







## DATA PROTECTION BY FUNCTION

# The Employee-First Strategy to Copilot



Many businesses are unsure about how Microsoft Copilot will fit into their current workflows. The key is to focus on how Copilot can add value to specific departments and roles within your organization. For instance, think about how Copilot can bring value to each department. You also want to consider how that will impact the type of data protection that should be used. Copilots' effectiveness is tied to the quality and security of the data it interacts with. By tailoring your data protection strategy to the specific needs of each department, you can ensure your business is fully prepared to leverage Copilot's capabilities.

Here is how different departments can effectively integrate AI while ensuring comprehensive data protection:

	Key Activities	Copilot Benefits	Common M365 Data Locations	Need for Data Protection
 <b>Human Resources</b>	Manages recruitment, onboarding, and benefits administration. Handles sensitive data like employee records, payroll, and performance reviews.	Automates routine tasks, assists in report generation, studies trends in employee feedback, and creates onboarding schedules.	<b>SharePoint Online</b> (employee documents) <b>OneDrive for Business</b> (HR personnel files) <b>Teams</b> (internal communications)	Protects sensitive employee data from breaches, maintains confidentiality, and upholds employee trust.
 <b>Finance</b>	Manages budgeting, payroll, financial reporting, and forecasting. Deals with sensitive financial data.	Automates financial processes, analyzes data, provides insights into spending patterns, and forecasts revenue.	<b>Excel</b> (financial models and reports) <b>SharePoint Online</b> (financial documents) <b>Exchange Online</b> (communications)	Protects financial information from breaches, ensures stakeholder trust, and complies with financial regulations.
 <b>Sales</b>	Manages customer relationships, follows leads, and closes deals. Requires accurate and accessible sales data.	Automates routine tasks, provides predictive insights, assists in data analysis, and drafts personalized sales pitches.	<b>Exchange Online</b> (communications) <b>SharePoint Online</b> (sales documents) <b>OneDrive for Business</b> (pitch decks)	Protects sensitive sales information, ensures compliance with regulations like GDPR, and maintains customer trust.
 <b>Marketing</b>	Develops marketing strategies, analyzes trends, creates content, and manages campaigns.	Optimizes campaigns, provides automated insights, assists in data analysis, and suggests optimal posting times.	<b>Microsoft Planner</b> (project management) <b>Exchange Online</b> (communications) <b>OneDrive for Business</b> (marketing assets) <b>Teams</b> (collaboration)	Protects sensitive data like customer demographics and campaign performance, ensures compliance with regulations.
 <b>Customer Service</b>	Manages support tickets, addresses inquiries, and resolves issues. Needs accurate and up-to-date customer information.	Provides insights for automation, faster resolution, data analysis, suggests solutions, drafts responses, and generates reports.	<b>Outlook</b> (communications) <b>SharePoint Online</b> (support documentation) <b>Teams</b> (case management)	Protects personal customer details and service history, maintains customer trust and confidentiality in interactions.
 <b>Legal</b>	Ensures company compliance with laws and regulations. Manages legal documents, contracts, and litigation.	Manages legal documentation, and tracks compliance.	<b>SharePoint Online</b> (legal documents) <b>OneDrive for Business</b> (personal files) <b>Outlook</b> (communications) <b>Teams</b> (case discussions)	Protects highly sensitive legal information from breaches, unauthorized access, and ensures compliance with legal standards and regulations.

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