



# Microsoft 365 Copilot

Readiness Assessment



# Copilot for Microsoft 365 is transforming work

60%

of leaders say a lack of innovation or breakthrough ideas is a concern

64%

of people have struggled with finding time and energy to get their work done

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

# Copilot for Microsoft Readiness Assessment Goals

## Assess your business readiness

Identify your organization's ability to drive adoption of Copilot for Microsoft 365 through effective organizational sponsorship, strategy, and execution of capabilities of generative AI solutions.

## Technical Readiness

Identify any gaps and opportunities where technical changes must be implemented for your organization to successfully support enablement of Copilot for Microsoft 365.

## Cyber & Security Readiness

Identify where cyber and data security enhancements need to be made within your organization to support the safe and compliant adoption of Copilot for Microsoft 365 by your business users.



# Readiness Assessment Agenda

## Discovery

- |  |              |
|--|--------------|
| <input type="checkbox"/> Copilot for Microsoft 365 Optimization Assessment Workshop with sponsors and stakeholders | 2 Hours      |
| <input type="checkbox"/> AI readiness 1:1 interviews with 3 executive sponsors and stakeholders                    | 30 mins each |

## Technical Review (Workshops)

- |  |         |
|--|---------|
| <input type="checkbox"/> Review SharePoint and Teams Configuration   | 3 Hours |
| <input type="checkbox"/> Review Data Security, Governance and Controls   | 2 Hours |
| <input type="checkbox"/> [Optional] Enable trial license of SharePoint Advanced Management and review findings | 2 Hours |
| <input type="checkbox"/> Review Identity & Access Management   | 1 Hour  |
| <input type="checkbox"/> Review Device Management  | 2 Hour  |
| <input type="checkbox"/> Review Data Lifecycle controls  | 2 Hour  |
| <input type="checkbox"/> Review App Management   | 2 Hour  |
| <input type="checkbox"/> Review data sources outside Microsoft 365   | 1 Hour  |

## Next Steps

- |  |         |
|--|---------|
| <input type="checkbox"/> Assessment Report and Recommendations | 1 Hour  |
| <input type="checkbox"/> Guidance on Next Steps                | 30 Mins |





# Out of scope

## Copilot for Microsoft 365 Deployment

Deployment of Copilot for Microsoft 365 is out of scope for this engagement but available as an add-on or separate SOW.

## Copilot for Microsoft 365 Adoption

Adoption and Change Management services including training for end-users for Copilot for Microsoft 365 is out of scope for this engagement but available as an add-on or separate SOW.

## Copilot for Microsoft 365 Customization

Customization of Copilot for Microsoft 365 and integration with any data source or application external to Microsoft 365 is out of scope for this engagement but available as an add-on or separate SOW.

# Discover – Know your data and understand the risks

Uncover the potential data and security risks Microsoft 365 Copilot could introduce into your organization.

What is sensitive?

- Define what is sensitive to the organization
- Generic & customer specific
  - Company secrets
  - Highly confidential
  - Personal Identifiable Information

Where does data live?

- Created inventory of all data repositories
- Considered as copilot source
  - Microsoft 365
  - 3rd party sources
  - Structured and unstructured

Who has access?

- What content can employee access
- Internal & external to the organization
- Access control and access management
- Oversharing

How is it used?

- Sensitive data overexposure
- Unprotected data
- Is the use of sensitive data managed

What is the risk?

- What if data is exposed
- Which data could harm the organization
- What would be the impact & cost
- Are we at risk
- Are we compliant

## Protect

Implement controls to mitigate and reduce risk.

Data Lifecycle controls

- Minimize obsolete data
- Retention policies and automatic deletion
- Records management for business, legal or regulatory record keeping requirements

Data Protection controls

- Protect sensitive information
  - Data encryption
  - Watermarking
- Prevent Data loss
- Protect against Oversharing and external sharing

Data access controls

- Optimize access permissions, remove, block
- Correct oversharing
- Exclude data sources

Data labeling

- Apply sensitivity labels to data
- Manual, user initiated
- Automatic, based on content, location, purpose, etc.

Data classification

- Select and define sensitive info types
  - Generic, out of the box
  - Customer specific, custom defined to specification



Organizational risk tolerance define next steps.

Low risk  
Enable copilot

Medium risk  
Implement (additional) data security and in parallel enable copilot.

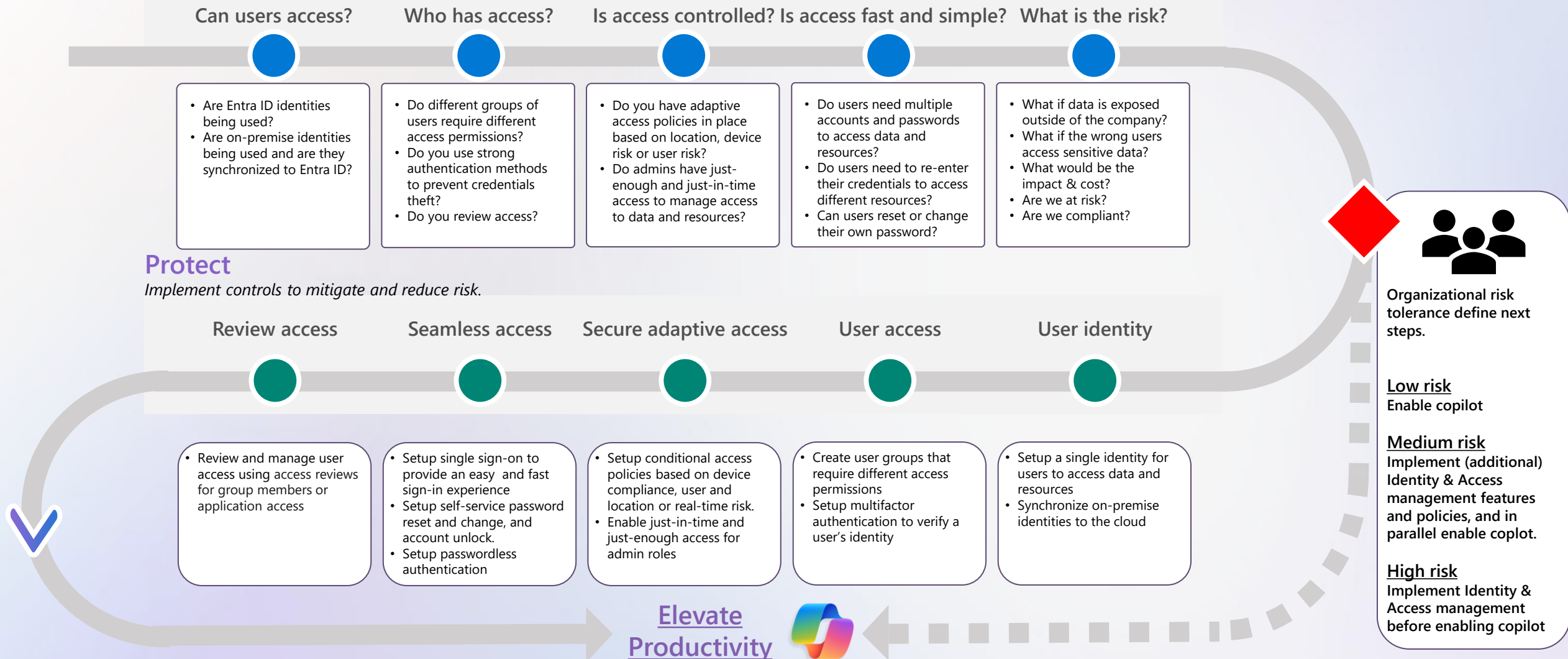
High risk  
Implement data security before enabling copilot

Elevate  
Productivity



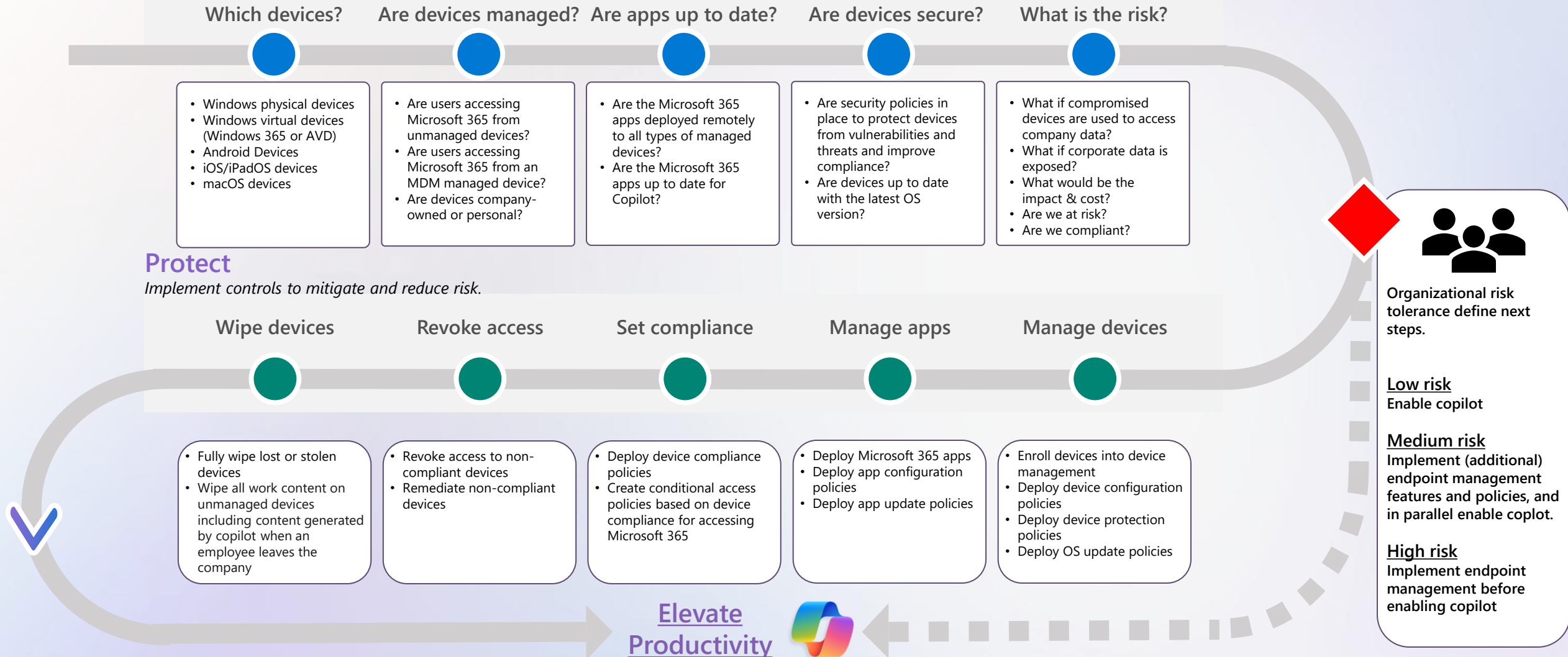
# Discover – Protect user access to Microsoft Copilot for Microsoft 365

Use strong authentication and real-time, risk-based adaptive access policies without compromising user experience



# Discover – Secure access to Microsoft Copilot for Microsoft 365 from any device

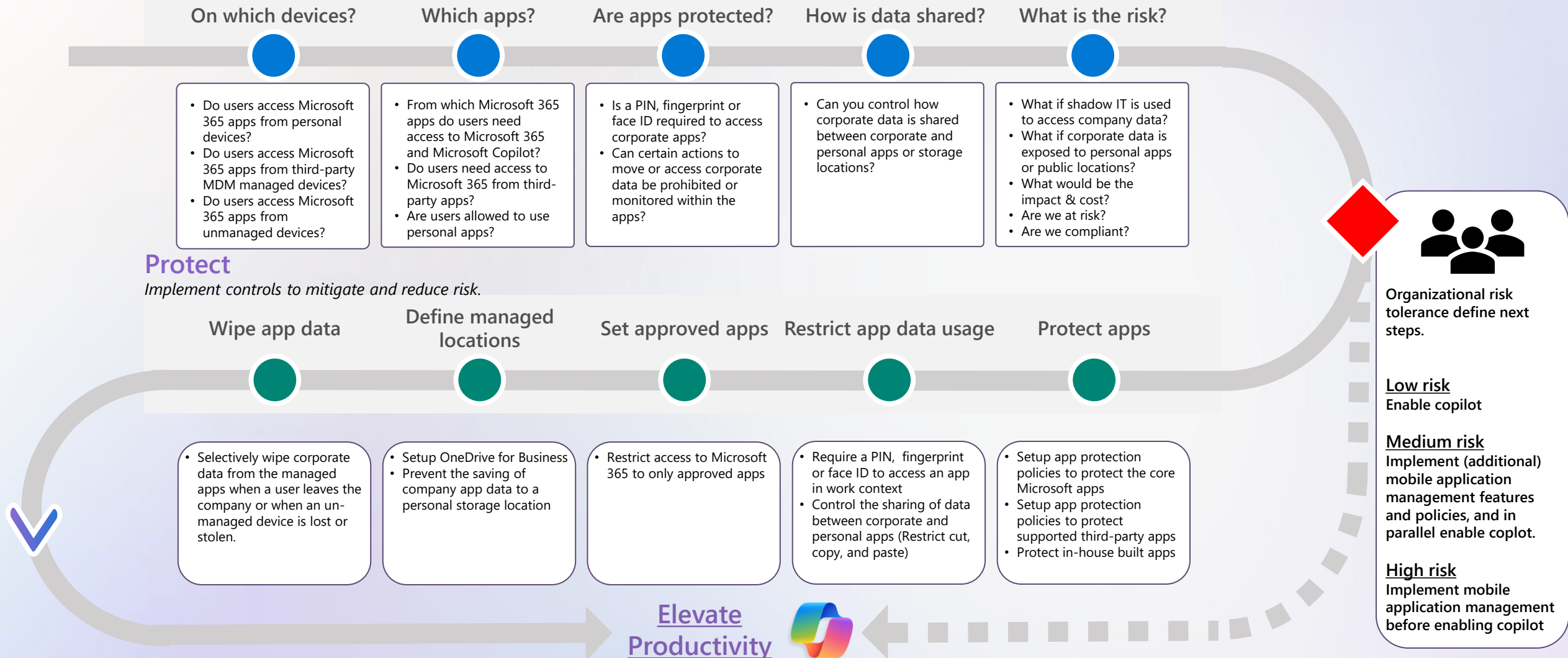
Ensure that only secure, up-to-date and compliant Windows physical or virtual devices and mobile devices have access





# Discover – Secure apps used to access to Microsoft Copilot for Microsoft 365

Control how data is accessed and shared by apps on mobile devices



# Next Steps

Schedule your assessment today!

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**MOONSHOT**  
SOLUTIONS