Copilot Flight Plan – Pre-Flight Check
Microsoft 365 Copilot Readiness Workshop

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The Problem

Microsoft 365 Copilot is a whole new way to work thanks to the integration of AI into our normal business tasks that allow us to be more productive and bring forth new insights from the documents we interact with. These new capabilities also bring challenges to adoption, security, and compliance within our environments.

Organizations may find it difficult to maintain consistent controls and policies for interacting with Microsoft 365 Copilot and never realize the potential benefits without introducing significant risk. The issues are around how to:

- Maximizing the business value of Microsoft 365 Copilot
- Handling increased data compliance and security risks
- Setting boundaries and policies for usage
- Steering innovation and integrations with Microsoft 365 Copilot
- Monitoring data access and exfiltration

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The Solution

Spyglass's **Microsoft 365 Copilot Pre-flight Check (Data and Security Readiness) Engagement** is focused on all the Identity and Data protection components that need to be accounted for to help prevent the access and exfiltration of any data that should not be performed. Readiness can focus on planning, strategy to implement, and/or the actual implementation of the controls and solutions.

- **Identity and Access Management (IAM)**

  The Readiness engagement will dive into the ins and outs of handling the required IAM controls and processes. These processes will be used to protect, monitor, and control who has access and how they view information presented within Microsoft 365 Copilot. This will evaluate and leverage solutions that include:

  - RBAC
  - Conditional Access
  - Identity Protection
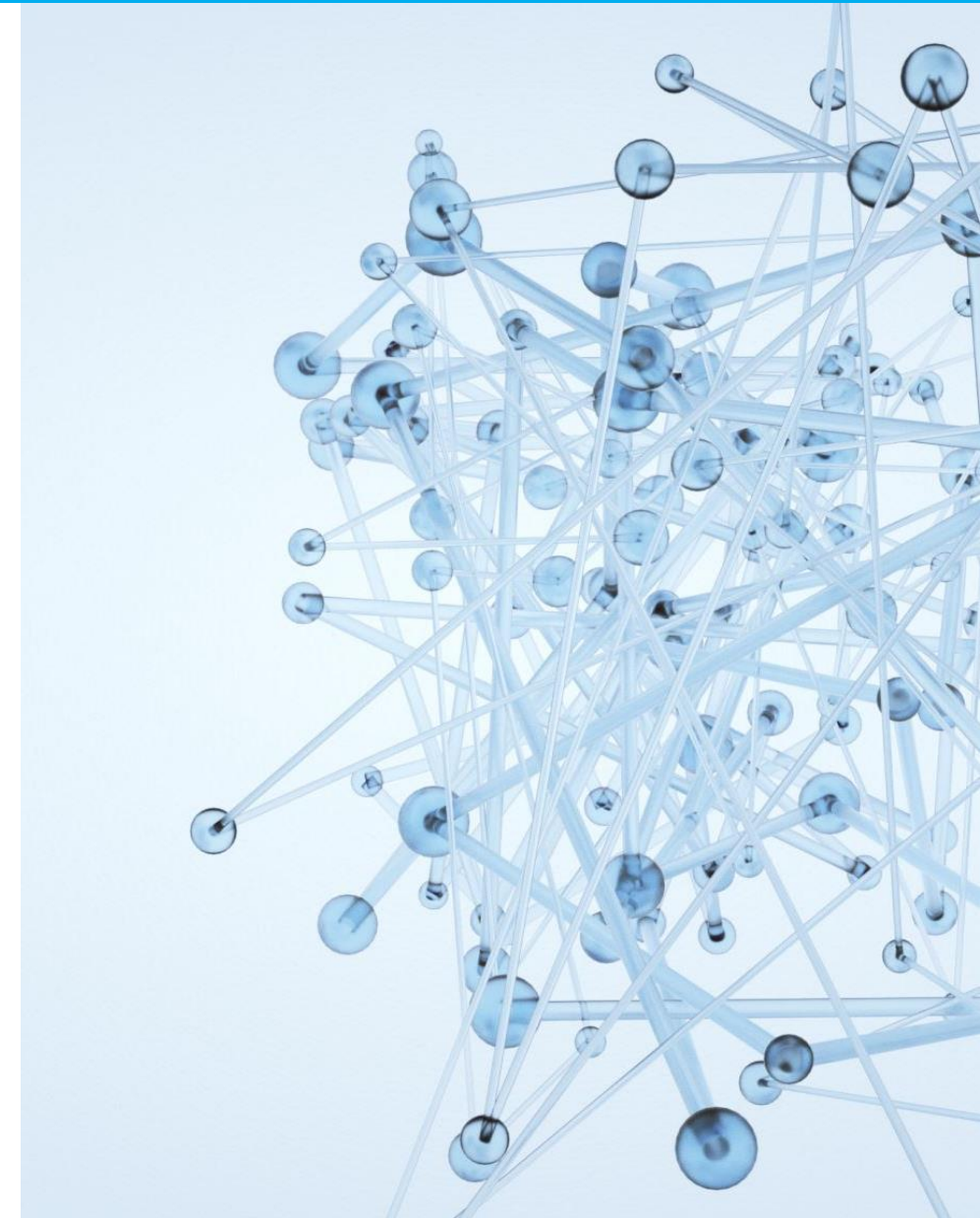 - External Identity handling
  - Auditing and Logging

- **Data and Information Protection/Governance**

  The Readiness engagement will work to establish the necessary controls and requirements to protect and govern data and information within Microsoft 365 Copilot and its sources. This will evaluate and leverage Microsoft Purview solutions that include:

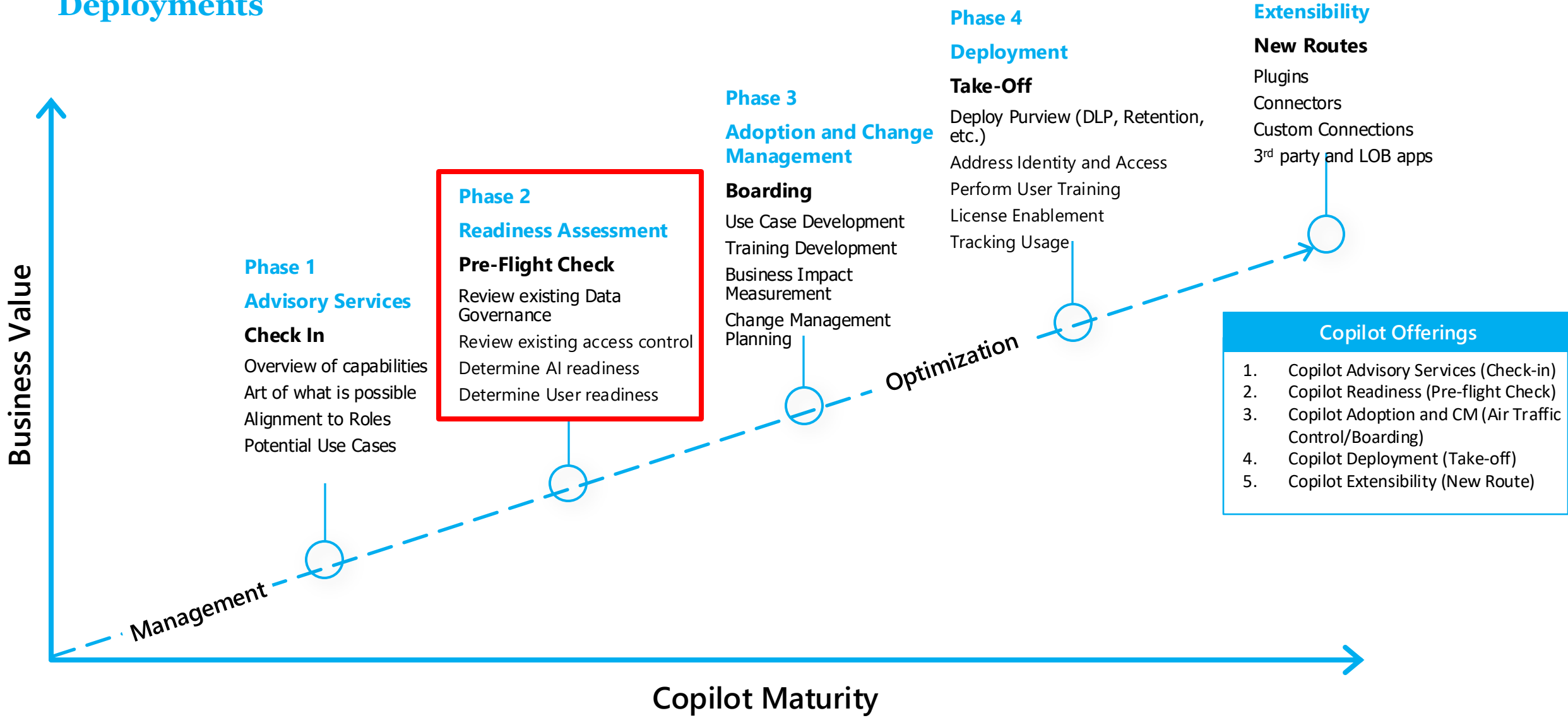 - Data Loss Prevention
  - Sensitivity Labels
  - Retention Policies and Labels
  - Sharing Internally and Externally
  - Auditng and Logging

- **Engagement and Final Deliverables**
  - Length will depend on scope and activities included in the Readiness but often will range from 1-6 weeks of effort.
  - Summary Document

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Microsoft 365 Copilot Flight Plan to Secured Deployments

Business Value (vertical axis)

Copilot Maturity (horizontal axis)

Phase 1
Advisory Services
Check In

Overview of capabilities
Art of what is possible
Alignment to Roles
Potential Use Cases

Phase 2
Readiness Assessment
Pre-Flight Check

Review existing Data Governance
Review existing access control
Determine AI readiness
Determine User readiness

Phase 3
Adoption and Change Management
Boarding

Use Case Development
Training Development
Business Impact Measurement
Change Management Planning

Phase 4
Deployment
Take-Off

Deploy Purview (DLP, Retention, etc.)
Address Identity and Access
Perform User Training
License Enablement
Tracking Usage

Phase 5
Extensibility
New Routes

Plugins
Connectors
Custom Connections
3rd party and LOB apps

Management

Optimization

Copilot Offerings

1. Copilot Advisory Services (Check-in)
2. Copilot Readiness (Pre-flight Check)
3. Copilot Adoption and CM (Air Traffic Control/Boarding)
4. Copilot Deployment (Take-off)
5. Copilot Extensibility (New Route)

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Phase 2: Microsoft 365 Copilot Pre-Flight Check (Readiness)

- Review existing Data Governance for:
  - Sensitive data
  - Retaining data
  - Performing eDiscovery activities.
  - Insider Risk Management (IRM)
  - Labelling for retention and classification.
- Review controls around
  - Role Based Access Control (RBAC)
  - Information Sharing (Internal and External) within the organization
  - Visibility into permissioning, data sharing, and sensitive data usage.
  - Connections to data across the organization.
- Determine AI readiness by looking at:
  - Corporate Cultures
  - The organization and users' ability to accept change and new ways or working
  - Regulatory compliance that may limit scoping.
- Determine User readiness
  - Discuss Use cases to maximize ROI
  - Determine potential adoption rates of new technology

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Thank You

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