

Beyondsoft Copilot Security & Governance – Secure Digital Transformation with Agents

Beyondsoft Copilot Security & Governance Solutions deliver an enterprise-grade approach to securing and governing Microsoft 365 Copilot and Copilot Studio environments. Our offer combines advanced CIS Benchmark assessments, ongoing managed services, and proven methodologies for Power Platform, Microsoft Purview, Microsoft Defender, Microsoft Intune and Microsoft Entra to ensure your organization's Copilot adoption is safe, compliant, and optimized for long-term success.

What is Beyondsoft Copilot Security & Governance Solutions Services?

This service is designed to support companies in the secure implementation and continuous operation of Microsoft 365 Copilot. We combine expert consulting, practical workshops, and ongoing managed services to ensure your Copilot environment remains secure, compliant, and optimized—every day. This offer may be structured as a project-based engagement or as an ongoing partnership, depending on your organization's needs.

What services are included?

After an initial alignment to understand your organization's needs and priorities, the following services and solutions will be delivered to support your secure agentic transformation:

- **Security & Governance Assessment**
 - Execution of the Microsoft 365 Copilot Optimization Assessment to map licensing profiles, existing security controls, and identify improvement opportunities.
 - Analysis of data governance maturity and regulatory compliance.
- **CIS Microsoft 365 Security Assessment**
 - Comprehensive evaluation of your Microsoft 365 tenant security posture based on the CIS Microsoft 365 Foundations Benchmark v5.0.0.

- Assessment covers key Microsoft 365 solutions: Defender, Fabric, Purview, Teams, Entra, SharePoint, Exchange, and more.
- Review of 118 security controls across categories such as Audit, Data Loss Protection, Email & Collaboration, Identity & Governance, Information Protection, Mail Flow, Meetings, Messaging, Policies, Protection, Roles, Settings, System, Teams, Tenant Settings, and Users.
- Delivery of a management dashboard and detailed report with compliance status, findings, and actionable next steps.
- Presentation of a tailored roadmap to address gaps and strengthen your security posture.
- *Note: Configuration changes are not included; assessment is performed on a single Microsoft 365 tenant.*
- **Continuous Security & Governance Service**
 - Ongoing monitoring, management, and optimization of all Copilot-related security and governance controls, including Copilot Studio Agent lifecycle management.
 - Proactive threat detection, incident response, and compliance management to ensure Copilot remains safe and effective in your enterprise.
 - Regular policy reviews, updates, and reporting to adapt to evolving business needs and regulatory changes.
 - Dedicated support team available to address issues, implement improvements, and guide your organization through every stage of Copilot adoption and operation.
- **Planning & Implementation**
 - Development of the Copilot implementation plan, including technical requirements, definition of priority scenarios, and adoption steps.
 - Configuration of advanced security controls such as sensitivity labeling, Data Loss Prevention (DLP), access policies, and content lifecycle management.
- **Workshops & Training**
 - Training for technical teams on best practices for security, governance, and responsible AI usage.
 - Guidance on integrating controls in SharePoint, Teams, Exchange, and other Microsoft 365 apps.
- **Compliance & Audit Support**
 - Implementation of audit trails, data retention and deletion, and support for incident investigation.
 - Alignment with regulations such as GDPR, LGPD, and international security standards.

How does the program work?

1. **Initial Alignment:** Environment diagnosis, priority definition, and leadership engagement.

2. **Assessment & Planning:** Execution of the Optimization Assessment and CIS Benchmark Security Assessment, followed by development of the implementation plan focused on security and governance.
3. **Control Deployment:** Configuration of policies, permissions, and data protection tools.
4. **Training & Engagement:** Workshops for technical teams and users, promoting a culture of security and responsible AI usage.
5. **Continuous Monitoring & Optimization:** Ongoing managed services, dashboards, reports, and policy reviews to ensure Copilot remains secure, compliant, and high performing.
6. **Support & Evolution:** Assistance with incident response, audits, and evolving practices as new demands arise.

What are the customer requirements?

- Paid licenses for M365 Copilot, Microsoft Copilot Studio, Microsoft 365, Purview among others.
- Availability of users and administrators for participation in workshops and mentoring sessions.
- Compatible infrastructure for agentic solution integration (SharePoint, Teams, Dataverse, etc.).
- Azure and other services cost according to usage.

What benefits does the offer provide?

- **Comprehensive Data Protection:** Leverage Microsoft Purview and advanced security controls to safeguard sensitive information across Copilot, Copilot Studio, and Microsoft 365, ensuring robust data loss prevention, classification, and lifecycle management.
- **Continuous Security Posture Improvement:** Benefit from ongoing CIS Benchmark assessments, proactive monitoring, and rapid incident response to maintain a resilient security environment and address emerging threats.
- **Regulatory Compliance & Audit Readiness:** Achieve and maintain compliance with global standards (GDPR, LGPD, ISO 27001, CIS) through automated policy enforcement, audit trails, and regular reviews—reducing audit preparation time and regulatory risk.
- **Governance at Scale:** Implement and manage clear policies, permissions, and controls for Copilot and Copilot Studio agents, supporting secure AI adoption and responsible automation across all business units.
- **Executive Visibility & Actionable Insights:** Access real-time dashboards and detailed reports for security, compliance, and usage metrics, empowering leadership to make informed, data-driven decisions.
- **Safe AI & Agent Adoption:** Ensure technical teams are trained on best practices for secure, compliant, and responsible use of Copilot and Copilot Studio Agents.
- **Operational Assurance & Business Continuity:** Rely on Beyondsoft's managed services for 24/7 support, continuous optimization, and rapid adaptation to new security, compliance, and governance requirements.



Additional Details:

The program is flexible and tailored to each organization's needs, with all terms, conditions, scope, and pricing customized for each client and subject to acceptance before starting.

Beyondsoft Differentiators

- Proven expertise in Microsoft 365 Copilot, Copilot Studio, Power Platform, Microsoft Purview, and security/governance projects.
- Methodology aligned with Microsoft's best practices, CIS Benchmark, and official recommendations.
- Flexibility to customize scope, terms, and pricing according to client needs.
- Ongoing support for evolving security and governance maturity.
- Global presence with cross-functional teams and 24/7 delivery centers.
- Highly prepared to maintain all aspects of Copilot and Copilot Studio use in the enterprise, from agent deployment to daily operations, with advanced data protection using Microsoft Purview.

Next Steps

Contact us to schedule a diagnostic meeting and receive a personalized proposal for your organization.