ETHER INSIGHTS

MICROSOFT 365 COPILOT

Readiness checklist

A four-pillar worksheet for eligibility, sharing exposure, data governance, and rollout evidence.

01 ELIGIBILITY

02 SHARING

03 GOVERNANCE

04 PILOT

CHECKED AGAINST MICROSOFT LEARN | 15 AUGUST 2026

Use this as a working record, not a certification. Confirm the linked first-party sources before rollout.

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WORKING RECORD

How to use this checklist

Name one accountable owner for each pillar. Mark an item complete only when evidence exists and another person can find it.

> **Decision rule**
>
> Classify each gap as required, strongly recommended, risk accepted, or not applicable. Complete required Microsoft prerequisites before assignment.

Assessment record

ORGANISATION

ASSESSMENT OWNER

EXECUTIVE SPONSOR

PILOT GROUP

TARGET DECISION DATE

NEXT REVIEW DATE

Four-pillar outcome

PILLAR	GREEN	AMBER	RED	OWNER / EVIDENCE
1. Eligibility	☐	☐	☐	
2. Sharing and access	☐	☐	☐	
3. Data governance	☐	☐	☐	
4. Pilot and adoption	☐	☐	☐	

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PILLAR 1

Eligibility and technical prerequisites

Capture the exact population you plan to license and validate each user, device, and network dependency.

Licensing, identity, and mailbox

- [ ] Confirm each proposed user has a currently eligible base subscription using Microsoft's live licence-options page.
- [ ] Confirm each proposed user has a Microsoft Entra ID work or school account.
- [ ] Confirm the primary mailbox is hosted in Exchange Online and record any on-premises or hybrid exception.
- [ ] Separate paid Microsoft 365 Copilot users from people who only need Copilot Chat, and document why each cohort is in scope.

Apps, devices, and network

- [ ] Export the Copilot readiness report and record eligible users, assigned licences, available licences, and pilot candidates.
- [ ] Confirm pilot devices use a supported Microsoft 365 Apps update channel.
- [ ] Validate supported browsers, operating systems, cookie policy for online apps, and required Copilot network endpoints.
- [ ] Record who owns remediation for failed eligibility checks and when each user will be checked again.

> **Evidence to retain**
>
> Readiness report, licence export, mailbox evidence, update-channel inventory, network test, exception register.

Notes, owners, and actions

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PILLAR 2

Sharing, permissions, and exposure

Find content users can already reach but should not, reduce immediate exposure, and repair access at the source.

Discover and prioritise

- [ ] Identify high-use and critical SharePoint sites, ownerless sites, inactive sites, and sites with sensitive data.
- [ ] Assess oversized audiences, broad tenant access, broken inheritance, and inappropriate sharing.
- [ ] Review Purview data-risk assessments for sensitive data and risky sharing links.
- [ ] Assign an accountable owner to every high-risk site and record remediation priority.

Contain, remediate, and validate

- [ ] Use an approved interim control for high-risk sites while remediation is under way.
- [ ] Do not present Restricted SharePoint Search as a security boundary; record it as temporary if used.
- [ ] Remove excessive access, rescope sharing links, and correct broken inheritance where risk is concentrated.
- [ ] Use Purview audit and reports to validate that restricted content is no longer surfaced before interim controls are removed.

> **Evidence to retain**
>
> Site inventory, assessment exports, risk register, access decisions, before-and-after permission evidence, interim-control removal date.

Notes, owners, and actions

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PILLAR 3

Data governance and compliance

Define how sensitive content is labelled, retained, audited, and excluded from grounding where policy requires it.

Classification and lifecycle

- [ ] Confirm an approved sensitivity-label taxonomy for files, email, Teams, groups, and SharePoint sites where applicable.
- [ ] Test that labels apply the expected encryption, privacy, and sharing outcomes, not only a visual marking.
- [ ] Review retention and disposal for stale or redundant content that should not remain discoverable.
- [ ] Identify documents protected only by legacy Information Rights Management and record the migration plan.

Guardrails, monitoring, and regulation

- [ ] Decide which labelled files, prompts, or sensitive information types must be restricted, then test the relevant Purview DLP policies.
- [ ] Review Copilot interactions, sensitive-data activity, and relevant DLP or insider-risk alerts.
- [ ] Map applicable obligations to owners, evidence, retention periods, and a review cadence.
- [ ] Record additional licence requirements for advanced SharePoint or Purview capabilities before relying on them.

> **Evidence to retain**
>
> Label catalogue, policy exports, test cases, retention schedule, DLP decisions, audit extracts, action register, licence assumptions.

Notes, owners, and actions

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PILLAR 4

Pilot, adoption, and operating evidence

Connect licences to named tasks, a controlled pilot, support ownership, measurable usage, and an explicit rollout decision.

Pilot design

- [ ] Define two or three real work scenarios for each pilot role and state the expected observable benefit.
- [ ] Choose a scoped cohort using eligibility, app usage, data risk, role, and support capacity rather than seniority alone.
- [ ] Document training, acceptable use, data-handling expectations, support routes, and escalation ownership.
- [ ] Capture a baseline before assignment, including task time, quality, usage, risk indicators, and current licence position.

Measure and decide

- [ ] Review the Copilot usage report after data has had time to populate.
- [ ] Review qualitative feedback and business outcomes alongside activity metrics; prompts alone do not prove value.
- [ ] Decide whether to coach, reassign, pause, or remove inactive and low-value assignments.
- [ ] Hold a documented go, adjust, or stop review and set the next owner and review date.

> **Evidence to retain**
>
> Pilot charter, cohort list, training record, baseline, usage export, feedback summary, exception log, decision record, next review.

Notes, owners, and actions

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DECISION RECORD

Final decision and source links

Record the decision, conditions, and next review. Keep the first-party links with the evidence pack.

DECISION - GO / ADJUST / STOP

DECISION OWNER

CONDITIONS AND ACCEPTED RISKS

NEXT REVIEW DATE

First-party Microsoft sources

1. Minimum requirements to deploy Microsoft 365 Copilot
   learn.microsoft.com/microsoft-365/copilot/microsoft-365-copilot-minimum-requirements
2. Copilot data and compliance readiness
   learn.microsoft.com/microsoft-365/copilot/microsoft-365-copilot-minimum-requirements-data-compliance
3. Configure a secure and governed data foundation
   learn.microsoft.com/microsoft-365/copilot/configure-secure-governed-data-foundation-microsoft-365-copilot
4. Restricted SharePoint Search
   learn.microsoft.com/sharepoint/restricted-sharepoint-search
5. Prevent oversharing with Purview assessments
   learn.microsoft.com/purview/data-security-posture-management-oversharing
6. Microsoft 365 Copilot readiness report
   learn.microsoft.com/microsoft-365/admin/activity-reports/microsoft-365-copilot-readiness
7. Microsoft 365 Copilot usage report
   learn.microsoft.com/microsoft-365/admin/activity-reports/microsoft-365-copilot-usage

MOVE FROM CHECKLIST TO LIVE TENANT EVIDENCE

EtherInsights brings licence eligibility, sharing posture, and rollout evidence into one tenant view.

efficientether.co.uk/solutions/microsoft-365-copilot-readiness

Try it free: app.etherinsights.ai

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