

Your Simple Copilot Readiness Checklist

Pillar 1

Technical and licensing eligibility

- ☐ Confirm users have a required base license (M365 E3/E5).
- ☐ Check that users are on a supported update channel (Current Channel or Monthly Enterprise Channel).
- ☐ Assign Microsoft 365 Copilot add-on licenses.

Pillar 3

Data governance and hygiene

- ☐ Identify and clean up redundant, outdated, or trivial data across Microsoft 365.
- ☐ Implement a clear sensitivity label policy (Public, Internal, Confidential, Highly Confidential).
- ☐ Review Microsoft 365 Group and Team ownership/membership to ensure active owners and accurate rosters.

Pillar 2

Security and permission audit

- ☐ Audit for *Anyone with the link and Public* sharing links on SharePoint and OneDrive.
- ☐ Review permissions on critical SharePoint sites and high-risk Teams.
- ☐ Check for external user and guest access permissions and remove where not justified.
- ☐ Establish regular workspace reviews to re-certify guest access, ownership, and content permissions regularly.

Pillar 4

User and pilot planning

- ☐ Choose a focused pilot group of 20–50 users with varied roles/departments.
- ☐ Define practical use cases and success metrics for Copilot deployment.
- ☐ Prepare a feedback mechanism by tracking security, productivity, and adoption in a real-world setting.

