Microsoft 365 Copilot Checklist

Has your Microsoft 365 Copilot pilot been held up by your IT pilot?

This checklist can help you clear obstacles.

So you've set out to test Microsoft 365 Copilot by launching a small IT pilot to see how it might work for your organisation. Only the effort so far seems to be stumbling. Your team keeps discovering issues with Copilot's performance, with prompts returning inaccurate or lacklustre results. It's also clear that responses are based on data that users shouldn't have access to, raising the risk of noncompliance with privacy and data security regulations. How can you identify where the problems lie, resolve these issues and get your IT pilot back on track?

Ask yourself the questions in the checklist below. The answers should help to identify gaps in your pilot programme and suggest actions that will put your organisation on the right path.

Look for gaps in your approach and prepare to regroup

Start by taking a step back to assess the technical foundations that your team has built on. As you do so, answer the following questions to identify where you need to make changes and then act accordingly:

- **Have we started with the right licences?** Microsoft offers several Copilot licence options depending on your organisation's size, needs and usage plans, as well as on which Microsoft 365 licences you might or might not have already been using. Review these choices to make sure you've made the appropriate selection.

- **How strong is our data foundation?** Because Copilot draws insights from your existing Microsoft 365 data, the results it produces will only be as good as the information you have in Word, Outlook, SharePoint and other applications. So it's critical to make sure your data is up to date, accurate and complete.

- **Have we set permissions appropriately?** Be sure you've set proper permissions for Copilot to prevent the risk of oversharing. For example, users outside of HR shouldn't be able to ask Copilot questions about individual employees' salaries. It's best to use the policy of least privilege, which ensures that employees have access only to the data they need to do their jobs.

- **Is data labelled correctly?** Another way to control what types of data different Copilot users can access is to use sensitivity labels. By assigning data to different categories – for example, general, public or confidential – you can ensure that somebody with access to general data only can't view confidential data when they use Copilot.

- **Are our security settings compliant?** Copilot uses your Microsoft 365 preferences for compliance with data security, privacy and sovereignty regulations. So make sure these are up to date.

- **Have we started with the right use cases and goals?** In its State of Microsoft 365 Copilot survey, Gartner found that the organisations most likely to reap benefits are those that start with highly focused use cases, well-defined business goals and the right KPIs to assess progress.

- **Are we prepared to provide the necessary support and encouragement?** Copilot users need to know there's help available when they have questions. Ensure that your AI-enablement team is keeping an eye on adoption progress, making it easy for people to find the answers they need and building a culture of trust and collaboration.

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How SoftwareOne can help?

If your Microsoft 365 Copilot adoption plans have stalled, SoftwareOne can help you with support for:

Licensing: In addition to buying a Copilot licence directly from Microsoft through an Enterprise Agreement, you can also purchase licences from SoftwareOne through Microsoft's Cloud Solution Provider licence programme. Licences obtained through SoftwareOne's Digital Workplace Essentials (DWE) offering also gives you access to SoftwareOne's dedicated 24/7 support, online training and additional benefits.

Technology readiness: We can help you understand your current readiness for Microsoft 365 Copilot licences and technology and provide recommendations based on your data, privacy and security needs.

Adoption and change management: Our services enable your organisation to embrace data-driven working and improve usability, accessibility and user satisfaction with Microsoft 365 Copilot.

Evaluation accelerator: Aimed at organisations with 300 or more Microsoft 365 users, this service helps you to identify high-value use cases, activate a community of champions and understand Microsoft 365 Copilot dashboard data and usage reports.

Use cases: These interactive workshop modules enable you to identify the use cases that are most likely to deliver value and help you to develop testing and deployment plans.

Security: Our security module helps you to review, implement, deploy and test configurations for identity/access controls and endpoint protection. It also covers deployment of Microsoft Defender, attack surface reduction policies, document policies and test scenarios.

Information protection: This module helps you to set up OneDrive, SharePoint and Data Loss Prevention and get started with Microsoft Purview for governance.

Pilot advisory services: We can guide you on upskilling, tracking results and planning for wider deployment across your organisation.

Customisation: Using Copilot Studio, SoftwareOne can help you to customise Microsoft 365 Copilot to your specific business needs and boost productivity through support for continuous learning. Copilot Studio enables you to build custom agents to automate specific tasks, such as answering questions for website visitors, supporting expense tracking or helping retail employees access store procedures and policies.

To learn more about how SoftwareOne can help you successfully adopt and get the most out of Microsoft 365 Copilot, get in touch with us today.

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