



**Empathy**  
TECHNOLOGIES

DECISION KIT FOR IT & LEADERSHIP

# The Microsoft Copilot *Readiness* *Checklist*

Before you roll out Copilot to the business, run your environment through this. 50+ checkpoints across infrastructure, data governance, security, licensing and adoption — the exact gaps that quietly waste licences and stall rollouts.

50+ Checkpoints

IT Assessment

Governance

Security Review

User Adoption

*A practical, vendor-neutral field guide for CIOs, IT heads and operations leaders who want Copilot to deliver ROI — not become shelfware.*

# How to use this *checklist*

Ten minutes now saves you a stalled rollout later. Here's the fastest way to get value from it.

**M**ost Copilot disappointments aren't a problem with Copilot. They're a readiness problem — messy permissions, ungoverned SharePoint sprawl, no adoption plan — that was present long before the licences were bought. This checklist surfaces those gaps before they cost you. Work through each section with the owner named beside it, mark every item Ready, Gap, or N/A, and treat anything left as a Gap as a task with a name and a date against it. You don't need a perfect score to start — you need to know exactly where the risk is.

**MARK EACH**

## Ready

In place, verified, and owned. No action needed.

**MARK EACH**

## Gap

Missing or unverified. Assign an owner and a date.

**MARK EACH**

## N/A

Doesn't apply to your tenant or rollout scope.

### THE 80/20 OF COPILOT READINESS

If you only fix three things first, fix these: **(1)** oversharing in SharePoint and OneDrive — Copilot surfaces whatever a user can already see; **(2)** sensitivity labelling on your most confidential content; and **(3)** a named adoption owner with a 90-day plan.

These three account for the majority of failed or risky rollouts we see.

**Scope note.** This checklist covers Microsoft 365 Copilot (the version embedded in Word, Excel, Outlook, Teams and SharePoint). Some items also apply to Copilot Studio agents and Copilot Chat. Adapt anything that doesn't match your licensing tier or region.

# 1 IT & Infrastructure Assessment

Is the technical foundation actually ready to carry Copilot?

12 CHECKS

## IDENTITY & LICENSING

- Microsoft 365 base plan confirmed.** Users are on a qualifying plan (Microsoft 365 E3/E5, Business Standard/Premium, or equivalent) before Copilot is assigned.  
*Copilot can't be layered onto an unsupported base licence.*
- Entra ID (Azure AD) identities are clean.** Stale accounts disabled, guest access reviewed, no shared "team" logins.
- Multi-factor authentication enforced** for every user who will receive Copilot.
- Named pilot cohort identified.** A representative 10–50 user group spanning roles, not just IT.

## DATA & WORKLOADS

- Microsoft 365 apps are current.** Users run the supported (Current Channel) build of Word, Excel, Outlook, Teams — not a frozen legacy version.
- Content lives in Microsoft 365, not on local drives.** Files in SharePoint/OneDrive/Teams are what Copilot can reason over; C:-drive content is invisible to it.  
*Low cloud-content maturity is the #1 cause of "Copilot gives weak answers."*
- Exchange Online & Teams fully cloud-hosted.** Hybrid or on-prem mailboxes limit Copilot's reach.
- SharePoint information architecture reviewed.** You know which sites hold business-critical vs. abandoned content.

## NETWORK & ENDPOINTS

- Endpoints meet requirements.** Supported OS, browser, and Microsoft 365 client versions across the pilot fleet.
- Network can handle the load.** No proxy/firewall rules blocking Microsoft 365 service endpoints.

**Search & indexing healthy.** Microsoft Search returns accurate results — Copilot relies on the same index.

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**Admin roles and access defined.** Clear owners for Copilot admin, security, and compliance settings.

# 2

## Data Governance Checklist

Copilot inherits your permissions. Govern the data, not the tool.

11 CHECKS

### OVERSHARING & ACCESS

- Oversharing audit completed.** You've identified sites and files shared with "Everyone," "All Company," or anonymous links.  
*Copilot will surface anything a user already has rights to — oversharing becomes over-exposure.*
- "Everyone except external" groups reviewed** on sensitive libraries and removed where inappropriate.
- Stale and orphaned content addressed.** Old sites, departed-employee OneDrives, and duplicate document sets archived or removed.
- SharePoint Advanced Management (or equivalent) considered** for access reviews and restricted-content discovery at scale.

### CLASSIFICATION & LIFECYCLE

- Sensitivity labels defined and applied** to confidential, financial, HR, and customer data.
- Retention policies in place** so Copilot isn't reasoning over content that should have been deleted.
- Data Loss Prevention (DLP) policies extended** to cover Copilot interactions where supported.
- Restricted SharePoint Search evaluated** as an interim guardrail while you remediate permissions.

### OWNERSHIP & ACCOUNTABILITY

- Data owners identified per business unit.** Someone owns the accuracy and access of each major content estate.
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**A governance forum exists.** A standing group (IT, security, compliance, business) reviews Copilot data posture.

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**Third-party connectors reviewed.** Any Graph connectors or plugins feeding Copilot are inventoried and approved.

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**WHY THIS SECTION MATTERS MOST**

Copilot doesn't break your security model — it **exposes** it. Every permission shortcut taken over the last decade becomes discoverable the moment a user types a question. Treat governance as the gate, not the afterthought.

# 3

## Security Review Template

Confirm Copilot operates inside your security and compliance boundary.

10 CHECKS

### ACCESS & CONDITIONAL CONTROLS

- Conditional Access policies cover Copilot surfaces.** Device compliance, location, and risk-based controls apply to Copilot-enabled apps.
- Privileged accounts hardened.** Admins use separate, MFA-protected, least-privilege accounts.
- Guest & external sharing posture confirmed** so external users can't reach content via Copilot-adjacent paths.

### DATA PROTECTION & RESIDENCY

- Data residency and tenant region understood.** You know where prompts and grounded data are processed and stored.
- Commercial data protection confirmed.** You've verified what is and isn't used to train foundation models on your tenant.  
*Microsoft 365 Copilot does not use your business data to train its foundation models — confirm this in writing for stakeholders.*
- Encryption posture verified** for data at rest and in transit across Copilot workloads.

### MONITORING & COMPLIANCE

- Audit logging enabled.** Copilot interactions are captured in the unified audit log for investigation.
- eDiscovery & Purview coverage confirmed** for Copilot prompts and responses where required.
- Regulatory mapping done.** GDPR, HIPAA, local data-protection or industry rules reviewed against the rollout.
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**Incident response updated.** Your IR runbook accounts for AI-assisted data exposure scenarios.



# User Adoption Checklist

Licences don't create value. Used licences do.

10 CHECKS

## OWNERSHIP & PLANNING

- A named adoption owner exists.** One accountable person (not "IT" in general) owns usage and outcomes.  
*Rollouts without a single owner are the ones that quietly become shelfware.*
- Success metrics defined up front.** You've agreed what "working" looks like — hours saved, active usage, specific workflows.
- Executive sponsor visible.** Leadership uses Copilot openly and references it — adoption follows the tone from the top.

## ENABLEMENT & TRAINING

- Role-based use cases mapped.** Each function (sales, finance, HR, ops) has 3–5 concrete, relevant prompts to start with.
- Onboarding session scheduled** for the pilot group — not just an email with a link.
- Prompt library provided.** Users get ready-made, copy-paste prompts so day one isn't a blank box.
- Champions network identified.** Enthusiastic early users in each team who help peers and surface wins.

## MEASUREMENT & ITERATION

- Usage dashboard monitored.** You review the Copilot adoption/usage reports and act on low-usage cohorts.
- Feedback loop running.** A simple channel for users to report wins, friction, and gaps — reviewed regularly.
- 90-day review booked.** A scheduled checkpoint to reassign idle licences and double down on what's working.

### THE LICENCE-WASTE TRAP

Organisations routinely leave 30–40% of Copilot licences barely used within the first quarter — paying full price for shelfware. The fix isn't more licences; it's an owner, role-based use cases, and a 90-day review that moves unused seats to people who'll use them.

WORKSHEET

# Readiness *scorecard*

Tally each section, capture the owner, and turn every Gap into a dated action. This is the page you take into the room with IT and leadership.

Readiness area	Ready	Gaps	Owner	Target date
1 · IT & Infrastructure	/ 12	—	_____	_____
2 · Data Governance	/ 11	—	_____	_____
3 · Security Review	/ 10	—	_____	_____
4 · User Adoption	/ 10	—	_____	_____
<b>Total</b>	<b>/ 43</b>	—	_____	_____

## HOW TO READ YOUR SCORE

Result	What it means & what to do next
<b>Mostly Ready</b> (few gaps)	You're in good shape. Start a controlled pilot, instrument usage from day one, and remediate the handful of gaps in parallel.
<b>Partly Ready</b> (gaps in 1–2 areas)	Don't go org-wide yet. Close governance and security gaps first, run a tight pilot, and stage the broader rollout behind the fixes.
<b>Not Ready</b> (gaps across areas)	Pause the broad rollout. Buying more licences now just multiplies risk and waste. Remediate foundations first — this is exactly where a readiness engagement pays for itself.

**TOP 3 ACTIONS FROM THIS CHECKLIST**

1. \_\_\_\_\_ Owner: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_ Owner: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_ Owner: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_

TURN THE GAPS INTO A PLAN

# Don't roll out Copilot on a *shaky foundation*.

Found gaps you didn't expect? That's the point. We help organisations across India, the UAE, Australia, Canada and the USA get Microsoft 365 and Copilot genuinely ready — then drive adoption that actually shows up in the numbers.

- ✓ Copilot readiness & data governance assessments
- ✓ Permissions remediation & sensitivity labelling
- ✓ Rollout, training & adoption programmes
- ✓ Ongoing managed services for Microsoft 365

**Book a readiness call →**

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