



Building Knowledge Platforms with Microsoft 365 & Copilot

Customer Readiness Checklist

Use this checklist to confirm prerequisites before the workshop. Items marked “Required” are needed to produce the workshop deliverables.

A. Tenant and access (Required)

- SharePoint Online enabled and target pilot location agreed (new or existing site).
- Workshop participants have required permissions (site admin and flow maker).
- Dedicated pilot area agreed (avoid production disruption during workshop).

B. Knowledge foundations (Required)

- Top knowledge domains identified (2–3) and content owners nominated.
- Sample content set prepared (10–20 documents) representing typical formats.
- Initial taxonomy/metadata expectations captured (even if incomplete).

C. Governance and compliance (Required)

- Security/compliance stakeholder assigned for decisions.
- Direction for sensitivity labels, retention, and DLP confirmed (or decision slot booked).
- Approval model for knowledge publishing agreed (who approves what, when).

D. Copilot readiness (Recommended)

- Copilot test users identified for scenario validation.
- Verification rules agreed (source citation, human review for high-impact outputs).
- Initial priority scenarios selected (e.g., policy Q&A; onboarding, intake-to-publish).

E. Logistics (Required)

- Workshop schedule confirmed and Microsoft Teams access prepared.
- Screen sharing policy and recording policy confirmed (if applicable).
- Single point of contact nominated for coordination and follow-up.

Notes / Decisions log

Decision topic	Owner	Decision / status
Metadata standard		
Approval workflow		
Labels / retention / DLP direction		
Pilot knowledge domains		

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