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MICROSOFT COPILOT READINESS CHECKLIST

1. Microsoft 365 Identity & Security

- Multi-Factor Authentication (MFA) enforced for all users
- Conditional Access policies configured
- No legacy authentication enabled
- Global admin roles reviewed & minimized
- Secure Score evaluated and baseline improvements identified

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2. Data Governance & Permissions

• SharePoint & Teams permissions reviewed for oversharing

• External sharing policies defined and enforced

• File/folder permissions audited for sensitive data exposure

• Retention policies configured and documented

3. Microsoft 365 Configuration

• Licenses reviewed for Copilot compatibility (M365 E3/E5, Business Premium)

• Inactive Teams/SharePoint sites identified

• Mailbox and OneDrive storage organized & compliant

• Third-party apps reviewed and approved

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4. AI Governance & Security Controls

- AI usage policy drafted or established
- Business rules for safe AI output defined
- Data loss prevention (DLP) readiness reviewed
- User access groups structured to prevent accidental exposure

5. Organizational Readiness

- Executive team aligned on AI adoption goals
- Training plan drafted for end users
- Communication plan for rollout established

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6. Your Copilot Go/No-Go Indicators

• Environment is secure (identity + access + governance)

• Data is structured and accessible to the right people

• Licensing is aligned with Copilot requirements

• Staff understands AI usage expectations

• Leadership approved the roadmap for rollout

Prepared by Cloud Cover
Helping Ohio businesses adopt AI securely and confidently.

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