



# Microsoft 365 Copilot: Deliver value and large- scale adoption safely with Responsible AI

Microsoft's integration of Generative AI into the Office 365 suite brings a significant step-change in productivity benefits and speed to innovation. Microsoft Copilot uses advanced Microsoft technologies such as Semantic search and Graph linking Generative AI to both user and corporate data. Copilot is revolutionising the landscape of artificial intelligence, transforming it from a specialised tool accessible to only a select few into a ubiquitous asset integrated into everyday tools and business operations. This shift is democratising the use of AI, propelling its applications from niche, expert-driven domains to a broad spectrum of tasks and activities within organisations. For businesses eager to harness the full potential of this technology on a large scale, it's imperative to proceed in a manner that is both safe and responsible. This entails implementing robust AI governance and control measures, ensuring that the widespread adoption of AI through Copilot not only enhances efficiency and innovation but also upholds ethical and secure practices.

As businesses integrate Microsoft 365 Copilot ('Copilot'), it's essential to align this with Responsible AI principles. Ethical deployment, transparency, and

accountability must be at the forefront. As Copilot becomes integral to business operations, embedding Responsible AI and evolving AI governance approaches are critical. Drawing upon our extensive experience in the industry, we are presenting our insights on how to expedite the adoption of Copilot in a manner that prioritises safety and fosters trust.

**To achieve this, businesses should focus on:**

**A - Responsible AI guardrails for the safe and trusted deployment of Copilot, such as:**

**Ethics:** Powerful AI tools, such as Copilot, will fundamentally change how we work and communicate. Without a Responsible AI framework, there's a risk of perpetuating harmful biases, compromising privacy, or inadvertently spreading misleading information.

Acceptable Use Policy” specifically crafted for Copilot outlines the parameters within which this technology operates, ensuring its functions are in harmony with the company’s strategic aims, values, and compliance mandates. It is essential that defined ethical standards are comprehensively understood and implemented by company employees and disseminated amongst third-party suppliers to secure uniformity in vision and governance procedures. Through transparent communication regarding Copilot’s access to, and handling of, data a foundation of trust can be fortified amongst all associated parties, reinforcing a collective commitment to data privacy and security.

#### **Ownership and Accountability:**

Systematic incorporation of human oversight is recommended to enhance the Copilot operation, with operators bearing ultimate responsibility for the content they generate and disseminate. To fortify the integrity and accountability of the output, business processes must be refined and training regimes intensified. This will empower Subject Matter Experts to assert their domain expertise more effectively. Their role in scrutinising and critiquing the AI-generated content is indispensable, not only to preserve the accuracy of the output but also to uphold ethical standards. It is imperative that users acknowledge their responsibility for the outcomes, recognising that domain expertise is essential in the validation of system-generated suggestions and outputs. This dual approach of user responsibility and expert validation is crucial to maintain the precision and ethical compliance of AI-assisted processes

**Mapping a central policy to existing internal policies:** Copilot needs access to corporate and user data. Handling this sensitive data transparently and responsibly ensures trust, protects intellectual property and data privacy, and results in a more resilient service. To do so, businesses must quickly align existing standards, policies and controls with the use of this new technology.

Data quality and access management are paramount: Copilot’s effectiveness, like any AI system, hinges on the quality and accessibility of its input and grounding data. If the corporate data Copilot accesses is outdated, inaccurate, or flawed, these issues will be reflected in its outputs and responses. Furthermore, Copilot’s sophisticated functionalities, such as its deep search capability, fundamentally depend upon the correct setting of file permissions and access management protocols. This dependency intensifies the risk of access management issues, which, without scrupulous monitoring, could result in the accidental exposure or misapplication of confidential information.

Consequently, stringent data governance is not just advantageous but an essential precondition for the successful and secure utilisation of Copilot’s advanced features. Organisations must ensure that robust data governance frameworks are established, enforcing vigilant control and regular audits of file permissions to prevent any potential breaches of sensitive data. Businesses must ensure that corporate and user input data are accurate, current, and well-organised and also securely managed. Effective file permission settings and access controls are essential to protect sensitive data, old, draft and duplicative documents shall be cleaned up, to ensure Copilot functions within the bounds of intended and authorised use.

#### **B - The evolution of AI guardrails’ approach to bolster Copilot adoption, such as:**

**Defining use-case patterns:** traditional AI governance reviews at use-case level won’t withstand the sheer volume of applications supported by Microsoft 365 Copilot. Risk assessments should consider use case “patterns” instead, with an acceptable use policy providing clear initial guidance - these might include:

- Summarisation;
- Drafting;
- Retrieval; or,
- Augmented generation.

The need to create inventories of AI applications and identify direct or indirect input to high risk use cases remain, but will become harder to achieve as use proliferates. A clear approach to classifying and triaging usage patterns is needed to focus attention on high-risk and edge use cases.

**Appraise productivity value in the context of safety and ethics:** business impact needs to be considered with a risk based approach and take into account ethical dilemmas. Whilst some use case patterns will appear as quick-wins (e.g. summarisation of internal meetings), other more transformational applications would require thorough thinking about guardrails (e.g. crafting advice to customers). Overall, building a careful balance between productivity, risk, ethics support building trust to deploy Copilot at scale.

**Promoting a trusted adoption, enterprise-wide and with third party providers:** Users must understand and have confidence in how Copilot operates. Training should emphasise transparency, enable users to understand the rationale behind

AI-generated outputs, and reinforce acceptable use behaviours. The risk of over-reliance or misinformation needs to be tackled by encouraging critical thinking, feedback and managerial oversight. Building a culture of trust necessitates clear standards and a robust approach to change management and training; supporting the importance of domain experts' oversight and human ownership in operations. Beyond the boundaries of an organisation, providers and partners should be aligned to the approach taken on building AI and associated imperatives. These would consider legal and compliance requirements (e.g. data privacy, copyright) and alignment on ethical choices (e.g. approach to transparency, ESG requirements).

#### **Sustaining an agile governance:**

As technology innovation and adoption accelerates, governance needs to maintain pace; a good governance framework today may quickly become outdated. Risk and Compliance departments must proactively engage with innovation departments to future-proof their methodologies. They should proactively engage with Third Parties and regulators to get comfortable on critical risks related to data privacy, IP and copyright protection and understand the wider concentration and reputational impact of their technology roadmap.



# Take action today for a successful rollout:

The general availability of Microsoft 365 Copilot marks a moment in the adoption of AI by corporates and the general public. The need for Trust, Transparency and Safe approach has never been so pressing to realise the incredible value of these technologies in a Responsible fashion. It starts with an in-depth understanding of the technology, its intended use organisation wide and a clear roadmap for a Responsible roll-out. An immediate task with the now general availability of Copilot as an everyday AI companion.

We invite you to engage with us for a detailed Rapid Readiness Assessment, designed to guide your successful Copilot integration. Let's ensure your adoption strategy is as forward-thinking and responsible as the technology itself.

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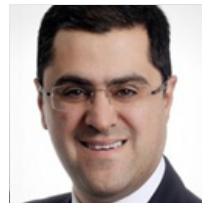
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