# **MedComms Networking**



## Using Copilot in MedComms The Good and the Not So Good News

Webinar

14 March 2024

Watch on YouTube

Tania's article we used in the webinar

### Q & A Supplement

Members of our audience had many questions and comments during the webinar; we were unable to address them all at that time.

This supplement provides an opportunity to elaborate on the feedback and questions we received from the audience.

### Licensing & the Different Copilot Products

**Nick Lamb**: "Can we have some info on availability/pricing of CoPilot? I find the MS site really confusing. There's home/business, then business basic/standard/premium, and you can also get it as an add-on?!"

**[Mario]** Licenses determine the features of Copilot that are available for use. Features and pricing can vary by region and are subject to change.

The minimum prerequisite license is a Microsoft 365 business subscription. Several options are available:

- Business Standard
- Business Premium
- E3, and
- E5

Licensing fees range from \$12 to \$57 per user/month (US\$). Note that these subscriptions also include, at no additional cost, the "*Commercial data protection for Copilot*", which facilitates private interaction (chat) with Copilot. [This is the product we used at the 20:41 mark in the video on YouTube.]

The version of Copilot that is compatible with Office tools (Word, Excel, PowerPoint etc.) is *Copilot for Microsoft 365*, which is an add-on priced at \$30 per user/month. Therefore, the minimum expenditure for a medical writer would be \$42 per month.

NOTE 1: The license for the *Copilot for Microsoft 365* add-on is not available under a monthly payment. One has to commit and pay for a full year.

NOTE 2: The licensing rules may be different for government and educational institutions.

**Bethany Garnett**: "Will co-pilot be available for people with personal license, not business license?"

**[Mario]** As far as I know, Copilot for Microsoft 365 is available only for business users. There is no official information available regarding future releases for Personal or Family subscriptions.

**Kate Munro**: "If we work as independent consultant to a client, do I need to use the client's copilot as a named user?"

**[Mario]** If your client gives you an account in their own Microsoft 365 environment (i.e. a "tenant"), then it is the client who needs to assign a license to you (i.e. they pay for the license). You can then use Copilot within that account (named user).

However, if you produce your deliverables within your own Microsoft 365 environment, that is, you have your client's documents on your own OneDrive, then you are the one who has to acquire a Copilot license, and use it with your own account.

**V Huynh**: "How long do you foresee co.pilot being in its beta-phase and would you foresee updates within this year or early next year?"

**[Mario]** For small businesses (that is, business subscriptions of less than 300 users), Microsoft made *Copilot for Microsoft 365* generally available on January 15, 2024. Thus, Copilot is no longer in a beta phase. Microsoft now releases updates to the product according to their normal schedule.

### Confidentiality, Privacy & Security

The concerns shared by the attendees about confidentiality, privacy, and security are completely valid. It is important to clarify the matter in ways that will inform decision making.

According to the Microsoft Copilot Privacy Statement, the product adheres to Microsoft's standing commitment to privacy, security, and compliance for business users. This includes the General Data Protection Regulation (GDPR) and European Union (EU) Data Boundary.

Data, Privacy, and Security for Microsoft Copilot for Microsoft 365

[The following questions are grouped together]

**Steve Palmisano asked**: "Peter, can you and the speakers specifically address how the AI user is taking confidential (not yet published) science, placing it into a generative AI model (exposed to outside world) and not violating confidentiality? Are these AI models being brought in house and within your own unique cloud environment? Would like to hear a step by step on this."

**Jack Seymour**: "A question about privacy—does Copilot (by default) 'scrape' data from Office documents for its learning model?"

**Laura Prieto**: "I think we should only include in copilot or other generative AI content that has already been published. Not sure about including an abstract or other content that has not been published yet"

**Irena Zurnic Bonisch**: "What about confidentiality issue? Is it safe working with unpublished and confidential client documents in Copilot?"

[Mario] When using Copilot for Microsoft 365:

- Your prompts remain within your business environment. In fact, other users within your environment cannot see your prompts. (Exception: the Global Administrator can access that data for auditing or e-discovery purposes, and even doing so will generate an audit trail in the system.)
- To prepare its response, Copilot may access data that is already accessible to you. This includes documents on OneDrive, emails, chats in Teams, and pages on SharePoint. Copilot cannot access data that is not already available to you.
- Copilot may use keywords in your prompts to search the web for additional information. Your Global Administrator must explicitly grand Copilot the permission to access the web, a permission that can be revoked at any time. (See picture below)
- A regular user can also prevent Copilot from accessing the web when using Copilot Chat. When selecting "Work", Copilot searches only data from within your business environment. (See picture below)

No confidential information leaves your business environment because of Copilot.

To be clear, data accessed by Copilot is never used to train the large language model (LLM). There is no 'scraping' of data for the training model. Please see the "LLM" section on page 7 for more details.



**Claire Elizabeth Line**: "As a freelancer, I work for different companies so if Copilot has access to Teams etc. then it can access one client's data for work on a document for another client?"

**[Mario]** Copilot's access is like yours, as a person. For example, when working on a client's engagement, Copilot will know and remember what you have written for another client. Nothing prevents the inspiration your mind derives from the work you deliver to your clients. This is the essence of your expertise, and your clients value and pay for this. If you keep your clients' documents on your OneDrive or Teams, Copilot may access the information to prepare a meaningful response.

Keep in mind that Copilot will indicate the sources it used to formulate its response. That is, if Copilot accessed "Document-Client-2", this document will be indicated. You can then determine how best to use the response.

[The following questions are grouped together]

**Stephanie Gibson**: "If our agency works for multiple client companies, would Copilot access data from multiple clients despite our firewalls?"

**Jeff Benjamin**: "So are there firewalls between different users within the organization? There may be a requirement for firewalls within different groups within the same or organization and region."

**[Mario]** For clarity, "firewalls" are network devices that control network traffic. Firewalls are not appliable to a cloud environment such as Microsoft 365. If we replace "firewalls" with "access policies", then the question is applicable.

Indeed, the enforcement of access control through access policies in Microsoft 365 is essential. In fact, every environment, based on Microsoft or otherwise, must enforce access policies.

For example, in this scenario: MedicalWriter-A works on a project for Client-A and MedicalWriter-B for Client-B, and the policy in that organization is that users cannot see other users' files without express permission. When MedicalWriter-A uses Copilot, no data from Client-B is accessed.

Note that permissions are normally applied to groups and not individual users. Users are then assigned to groups. This method of assigning permissions is more practical and easier to manage.

**Paul Derbyshire**: "Your copilot query can only access the data that you can access, so as long as you build your Teams/SharePoint structure with user access management in mind you are safe. You also need to make sure users are trained on how to share properly, e.g. if something is shared with 'People in your company can access', then Copilot can see it."

[Mario] Thank you Paul. Your comment is correct.

**Sital Harris**: "Security if you have the professional version of MS is strong and personal to you and your data - it depends on your MS license"

**[Mario]** Quite valid comment, Sital. Thank you. Absolutely, a medical writer should never use a personal or family subscription to work on a client's engagement. Enterprise-grade security is available only with business subscriptions.

And even then, different business subscriptions offer different security features. It is very important to review the security features you currently have with your subscription and determine if they meet the security requirements that your clients expect. If not, you need to consider upgrading to a higher level of security.

For example, we provided this add-on to some of our users: <u>Enterprise Mobility + Security</u>

### The LLM

The Large Language Model

**Background**: Copilot leverages sophisticated large language models (LLMs), including pre-trained models like GPT-4. These LLMs use deep learning techniques and vast data sets to understand, summarize, predict, and generate content. The keyword here is "pre-trained". While Copilot uses the capabilities of the LLMs, the LLMs themselves remain unchanged and do not "get trained" with the prompts you provide to Copilot.

The Copilot architecture diagram (see page 17) shows the complete flow of a prompt. On the diagram, notice the "Large Language Model" part on the right. Step 3 is where Copilot submits the modified prompts to the LLM, and step 4 is the LLM's response. This is the extent of the interactions between Copilot and the LLM.

**Jack Seymour**: "But presumably if it is going to continue to 'learn' and get better, Copilot will HAVE to use our data, because this is how the LLM works? How can Microsoft et. al. say it endlessly improve whilst simultaneously guaranteeing that it won't use our data? What will it be 'learning' from? It's a paradox..."

[Mario] The LLM (i.e. GPT-4) does not learn anything from Copilot prompts.

Using the term "learning" within the Copilot context might be misleading. Actually, it is not that Copilot "learns" from your prompts, rather, Copilot uses your information to produce responses that are meaningful to you. As you generate information specific to you over time within your business environment (e.g. sending emails, saving files), the larger the pool of data available to Copilot. Consequently, over time, Copilot gets better at providing you with more detailed answers.

This is done as follows: On the diagram on page 17, you can see the "Microsoft Graph" component at the bottom left. Every Microsoft business users has a "Graph". In a nutshell, Graph is like a huge database. It is where your emails, files, meetings, chats, calendars and contacts are stored. Copilot accesses your Graph to create better and more detailed answers for you.

For instance, as you accumulate emails, files, meetings (etc.) over time, Copilot has more data to "understand" your business context.

This data is not related to the LLM in any way.

[The following questions are grouped together]

**V Huynh asked**: "How does it know to be a GP [general practitioner]? Was it trained based on feedback from real GPs?"

**Stephanie Gibson**: "How is that providing actual feedback vs just telling you what it thinks feedback looks like for that individual? Especially as you highlighted earlier that everything needs human review? Not sure I see the utility of this function."

**[Mario]** Copilot is able to play the role of a GP (up to a point) because the LLM that it is using (e.g. GPT-4) was trained from billions of internet pages, many of which where either from GPs, about GPs, or communications between GPs. Thus, given all the material about GPs, the LLM can "play the role" of a GP. Like any respectable LLM, GPT-4 can determine the answers a GP would likely provide given a scenario (in our demo, the scenario was the text of the manuscript and the prompt).

Whether you find this feature useful is totally up to you. The "role playing" feature is one more tool in a toolbox. The more tools you have, the better equipped you are to respond to different situations.

### Features & Functionality

[The following questions are grouped together]

**Claire Elizabeth Line**: "Can you ask it to check if an article is aligned with CONSORT/STROBE guidelines?"

**Ruth Herman**: "Please can you expand on the ability of Copilot to help with styling manuscripts for different journals: what is feasible currently and what's expected in say a year's time?"

**[Mario]** We tried to have Copilot do this in the past, with STROBE and EQUATOR. We could not get a satisfactory result. Copilot was unable to check if an article was aligned with specific guidelines or journal requirements.

I am optimistic about Copilot becoming useful at reformatting text according to specific sets of guidelines and requirements in the future. When looking at other Copilot products, for example, with <u>Copilot for Security</u>, used by cybersecurity analysts, Copilot can write precise lines of code (in the Kusto Query Language) to query security logs to find sets of security events related to incidents and make sense of them. If Copilot can apply such complex requirements as Kusto, it may not be farfetched to believe that soon, it will be able to do the same with STROBE.

### Jennifer Peterson: "Can you track changes with this rewrite feature?"

**[Mario]** When using the Copilot rewrite feature in a Word document with track changes ON, track changes shows the new entire paragraph replacing the entire old paragraph. It does not show the changes by individual word/letter.

Adam Jeffery: "Is the same functionality shown here in word available in PowerPoint?"

**[Mario]** Yes, the same functionality is <u>available in PowerPoint</u> and several other Microsoft 365 products such as Excel, Teams, Outlook, Loop. In fact, this functionality applies beyond the Office apps. Copilot is also integrated with the Power Platform and Dynamics 365.

One thing to keep in mind is that Copilot works somewhat differently in each of these products. Copilot is adapted to each specific application. That is, a good prompt with one product may not be as good (or applicable) with another product. One needs to play with each product to learn how to produce powerful prompts.

**Bethany Garnett**: "Can co-pilot be used to create data visual from text or from another format of data? E.g. convert a table to a graph?"

**[Mario]** Very much so. In fact, there is a use case where we found Copilot to be especially strong. For example, when you have tables of data, you can use Copilot for Excel for creating different ways to illustrate the data. (*Copilot for Microsoft 365* includes both Copilot for Word and Excel.)

**Nick Lamb**: "These use cases would work on all the standalone Gen AI websites. Can we see examples where you're using CP within the MS apps to create something?"

**[Mario]** Good point. During our limited time demo, we did not cover scenarios where Copilot creates something new. In fact, we had prepared such a scenario, but did not have time to present it.

The scenario is as follows: We are presenting a poster at a conference. We ask Copilot to create a promotional advertisement to invite members of our network to join us at the specific location of our poster at the conference. Using our manuscript and the conference event brochure, Copilot creates an ad we can use on LinkedIn, in emails, and on our website, both in Word and PowerPoint with text and illustrations.

We plan on producing more Copilot demo videos in the near future. We will let you know when we cover new content generation.

[The following questions/comments are grouped together]

**Claire Elizabeth Line**: *"I tried using copilot this morning to find references for an article written by authors who neglected to add their refs. I had limited success, but then it was my first try."* 

**Ryan Ellison**: "@Claire, I agree. I've generally found Gen AI to be poor at finding scientific references to back up answers. I think generally Gen AI is more useful at writing content but struggles to show its work."

**[Mario]** Ryan makes a good point. I would like to add that finding references is a use case better suited for a search engine.

[The following questions are grouped together]

Jennifer Peterson: "How you do you get access to the Word integration/add-in?"

**Helen Makris**: "I have Microsoft for business but don't seem to have Copilot on the tool bar, how do I add it please?"

**Kate Silverthorne**: "I can't find the Enterprise version of CoPilot with my MS Business Standard license - I've tried lots of digging around and searches. Any ideas?"

**[Mario]** Assuming you have the proper license (see the *Licensing* section on page 2), Copilot shows up at two places in Word: 1) in the Home tab at the far right of the ribbon; and 2) when you select text in the document, the Copilot icon appears in the left margin beside the selected text.

Note that after you purchase a *Copilot for Microsoft 365* add-on license, the Office applications need to be updated. Though Office applications will normally update themselves automatically, the frequency of the updates depends on how your Microsoft 365 tenant is set up: updates can be "immediate", "annual", or something in between. You can always manually force an update at any time.



[The following questions/comments are grouped together]

**Kate Munro**: "How would you advise for independent consultants to best use gen ai to enhance work with clients?"

**Sital Harris**: *"I have used Co-pilot to re-write or re-structure paragraphs - it has saved me hours of time - I do still have to edit/write/update the paragraph but its really useful."* 

**[Tania]** Same with me. It is not that rewriting is hard, but it is tedious. I like being able to get this kind of work done quickly so that I can focus on higher value deliverables. I make sure of enough contribution from my side though to evade the plagiarism issue.

**[Mario]** Assuming that confidentiality, security, and governance are well taken care of, we try Gen AI (via Copilot) with everything. This includes deliverable production, project management, business development, among others. Then we determine whether the use of Copilot with a specific use case brings value to our clients. Depending on the client, the value may be producing deliverables faster, or creating richer content, or being able to offer some services that we would not be able to offer otherwise. We then formally adopt Copilot in those situations where we find value.

This is especially important for an independent consultant. You have limited resources. You are constantly under pressure to win new engagements or earn a renewal. Gen Al is exactly that, a tool. The more tools you have in your toolbox, the more you can do. Try the tool everywhere, develop skills, and, as Sital says, use the tool where it works.

### Governance

Governance in the context of Generative AI involves the establishment and enforcement of guidelines, policies, and procedures to ensure the ethical, responsible, and compliant use of AI technologies. When applied to the production of deliverables for clients by medical writers, governance plays a crucial role in maintaining the integrity, accuracy, and reliability of the generated content.

Governance ensures that the AI adheres to medical writing standards, respects patient privacy, and complies with regulatory requirements. Furthermore, it helps in managing the AI's learning and output generation processes, ensuring that the information produced is not only scientifically accurate but also tailored to the specific needs of the client. Thus, governance serves as a critical framework guiding the interaction between medical writers and Generative AI, fostering a productive and ethical collaboration.

#### [The following questions/comments are grouped together]

**Angie Weiiss**: "I'm just amazed that as medical writers, clients would allow us to insert AI generated text in documents. I was recently fired because my natural writing sounds too much like AI, and I was writing just silly marketing blog post."

**Rosie Morland**: "@Angie We are currently not allowed to use AI generated materials for client deliverables at the agency I work for - we're still in the experimentation phase, and trying to spread understanding of the potential, but not allowed to use it for client work, unless they explicitly ask for it (we had an image Gen AI project last week that was quite fun, but again, not for a data-focused presentation!)"

**[Mario]** Angie, I am sorry to hear about wha happened to you. The spectrum of clients' awareness of Gen AI is quite wide, to say the least. A medical writer can suffer from clients' misunderstanding of Gen AI... even when that same medical writer has not even used Gen AI, which I find astounding.

E. M. Wolkovich shared a similar experience in *nature* in February: <u>'Obviously ChatGPT' — how reviewers accused me of scientific fraud</u>

I don't think there is an easy fix for this issue. It will take time for Gen AI to be more widely accepted without risks for the users. We need to continue sharing our experiences within the medcomms community.

**[Tania]** Your experience applies to all of us. We are all exposed to the risk of clients not understanding how Gen Al is "just a tool" and that medical writers can use it (or not use it) in an appropriate fashion in a way that brings value to their manuscripts. I think that we, the medcomms community, could help by organizing awareness sessions for clients.

Many of my clients are medical writers from B2B entities. I need them to trust me and my skills. If a deliverable sounds like AI, I want transparency between us for them to clarify with me without hesitation.

I also want their trust in my explanation and my expertise in using generative AI. While we can educate our clients, we need a relationship that allows us to sincerely navigate the generative AI landscape.

To recap, first comes my openness to learn, use AI sincerely, and then its clients' part to rely on my expertise.

**Stephanie Gibson**: "For graphics, how would these work regarding copyright permissions?"

**[Mario]** It would be nice to hear from a lawyer or a chief librarian about this topic. For us, we evaluate each situation on a case-by-case basis.

[The following questions are grouped together] **Kavita Garg**: *"How about the content being detected by AI when checked for plagiarism?"* 

Silpa Rani: "What about plagiarism?"

**[Tania]** I use generative AI to assist me in research and ideation. I always crosscheck the ideas I accept. I use the generated content to give me a head start, but most of it goes away after a few rounds of revision, thus nothing unusual was ever detected when I checked for plagiarism.

[Mario] Gen Al and plagiarism is a complex issue that requires far more attention than we can entertain here. This BMJ paper provides some information: <u>Publishers' and journals' instructions to authors on use of generative artificial</u> <u>intelligence in academic and scientific publishing: bibliometric analysis | The BMJ</u> [The following questions/comments are grouped together]

**Sarah Feeny**: "On confidentiality/security: Whether co-pilot (or other) is secure or not, I believe most clients would expect that they had given you express/explicit okay to post their confidential data anywhere before you did it.[ ...] Different if you are creating derivative content from published info ... then you get into the complexities of what disclosure you should provide audiences about whether generative AI has been used at any point."

**Stephanie Gibson**: "Are you including acknowledgement of the use of AI along with medical writers in the appropriate acknowledgments of manuscripts?"

**Rosie Morland**: "@Stephanie depends how it's used - only if text generated by AI is directly used, as otherwise it's a tool like Embase or Microsoft office"

**[Mario]** Good points here. I think transparency is the key. This is why having a written service agreement is always essential for any engagement. The agreement is the place to clarify the expectations of both parties with respect to Gen AI, how is it to be used, cited, and kept secure and confidential.

**[Tania]** This problem can be eased by gradually shifting to a business culture where more and more agreements clearly define the scope of Al use. As of now, I use generative Al to assist me in research and ideation, which is equivalent to browsing the web faster and smarter, which is why I do not believe I need to inform my clients unless a clause in the agreement says otherwise.

However, we must use a secure system and client's approval while feeding Al confidential data. This is where a clear clause in the agreement can save us from future liability. I hope we are progressing to a time where we can freely discuss the use of Al with clients.

### The Future

Abira Ghosh: "I'm eager to know if any of the freelance medical writer is using co- pilot?"

**Sarah Feeny**: "Totally agree with Peter's point about giving things a try with published data, to see what the potential possibilities are"

**Jack Seymour**: "Thank you for an interesting presentation. It was great to see Copilot being used in a medcomms setting. I will proceed with a spirit of 'cautious optimism'."

### **Prompts Used During the Demonstrations**

Bethany Garnett: "Can you provide a summary of all the prompts used at the end?"

- Suggest 4 titles for this article.
- Can you write a 250-word abstract for this article? Make a section about Background, Methodology, Principal Findings, and Conclusion.
- Can you write a 200-word abstract for a scientific poster to be presented at an infectious disease conference? Expand on TPT's use in resource-poor settings.
- Give me 5 different versions of this text with each a different tone: [text here]
- Write a catchy and convincing one-paragraph summary that highlights the innovations presented in the document.
- Write four paragraphs to summarize this paper while highlighting the findings.
- If you were an experienced general practitioner, what would you think of this paper?
- If you were a graduate student, which opportunities for further research would you gather from this paper?
- What are the three strongest points in this paper that would encourage a pharmaceutical firm to invest in further research?

### **Humbling Kudos**

We—Tania, Mario, and Peter—appreciate so much your feedback and kind words. This will encourage us to continue producing useful and informative content for the medcomms community in future webinars. Stay tuned!

Hannah Birkett: Really interesting, thank you!

Sara Black: Thanks for a great demo

**Jayne Carey-George**: Most useful webinar I have seen in a long time on AI in med comms - thank you so much!

Claire Line: Thank you, It has been interesting

Ryan Ellison: Thank you both for the tutorial - very interesting to see what copilot can do!

Mark English: Fantastic session - thank you!

David Evans: Thanks - that was fantastic!

**Sarah Feeny**: So good to see a live session!! ... most useful session I've attended on this topic :)

Paul Flynn: Thank you for some great insights on Co-pilot.

**Sara Freeman**: This is very useful, practical run though. Definitely going to check out if I can access this via my subscription.

**Abira Ghosh**: Great to know about Co- pilot in so much details. Very informative session. This clears my query about confidentiality. Thank you for the wonderful webinar!

**Jane Grills**: Fascinating presentation Mario and Tania - many issues to think about; will be interesting to see how CoPilot use develops. Thank you!

Ezzie Hutchinson: Very interesting, thank you!

**V Huynh**: Thank you Peter, Tania and Mario for your time. I will be going back to the replay. Look forward to the future progress.

Helen Makris: Insightful, thank you.

Rosie Morland: Thanks all - very interesting discussions as always!

**Kathleen Ohleth**: *Thanks for taking the time to talk about Co-Pilot - very helpful for a newbie user!* 

Valeria P: Thank you so much for this very interesting and informative webinar!

Jennifer Peterson: Thank you both very much!!

Angela Pozo Ramajo: Thank you - this was brilliant!

Jane Tricker: Thank you for a very interesting webinar!

Angie Weiiss: Thank you for all these insights.

### **Copilot Architecture Diagram**



Source: MS Ignite Presentation on MS Copilot by Ramesh Balasubramanian, Principal Product Manager.

#### References

<u>Microsoft Copilot for Microsoft 365 | Microsoft 365</u> <u>Microsoft Copilot for Microsoft 365 documentation | Microsoft Learn</u> <u>How to prepare for Microsoft 365 Copilot - Microsoft Community Hub</u> <u>Copilot Privacy and Protections | Microsoft Learn</u>



### Need Help Getting Started with Microsoft Copilot?

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We manage all technical aspects so that you can focus on serving your clients.

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- 2. FMC deploys your selected services and onboards you on your platform
- 3. FMC maintains your platform and monitors for security so that you can keep delivering more and better content to your clients

Copilot & Microsoft 365 Services	Performed by You	Outsourced to FMC
Free Trial		₹
Procure & Manage Licenses		
Platform Deployment & Management		
Copilot Integration		
Create Workspaces (Teams, SharePoint, OneDrive)		
Document Version Management & Change Control		
Monitor for Security & Respond to Incidents		
Monitor for Confidentiality Compliance		
Data Migration		
Training & Support		
Reporting & Analytics		

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