

Microsoft 365 security solutions

Secure your copilot journey: M365 protection unlocked

protiviti®
Global Business Consulting

As organizations adopt Microsoft 365 copilot, securing data, controlling access, and preventing oversharing are critical. Without a strong security foundation, copilot can introduce risks and compliance gaps. Addressing these challenges is key to unlocking copilot's full value while protecting your business.



Are you ready to secure your copilot journey?

Business leaders face a rapidly evolving threat landscape as they deploy M365 copilot and custom agents. Key challenges include:

- Managing content sharing and access controls to reduce risk and oversharing
- Configuring copilot-specific controls across Purview, Defender, Intune, and Entra without requiring full enterprise-wide deployments
- Aligning security controls with business needs and regulatory requirements
- Preventing misuse, data leakage, and unauthorized access to sensitive information
- Ensuring readiness for advanced copilot studio agent development and power platform integration

Protiviti's M365 and security architects understand these complexities and offer a proven approach to defining, implementing, and operationalizing copilot security controls—empowering organizations to innovate with confidence.

Business outcomes of our solutions



Achieve secure copilot adoption with tailored controls that minimize risk and support compliance.



Prevent data oversharing and misuse through targeted policies and real-time monitoring.



Accelerate business value by enabling safe, scalable copilot and agent deployment.



Gain visibility and control over sensitive content and AI interactions.



Optimize investment in Microsoft 365 security tools with expert guidance

Protiviti's M365 and security architects deliver a comprehensive, phased approach to securing M365 copilot—combining deep Microsoft expertise with hands-on implementation to ensure your organization's copilot journey is secure, compliant, and future-ready.

Case study:

A global wealth management firm engaged Protiviti to enable the controls to realize the benefits of Copilot



NEED

Concerned about data security and regulatory compliance, the firm sought expert guidance to establish a robust control framework and technical safeguards to enable secure Copilot use without disrupting business operations.



SOLUTION

Protiviti guided the firm through a multi-phase approach, first defining Copilot-specific controls and then implementing security measures like custom identifiers, sensitivity labels, and data loss prevention policies including for Copilot Studio.



BUSINESS OUTCOMES

Sensitive data protection was strengthened, oversharing was reduced, and unapproved AI tools were blocked, resulting in improved compliance and operational security to innovate with AI while maintaining regulatory standards.

How Protiviti can help:

Protiviti partners with clients to:

- Define and implement Copilot security controls across M365 applications
- Facilitate workshops to refine content management and access policies
- Configure Copilot-specific controls efficiently, without full-scale deployments
- Develop risk-control matrices and operational guides for ongoing security
- Secure Power Platform and Copilot Studio agents with tailored policies
- Deliver expert advisory and hands-on support throughout the engagement

Trusted Microsoft partner

As a Microsoft AI cloud solutions partner, Protiviti is uniquely qualified help your organization get most of your investment with access to exclusive partner programs and benefits.

- ✓ Azure migration and modernization (AMM) partner
- ✓ MSSP partner
- ✓ Microsoft intelligent security association member
- ✓ Azure security engineering advisory counsel
- ✓ Copilot jumpstart program
- ✓ Solution assessment partner
- ✓ Fast track partner
- ✓ Microsoft cloud accelerator program

Ready to transform your business?

Let's create a tailored strategy for your success.

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