Data Pros

Key Considerations for Secure Copilot Adoption

Whether You've Started or Not—
Here's What to Check for Secure Copilot Use

Adopting AI in your business—especially tools like Microsoft Copilot—opens the door to incredible opportunities. But success with AI starts with asking the right questions and making sure the right protections are in place.

This list walks you through key areas to consider during your Copilot implementation. It'll help you gain clarity on your current security practices, spot areas for improvement, and move forward with confidence.

The more "Yes" answers you check off, the stronger your starting point. And if you find a few gaps? That's completely normal—and Data Pros is here to help you close them.

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1. Data Protection	Yes	No
Do you have a way to dynamically preserve deleted files to ensure important data isn't lost or unrecoverable?	☐	☐
Are access controls and encryption automatically applied to sensitive content?	☐	☐
Do you know where your sensitive data lives and how it's being used?	☐	☐
Do you have systems in place to automatically protect sensitive information from risky or unauthorized access across apps, services, endpoints, and on-premises files?	☐	☐

2. AI Access

	Yes	No
Do you have an automated system to manage metadata and classify data consistently across your hybrid data sources?	☐	☐
Are you applying responsible AI principles across your data, models, prompts, and responses?	☐	☐
Do you have controls in place to prevent Copilot from processing certain sensitive files or using them in its responses?	☐	☐

3. AI Oversharing & Internal Security Risks

Are you using conditional access to dynamically prevent unauthorized access based on real-time risk and user context?	☐	☐
Do you have easy visibility into your overshared content?	☐	☐
Do you get notifications when new overshared content occurs?	☐	☐
Are you improving Copilot responses by regularly archiving or deleting outdated or unnecessary content?	☐	☐

4. AI Governance & Risk Mitigation

Do you have retention and deletion policies in place for Copilot interactions, meeting recordings, and transcripts—and are they being enforced consistently?	☐	☐
Do you have the ability to detect, investigate, and take action on critical risks like data theft, leaks, or security policy violations within your organization?	☐	☐
Do you have a way to detect sensitive or inappropriate content shared across your organization's communication channels to help maintain a safe and compliant workplace?	☐	☐
Can you audit Copilot interactions to access detailed logs and understand how the tool is being used?	☐	☐
Can you efficiently locate and manage data required for legal or internal investigations without disrupting daily operations?	☐	☐

5. AI Security & Monitoring

	Yes	No
Do you receive alerts and reports that highlight risky behavior or unusual AI activity in your organization?	☐	☐
Do you have visibility into data metrics and distributions to make informed decisions about your data estate?	☐	☐
Do you have a unified view of your data security posture to identify and address potential vulnerabilities?	☐	☐

6. Employee Training & AI Awareness

Have employees received training on AI security best practices?	☐	☐
Are employees aware of the risks of using AI tools for sensitive business processes?	☐	☐
Do you have a clear AI usage policy that outlines responsible AI use?	☐	☐

Reviewing Your Responses

If you marked a few "No" responses, take it as a valuable signal. It means you've uncovered opportunities to improve and strengthen your environment as you move forward with Copilot and AI. This guide is designed to spark insight and support progress—because even small changes can lead to big results. Connecting with a specialist can help you confidently address any gaps, fine-tune your approach, and set the stage for long-term success with secure, well-governed AI.

Reference Material:

Microsoft Purview | Microsoft Security — https://www.microsoft.com/en-us/security/business/microsoft-purview

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For more information on Microsoft 365 Copilot and getting AI ready, **click here**.