

Microsoft 365 Copilot Readiness Checklist

Fix oversharing and Purview labels before your 30-day trial starts

Microsoft is subsidizing Copilot adoption through December 31, 2026 with 30-day Microsoft 365 Copilot trials and discounted Purview licensing. A trial only pays off if Copilot can find the right content and cannot find the wrong content. This checklist covers what to fix before the trial starts.

Why readiness comes first

Copilot respects existing permissions. That is the whole problem. Most tenants have years of oversharing: sites where "Everyone except external users" has read access, anyone-with-the-link documents, and Teams channels that were never cleaned up. Copilot surfaces all of it, accurately, to anyone who asks.

The readiness checklist

- ☐ **Run the oversharing report.** Use SharePoint Advanced Management or the Copilot readiness reports in the Microsoft 365 admin center to list sites and files with broad access. Fix the top of the list first.
- ☐ **Apply sensitivity labels that mean something.** Three to five labels (Public, Internal, Confidential, Highly Confidential, plus PHI or PCI where applicable) with encryption and access policies on the top tiers. Auto-label the patterns your regulators care about.
- ☐ **Turn on Restricted SharePoint Search or Restricted Content Discovery** for the sites you have not cleaned yet, so Copilot does not index them until you are ready.
- ☐ **Fix identity.** Conditional Access and MFA for every Copilot user; retire shared accounts; review guest access.
- ☐ **Define the pilot cohort and the measures.** Pick roles with repeatable knowledge work (analysts, project managers, service desk leads) and agree on three measures before day one: hours saved per week, first-draft turnaround, and satisfaction.
- ☐ **Decide the agent question early.** Users will build Copilot Studio agents. Publish a policy on who may build, what data agents may touch, and how they are inventoried (Agent 365).
- ☐ **Plan the change.** Champions, a prompt library for your industry, weekly office hours, and a 30-day success plan.

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What regulated organizations add

Industry	Additional controls before the trial
Healthcare	PHI labeling and auto-labeling, Purview audit for Copilot interactions, and a policy on clinical use.
Financial services	Records retention for Copilot outputs, model-risk documentation for any agent that influences a decision, and Communication Compliance where required.
Government	GCC or GCC High tenant considerations and the current Copilot feature parity for your environment.

Measuring the trial

Report weekly on **adoption** (active users, prompts per user), **value** (hours saved by role, self-reported and sampled), and **control** (labeled documents, oversharing items remediated, agents inventoried). A trial that ends with those three numbers has a business case. A trial that ends with anecdotes does not.

Typical timeline

Two to four weeks for a focused assessment and remediation of the highest-risk sharing, longer if labeling is starting from zero. Purview Suite is discounted for Copilot customers through December 31, 2026.

Talk to a practitioner

VTPMO is a Microsoft Solution Provider delivering Copilot readiness assessments, Purview labeling, and pilot programs for financial services, healthcare, and government tenants.

Book a 30-minute discovery call: outlook.office.com/book/vtpmo@vtpmo.com · info@vtpmo.com