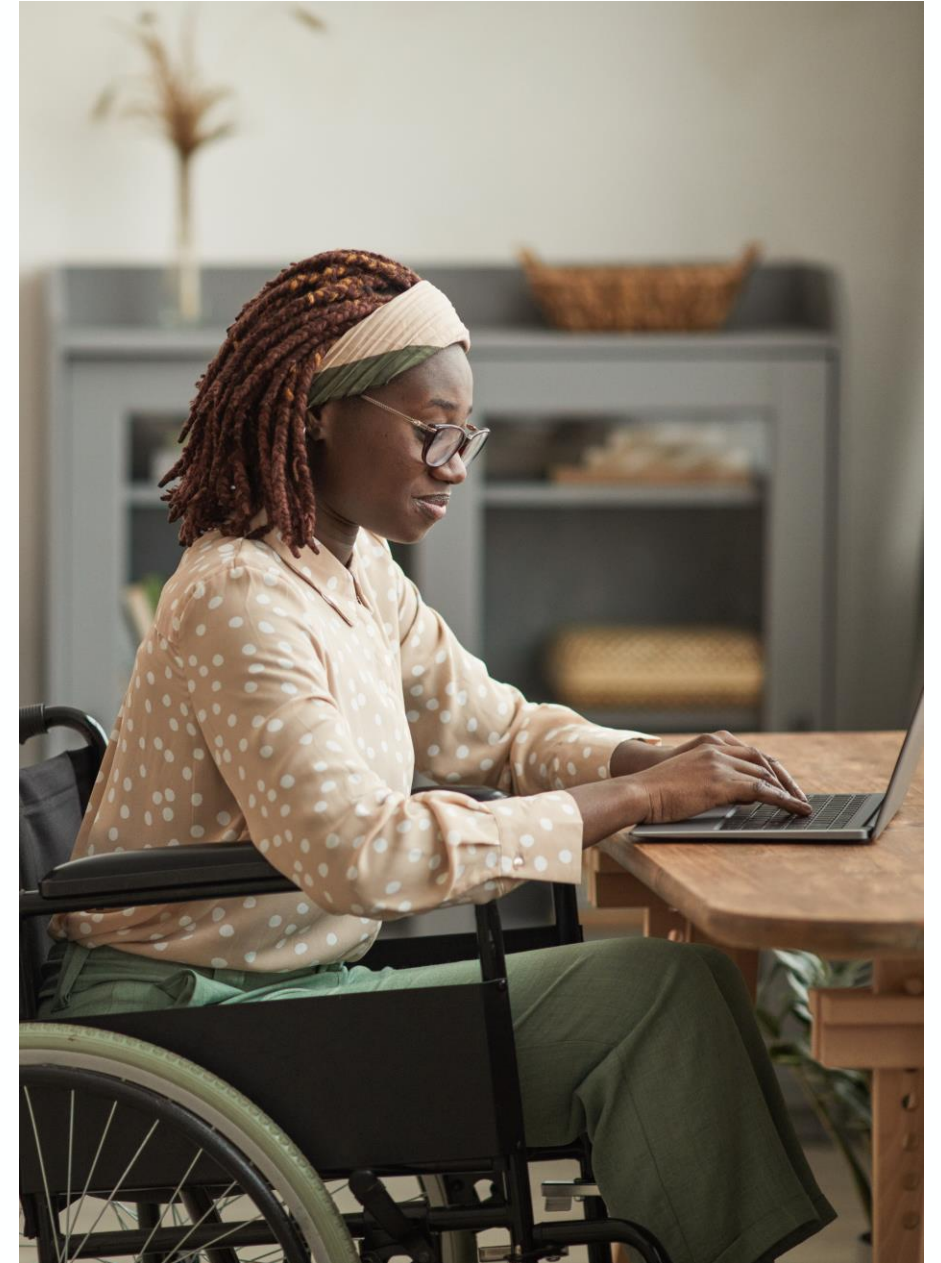
Partners with legacy gold benefits (continued)

Partners who develop software can attain [Solutions Partner with certified software designations](#) to validate the quality, reliability, and interoperability of their individual software solutions. When you attain a certified software designation, you'll receive benefits designed for developers and a badge that showcases your solution to customers.

In addition to purchasing packages and attaining designations, partners who develop software are also encouraged to explore [ISV Success](#), which provides benefits designed to expand your development capabilities and accelerate your time to market. You can activate all three of these offerings—ISV Success, certified software designations, and partner benefits packages—if that's the right choice for your business.

You may renew your legacy gold benefits until January 22, 2025, and keep those benefits until they expire one year later. Note that, while legacy benefits offerings will not provide access to updated benefits, our supported offerings empower you to do more, with more than 20 products that represent the latest innovations.

Partners with an eligible active legacy silver/gold purchase status as of January 21, 2025, will be eligible for the remainder of the FY25 CSP incentive term (January 22, 2025, to September 30, 2025).

The impact is real

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

100

10

1

0

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

+AI

1000 1100 1200 1300 1400 1500 1600 1700 1800 1900 2000

GDP growth multiplier per century

0.4x   1x   1x   2x   4x   20x
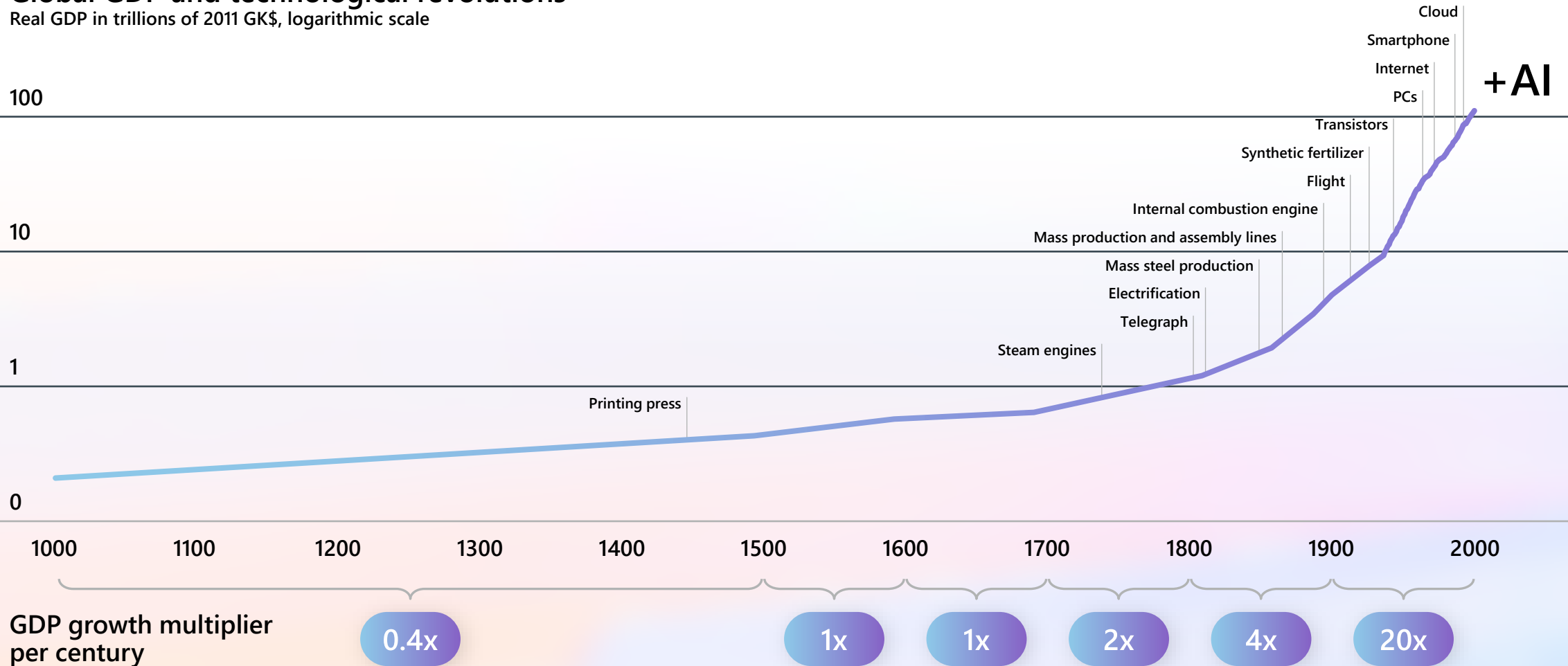
Microsoft's 3 types of GenAI Offerings

Use case

Buy: M365 Copilot
Internal use
Fits with a MSFT delivered Copilot
Fully managed

Configure: Copilot Studio
Internal use
Expand functionality of existing Copilot
Configure grounding and functionality

Build: Azure Open AI & GitHub Copilot
Internal + external use
Bespoke application
Full Control
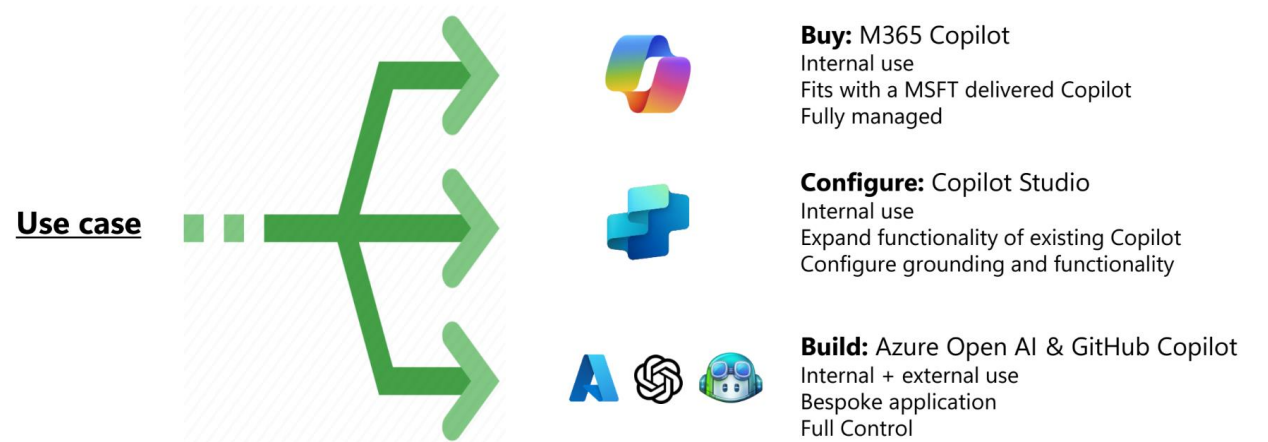
We differentiate between 3 types of GenAI Offerings

Built-in
- Search and Q&A
- Better customer engagement and support
- Create and tailor reports in seconds
- Better email management and meeting preparation
- Better meeting management
- Better reading and writing assistance

AI-Builder
- Enriching self-service with conversational AI
- Automate answering questions, summarizing documents, and more.
- Intuitive low-code development for Everyone

AI-Models
- Azure OpenAI Language Models
- Model Catalog / Prompt flow

Buy — Copilot
Configure — Power Platform + AI Builder
Build — LLMs to a variety of use cases

IMPACT
COMPLEXITY

Microsoft Copilot Portfolio
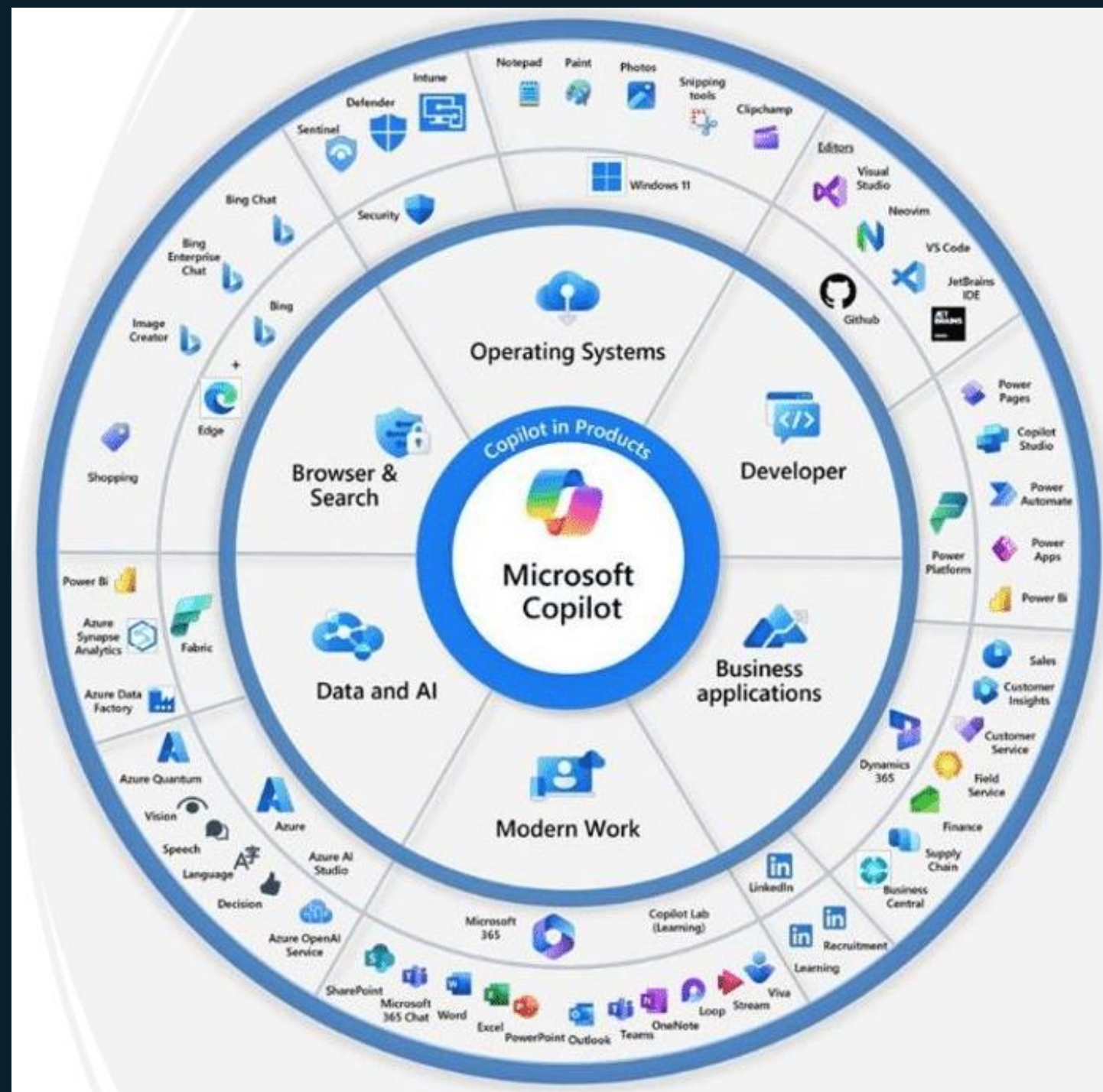
Copilot (Bing Chat)

interaction with web content

[Copilots for Web](#)

Copilot for M365

Word, Outlook, Excel, PowerPoint, Teams

[Copilot for Productivity](#)

Copilot in Windows

interaction with OS, apps, and files

[Copilot for Everyday](#)

Designer

digital creations

[Copilot for Creativity](#)

Azure

Azure platform operations and optimizations

[Copilot for Cloud](#)

Fabric Copilot

data analytics and business intelligence

[Copilots for Analytics](#)

Power BI

Unlock your insights

[Copilot for Dashboard](#)

Security Copilot

threat detection, identification, and mitigation

[Copilot for Security](#)

Dynamics Copilot

sales and customer support

[Copilots for Business](#)

GitHub Copilot

code development

[Copilot for Development](#)

Power Platform

creation of apps, and workflows

[Copilot for Low/No Code Development](#)

Copilot Studio

creation of your agents

[Extend your Copilot for M365](#)

Custom Copilot

Create your own copilot

[AI Platform](#)

Copilots and Conversational AI

Microsoft 365
Conversational Experiences for M365

Biz Apps & Power Copilots
Conversational Experiences for D365 and Power products
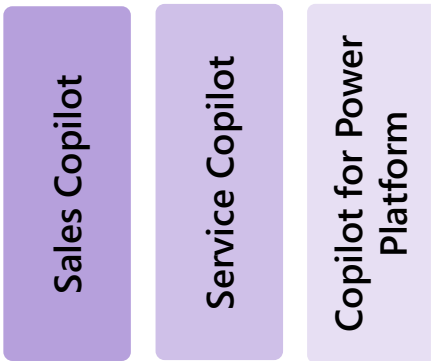
Other Microsoft Copilots
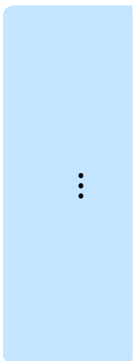
Custom Copilots
Custom copilots and bots for enterprises and third parties

Copilot for Microsoft 365

+

Sales Copilot

Service Copilot

Copilot for Power Platform

+

⋮

+

Custom Enterprise Copilots
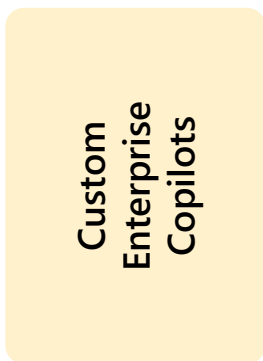
Microsoft Copilot Studio
Extend and customize 1st party copilots | **Build custom** Copilots

| Bot Framework / SDK | Bot Service Channels | Azure AI Studio | Azure Cognitive Services | Power Platform Connectors | AI Builder |

	For Individuals		For Organizations	
	Copilot	**Copilot Pro**	**Copilot**	**Copilot for Microsoft 365**
	Free	**$20**	**Free**	**$30**
Foundational Capabilities	●	●	●	●
Web Grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Priority Model Access		●		●
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote		●		●
Copilot in Teams				●
Microsoft Graph Grounding				●
Enterprise-Grade Data Protection				●
Customization		Copilot GPT Builder		Copilot Studio

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.

Expand your opportunity

The most complete solutions for productivity workers, sales organizations, and service agents.

New to Copilot for Microsoft 365

Copilot for Microsoft 365
$30 per user/month
or
Copilot for Sales or **Copilot for Service**
$50 per user/month

Existing Copilot for Microsoft 365

Upsell to
Copilot for Sales or Copilot for Service
$20 per user/month

Microsoft Copilot

	Copilot	Copilot for Microsoft 365	Copilot for Sales	Copilot for Service
	Free	$30	$50	$50
Foundational Capabilities	●	●	●	●
Web grounding	●	●	●	●
Commercial Data Protection	●	●	●	●
Enterprise-Grade Data Protection		●	●	●
Graph Grounding		●	●	●
Microsoft 365 Apps		●	●	●
Copilot Studio		●	●	●
Role Specific capabilities			●	●

What are the eligibility prerequisites for Copilot for Microsoft 365?

To be eligible, enterprise customers must have a license for Microsoft 365 E3, E5, F1, F3, or Office 365 E1, E3, or E5.

Business customers must be licensed for Microsoft 365 Business Basic, Business Standard, or Business Premium to be eligible.

Education customers must have a license for Microsoft 365 A3 or Microsoft 365 A5 for faculty and should contact their Microsoft sales representative to purchase.

Consumers are not currently eligible to purchase Copilot for Microsoft 365.

Teams-integrated features require a Teams license.

https://www.microsoft.com/en-in/microsoft-365/business/copilot-for-microsoft-365

https://www.microsoft.com/en-us/microsoft-365/enterprise/copilot-for-microsoft-365#FAQ

Microsoft Copilot Studio

Plans	RECOMMENDED MOTION **Microsoft Copilot Studio** $200 per tenant/month	**Copilot Studio Use rights included in**	
		Copilot Studio in Copilot for M365* Use rights with Copilot for M365 licenses ($30 per user)	**Copilot Studio for Teams (was PVA for Teams)** Use rights with select M/O365 licenses
The output you create is...	Your own standalone copilot	Plugins for Copilot for Microsoft 365	Teams chatbot
Available channels to publish your copilot/plugins	B2C - External channels (e.g., External Web, FB, WhatsApp etc.) B2E - Internal Channels (e.g., Internal Web, Teams, etc.)	Copilot for Microsoft 365 only	Teams channel/chat only
Messages/tenant/month	25,000 Messages [1]	Unlimited	Unlimited[2] (Teams only)
Gen AI: AI-enabled conversations	● [3, 4]	●	
Create plugins to customize Microsoft Copilot		●	
Build your own standalone copilot	●		
Create and iterate on copilot topics using expanded natural language capabilities[5]	●		●
Power Automate for Copilot Studio cloud flows (Automated, instant, and scheduled flows) within the context of Copilot Studio creations	●	●	
<u>Standard</u> Power Platform connectors	●	●	●
<u>Premium</u> and <u>Custom</u> Power Platform connectors	●	●	
On premises and cloud services data transfer for Power Platform Connectors	●	●	
Dataverse for Copilot Studio	● [6]	● [6]	Dataverse for Teams
Managed Environments	● [7]		

[1] Microsoft Copilot Studio messages are the common currency across Microsoft Copilot Studio capabilities. A billed message is a request or message sent to the copilot triggering an action and/or response. Examples: a) User asks copilot when a store is open, and copilot replies with store hours = 1 billed message b) Copilot proactively greets the user on a website = 1 billed message, c) User asks copilot for store hours for the upcoming holiday, copilot responds using GenAnswers = 2 billed messages

[2] Messages in Microsoft Copilot for Teams are unlimited per tenant/month. A service limit of 10 sessions per user/24 hours across all bots in a tenant will be enforced. See <u>Quotas, limits, and configuration values</u> for more information.

[3] Message Consumption rates: 1) Regular (Non-generative AI) = 1 message, 2) Generative AI (Gen AI) answers over your data = 2

messages. Customers can use a mix of regular and Generative AI messages.

[4] More information on Generative Answers capability can be found <u>here</u>.

[5] See <u>Create with Copilot</u>.

[6] Dataverse for Microsoft Copilot Studio default capacities: Dataverse Database 5 GB, Dataverse File 20 GB, Dataverse Log 2 GB

[7] When <u>Managed Environments</u> is activated in a specific environment, all Power Apps, Power Automate, Microsoft Copilot Studio, and Power Pages usage in that environment requires full licenses.

*Currently in Public Preview

All pricing subject to change, please consult price list for actual pricing.

Scenarios examples from different license type

| Plans | Microsoft Copilot Studio | Copilot Studio Use rights included in | |
		Copilot Studio in Copilot for M365	Copilot Studio for Teams
Price	Capacity Pack**$200** per tenant/ month for 25k messages	Included in **$30** M365 Copilot SKU per user per month	Light seeded license with select M/O365 license
Pre-reqs	No	ME3/ME5	Select M/O365
Output	Your own Copilot	Plugins for Microsoft Copilot	Teams Chatbot
Example Scenarios	**Host your own copilot on any channel for employees:** • HR Copilot on SharePoint to help with onboarding, benefits etc. • IT Services copilot on custom IT employee website. **Customer facing copilots on web, social media etc.:** • Account Management • Order management • Find your product • Manage bookings	**Only consumed via M365 Copilot** **Horizontal Workflows backed with automation:** • Expense management • Vacation requests • Reset my password • Specifically designed responses for - Legal requests; HR sensitive topics; Finance/compliance requests	**Simple chatbot published to a Teams Channel or Chat.** With standard connectors. Examples: • Chatbot that can call a SharePoint table and retrieve a response (Standard connector) • Ask the chatbot to send an email and a meeting request (Standard connector)

Common Ask Questions

Q: Does Microsoft Copilot Studio work with other copilots than Copilot for Microsoft 365?

A: Yes, Copilot Studio also works to extend Copilot for Power Platform such as Power Apps Copilot and Power Pages Copilot enabling you to provide curated topics that the Copilot can call on, all designed by you. In addition, the plugins created are published to the Dataverse registry which allows Copilot for Dynamics 365 to be able to use it.

Q: Is the Microsoft Copilot Studio User License also required for each user authoring bots?

A: Yes, the Microsoft Copilot Studio User License will be required for users to access the Microsoft Copilot Studio portal to author bots. Available at no additional cost, the license can be assigned to users by the administrator in the admin portal.

• List Price (USD): $0 per user/month

• Entitlements: Licensed by user, the Microsoft Copilot Studio User License is required for each user authoring bots. It is recommended to acquire the tenant license and user licenses as part of a single transaction to simplify onboarding to Microsoft Copilot Studio.

This is our moment

Lead AI transformation when you empower your customers to

Drive growth

Manage costs

Deliver value

Restricted SharePoint Search
Marie Quigg

Director, Americas Modern Work SMB GTM

Partner Audience: All
#ModernWork #CopilotReadiness #GoToMarket

Security and compliance challenges with use of GenAI

1

Data oversharing

Users might access sensitive data through AI apps without proper authorization

Project x
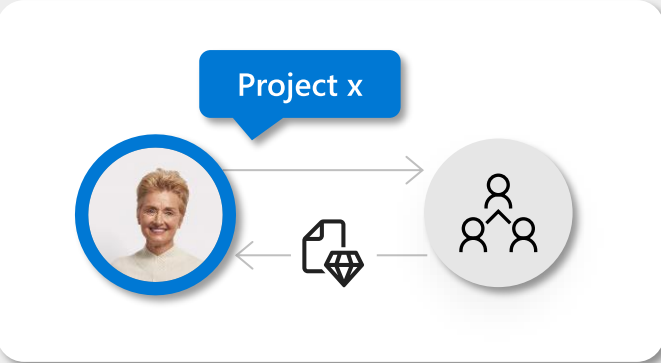
2

Data leak

Users may inadvertently leak sensitive data to AI apps
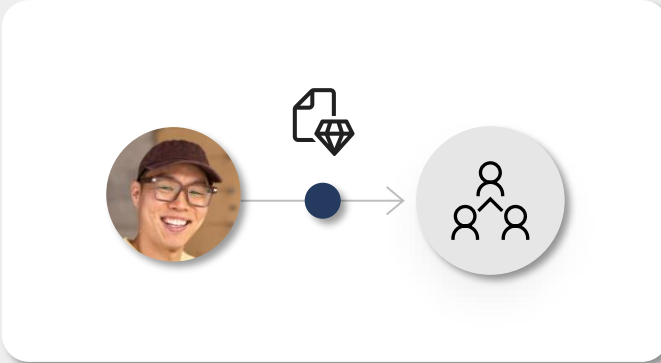
3

Non-compliance usage

Users might use AI apps to generate unethical or other high-risk content

COMPLIANT
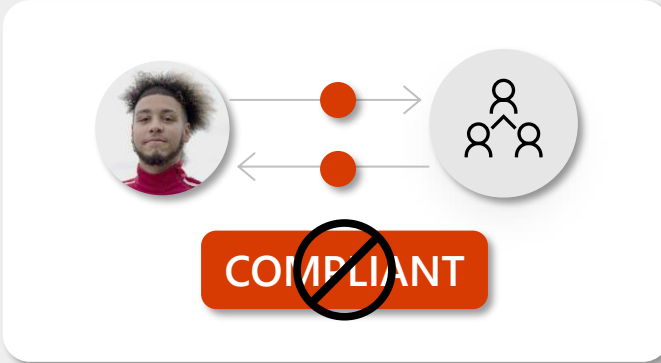
Restricted SharePoint Search with Microsoft 365 for Business

Copilot for Microsoft 365 offers **Restricted SharePoint Search (RSS),** which can be enabled or disabled when implementing data security to limit Copilot and organization-wide search across SharePoint. For enhanced data security with Copilot, consider upgrading to Business Premium.

1

Copilot for Microsoft 365 Optimization Assessment

Determine path
(26 questions; 30 minutes)

2a

Ready to deploy?

YES→

NO

2b

Enable Restricted SharePoint Search

Available with **Business Basic, Business Standard** or **Business Premium**

3

Deploy Copilot for Microsoft 365

4

OPTIMIZE FURTHER

Comprehensive security

Business Premium

Restrict data oversharing and data leaks with manual labeling and policy implementation

Data protection add-ons

Prevent data oversharing, data leaks, and detect non-compliant usage at scale with auto labeling and policies

Available add-ons:
- Information Protection and Governance
- eDiscovery and Audit
- Insider Risk Management

5

Once data security features are deployed, disable Restricted SharePoint Search for optimal Copilot experience

Learn more about Restricted SharePoint Search here

Restricted SharePoint Search

Now generally available

This is intended as a temporary solution to give you time to review and audit site permissions while implementing robust data security solutions to content on SharePoint sites.

- **Restricted SharePoint Search** is designed for organizations particularly concerned about unintentional oversharing of content.

- When enabled, Copilot experiences and organization-wide search are limited to a select set of SharePoint sites, as well as the individual user's files and content.

PRE-REQUISITES

- Available to tenants with Copilot for Microsoft 365 subscriptions.
- Activation requires Global/Tenant/SharePoint admin rights.

IMPACT

Restricted SharePoint Search disables organization-wide search, while allowing you to select sites that you trust. This means users in your organization can use Copilot to reason over:

- An allowed list of curated SharePoint sites set up by admins (up to 100 SharePoint sites), honoring existing permissions on a site.
- Users' OneDrive, chats they are part of, emails they send and receive, calendars they have access to, etc.
- Files that are shared with and accessed by users.
- Content from users' frequently visited sites.

Access this article for more info

Challenge

Accidental exposure of sensitive data to AI systems

A financial firm is deploying Copilot for Microsoft 365 to boost productivity and they want to **ensure sensitive data is not inadvertently exposed to AI**, to prevent data breaches and compliance issues.

File share 1:
Confidential information

Credit card #   Employee ID

File share 2:
Public marketing content

Plans and pricing   Solution benefits
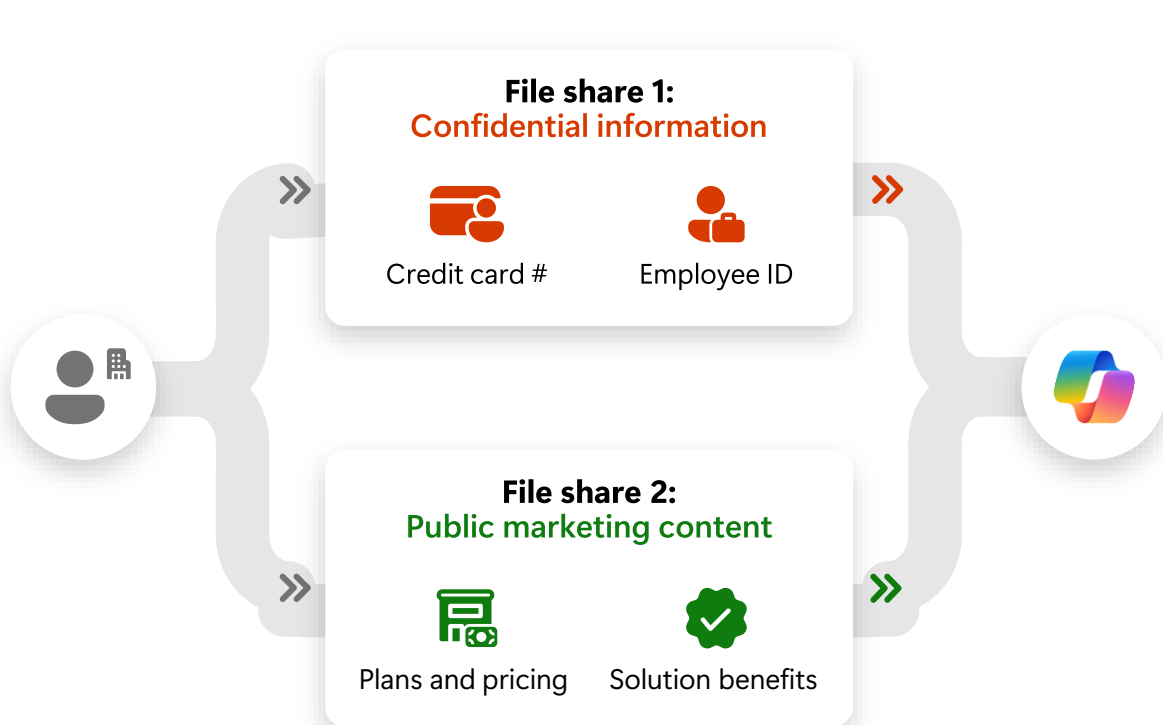
Solution

Protect sensitive files shares with Microsoft 365 Business Basic or Business Standard + Copilot for Microsoft 365

Microsoft 365 for Business enhance security by **restricting access to confidential sites with Restricted SharePoint Search, enabling audit logs for Copilot interactions, and enforcing multi-factor authentication (MFA) with Copilot.** Available with M365 Business Basic, Business Standard and Business Premium.

File share 1:
Confidential information

Credit card #   Employee ID

RESTRICTED

File share 2:
Public marketing content

Plans and pricing   Solution benefits
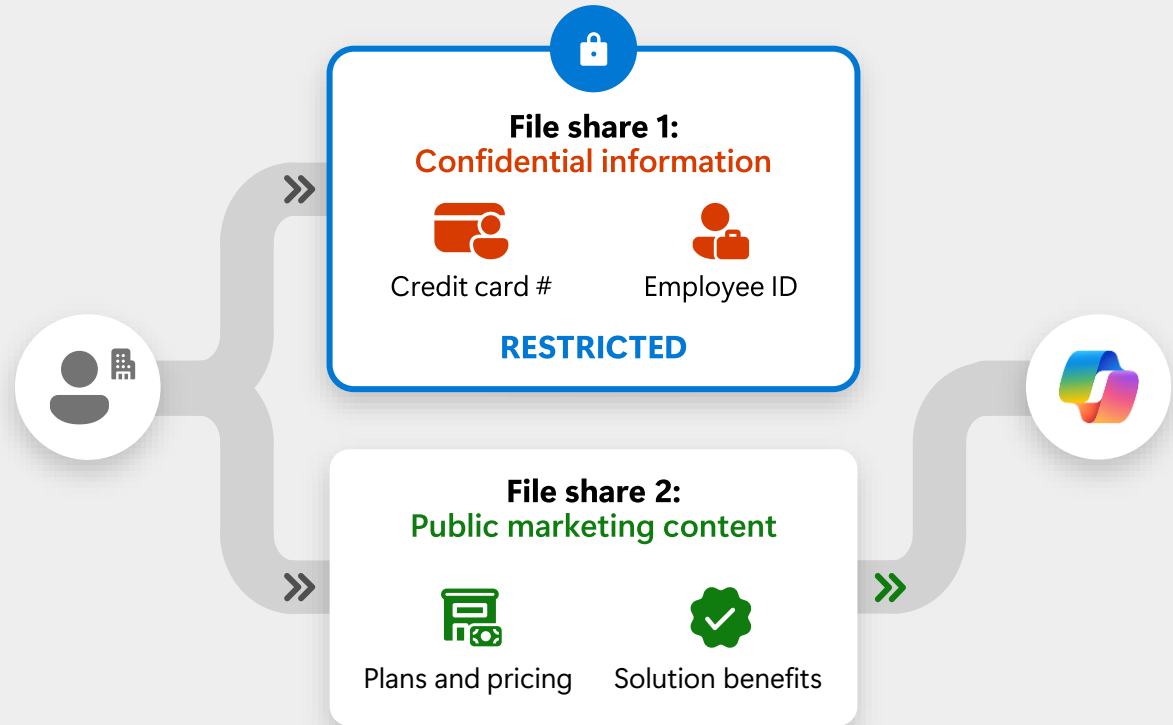
Restricted SharePoint Search | Now generally available

Maintain momentum with Copilot deployment while implementing robust data security solutions

1 Restricted SharePoint Search **gives you time to review and audit site permissions**. It is designed to help you maintain momentum with your Copilot deployment while you implement robust data security solutions

2 Restricted SharePoint Search allows you to **disable organization-wide search**, and to **restrict** both search Copilot experiences to a **curated set of SharePoint sites of your choice** *(with up to 100 SharePoint Sites)*

3 Restricted SharePoint Search is a **feature within Copilot for Microsoft 365** (no additional cost/ license) and is **off by default with the allowed list is empty**

4 There are **two options available for admins to define the list of allowed sites**: a CSV file or the SitesList switch. **As an organization optimizes both site and file access, they can increase organization-wide information results at their own pace**

5 There is a message at the top of the screen with the following text:
"Your organization's admin has restricted Copilot from accessing certain SharePoint sites."

Learn more & discuss with customers

- Checkout the Restricted SharePoint Search [blog](#) and view the [Microsoft Learn article](#)

- Watch the [Microsoft Mechanics YouTube video](#) to get a step-by-step demo and FAQ

- Download the [Securing Copilot for Microsoft 365 in SMB](#) deck on the [CSP Copilot for Microsoft 365](#) to address customer security concerns and explain how Restricted SharePoint Search can help as an interim solution

- Walk customers through a successful pilot using the **new!** four steps to adoption [interactive flipbook guide](#)

Become a Copilot for Microsoft 365 **super user yourself!**

Join the [partner prompt-a-thon](#) on August 15th

Register now! CSP Copilot and Microsoft 365 Activation Event

Reinvent your Cloud Solution Provider program (CSP) growth in the AI era with Copilot and Microsoft 365!

DETAILS	
SAVE YOUR SEAT	Register today by selecting your preferred date and time zone below to reserve your spot and to get notified when session content is available on demand. August 27th •AM option •PM option September 5th •AM option •PM option
TOPIC DETAILS	Discover: •New promotional offers across Copilot for Microsoft 365, Microsoft 365 E SKUs, and Dynamics 365 Business Central •How CSP partners like you can accelerate growth with Copilot and Microsoft 365
PRESENTED BY	Giovanni Mezgec, VP of Modern Work and Business Applications Field & Partner Marketing David Smith, VP of Worldwide Channel Sales

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Use our Taxonomy Keywords to search for content relevant to you and your organization!

Category	Description	Taxonomy								
Partner Type (Always)	Services & solutions the partner commercializes	AllPartners	ISV	CSP	Services	Telco	GSS	MSP		
Partner Role (1)	Partner role	AllRoles	Exec	Tech	SalesAndMktg	SupportAndOperations	ProfServices	Developer	AllianceMgr	
Message Type (2)	Message type	PartnerProgram	Event	News	Deadline	ProgramOfferUpdate	WinFormula	BestPractice	DoingBizwMSFT	SuccessStory
Solution Area (3a)	Microsoft's solution area	CrossSolution	ModernWork	BizApps	Azure	Security	Surface			
Partner Stage (3b)	Stage of journey		NewtoMSFT	UnderstandBenefits	LearnSolutionAreas	GrowSkills	GoToMarket	GeneratePipeline	AccelerateDeals	GrowYourBiz
Microsoft Brand (4)	Regional taxonomy	MSFTAmericasPartner	LATAM	Canada						
Customer Segment	Customer segment		Enterprise	SMC	SMB					
Industry	Industry focus	AllIndustry	StateAndLocalGov	Retail	EDU	MFG	HealthcareAndLifeScience	FinancialSvcs	Energy	
Additional	Additional taxonomy	QuestionforGroup								

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