

# Microsoft 365 Copilot Readiness

Copilot shows people anything they already have access to. Clean up access first, then pilot with a small group.



## 1 Sign in and accounts

- ☐ MFA on for every user
- ☐ Conditional Access policies in place
- ☐ Admin roles reviewed and kept to a few people
- ☐ Former staff accounts disabled

## 3 Lock down what matters

- ☐ Fix permissions on sensitive sites first
- ☐ Use sensitivity labels if your licenses include them
- ☐ Hide sensitive sites from Copilot with Restricted Content Discovery while you clean up

*Copilot licenses include SharePoint Advanced Management oversharing reports that help with this.*

## 5 Pilot plan

- ☐ Start with 5 to 10 people from different teams
- ☐ Run for 30 days with clear tasks to try

## 2 Find oversharing

- ☐ Find files shared with Anyone links
- ☐ Find sites open to Everyone except external users
- ☐ Review sites that hold HR, finance or client data
- ☐ Remove old sites and Teams no one uses

## 4 People and policy

- ☐ AI use policy approved and signed
- ☐ Short training on good prompts and checking results
- ☐ A named owner who answers questions
- ☐ A way for staff to report odd results

- ☐ Track time saved and any access surprises
- ☐ Decide to expand, adjust or stop, then document it

### Want a second pair of eyes? Ask for a free first look.

One conversation and a straight answer about where your organization stands. No cost, no commitment, no pitch.

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