

Copilot readiness checklist

Work through it with whoever runs your Microsoft 365, before Microsoft 365 Copilot reaches more than a small test group. It isn't legal advice.

Business	[Your business]
Checked by	[Name, role]
Date	[DD/MM/YYYY]

1 Licences and accounts

- ☐ Each test user has an eligible Microsoft 365 plan and a Copilot licence
- ☐ Everyone signs in with a work account, not a personal one
- ☐ Mailboxes are in Exchange Online, if Copilot will use email or calendars
- ☐ OneDrive is set up for each test user

2 Permissions and oversharing

- ☐ You've found SharePoint sites and Teams shared with everyone in the business
- ☐ Sites holding HR, finance or client records are limited to the people who need them
- ☐ Old sharing links that anyone can open have been removed
- ☐ Sensitive documents carry sensitivity labels, if you use them
- ☐ Sites still under review are kept out of Copilot's results for now

3 Data protection

- ☐ Your data protection lead has decided whether you need a DPIA
- ☐ Your AI policy covers Copilot, and staff have read it
- ☐ You know where Copilot processes your data, and it fits your rules
- ☐ You've decided how long Copilot chat history is kept

4 People

- ☐ A small test group is chosen, with one job each to try
- ☐ Someone checks Copilot's work before it's used or sent
- ☐ The test group knows Copilot can be wrong and what to check
- ☐ There's one person to ask, and to tell when something goes wrong

5 The first test

- ☐ You've timed each job as it's done now
- ☐ The test runs for four weeks on everyday work
- ☐ You'll compare the time taken and the quality at the end
- ☐ You've agreed what would make you roll it out further, or stop