

THE STEPS TO SUCCESS

COPILOT FOR MICROSOFT 365



1



INTRODUCTORY WORKSHOP

A 90-minute workshop for senior management to educate on Copilot for Microsoft 365, conduct a readiness assessment of your environment, and outline next steps.

2



SECURITY READINESS ASSESSMENT FOR COPILOT FOR MICROSOFT 365

The readiness phase prepares your Microsoft 365 environment for Copilot adoption by licensing and configuring the Policies and Insight assessment tool, reviewing permission boundaries, insecure sharing practices, access controls, and reporting on unused Teams and SharePoint sites.

3



COPILOT FOR MICROSOFT 365 ADOPTION

This phase focuses on helping staff integrate Copilot into their daily routines through key activities such as selecting a pilot group and running an internal activation and adoption program, offering insights into usage and progress, reviews to assess adoption progress.

4



OPTIONAL - SECURITY OPTIMISATION

Optional - Security Optimisation is customised based on the results of the Security Readiness Assessment. Tasks may include tightening SharePoint and Teams permission boundaries and implementing sharing policies with link expiry periods.