

Microsoft Copilot Readiness

Service Description

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EXECUTIVE SUMMARY

Microsoft Copilot is a suite of AI-powered tools that integrate with Microsoft 365 applications and third-party software that helps users create, collaborate, and communicate more effectively.

Microsoft have provided a detailed list of pre-requisites that your environment must be configured with before the service can be turned on.

Furthermore, Microsoft Copilot operates in the context of the user that is asking it questions, where the user inadvertently has access to data that they shouldn't have, with Copilot it will be trivial to obtain this information from a simple question. In addition, the presence of historical data that is irrelevant or outdated may reduce the accuracy of the results returned.

In response, Wanstor has created a readiness assessment consultancy service that will help your organisation get ready for using Copilot effectively and safely.

This service will give you a clear understanding of what steps you need to take before enabling Microsoft Copilot products, ensuring a smooth transition into AI integration, with appropriate safeguards for your data.

During the readiness assessment, Wanstor will also workshop with you on how to measure ROI on your Copilot adoption and provide practical advice on how to baseline this.

Service Overview

Wanstor's Copilot readiness consultancy service will take your organisation through the following activities that ensures your environment is primed for the successful implementation of Microsoft's Copilot products and includes:

- **Prerequisite Assessment:** Conduct a thorough review of your current environment against the prerequisites for using Copilot checking if:
 - Microsoft 365 Apps for enterprise is deployed.
 - Users have a OneDrive account for certain features in Microsoft 365 Copilot.
 - Microsoft 365 new Outlook (for Windows and Mac) is enabled, which are currently in preview.
 - Microsoft Teams is configured properly.
 - Microsoft Loop is enabled / can be enabled for your tenant.
 - Users' devices are on either current channel or monthly enterprise channel to access Microsoft 365 Copilot features.
 - Network requirements are met for optimal experience with Copilot.
 - License requirements are met.
 - Privacy settings for Microsoft 365 Apps for enterprise are reviewed as they might affect the availability of Microsoft 365 Copilot features.
- **Data Governance:** Wanstor will conduct a review of your current data governance policies and report on what changes are required to ensure the foundational policies are adequate for the initial Copilot implementation.
- **Business Workshop:** Conduct a workshop of the customers business applications and processes to understand which Copilot products will immediately benefit customer teams and document what ROI (return on investment) metrics should be monitored to realise these benefits.
- **Tailored Recommendations:** Following the workshop, Wanstor will provide recommendations. These recommendations will guide you on the necessary steps to prepare your environment including any system upgrades, or changes to governance structures.
- **Key features and use cases:** Based off the workshop, Wanstor will provide you with use cases that give insight into how your business can benefit from Copilot and which Copilot offerings will benefit you. Along with any demos of how these offerings work.

Data Governance

A key part of the preparations for Copilot is ensuring that the data it returns to your users is accurate and does not contain confidential information that they should not have access to.

To address this, as a key part of the readiness process, Wanstor will complete a review of your data governance practices reporting the permissions and accessibility of files and folders in SharePoint, OneDrive, or other Microsoft 365 services where permissions have not been set to the appropriate configuration.

Wanstor will:

- **SharePoint:** Audit site collections and permissions hierarchy. Provide a report and recommendations to adjust settings such as versioning and document retention policies.
- **OneDrive:** Audit sharing settings and restrictions. Report all files that are publicly shared between users. Provide a list of recommendations to adjust settings to secure data appropriately.
- **Data loss prevention and sensitivity settings:** Audit the policies that control how data is handled and protected and review / revise sensitive labels used for company data.
- **Audit existing MSGraph connectors** and report if any will cause data leakage of 3rd party applications into Copilot

This assessment provides your company with:

- **Expert guidance:** Wanstor conducts a comprehensive review of your Microsoft 365 estate and governance structures, offering recommendations to enable the use of Copilot products.
- **Efficiency:** Wanstor will identify potential issues prior to implementing AI, which will help you avoid any pitfalls and in return, simplify the process when ready to enable Copilot.
- **Confidence:** Our guidance assures you that your environment will be ready for Copilot implementation.

During the readiness assessment, our engineer will work with you to provide opportunities for your teams to gain an understanding of the different Copilot offerings. This knowledge transfer is a key component of any successful implementation and will ensure the business understands how Copilot can benefit your employees.

Wanstor also aims to simplify the process of integrating Microsoft's Copilot into your environment. Wanstor will provide clear, actionable steps for enabling Copilot, making the process straightforward and manageable.

Assumptions, Dependencies and Constraints

- Before taking our readiness day, the company should have either E3 or E5 licenses from Microsoft to fully leverage the Copilot products and engage in the consultancy day provided by Wanstor.
- To ensure we have the required access to complete our readiness service, Wanstor will provide you with a form that needs to be filled out by your Microsoft 365 or IT (Information Technology) team. This form includes information about the required access to your subscriptions and tenants.
- Wanstor will require a global administrator account in M365 to run the reports.
- Deliverables and tasks not covered in this document are excluded from this project.
- Wanstor business hours are Monday to Friday, 8am to 6pm. Project work done outside of these periods will need advanced notice to remain on track on the project schedule.
- The customer team will ensure availability of relevant and appropriate IT staff and resources for readiness consultancy work.

Pricing

Service	Senior Technical Architect	Project Management
<ul style="list-style-type: none"> • Prerequisite Assessment • Data Governance • Business Workshop • Tailored Recommendations 	3 Days	1 Day
<ul style="list-style-type: none"> • Data Governance assessment and report only* 	1.5 Days	0.5 Days

*Does not include the tailored recommendations on next steps to secure your data