

Securing Microsoft 365 Copilot deployment

Strategy workshop

Artificial Intelligence (AI) strategy and adoption start with trust, and trust depends on strong platform and data security. While traditional attack vectors such as networks, identities, endpoints, and data remain prevalent, AI introduces new threats.

This emerging surface is centred on generative AI prompts and responses, web data and source context and requires agent observability and governance in order to mitigate these risks.

This workshop will demonstrate and educate the various stakeholders on the different risks and considerations that need to be evaluated before the organisation can start to introduce agents and other AI tools into the environment securely, with trust and at scale.

Microsoft 365 E7

Microsoft 365 E7 is Microsoft's new top-tier enterprise subscription designed for an organisation moving from traditional productivity tools to an AI- and agent-driven workplace.

The suite brings together Microsoft 365 E5, Microsoft 365 Copilot, Microsoft Agent 365, and Microsoft Entra Suite into a single platform, combining AI-powered productivity with enterprise-grade security, identity, and governance capabilities.

This shift reflects Microsoft's strategy to place AI agents at the centre of modern work. With Microsoft Agent 365 acting as the control plane for managing and governing AI agents, organisations gain the ability to observe, secure, and manage agents alongside human users across the Microsoft ecosystem.

Workshop overview

Microsoft SharePoint Online (SPO) underpins collaboration and content storage across Microsoft 365, including Microsoft Teams and OneDrive. As organisations adopt Copilot, managing SharePoint content sprawl and oversharing becomes increasingly important to ensure sensitive information is accessible only to the right users.

Microsoft 365 Copilot surfaces only the data users already have permission to access. Effective governance across SharePoint Online, Microsoft Purview, and Microsoft Entra ID is therefore critical to securing Copilot deployments and maintaining appropriate access controls.

The workshop agenda includes the following key topics and activities:

✓
Review and assess
current Microsoft Purview, SharePoint Online, and Microsoft Entra ID configurations relevant to Copilot.

✓
Demonstrate
governance, security, and remediation capabilities, including SharePoint Advanced Management.

✓
Gather business requirements and help define a Copilot deployment roadmap.

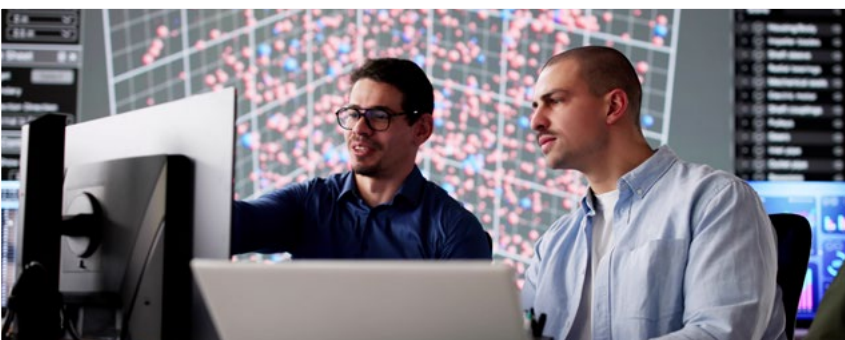
✓
Document findings and provide recommendations to support secure and successful Copilot adoption.

✓
Generation of a review and recommendations report alongside a technical roadmap sequencing the design and implementation of solutions in the appropriate order based on risk, business and technical requirements.

Business outcome

Business and technical leaders gain assurance that copilots can be adopted securely, governed effectively, and aligned with organisational goals.

This minimises risk, maximises productivity, and helps the organisation realise a return on its investment.



Who should attend these workshop sessions?

- Microsoft 365/SharePoint Admins
- IT Security
- Information Compliance

Why Phoenix

We help organisations across the UK adopt, secure, and optimise Microsoft technologies, supporting customers through their cloud, security, and AI transformation journeys.

Our expertise and close relationship with Microsoft ensures organisations receive guidance aligned with Microsoft best practices and future technology roadmaps.

Why work with Phoenix:

- Over 30 years' experience as a Microsoft partner, with dedicated specialists across cloud, security, and AI technologies
- Member of the Microsoft Intelligent Security Association (MISA), giving us early access to Microsoft security insights, product developments, and best practices
- Dedicated delivery teams for security, cloud, and AI transformation programmes for organisations across the UK
- Ability to support the full journey from strategy and advisory through to implementation and managed services

Through this close alignment with Microsoft and our experience delivering secure technology adoption programmes, Phoenix helps organisations adopt AI and emerging technologies securely, responsibly, and at scale.



Ready to make your Copilot deployment secure by design?

Speak to our team to book your Copilot Security Workshop.

[Get in touch now](#)

01904 562200
www.phoenixs.co.uk
hello@phoenixs.co.uk

