We'll get you there.

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Securely Implementing Copilot for Financial Services

Gaining Confidence in Gen AI Through a Secured Foundation

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Welcome

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Poll

How secure do you feel your M365 tenant is?

- We've not had a controls assessment specific to M365
- I'd need to ask our IT team
- We've had our M365 controls and config reviewed by an outside resource
- We're only currently using Outlook, Word, Excel and PowerPoint

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Learning Objectives

Recognize why AI and generative AI specifically is important

Taking a cybersecurity first approach to artificial intelligence consideration

Generative AI and Copilot for M365 differences and similarities

Real world use cases through live demo

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Main Categories Of Opportunity With AI

Efficiency

Data insights

Fraud/compliance

Cybersecurity

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Foundational Considerations in Implementation of AI

- Organizational appetite
- Data quality
- Data privacy and security
- Infrastructure and technology
- Staff training and knowledge
- Regulatory compliance
- Cost and ROI
- Change management

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Cybersecurity

Responsible AI Implementation: A Security-First Approach

- Integrating security across the AI lifecycle:
  - Embed security practices at every stage, from design to deployment.
  - Establish secure coding practices to safeguard AI models.
- Protecting AI assets:
  - Secure Large Language Models (LLMs) and training data against breaches.
  - Conduct regular penetration testing on AI hosting environments.

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Cybersecurity

Governance for Third-Party AI Models

- Establish robust AI governance:
  - Develop a comprehensive strategy with clear policies for AI usage.
  - Implement training and awareness programs for employees.
- Establish data privacy and compliance:
  - Enforce strict data governance to control information sharing.
  - Prioritize data privacy to protect sensitive financial data.

Secure AI = Secure Business

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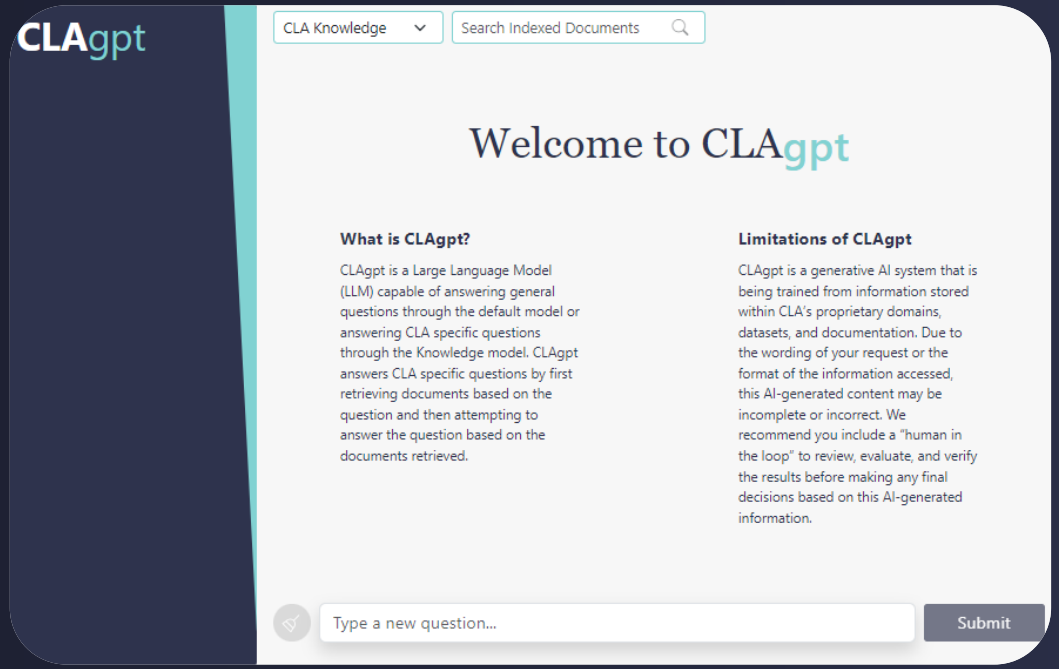
Leveraging the Power of Generative AI



- Enhancing human potential and productivity
- Powerful and intuitive search for accurate and timely data retrieval
- Efficiency driving personal assistance

Generative AI is transforming the daily work experience

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Good Jumping Off Point – Copilot

- Office365 controls and configuration assessment
- Leverage existing infrastructure you already have
- “Walled Garden”
- Employee onboarding, HR manual inquiries, procedures
- Content creation
- Drive internal efficiencies

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Demo Time

Some Practical Generative AI Use Cases for Financial Institutions

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What Is the Cost of Doing Nothing?

- Increased risk in the landscape of banking with current tools that cannot monitor and notify as quickly
- Employee turnover
- Lack of deeper insights to performance & preferences
- Less effective customer/member service
- More effort catching up- this isn’t going away

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Poll

With what you learned today, are you seeing how Copilot for M365 could help your FI while remaining secure?

I still don't think we're ready

I think we can leverage our environment to drive efficiencies

I'd like to start with the M365 controls or configuration assessment

Not considering it

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What is *Next* for Your Institution?

- Educate
- Plan
- Consider
- Monitor

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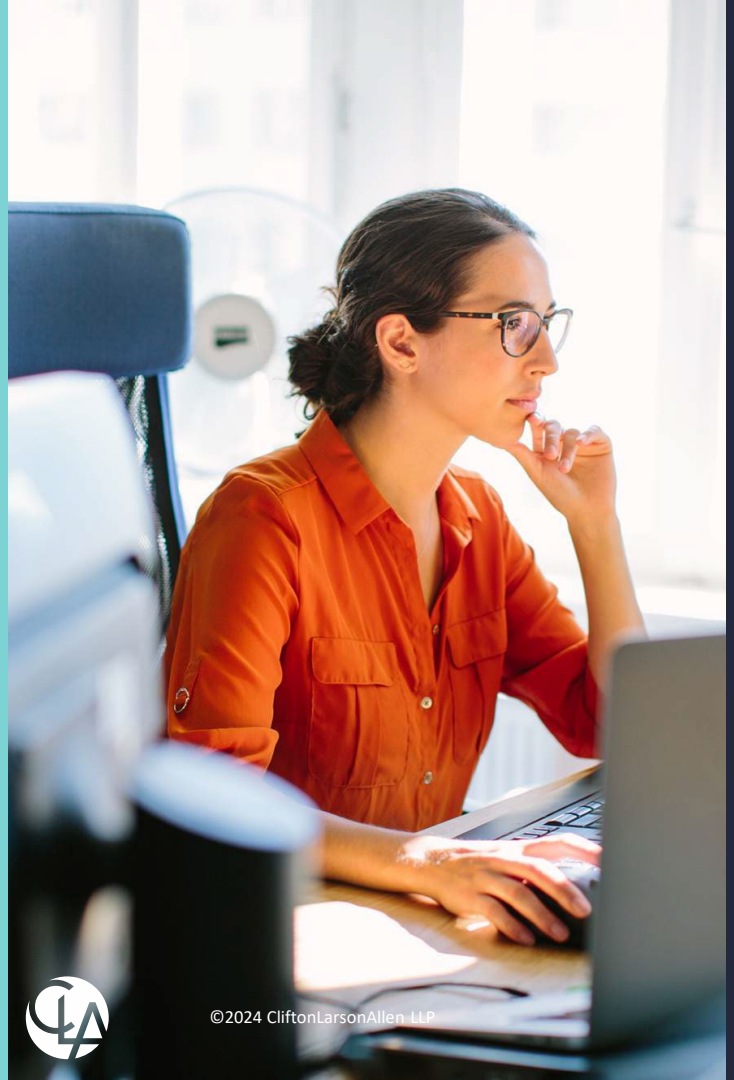

AI Strategy and Roadmap

Collaborative roadmap development focusing on removing key barriers to growth and accelerating scale.

1. Discovery and evaluation
2. Current state mapping
3. Use case and feasibility study
4. Future state mapping
5. Roadmap and value definition

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Schedule a Complimentary Listening Session

It’s our job to engage in conversations, listen to what you really want, and apply our talents and experience to make extraordinary impact on your organization and life.

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Thank you!

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