

Microsoft 365 Copilot data and security readiness assessment

Secure your searchable assets and upgrade your organization's data and security governance policies ahead of your Copilot implementation.

4-week engagement

Before you empower your end users with Microsoft Copilot it's critical that you get your information ready to be searched – and that starts with security. Effective content tagging and the right access controls will make your deployment of Copilot both safer and more powerful. By identifying and optimizing your data access policies, we can ensure the right level of access throughout your organization to pre-empt issues ahead of your Copilot roll-out.

In this essential assessment we will review your content to remove anything redundant and outdated, as well as propose a high-level taxonomy of keywords, classification, and sensitivity levels that will promote data hygiene habits across your business. Additionally, we will review your data security and compliance configurations for all Copilot-accessible data. This involves documenting isolation and access controls and identifying the regulatory compliance requirements for your searchable content.



Expected outcomes

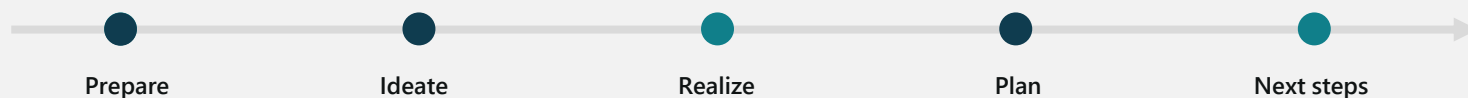
- ✓ Increased understanding of your data and security governance settings
- ✓ A uniform approach for tagging and classification
- ✓ Documented security recommendations for policies, access controls, and compliance needs
- ✓ A clear remediation plan to action

What's included

To be tailored to your organization's needs.

Objectives	<ul style="list-style-type: none">• Identify gaps and recommended remediation steps in data classification and security configuration• Document status of content classification, sensitivity tagging, and taxonomy• Create plan for data cleansing and optimization• Define next steps and scope
Activities	<ul style="list-style-type: none">• Review and analysis of target search data (including metadata, tagging, file structure, security, policies, compliance requirements, etc.)• Facilitate stakeholder sessions to confirm taxonomy and basic content hierarchy• Create plan to update data and security policies and settings
Deliverables	<ul style="list-style-type: none">• Data preparation status documentation• Security best practice gap analysis• Basic taxonomy including content hierarchy and tagging suggestions• Remediation plan
Timing	<ul style="list-style-type: none">• 4 Weeks
Team	<ul style="list-style-type: none">• Copilot Lead, Productivity Specialist, Security Specialist

Our streamlined process



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Ready to Get Started?

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