

Arx Certa

Expert UK Cloud, Infrastructure & AI

AI READINESS · COPILOT

Microsoft Copilot Readiness Checklist

30 items UK businesses should be able to tick off before deploying Microsoft 365 Copilot at scale.

Free download · May 2026 · v2026-05

Scorecard companion: arxcerta.com/ai-readiness-scorecard

Why Copilot needs its own checklist

Copilot is unusual among enterprise AI tools because it does not introduce new permissions — it reflects the permissions you already have. The hard part of a Copilot rollout is finding out what your users actually have access to today versus what you think they have. Almost every pre-rollout engagement Arx Certa has run has surfaced over-shared SharePoint sites, OneDrive sprawl, or chat history that nobody expected Copilot to summarise back to a user.

This checklist is the conversation that should happen before the pilot opens. Thirty items across five dimensions. Tick what you can. For everything you can't, the work needs to happen before Copilot enters production.

How to read this. Five sections of six items each — Governance, Data, Tenant infrastructure, Security, Use cases. A maturity signal, not a Microsoft certification.

Governance for Copilot

- Copilot usage is covered by a written AI usage policy approved by leadership.
- A named owner is accountable for Copilot inside the organisation.
- An approval process governs which user cohorts get Copilot licenses and when.
- Training has been delivered to every licensed user before activation.
- A change-control process applies to material Copilot configuration changes.
- An exception process exists for content that should not be Copilot-accessible.

Data classification + sensitivity

- Microsoft Purview sensitivity labels are applied to content at scale (Tier 2 and Tier 3).
- DLP policies operate on Copilot interactions, not just classic file movement.
- Retention policies have been reviewed for AI-generated content.
- Confidential content is auto-tagged at creation through templates or policy.
- Document libraries containing client / personal data are isolated from default Copilot scope.
- Sensitive chat history has been audited and pruned where appropriate.

Tenant infrastructure

- SharePoint site sharing has been audited — over-shared sites remediated.
- OneDrive sharing has been audited — externally-shared documents reviewed.
- Teams chat retention is set deliberately, not by default.
- Conditional Access policies cover Copilot-eligible users.
- Geographic data-residency boundaries are configured where required.
- Backup and restore covers Copilot-generated content alongside source content.

Security controls

- MFA is enforced on every Copilot-licensed user.
- SSO + role-based access control is in place tenant-wide.
- Audit logging captures Copilot prompts and responses, retained per policy.
- Privileged access (admin, security) is excluded from broad Copilot rollout until reviewed.
- Vendor security (Microsoft) DPA is signed and matches actual data flow.
- Incident response plan covers AI-specific scenarios (prompt leak, data exposure).

Use cases and adoption

- Pilot cohort is defined with measurable success criteria.
- 2–3 priority use cases are identified, each with a named owner.

- Power users / Copilot champions are identified per business unit.
- Feedback loop captures real productivity gains (not just adoption metrics).
- Retire / extend decision criteria are pre-defined for the pilot.
- Expansion plan is sequenced — cohorts ordered by readiness, not enthusiasm.

What to do with this

Tick what you can. For everything you cannot, you have identified the pre-rollout work that should happen before Copilot expands beyond a pilot. The Arx Certa AI Readiness Scorecard quantifies this assessment across five dimensions and produces a 30-day action plan tailored to your specific gaps.

Test your Copilot readiness in 4 minutes

The Arx Certa scorecard scores your tenant across governance, data, infrastructure, security, and use case. Free; personalised report.

Take the scorecard → arxcerta.com/ai-readiness-scorecard