

## TECHNOLOGY READINESS CHECKLIST: Copilot for Microsoft 365

This checklist for ms copilot organization readiness is a tool designed to guide businesses through the process of preparing for the integration of microsoft copilot and artificial intelligence (AI) technologies into their operations. Copilot for Microsoft 365 requires the user to have a prerequisite base license assigned. Copilot is not available on device-based licensing for Office 365 apps.

### GET READY

The effectiveness of Co-Pilot is contingent on data accessibility and requires access to quality organized data. Ensuring data is properly stored and controlled is crucial.

- Perform the Copilot for M365 Optimization Assessment. Build implementation plan with User Enablement team
- Understand current licensing, how many licenses would you need to purchase?
- Understand identity management. Evaluate sharing controls that govern who can share and how broadly
- Understand current collaboration tools.
- Understand current data locations. Identify inactive sites, restrict access, and move sites to M365 Archive or delete. Do all items have owners and due dates?
- Address data security, governance, and data access questions.
- Identify potentially overshared content, restrict site access, initiate site owner review.
- Run a risk assessment to uncover opportunities to implement data security measures and improve data security posture
- Identify the first set of employees that would get Copilot for Microsoft 365?
- Manually review SharePoint site permissions and correct as needed
- Run sharing reports in their ODB and correct settings
- Review your privacy settings for M365 Apps because those settings might have an effect on the availability of Copilot for M365 features.
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### PREREQUISITS

Copilot for Microsoft 365 requires the user to have a prerequisite base license assigned.

#### Microsoft OneDrive

- Some features in Copilot, such as file restore and OneDrive management, require that users have a OneDrive account.

#### Microsoft Entra ID

- Users must have Microsoft Entra ID (formerly Azure Active Directory) accounts. You can add or sync users using the onboarding wizard in the Microsoft 365 admin center.

#### Microsoft Outlook

- Copilot works with the new Outlook. To have Copilot appear, you need to sync your M365 settings. It will be supported on classic Outlook for Windows (Win32 desktop app) in the future.

#### Microsoft Teams | Teams Phone

- Set up key configurations such as external access, guest access, team creation permissions, and phone settings. To utilize Copilot in Teams for referencing meeting content post-meeting, and phone, ensure transcription or meeting recording is activated. For Copilot functionality with PSTN calls, a Teams Phone license along with a calling plan, is needed in addition to the Copilot license.

#### Microsoft Loop

- To use Copilot with Microsoft Loop, you must have Loop enabled for your tenant.

#### Microsoft Whiteboard

- To use Copilot with Microsoft Whiteboard, you must have Whiteboard enabled for your tenant.

#### Office Feature Updates Task

- The Office Feature Updates task is required for core Copilot experiences in apps such as Word, PowerPoint, Excel and OneNote, to work properly. This task should be allowed to run on its regular schedule, and allowed to access the required network resources.

## COPILOT READINESS CHECKLIST cont.

This Organization Readiness for MS Copilot Checklist is a tool designed to guide businesses through the process of preparing for the integration of Microsoft Copilot and artificial intelligence (AI) technologies into their operations. Covering essential areas such as leadership support, infrastructure assessment, data readiness, security, governance, and scalability, this checklist helps organizations evaluate their readiness and take necessary steps to ensure a smooth and successful adoption of MS Copilot and AI. By systematically addressing key aspects of organizational readiness, businesses can effectively leverage these advanced technologies to drive innovation, enhance productivity, and achieve their strategic goals.

### ONBOARD + ENGAGE

Use the new Microsoft 365 Copilot setup guide, a wizard-based experience in the Microsoft 365 admin center, to help prepare your organization for Copilot

#### Assign Licenses To Your Users or Groups

Develop a list of users who will receive the licenses first. A few data points to keep in mind:

- Analyze departments with the highest Microsoft 365 usage data, and based on that analysis start enabling entire teams within Marketing, Sales, or HR
  - Identify top use cases and the key metrics you would like to improve in your functional area.
  - Deliver a readout on the prioritized activities for data security controls based on the selected deployment path
  - Validate user cohorts prior to assignment of licenses.

#### Configure Channel

- To use Copilot, Microsoft 365 apps must run on Current Channel or Monthly Enterprise Channel.

#### Deploy Required Apps

To seamlessly integrate with Copilot for Microsoft 365, you are required to deploy the following applications for your users: Word, Excel, PowerPoint, new Outlook for Windows, Microsoft Teams, OneDrive, SharePoint, Exchange.

- Develop a list of users who will receive apps
  - Map the users to the apps

#### Assign Usage Report Permissions

The following roles can see the report: Global admins, Exchange admins, SharePoint admins, Reports reader, Teams admins, User Experience Success Manager.

- Develop a list of users who will have permissions to read the Microsoft 365 Copilot usage report
  - Assign permissions to the identified users

#### Promote Microsoft 365 Copilot

- Promote Copilot features to your users with the email announcement template provided in the setup wizard.

#### Conduct Periodic Assessments

- Periodically review health and business value of the AI transformation journey and identify opportunities for expansion and further optimization of key Microsoft Copilot user experiences.