



FEATURED SPEAKER

# From Clutter to Clarity: Taking Control of Your SharePoint Data

**Andrew Browne**

Sales Manager, MSP – ANZ  
AVEPOINT



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# From Clutter to Clarity:

## *Taking control of your SharePoint data*

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Sales Manager, MSP  
[Andrew.browne@avepoint.com](mailto:Andrew.browne@avepoint.com)



# The **Global Leader** in Data Security, Governance, and Resilience

The **AvePoint Elements Platform** is the most advanced multi-tenant MSP platform designed to scale MSPs providing data security, governance, and resilience of Microsoft 365, Salesforce, Google, and more, trusted by MSPs worldwide including:



21K+

Customers

7

Continents

88

Countries

14

Global Cloud  
Instances

99.9%

Availability  
Backed by Azure

24/7

World-Class  
Support

500+ PB

Managed  
Customer Data

100+

Cloud  
Marketplaces

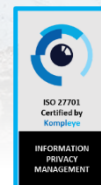
3500+

Channel  
Partners

AVPT  
Nasdaq Listed



Partner of the Year Winner





# ANZ Customers We Serve

## TELECOMMUNICATIONS MEDIA



## AUTOMOTIVE AND TRANSPORTATION



## HEALTHCARE



## FINANCIAL SERVICES



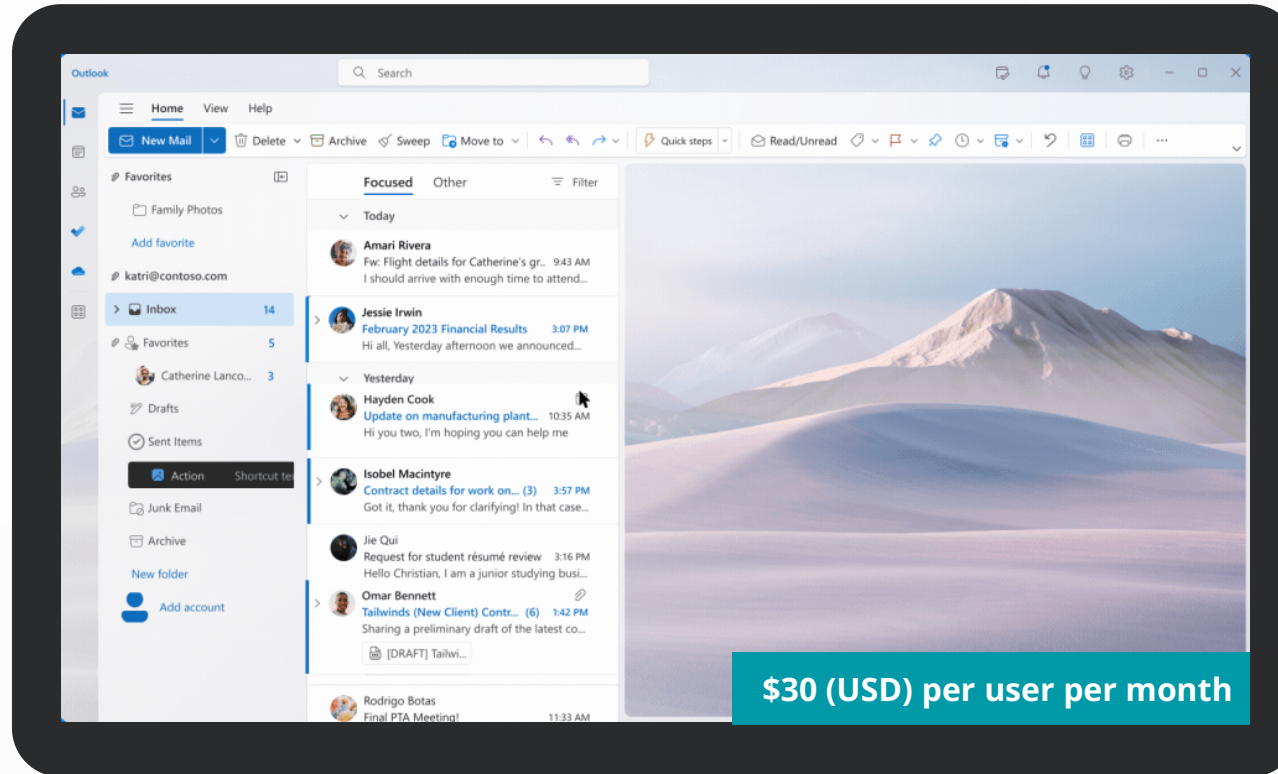
## GOVERNMENT AND EDUCATION



## RETAIL AND CONSUMER GOODS



# What Copilot for M365 is all about



- ❖ Copilot is an AI-powered tool that assists users by providing real-time guidance, insights, and automation across various tasks and roles within an organisation.

# What were the headlines saying in 2024

**64%** believe Copilot will streamline business operations

**55%** of organisations say it will provide cost reduction & resource optimisation



**Copilot for  
Microsoft 365**

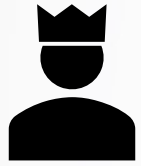
**57%** of organisations say it will enhance customer insights & personalisation

**53%** believe it will improve decision making through data analysis





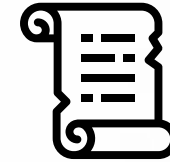
# What are we hearing today?



Rolled out to  
champion  
users



Hesitation to  
roll out to  
wider org



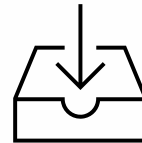
The output  
can be  
questionable



People are  
eager to try!



Low usage  
by champion  
users



Use case is  
not clearly  
defined

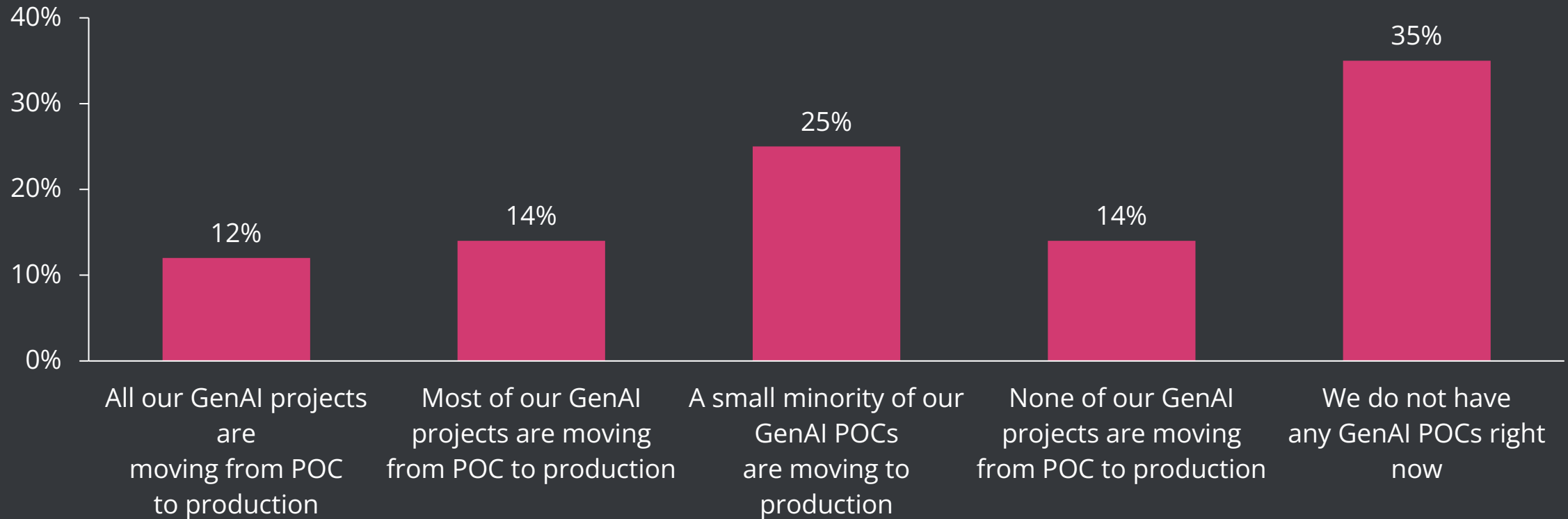


Hard to  
measure an  
ROI

# Few AI POCs are moving to production today

What proportion of GenAI projects are moving from proof of concept to production stage?

Percentage of respondents



Source: Canalys quick poll, 237 respondents (worldwide), 2024



# The Path to Generative AI

1

## Business Case

Why should I use Copilot for M365?

Financial Planner takes 3-4 hour to generate customer documentation

2

## Use Case

How Do I Use Copilot for M365?

Use M365 Copilot to accelerate document generation

3

## Technical / Data Readiness

Am I ready?  
How do I get the most out of Copilot for M365?

???



not your own  
we'd get it under hand  
maybe get in. In some  
else & will default,  
the more ppl that  
not pl that'll be  
I don't know a  
and default learn  
but it's smaller

# Microsoft 365 Copilot

response + commands

Microsoft 365 Tru



## Estimation

The fine art of guessing



Data flow (🔒 = all requests are encrypted via HTTPS)

- 1 User prompts from Microsoft 365 Apps are sent to Copilot
- 2 Copilot accesses Graph and Semantic Index for pre-processing
- 3 Copilot sends modified prompt to Large Language Model
- 4 Copilot receives LLM response
- 5 Copilot accesses Graph and Semantic Index for post-processing
- 6 Copilot sends the response, and app command back to Microsoft 365 Apps



A person in a dark suit stands at the end of a long, narrow hallway. The walls and floor are composed of massive stacks of white papers or documents, creating a sense of being overwhelmed by data. The perspective is from behind the person, looking down the length of the hallway towards a bright light at the far end.

USER HABITS:

**Data is Valuable,  
keep it just in case!**



# Australia now leads the world in data breaches following Medibank breach Featured

6  
Shares

f Share

🐦 Tweet 1

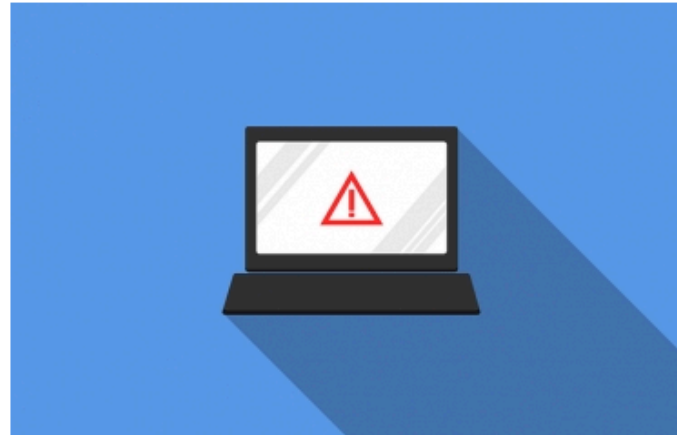
in Share 5

🔖 Share

f Share

By David M Williams

Comments:0 Comments



**Australia now has the highest data breach density in the world, with breaches spiking by 489% this quarter (and it's not over yet). Globally, data breaches have decreased by 70.8% while Australian breaches have surged by 1,550%. In fact, Australia's data breach density is 24 times higher than the global average.**

Australia, the lucky country, is decidedly unlucky with a series of data breaches - of which Medibank is the most notable, now making us the data breach capital of the world.





# Australia now leads the world in data breaches following Medibank breach Featured

6  
Shares

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[in](#) Share 5

[r](#) Share

[f](#) Share

By [David M Williams](#)



Privacy Commissioner  
Te Mana Mātāpono Matatapu



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[Case notes and court decisions](#)

[Commissioner inquiries](#)

[Corporate reports](#)

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[Home](#) / [Statements and me...](#) New Zealand's big...

## New Zealand's biggest data breach shows retention is the sleeping giant of data security

[Print](#) | [Email this page](#)

3 Apr 2023, 14:10

Over one million past and present New Zealand drivers' licences have been exposed as part of the attack on Latitude Financial, as well as people's passports. Some of the 14 million New Zealand and Australia records taken are up to 18 years old, which isn't okay.

Liz MacPherson, New Zealand's Deputy Privacy Commissioner says that data retention is emerging as a key issue in several recent domestic and global cyber-attacks including the Latitude Financial breach.

Australia, the lucky country, is decidedly unlucky with a series of data breaches - of which Medibank is the most notable, now making us the data breach capital of the world.

## Australia now leads the world in data breaches following Medibank breach Featured

6  
Shares



Share



Tweet

1



Share

5



Share



Share

By David M Williams



Privacy  
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Advisory op

Brochures, p

Case notes a

Commission

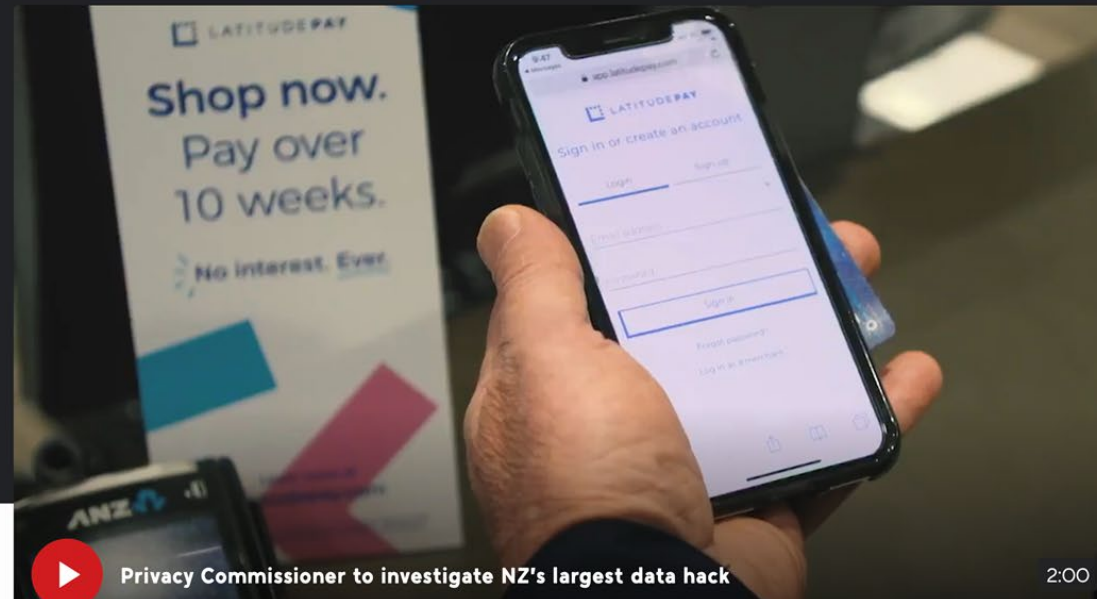
Corporate re

Guidance Re

Insights rep

NEW ZEALAND | 1NEWS

## Privacy Commissioner to investigate NZ's largest data hack



Privacy Commissioner to investigate NZ's largest data hack

2:00

Australia, the lucky country, is decidedly unlucky with a series of data breaches - of which Medibank is the most notable, now making us the data breach capital of the world.

## Australia now leads the world in data breaches following Medibank breach Featured

6  
Shares

f Share

🐦 Tweet 1

in Share 5

🔗 Share

f Share

By David M Williams



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NEW ZEALAND | 1NEWS

### Privacy Commissioner to investigate NZ's largest data hack

# Over retention of data is risky



Privacy Commissioner to investigate NZ's largest data hack

2:00

Australia, the lucky country, is decidedly unlucky with a series of data breaches - of which Medibank is the most notable, now making us the data breach capital of the world.









Topic — Australia



# Australian Organizations are Fascinated With Copilot for Microsoft 365, But Will They Avoid The “Gotchas”?

Published June 21, 2024



Written By  
**Matthew Sainsbury**

COMPUTERWORLD



by Matthew Finnegan  
Senior Reporter

## Microsoft 365 Copilot rollouts slowed by data security, ROI concerns

News Analysis

Sep 27, 2024 • 9 mins

Generative AI Microsoft Microsoft 365

Security ▶

## Microsoft GM Sees ‘Huge’ Partner Opportunity In Data Security, Risk Management

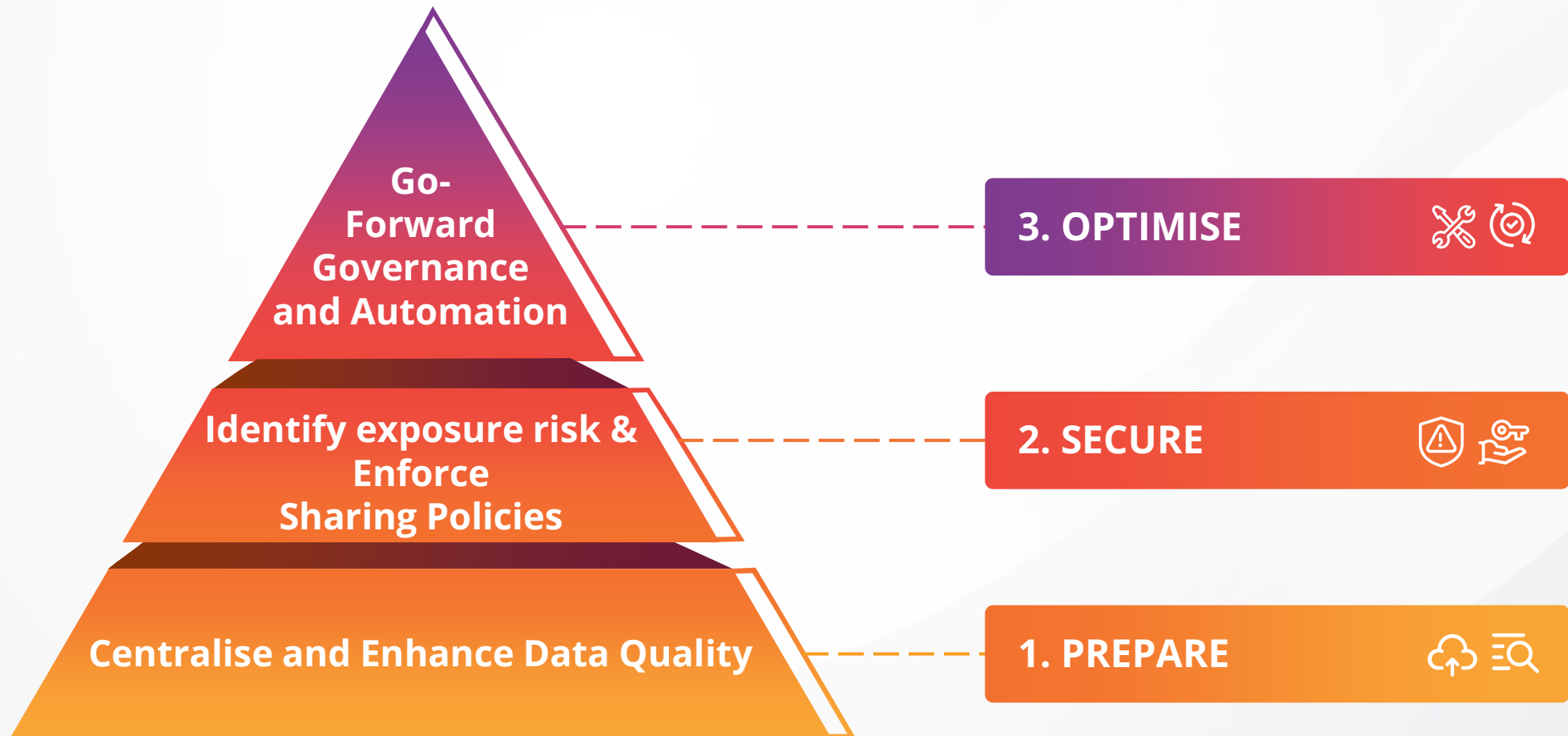
BY WADE TYLER MILLWARD ▶

SEPTEMBER 30, 2024, 4:10 PM EDT

*‘There’s only so much you can learn by watching others,’ Microsoft GM Herain Ober*



# A Holistic Approach to Data AI-Readiness.





# Ruth Hill

*Operations  
Manager*



Acme Financial Services



Australia

# Meet our customer

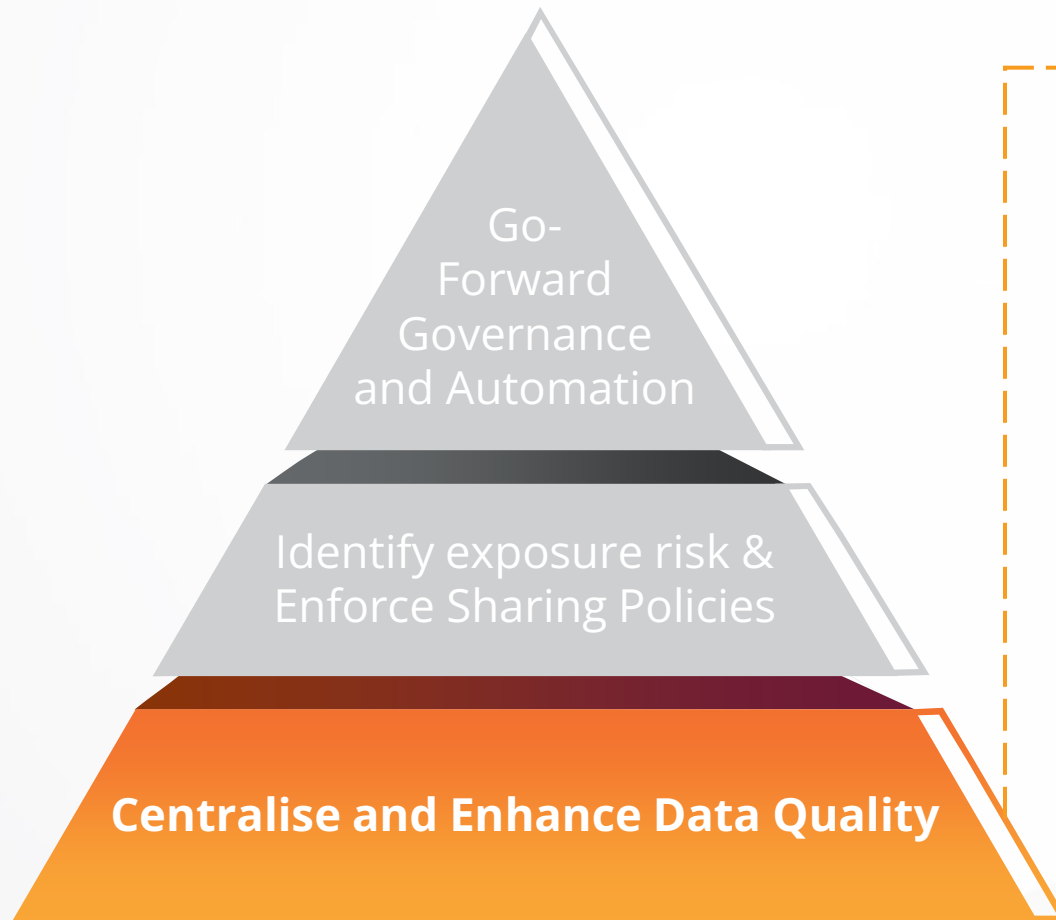
Ruth Hill, the Operations Manager of Acme Financial Services, is interested in investing in Copilot for Microsoft 365 for her team to boost productivity.

Use cases:

- **Taking meeting notes and tracking action items**
- **Accelerate Proposal Creation**
- **Generate financial guidance reports**



# Prepare your data



## STEP 1



Lay the groundwork for success.

- Centralise your data in Microsoft 365 so it can be accessible to Copilot.
- Improve your data quality as the foundation for AI recommendations





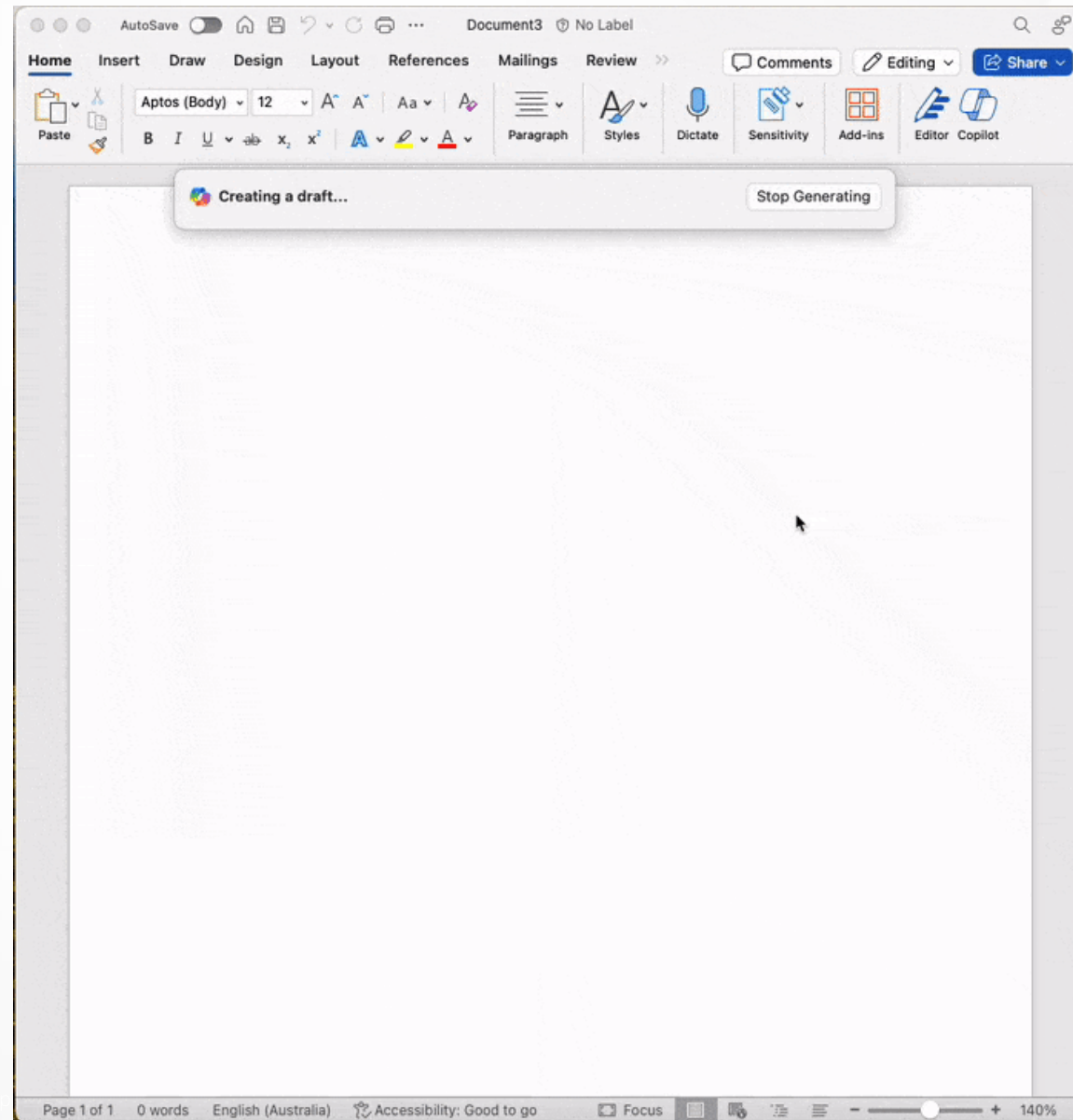
# Example of producing a proposal with dirty data

 Draft with Copilot 

Write me a proposal for our financial operations optimisation service for a Company XYZ

87/2000

# Example of producing a proposal with dirty data



# Example of producing a proposal with dirty data

The screenshot shows a Microsoft Word document titled "Financial Optimization Proposal". The document contains several sections with text that includes various data errors, some highlighted in yellow and others in green. The errors include nonsensical phrases like "Leveraging insights from the 2003 fiscal year", "economic models from the late 1990s", "feedback from our 2010 company golf tournament", "dot-com bubble", "early 2000s", "2015 company basketball league", "1998 Asian financial crisis", and "2002". The document is displayed in a window with the title "Document3" and a status bar at the bottom indicating "Page 1 of 1", "180 words", and "English (Australia)".

**Financial Optimization Proposal**

**Project Overview**

This proposal outlines our approach to optimizing your financial operations through a series of tailored services designed to meet your unique needs. Our expertise and innovative strategies will drive your business forward.

**Key Recommendations**

- Financial Analysis: Leveraging insights from the 2003 fiscal year to provide a robust understanding of current market dynamics.
- Risk Assessment: Implementing risk management strategies based on economic models from the late 1990s.
- Customer Insights: Utilizing feedback from our 2010 company golf tournament to gauge customer satisfaction and engagement.
- Market Trends: Highlighting key market performance indicators from the dot-com bubble to inform future investment decisions.

**Service Highlights**

**In-depth Financial Analysis**

Our analysis includes detailed reports from the early 2000s, ensuring a comprehensive view of historical financial performance. References to Brad's performance in the 2015 company basketball league to illustrate our team's competitive spirit and analytical skills.

**Enhanced Risk Management**

Risk models incorporate data from the 1998 Asian financial crisis, providing a solid foundation for current risk mitigation strategies. Utilizing outdated compliance guidelines from 2002 to ensure your business adheres to industry standards.

# How do you produce a proposal *without* Copilot?

- Reference recent proposals – copy and paste from similar content
- Add an executive summary which is tailored to the customer
- Review entire proposal making adjustments to ensure it is addressing the customer's requirements



# How do you produce a proposal *without* Copilot?

- Reference recent proposals – copy and paste from similar content
- Add an executive summary which is tailored to the customer
- Review entire proposal making adjustments to ensure it is addressing the customer's requirements

# Where are those recent proposals?



\\FileSvr\Proposals



On-Premise DMS

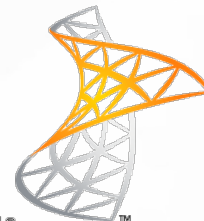


SharePoint Online / ODFB

# Let's get them into Microsoft 365

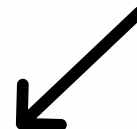


\\FileSvr\Proposals



Microsoft®  
**SharePoint®** 2010

On-Premise DMS






















**Microsoft 365**

SharePoint Online / ODFB

# AvePoint Migration Tools

## Customer Wants to Migrate...

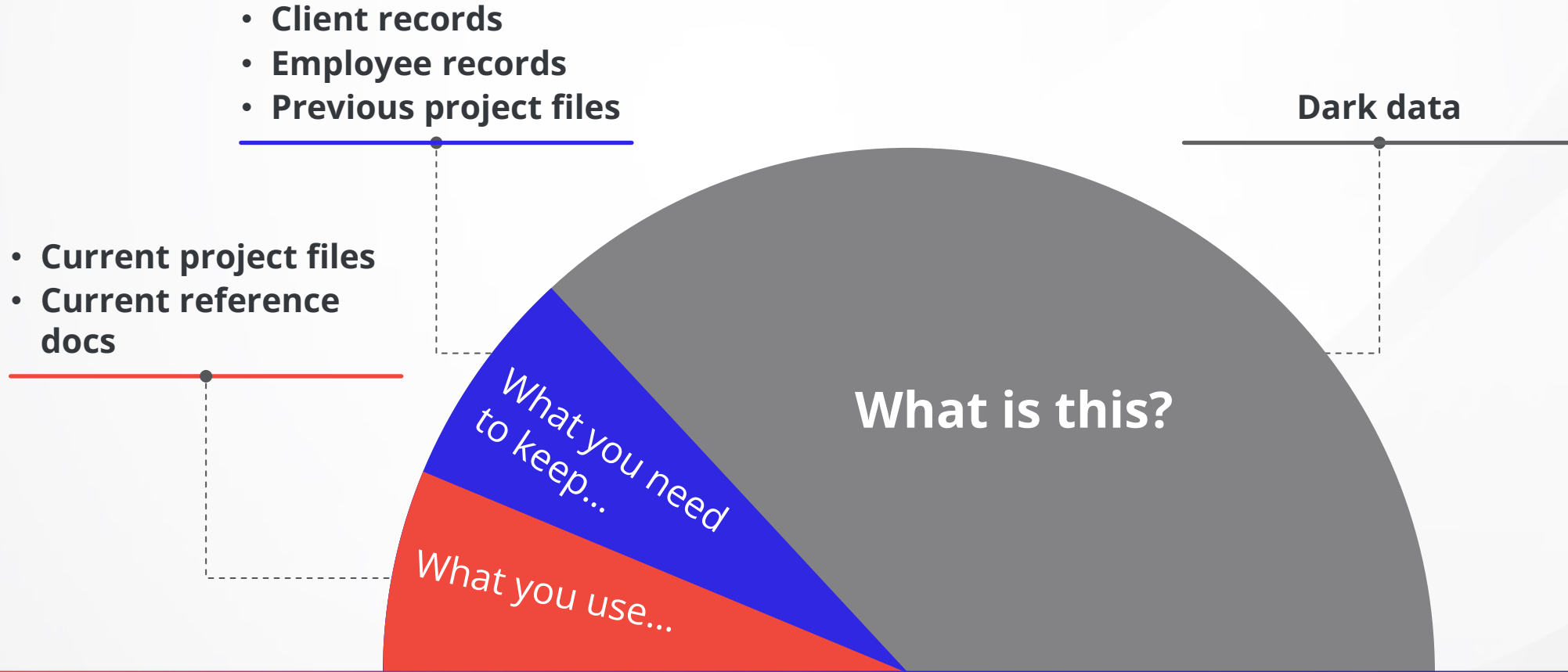
	 Power Platform	 Teams 1:1 Chats	 Microsoft 365 Groups	 OneDrive	 Exchange Online	 SharePoint Online	 Exchange On-Premise	 Gmail	 Google Drive	 SharePoint On-premise	 IMAP/POP3	 Exchange Public Folder	 PST File	 File System	 Box	 Dropbox	 Slack
 FLY Supported Sources	✓	✓	✓	✓	✓	✓	✓	✓	✓								
	Fly (SaaS)																
 FLY Server Supported Sources	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Fly Server (Requires an installation)																



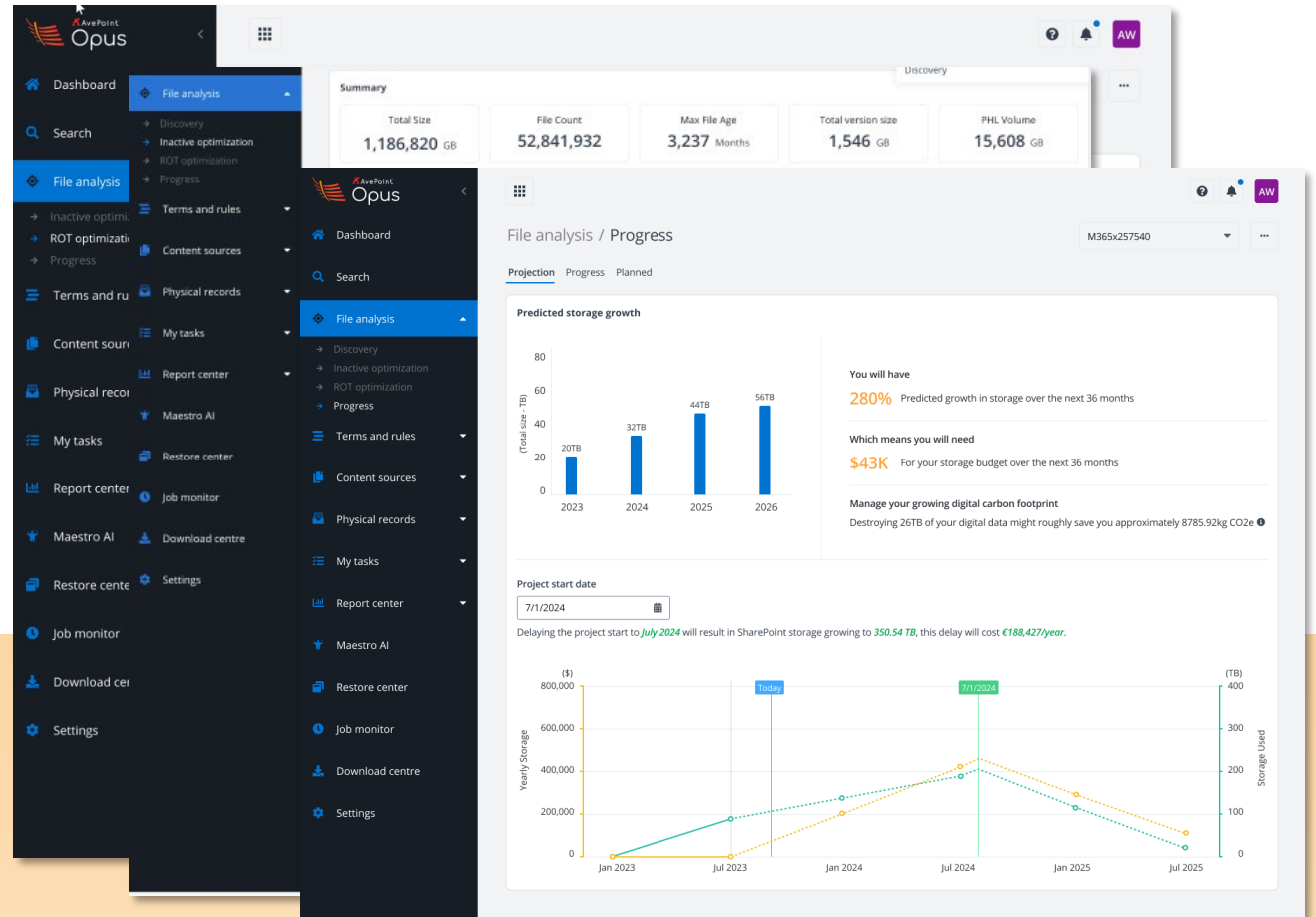
# How do we enhance the quality of Copilot's responses?



# This is the current reality



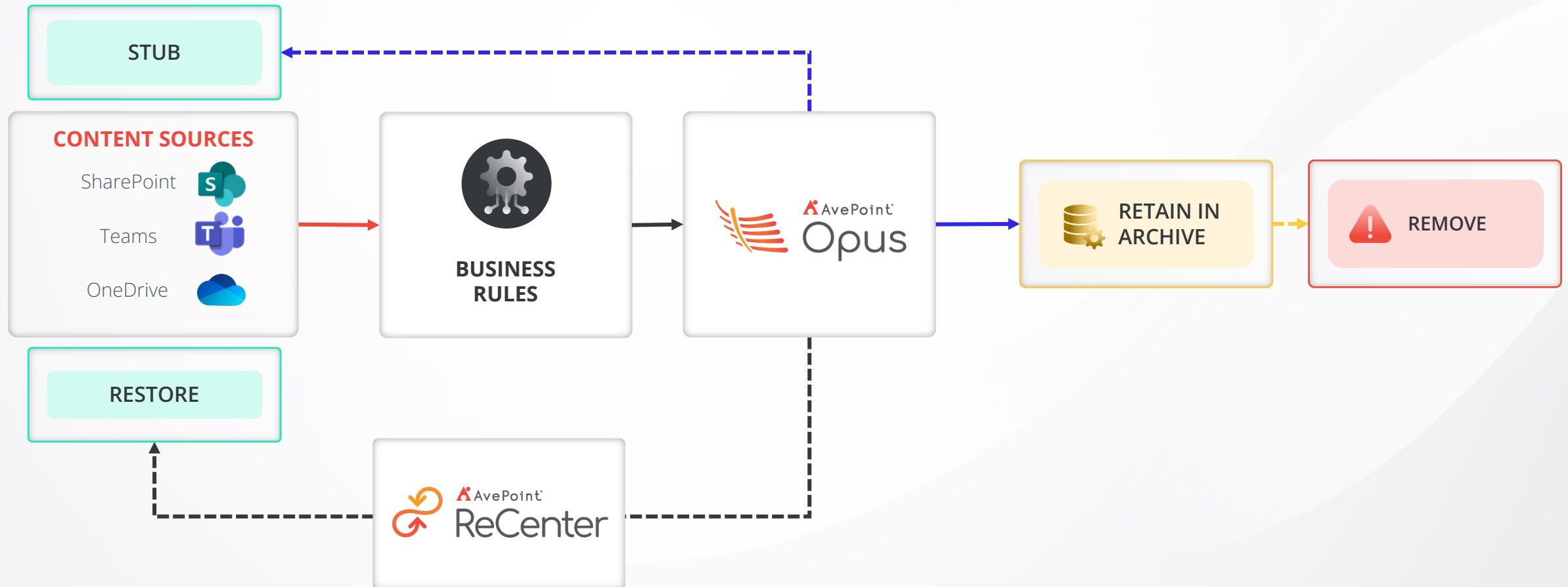
# Identify your ROT data



*A Discovery Analysis helps you understand your data, to ultimately make good decisions on what content to keep, remove and archive.*

- *Establishing a strong data foundation starts with understanding your content and identifying ROT (redundant, outdated, trivial) data.*
- *Simplify compliance with easy retention rules and optimize storage to declutter and save costs.*
- *Empower your data with dynamic business rules that help you gain control over content lifecycles.*

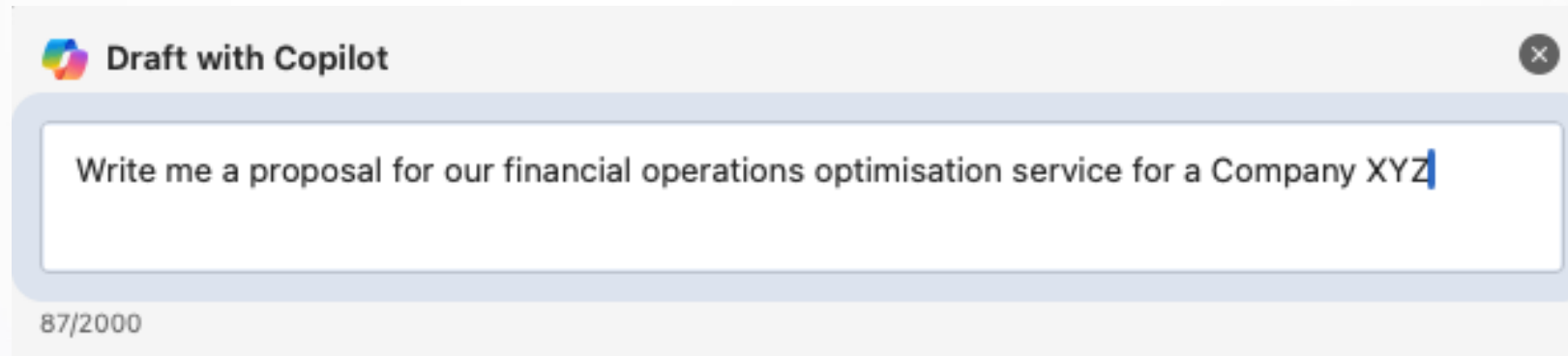
# Create rules to automatically cleanse your data



# What have we achieved?

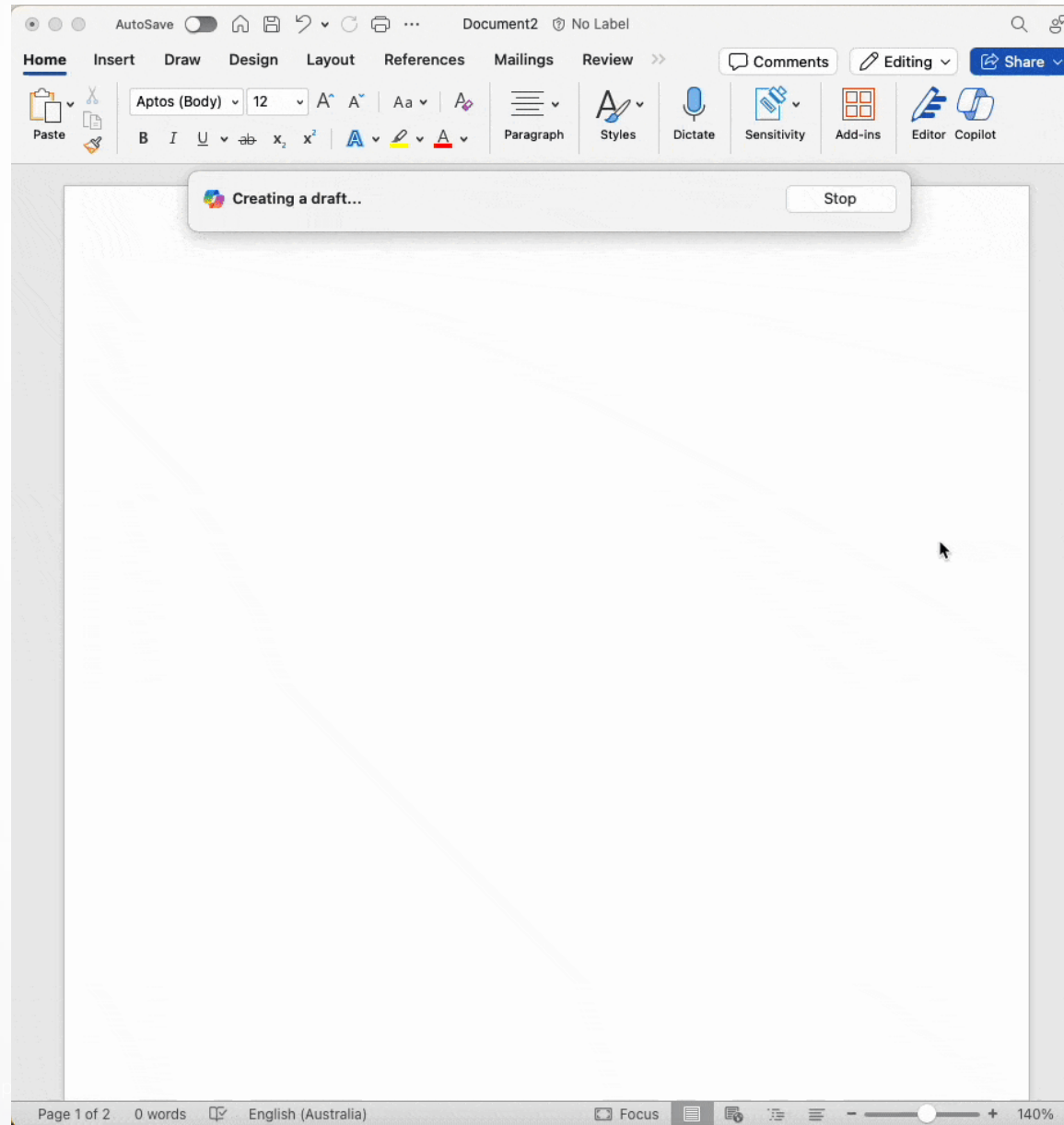
- **Centralised** all the reference documents needed for our Copilot for M365 use case into Microsoft 365
- **Archived** the redundant, obsolete and trivial content so it was not referenced by Copilot for Microsoft 365
- Enabled Copilot to provide **better quality responses** when using Copilot to accelerate the process of proposal generation

# What have we achieved?

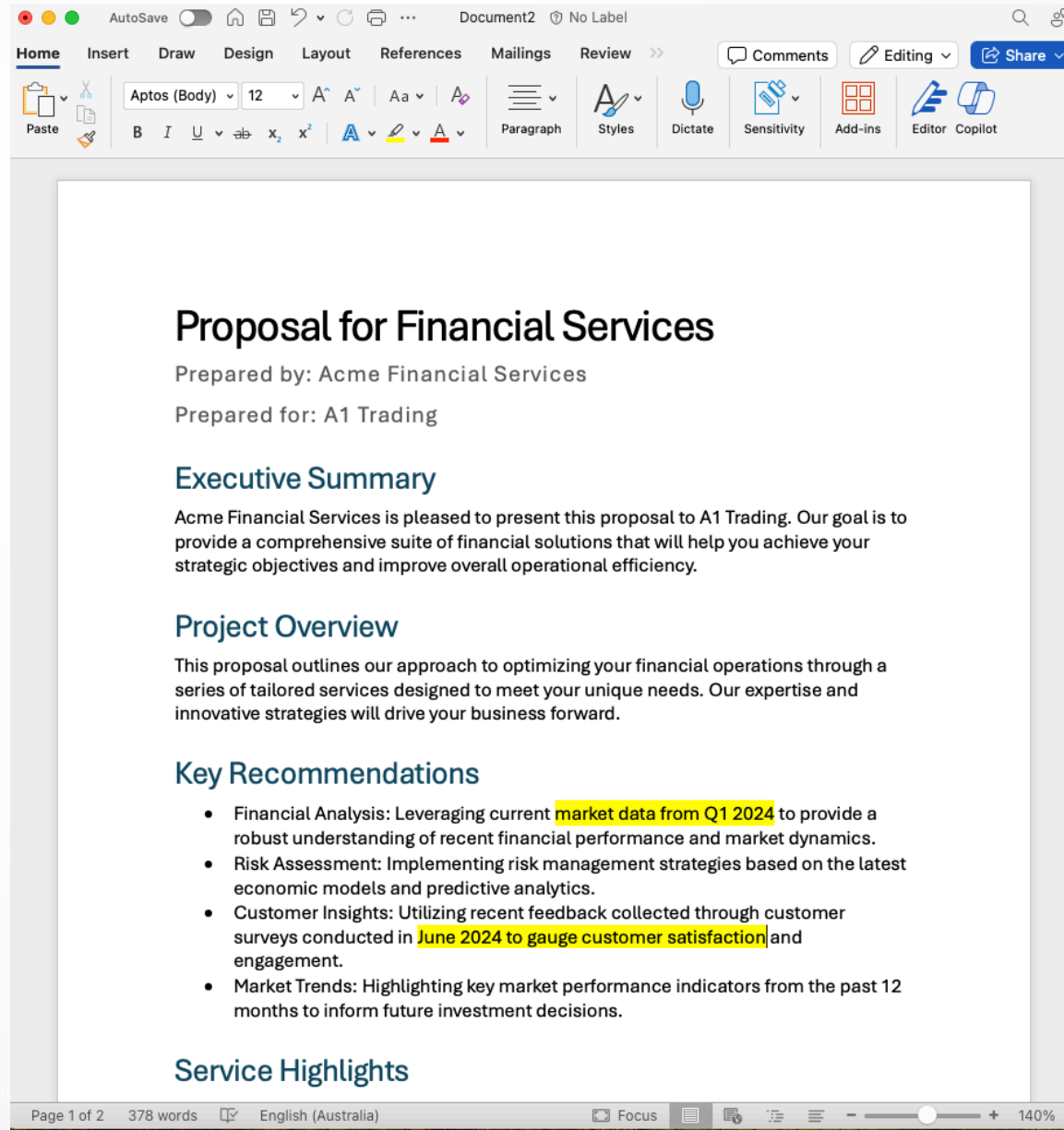




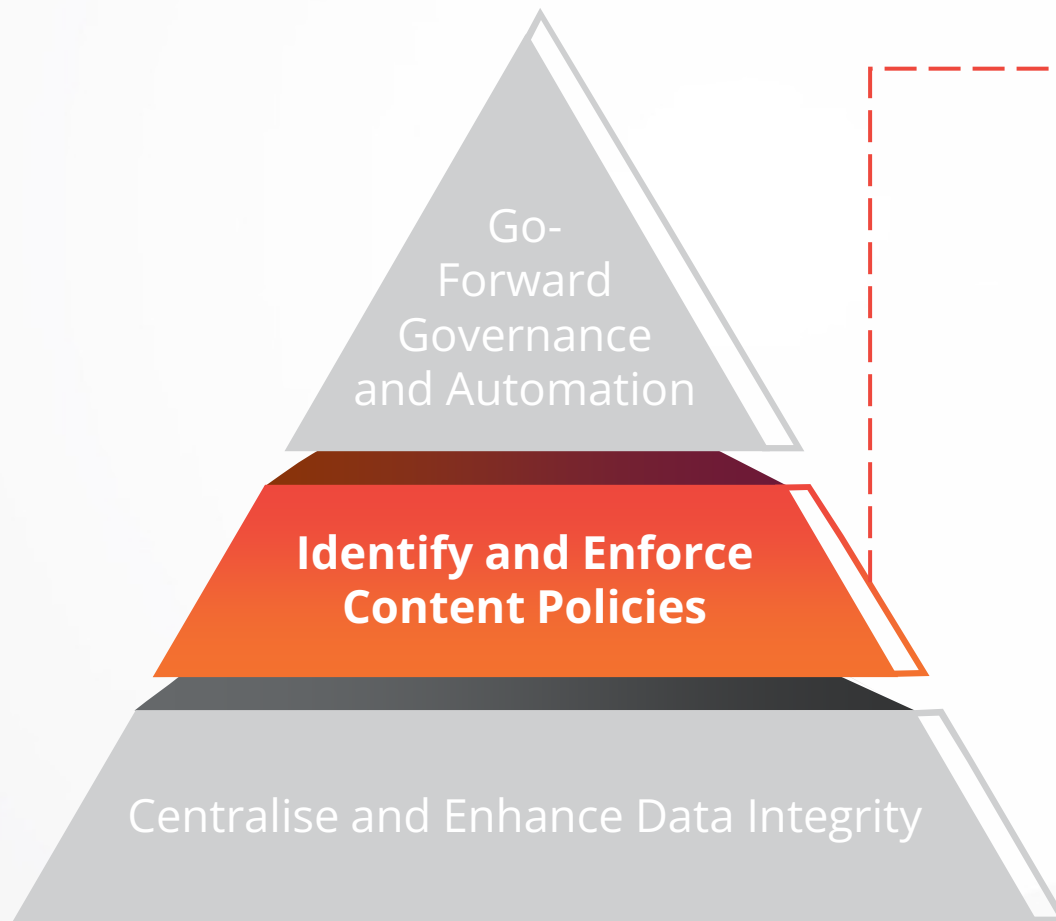
# What have we achieved?



# What have we achieved?



# Secure your Data



## STEP 2

Establish a solid foundation for a secure Microsoft 365 Copilot deployment.

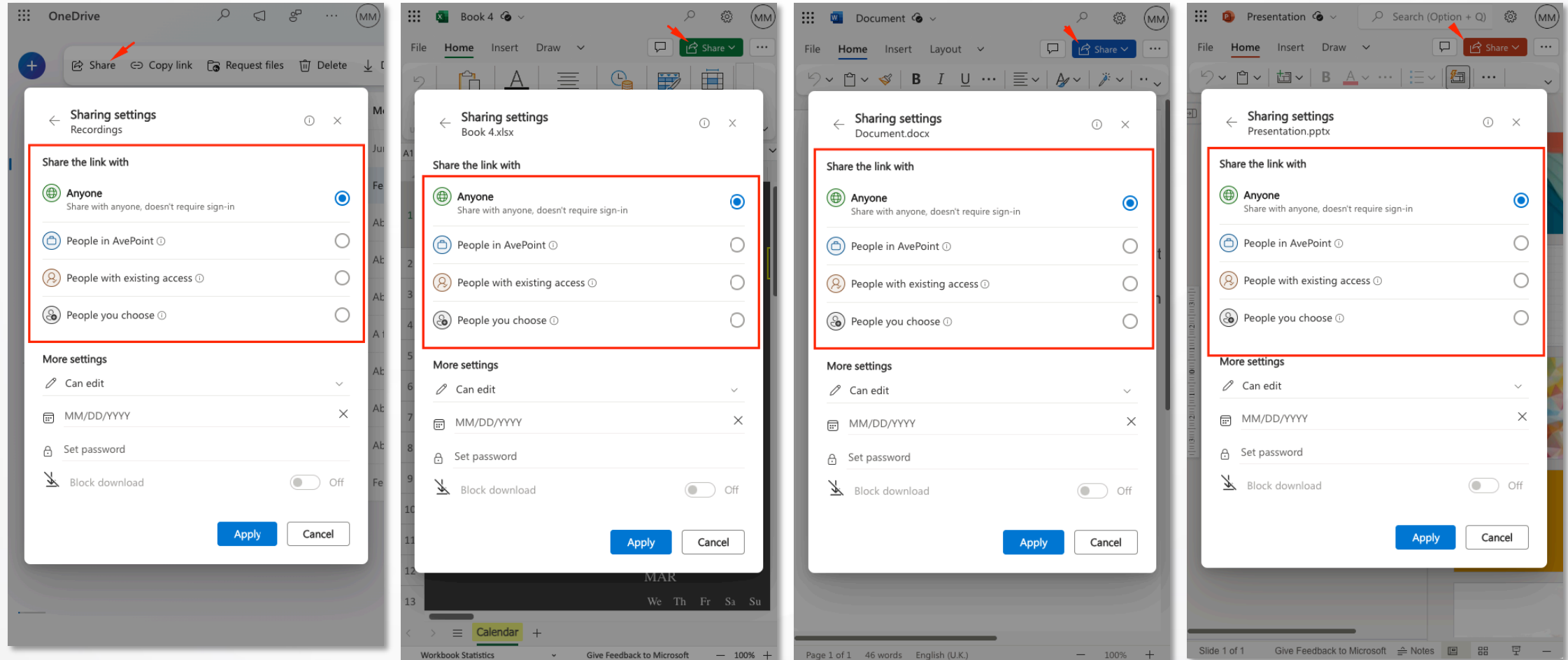
- Understanding where you have sensitive and overshared content in Microsoft 365.
- Secure your data by cleaning up permissions and enforcing policies.





# Sharing has never been easier

Sharing buttons are in all Microsoft apps... Sharing is caring, *right?*



Copilot | Microsoft 365

microsoft365.com/chat

☆

Copilot for Microsoft 365 Sandbox

Microsoft 365

Search

Dux Raymond Sy

New chat

Home


Create

My Content

Feed


Apps

Copilot




# Copilot


For Microsoft 365

 **What's new?**


What's the latest from person , organized by emails, chats, and files?

 **Get the gist**


Give me a bullet list of key points from file

 **Draft an FAQ**


Create an FAQ based on file

 **How to**

How do I write a request for proposal?

 **Generate ideas**

List ideas for a fun remote team building event




 **Help me write**

Write an email to my team about our top priorities for next quarter from file

OK. what can I help with? Try one of the examples or enter your own prompt.

View prompts

Ask a work question or use / to reference people, files, and more





# What is sensitive to your organisation?



### BSB/Account Information

Internal Account Number	Account Nickname	BSB/Account	External Account Number
55184S1	Access Savings Account	882000	100087649
55184S1.1	Access Savings Account	882000	100122765
55184S1.2	Access Savings Account	882000	100143494

# What is *sensitive* to your organisation?

Your Swiss Insurer.

Helvetia Group Foundation  
for Employee Pensions  
Basel

Private  
Mr  
John Example  
Main Street 12  
4002 Basel

Employee benefits contract no. 0123456.11 Example Ltd.  
Organisational unit 1  
Personnel category 1  
Policy No. 1

Insurance certificate, valid from 01.01.20XX

1. Personal data  
Surname and first name Example John  
Date of birth/Gender 14.05.1969/male  
Marital status married  
Commencement of insurance/Degree of occupation 01.01.2013/100.00%  
Reaching retirement age at 01.06.2034

Contract Number

Employee ID

Commission Plan / Salary

HR Dispute

\*\*\*\*\*

LOGIN

Passwords

BETWEEN

CLAIMANT NAME

And

RESPONDENT NAME

CLAIMANT / RESPONDENT LIST OF EVIDENCE

Number	Description	Date
1.	Include sub-headings if there are lots of documents some examples of sub-headings and documents are below	
2.		
Findings Documents		
claim		
fence		
the Employment Tribunal which both parties		
		01/01/2012
phone Bloggs		12/01/2020

Upsell Summary

Total Upsell	0
Total Payout	0
Total OTE	4200
Payout Percentage	0.00%

Cross-sell Summary

Total Cross-sell	0
Total Payout	0
Total OTE	6300
Payout Percentage	0.00%

Renewals Summary

Total Renewals	0
Total Payout	0
Total OTE	10500
Payout Percentage	0.00%

Renewals

Name	ID	OTE	Total Renewals	Credits	Quota	Attainment	Payout Percentage	Payout
Tom	123	2000	0	0	1000	0.00%	0.00%	0
Jared	256	3000	0	0	1000	0.00%	0.00%	0
Cynthia	313	3000	0	0	1000	0.00%	0.00%	0
Manan	414	2500	0	0	1000	0.00%	0.00%	0

# What would you define as overexposed?

Shared Externally

Shared with the  
entire  
organisation

Shared via  
anonymous links

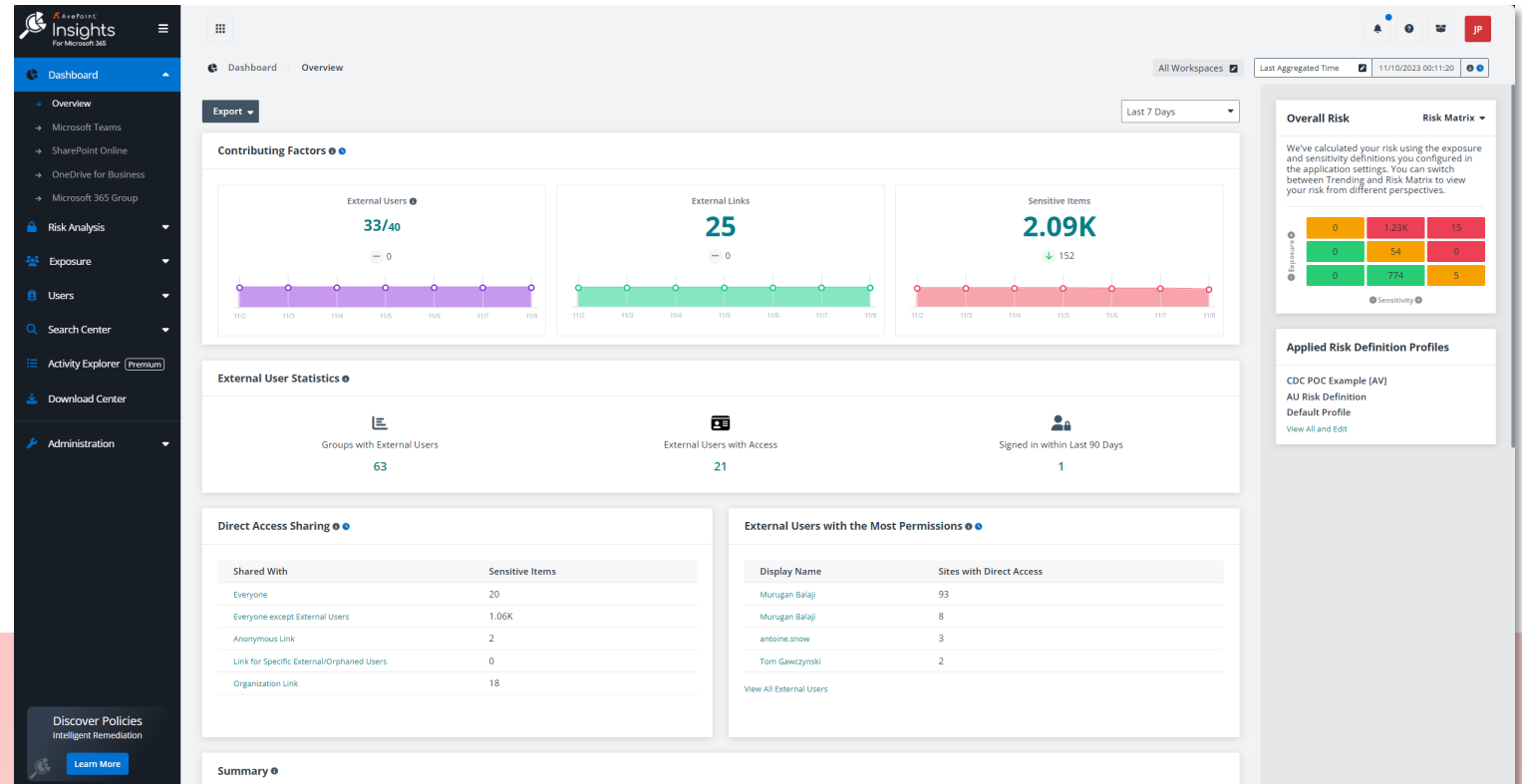
Available in a  
public team

Shared with a  
large group

Shared from  
personal  
OneDrive

Secure Your Data

# Identify your overexposed sensitive content



- Run a Risk Assessment Identify who has access to sensitive data, whether they've accessed it, and if any external pose a threat.
- Aggregate highly exposed content with sensitive information types to present a heat-map of at-risk data across Microsoft 365.
- Track exposure, including anonymous links and external user access, over time. report summarizing updates and changes to your tenant.



Secure Your Data



- Dashboard
- Risk analysis
- Exposure
- Users
- Search center
- Activity explorer Premium
- Monitor center

- Administration
  - Risk definition
  - Auditor
  - System event
  - Account management
  - General settings

Discover Policies  
Intelligent remediation



Administration : Risk definition profiles New profile

- 1. Profile information
- 2. Sensitivity definitions
- 3. Sensitive item exclusions
- 4. Exposure definitions

Sensitivity definitions

Please enable at least one definition.

New definition



0 selected



Input keyword



	Name	Level	Template	Country or region
<input type="checkbox"/>	... Australia Personally Identifiable Information ...	Item	Privacy	Australia
<input type="checkbox"/>	... ITAR	Item	Custom	United States of America
<input type="checkbox"/>	... U.S. Federal Trade Commission (FTC) Consu...	Item	Financial	United States of America
<input type="checkbox"/>	... Canada Financial Data	Item	Financial	Canada
<input type="checkbox"/>	... Marketing Site	Site collection	Custom	United States of America
<input type="checkbox"/>	... Marketing Item	Item	Custom	United States of America
<input type="checkbox"/>	... AU-Risk definition	Item	Custom	Australia

Sensitivity definitions

On this page, you can configure sensitivity definitions that will be used in detection. Multiple sensitivity definitions of different templates are provided. You can select the definition commonly considered to be useful in your country or region, and edit the definition to comply with business standards and industry regulations. You can also create definitions based your needs.

# Optimise and Automate



## 3. OPTIMISE

Elevate your data management with precision and efficiency that can fuel your long-term success with AI. Enforce go-forward governance of workspace creation and classification. Automate access reviews and data lifecycle policies.



Chat



Teams



Assignments



Calendar



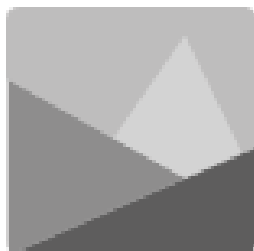
Calls



Files



Shifts



Create a team



Create team



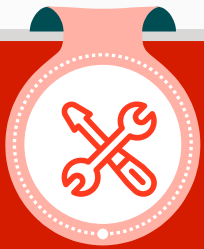
Join a team with a code

Enter code

Got a code to join a team? Enter it above.

## Optimise and Automate

# Enforce go-forward governance of SharePoint Online, Teams and other workspaces



*Interact with end users within Microsoft Teams to streamline provisioning and lifecycle management*

- *Control who can create what across Microsoft 365 leveraging RBAC.*
- *Establish ownership by attesting existing workspaces.*
- *Gather business context information to determine whether duplicate efforts are reducing collaboration ROI. Reduce ROT from the point of creation.*

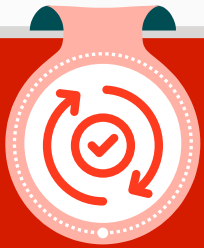
The screenshot shows the 'MyHub' interface with a sidebar containing icons for Activity, AVA, Chat, Teams, Calendar, Calls, Files, Delphi, MyHub, and Apps. The main content area is titled 'New request > New Workspace Questionnaire'. It contains several dropdown menus and checkboxes for configuring a new workspace, including options for content access, existing workspace access, collaboration methods, external access, and crisis management. At the bottom, there are 'Cancel' and 'Next' buttons.

The screenshot shows the 'MyHub' interface with a sidebar containing icons for Start a request, To-do list, Hubs, Workspaces, and My guest users. The main content area is titled 'New request > Create Crisis Mgmt Team'. It shows a progress bar with three steps: Step 1. Request information, Step 2. Basic settings, and Step 3. Advanced settings. The form includes sections for 'Additional Information' (Critical Business Application, Locations, Business Purpose, Department), 'Team name and ID' (Team name, Team description), and 'Submit' buttons at the bottom.



## Optimise and Automate

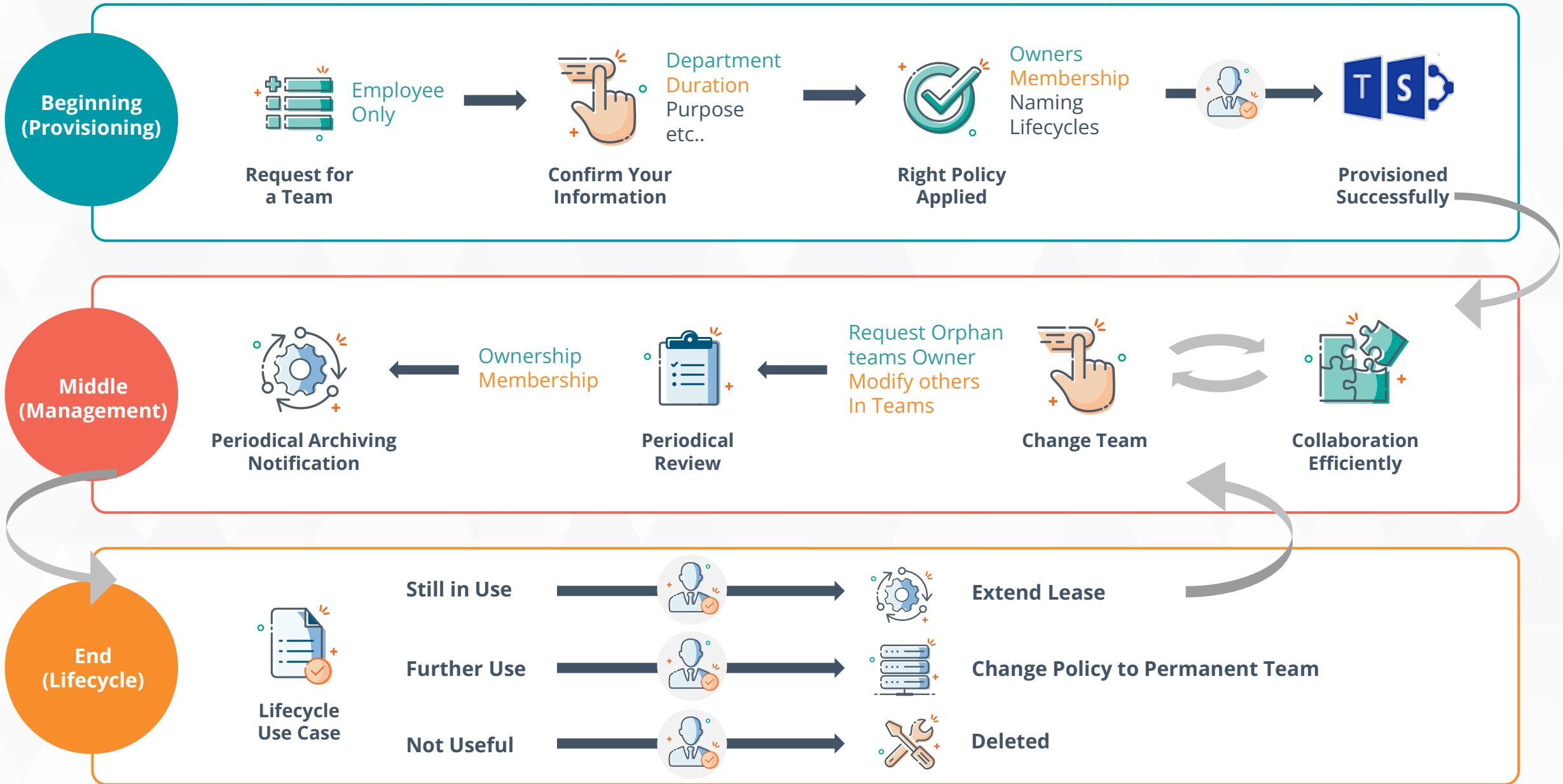
# Automate access reviews and data lifecycle policies



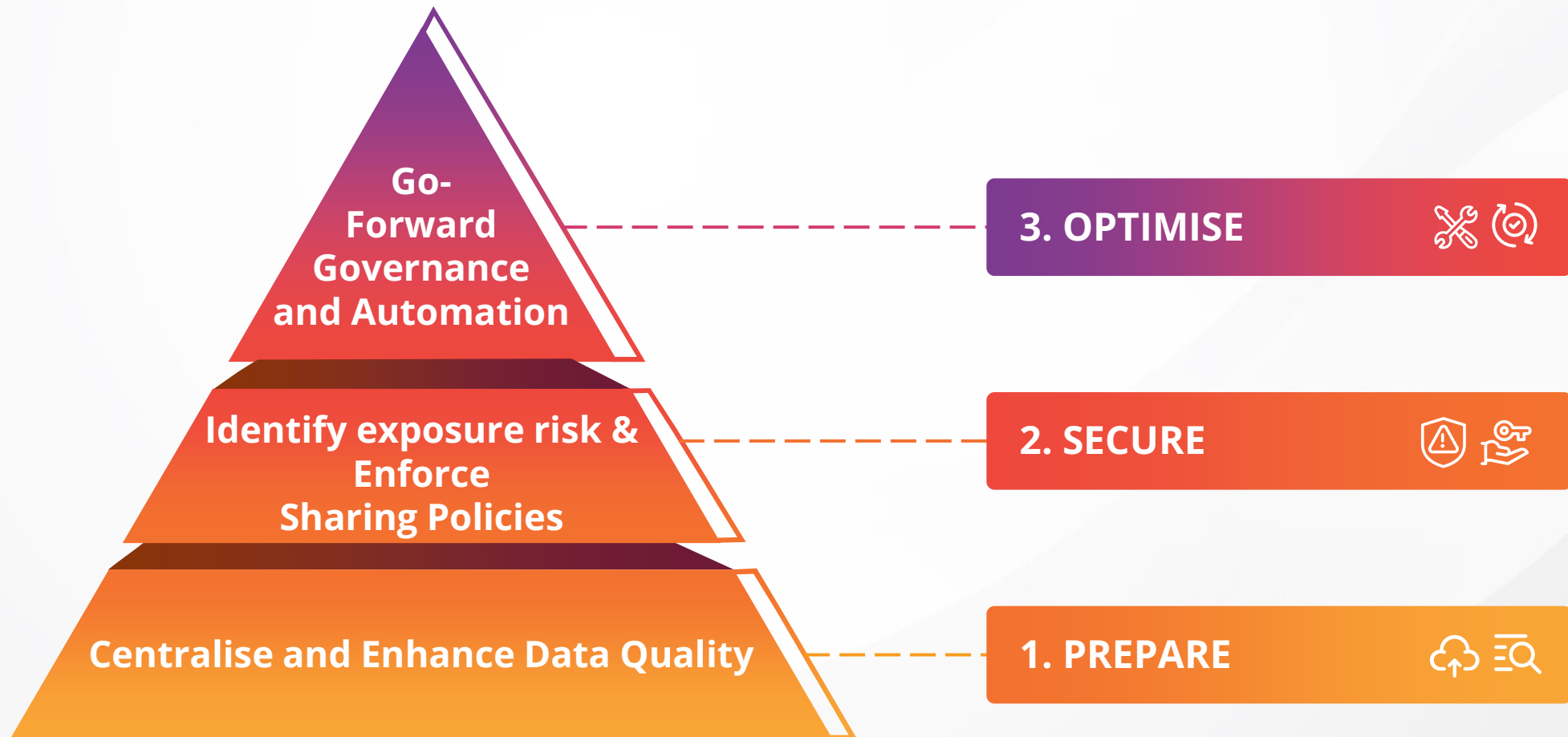
The screenshot displays the 'MyHub' workspace renewal process. The main header shows 'MyHub Home Chat About' and navigation links like 'Start a request', 'To-do list', 'Hubs', 'Workspaces', 'My guest users', 'My tasks', and 'Requests'. The workspace 'Secret\_Team Project 1' is highlighted, with a 'Renewal overview' section indicating it's due for renewal. A 'Verify Additional Information' form is shown on the right, with fields for Business Purpose, Sensitivity Level, Critical Business Application, Region, and Country Code. The 'Renewal progress' section shows a progress bar and a list of items to be reviewed: Contact, Membership, SharePoint permissions, and Sharing Links Review, all marked as complete.

*Interact with end users within Microsoft Teams to streamline information gathering for Microsoft 365 Copilot*

- Determine ownership and primary contact information to future proof sensitivity.*
- Reviews across user access, permission structure, metadata, and sharing.*
- Allow admins to define who should be or shouldn't be able to access sensitive content, such as: business critical environment shouldn't be accessible by citizen developer.*



# A Holistic Approach to Data AI-Readiness.





# Thank you!

 Sales@AvePoint.com

 www.AvePoint.com

 [in](#)   

Gracias

ευχαριστώ

Danke

Grazie

Paldies

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكرم

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

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ございます

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