

# Microsoft Copilot: Preparation Checklist

This checklist is intended as a guide to help you get started with your journey into Copilot adoption. Should you need it, we are on hand to support you with our purpose built tooling, training and project design capability.



## Analysis - Build certainty and understanding

- Profile departments and roles that could be suitable for Copilot, explore routine processes which could be enhanced or shortened through using the service.
- Understand any resistance through engagement with leadership and internal compliance.
- Profile end user Microsoft application adoption and understand how co-pilot can benefit them.
- Review additional business processes and functions that might be a suitable target, for example, co-pilot integration with CRM, deliver a better chatbot experience for website visitors and empower telephony conversations via Microsoft Teams phone system.



## Compliance and rules of engagement

- Engage with internal compliance to agree parameters around the usage of AI, consider written policy to define the rules of engagement.
- Map out and document Copilot traffic routing and verify that GDPR regulations are maintained.
- Establish the mechanisms and toolset that will be used to analyse, report and control document storage, sharing and collaboration between platforms such as Teams and SharePoint, 3rd party tooling should be considered where no in-house capability exists.



## End user engagement and experience

- Design and agree a plan for end user training, for example, leveraging third party specialists or doing this in-house. Training should include advice on how to interact with Co-Pilot to get the maximum benefit whilst re-enforcing the need to personally verify the results and use the outputs in a responsible manner.
- Consider a sand-box environment in which users can test the service before adoption.



## Technical & Licensing requirements

- Review your IT network configuration and benchmark against Microsoft's connectivity principles to identify any potential latency issues and deliver the best possible user experience.
- Consider document classification labels to protect data at rest and in transit via sharing.
- Review existing file share permissions and groups to understand where oversharing and incorrect access permissions may present a data security risk. Remember that Copilot has the ability to interrogate files and provide results to queries from the end user.
- Understand existing Microsoft 365 subscription allocation to end users, therefore the ability to define which staff will have access to the service and to what degree.
- Choose a licensing partner for Copilot subscription procurement.