B&R Business
SOLUTIONS

Is your organization ready for Copilot for Microsoft 365?

Microsoft Copilot helps your employees work smarter, be more productive, boost creativity, and stay connected—an AI companion that works everywhere they do and intelligently adapts to their needs.

Before rolling out Copilot to your organization, it's critical that you have the right data protection, governance, security, and licensing. B&R's Copilot Assessment can help ensure you're ready to unlock the power of Copilot.

DATA PROTECTION

- Audit of the Microsoft 365 environment to ensure sites, documents and email have appropriate permissions.

- Review the performance of search and confirm that search results are accurately security trimmed.

- Review organizational practices to determine if policy decisions or corporate culture would impede a rollout of Copilot.

- Ensure the organization is following security best practices and has implemented tools such as Information Protection, Sensitivity Labels, Conditional Access and Privileged Identity Management.

DATA PREPARATION

- Review the organization's Information Management Policies to validate that outdated or irrelevant data won't hinder the accuracy of Copilot's responses.

- Ensure that the organization is following information architecture best practices for the structuring of sites, libraries, folders & documents.

- Review current policies around keyword tagging, file naming conventions and data cleanliness.

- Ensure that the organization is leveraging the proper tooling to manage and oversee file versioning.

DATA GOVERNANCE

- Audit the organization's policies and practices around data management, storage, retention, and disposition.

- Review which platforms and services are used to store different types of information, along with any appropriate legal, regulatory, or compliance requirements.

- Review organizational practices around user management, access changes, and permission reporting and/or auditing.

- Confirm that the organization has a documented approach to ensure applicable ongoing maintenance is scheduled & deployed.

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