

M365 COPILOT READINESS ASSESSMENT

Prepare your organization to adopt Microsoft 365 Copilot securely, with the right data, identity and governance foundations.

Gain confidence. Reduce risk. Unlock the value of Copilot.



CUSTOMER PROBLEM

Companies want to enable Microsoft 365 Copilot but are concerned about oversharing, sensitive data exposure, weak access controls and poor content governance.



The result: potential data exposure, compliance violations and loss of trust in AI-driven productivity.



HOW INNOVATE HELPS

INNOVATE performs an automated evaluation for Copilot readiness across identity, permissions, SharePoint/OneDrive/Teams exposure, sensitivity labels, DLP, retention and user adoption prerequisites. We use Microsoft Purview, SharePoint Advanced Management concepts, Microsoft Entra ID, Defender for Cloud Apps and Microsoft 365 admin/security insights to define a safe adoption plan.

- ✓ Reduced risk of data oversharing before Copilot rollout
- ✓ Clear readiness score and remediation backlog
- ✓ Faster and safer business adoption of GenAI



YOUR OUTCOME

A clear, actionable readiness view to move forward with confidence and enable Microsoft 365 Copilot securely.



Lower risk of data exposure and oversharing



Stronger governance and access controls



Faster, safer and more productive adoption

BASIC

Get ready. Build a secure foundation.

ASSESSMENT FOCUS

- Identity & Permission Review (Entra ID)
- Content Exposure Assessment (SharePoint, OneDrive, Teams)
- Sensitivity Labels & DLP Review (Purview)
- Data Governance & Retention Check
- Copilot Readiness Score & Key Recommendations

YOU GET

- Readiness Score
- Key Findings Report
- Top Risks & Gaps
- Prioritized Remediation Backlog
- High-level Roadmap

COPILOT READINESS SCORE



IDEAL FOR



Organizations exploring Copilot and needing a fast, focused readiness assessment.

PLUS

Plan and adopt with confidence.

ASSESSMENT FOCUS

- Data Security Posture (Purview, DLP, Labels)
- Identity & Access Controls (Entra ID, Roles, Groups)
- Information Governance (Retention, Records, eDiscovery)
- Insider Risk & Compliance Posture
- Operating Model & Governance
- Adoption Strategy & Pilot Use Cases

YOU GET

- Comprehensive Readiness Report
- Detailed Risk Analysis
- Prioritized Remediation Plan
- Pilot Plan & Adoption Roadmap
- Governance Model for Copilot
- Executive Presentation

COPILOT READINESS SCORE



PILOT ROADMAP

- ✓ Use case selection
- ✓ Pilot scope & users
- ✓ Success metrics
- ✓ Adoption waves

IDEAL FOR



Enterprises requiring a complete readiness, governance and pilot roadmap across security, compliance and business teams.

WHAT YOU RECEIVE



Executive Summary Report



Identity & Access Assessment



Content Exposure Findings



Data Governance Review



Risk & Gap Analysis



Remediation Roadmap



Readiness Score & Dashboard



Let's start the conversation.

Contact us to turn security challenges into strategic opportunities through actionable insights and expert guidance



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