Microsoft 365 Copilot Readiness Assessment

Contoso Ltd

Assessment date: 07 May 2026

Prepared by: JFDI Consulting

Deployment Verdict: Not Ready

CONFIDENTIAL — This document contains information about the security configuration and readiness posture of the assessed tenant. It should be handled in accordance with the organisation's information classification policies and shared only with authorised personnel.

Contents

Update this field to populate (right-click > Update Field)

Executive Summary

Your organisation has 18 licensed users, 1 of whom hold active Copilot licences. The assessment found that the organisation is not yet ready for Copilot deployment, with 31 high-priority and 43 medium-priority findings (based on 91 of 177 assessed modules). Key gaps span 5 domains: Purview (13), M365 (6), Defender (5), Power Platform (4), Entra (3). On the positive side, 237 checks passed across Copilot Studio, Defender, Entra, M365, Power Platform, and Purview. We recommend addressing Purview findings as the first priority, then piloting Copilot with your most active Teams users where adoption potential is highest.

Resolve 16 high-priority findings to achieve At Risk status.

Resolving 16 additional high-priority findings would advance the organisation to "At Risk" status.

Metric	Value
Total findings	321
High priority	31
Medium priority	43
Low priority	18
Observations (no action needed)	229
Deployment verdict	Not Ready
Readiness score	87.6%

With 1 Copilot licence across 58 users (1.7% penetration), a phased pilot starting with 10–20 users across 2–3 departments is recommended. Expand licensing incrementally as Phase 0 and Phase 1 findings are remediated.

Quick Wins

The following findings are high-priority but low-complexity — they can be resolved quickly and will have an immediate positive impact on readiness. These are recommended as the first items to address.

Skype for Business Online (Plan 1) — Action Required | High | Simple | 1-2 hours | IT / Digital Workplace

Observation: Skype for Business Online (Plan 1) is active in Microsoft_Teams_Enterprise_New - CRITICAL: Blocks Copilot adoption.

Recommendation: Immediately migrate remaining Skype for Business users to Microsoft Teams. Skype for Business (retired July 2021) is incompatible with M365 Copilot.

Reference: https://learn.microsoft.com/microsoftteams/skype-for-business-online-retirement/

Viva Insights — Action Required | High | Simple | 1-2 hours | IT / Digital Workplace

Observation: High collaboration activity: 416 meetings across 18 Teams users (23.1 avg/user). Viva Insights can identify meeting overload patterns where Copilot summaries save maximum time.

Recommendation: Use Viva Insights to identify teams with excessive meeting load (15+ hrs/week) who benefit most from Copilot meeting intelligence. Track reduction in meeting hours and increase in focus time as Copilot adoption grows. Insights data proves ROI by showing time reclaimed from meetings and email.

Reference: https://learn.microsoft.com/viva/insights/introduction

Common Data Service for Copilot Studio — Action Required | High | Simple | 1-2 hours | Power Platform Admin / Centre of Excellence

Observation: Organization with 7 environments ready for Copilot Studio agents

Recommendation: Deploy Copilot Studio agents with Dataverse: 1) Build HR agent that queries Dataverse tables for PTO balances, org charts, policies, 2) Create IT helpdesk agent accessing ticket history, asset inventory, FAQ database, 3) Deploy procurement agent with supplier data, purchase history, approval workflows. Dataverse stores agent conversation context enabling multi-turn interactions, remembers user preferences, maintains state across sessions. Agents become stateful assistants rather than one-off Q&A.

Reference: https://learn.microsoft.com/microsoft-copilot-studio/

Power Automate for Copilot Studio - Action Agents — Action Required | High | Simple | 1-2 hours | Power Platform Admin / Centre of Excellence

Observation: Organisation with 7 environments and 128 flows - ready for action-oriented agents

Recommendation: Deploy action agents with Power Automate: 1) Build 'IT Helpdesk Agent' that creates service tickets in ServiceNow/Jira when user reports issue, 2) Create 'HR Assistant' that triggers PTO approval workflows, updates employee records in Dataverse/HRIS, 3) Deploy 'Procurement Agent' that submits purchase requests, routes approvals, sends notifications. Each agent connects to Power Automate flows for backend actions. Agents go from 'How do I...' to 'I did it for you' - transforming productivity. Target: 3-5 action agents replacing manual form submissions within 90 days.

Reference: https://learn.microsoft.com/microsoft-copilot-studio/advanced-flow

---

Azure Rights Management — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance

Observation: Azure Rights Management licence active but RMS is not enabled in Exchange

Recommendation: Enable Azure RMS in Exchange Online to ensure encryption protects content that Copilot accesses and generates.

Reference: https://learn.microsoft.com/azure/information-protection/

Content Marking Coverage — Missing Prerequisite | High | Simple | 1-2 hours | Compliance / Information Governance

Observation: Unable to assess content marking — no sensitivity labels configured.

Recommendation: Create sensitivity labels with content markings for visual classification indicators.

Reference: https://learn.microsoft.com/purview/sensitivity-labels-office-apps#content-marking

---

Copilot Interaction Audit Trail — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance

Observation: Copilot interactions are not being audited: the unified audit log is disabled. 1 users hold Copilot licences with no audit trail. This creates compliance exposure and removes forensic capability. Enable audit logging before any Copilot deployment.

Recommendation: Enable the unified audit log in the Microsoft Purview compliance portal. Confirm that Copilot interaction log event types are being captured. Configure retention policies covering AI interactions.

Reference: https://learn.microsoft.com/purview/audit-log-enable-disable

---

Information Protection for O365 Standard — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance

Observation: Information Protection for O365 Standard licence active but ZERO sensitivity labels configured — no content classification

Recommendation: Deploy sensitivity labels IMMEDIATELY before Copilot rollout. Create 4 baseline labels: Public, General, Confidential, Highly Confidential.

Reference: https://learn.microsoft.com/purview/create-sensitivity-labels

20 additional high-priority findings are detailed in the domain sections and Remediation Roadmap below.

What Copilot Can Do Today

Despite a readiness score of 87.6%, 2 of 6 Copilot capabilities are already functional or close to ready. The table below shows the status of every capability and what is blocking those that are not yet ready.

Capability	Status	Summary	Blocked by
Meeting Intelligence	At Risk	1 finding(s) require attention	Microsoft Teams
Document Drafting and Summarisation	Not Ready	2 critical finding(s) blocking this capability	SharePoint (Plan 2); Content-to-Label Coverage
Email Assistance	Partially Ready	Some key findings not yet assessed	—
Chat and Collaboration	At Risk	1 finding(s) require attention	Microsoft Teams
Security and Compliance Readiness	Not Ready	2 critical finding(s) blocking this capability	Defender for O365 P1; Content-to-Label Coverage
Power Platform Integration	Partially Ready	Some key findings not yet assessed	—

A phased pilot starting with the ready capabilities demonstrates early value to stakeholders while the remediation roadmap addresses remaining gaps.

Readiness Scorecard

The organisation achieved an overall readiness score of 87.6% across all assessed service domains. This score reflects the proportion of checked features and configurations that meet Microsoft's recommended posture for a secure and effective Copilot deployment. The deployment verdict is reported separately and reflects the current count of high-priority blockers.

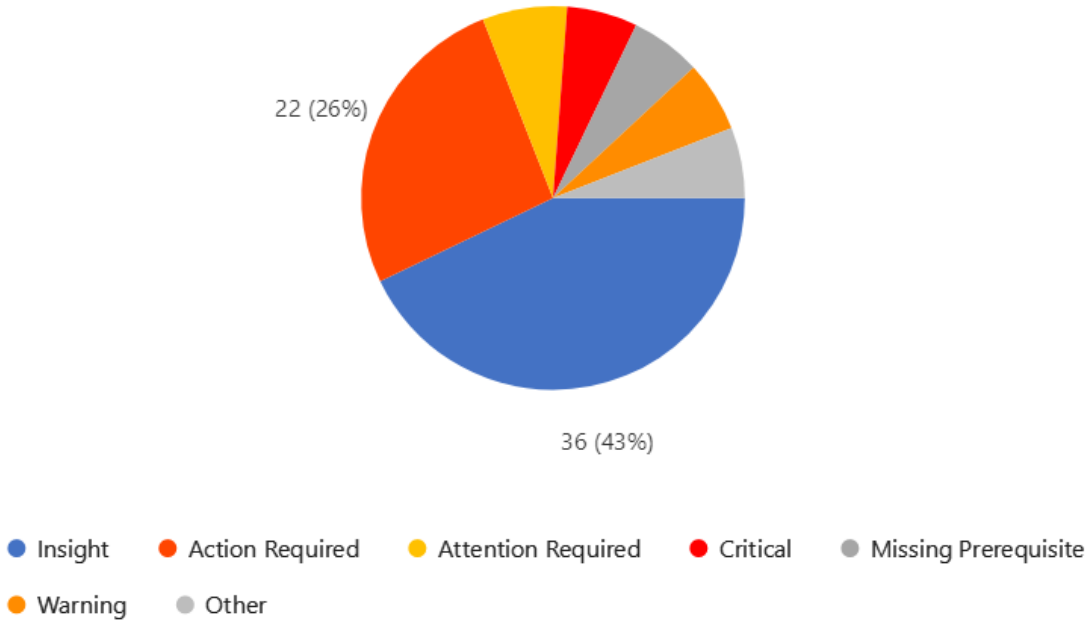
Domain	Score	Critical	Warning	Attention	Active Usage
Copilot Studio	100.0 %	0	0	0	Yes
Productivity & Collaboration (M365)	94.1%	2	3	2	Yes
Power Platform	82.9%	4	0	0	Yes
Security Posture (Defender)	72.6%	6	1	0	Yes
Identity & Access (Entra)	72.5%	8	0	3	Yes
Compliance & Governance (Purview)	57.2%	7	1	1	Yes

The strongest domain is Copilot Studio at 100.0%, indicating a mature configuration in this area. The domain requiring the most attention is Compliance & Governance (Purview) at 57.2%, where targeted remediation would yield the greatest improvement in overall readiness.

Assessment Overview

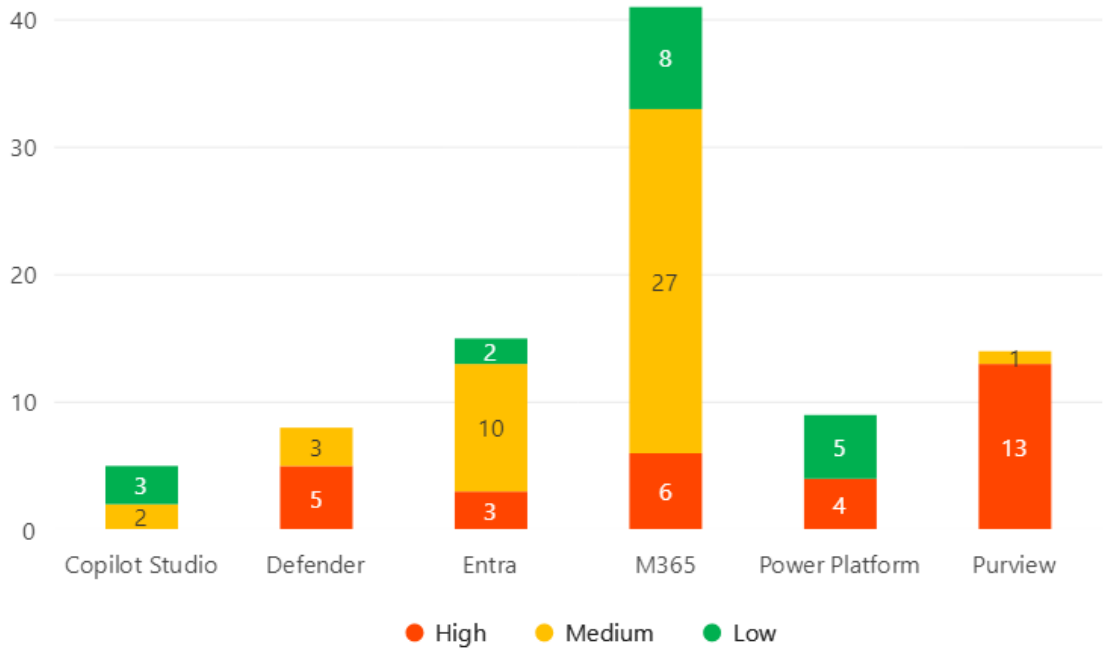
Finding Status Distribution

The following chart shows the distribution of findings by status across the entire assessment. A healthy posture concentrates findings in the Success and Observation categories rather than Critical or Action Required.



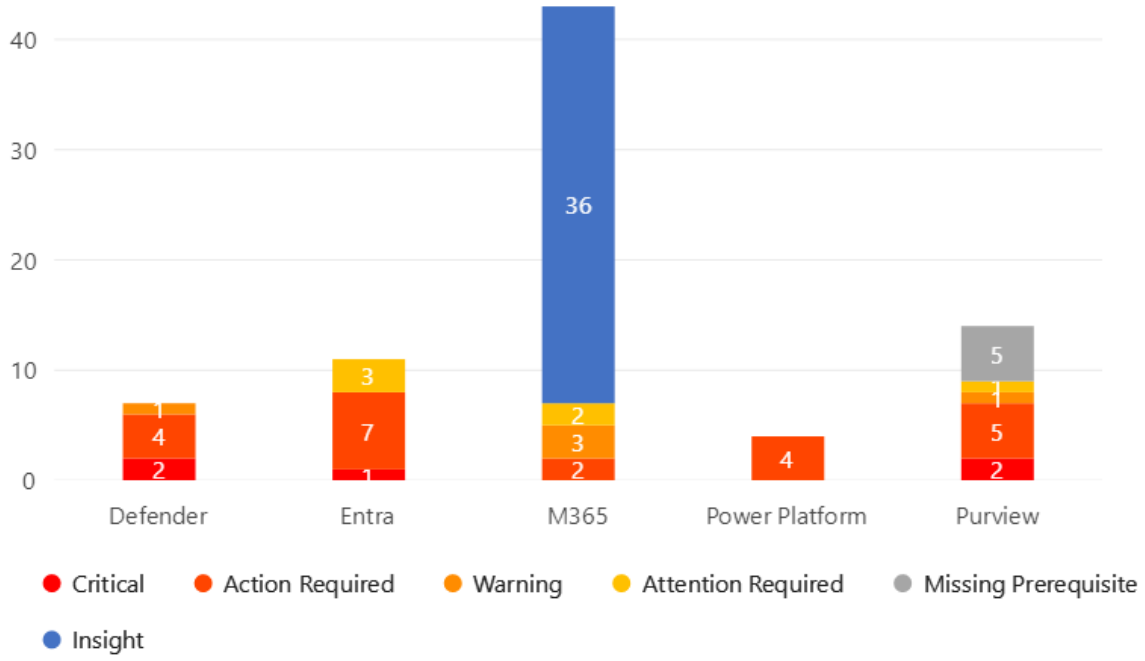
Findings by Priority

This chart breaks down findings by priority (High, Medium, Low) across each service domain, enabling the organisation to prioritise remediation effort where the greatest concentration of high-priority issues exists.



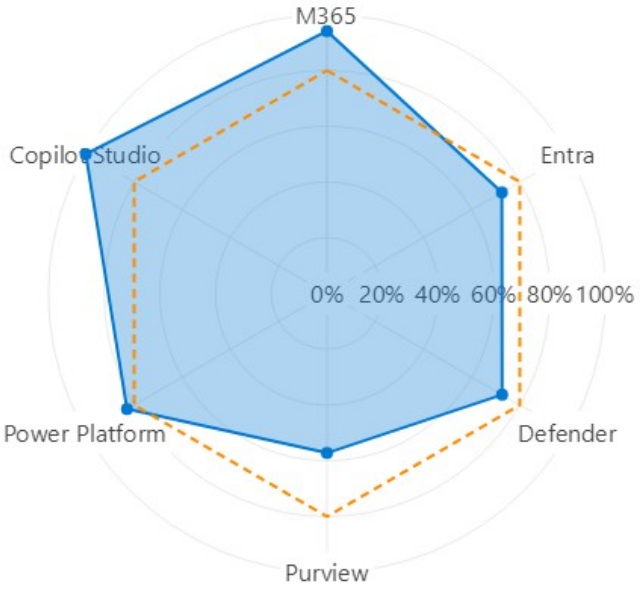
Findings by Status

This chart shows the status distribution (Critical, Action Required, Warning, Attention Required, Missing Prerequisite, Insight) across each service domain. Focus on domains with red and orange segments — these require immediate attention.



Domain Readiness Radar

The radar chart provides an at-a-glance view of readiness across all six assessment domains. Domains closer to the outer edge are more mature; indentations indicate areas requiring focused investment.



Domain Assessments

The following sections present the assessment findings for each Microsoft 365 service domain. Findings are grouped by domain and ordered by priority. Successful checks are summarised as a count; only findings requiring action are detailed in full.

Productivity & Collaboration (M365)

The tenant has 58 users (18 licensed), of whom 1 hold Copilot licences (0.1% adoption). SharePoint contains 78,774 files across 417 sites. Teams has 18 active users with 416 meetings in the last 30 days.

161 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

Defender for Endpoint (SMB) — Disabled | High | Half day to 1 day | IT / Digital Workplace

Observation: Defender for Endpoint (SMB) is not provisioned.

Recommendation: Enable Defender for Endpoint (SMB) to protect Copilot workloads.

Microsoft 365 Copilot - Business Chat — Insight | High | Simple | 1-2 hours | IT / Digital Workplace

Observation: Rich knowledge graph: 78,774 files and 416 meetings create massive Business Chat value. Copilot can synthesize across this organizational memory.

Recommendation: Train users on cross-app Business Chat queries that leverage your 78,774 files and 416 meetings. Teach prompts like: 'Summarize decisions from last month's leadership meetings', 'Find all customer feedback about feature X', 'What are the risks mentioned in recent project documents?' Business Chat shines when organizational knowledge is deep - you have the content volume for transformative AI search.

Reference: https://learn.microsoft.com/microsoft-365-copilot/microsoft-365-copilot-chat

---

Microsoft 365 Copilot in Teams — Insight | High | Simple | 1-2 hours | IT / Digital Workplace

Observation: High meeting volume: 416 meetings (23.1 per user) indicate meeting overload. Teams Copilot essential.

Recommendation: Deploy Teams Copilot training focused on meeting efficiency: Enable automatic meeting summaries for your 416 meetings, teach users to ask 'What were the action items?' and 'Summarize decisions made', use chat Copilot for real-time Q&A during meetings. Measure time saved from not attending every meeting - users can review AI summaries instead. With 23.1 avg meetings per user, Copilot is critical productivity tool.

Reference: https://learn.microsoft.com/microsoftteams/copilot-teams-transcription

Skype for Business Online (Plan 1) — Action Required | High | Simple | 1-2 hours | IT / Digital Workplace *— See Quick Wins above.*

Viva Insights — Action Required | High | Simple | 1-2 hours | IT / Digital Workplace *— See Quick Wins above.*

Content Freshness — Attention Required | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: SharePoint activity rate is 2% — stale content risks inaccurate Copilot responses for 1 licensed users.

Recommendation: Encourage content owners to review and update SharePoint content regularly. Copilot accuracy depends on current, well-maintained content.

Reference: https://learn.microsoft.com/sharepoint/get-started-new-admin-center

Copilot Graph Connectors — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing connector usage: 1 external connections with 78,774 SharePoint files. Additional connectors would broaden Copilot's data coverage.

Recommendation: Add Graph connectors for key external data sources. Prioritise systems where employees frequently search for information outside M365.

Reference: https://learn.microsoft.com/graph/connecting-external-content-connectors-overview

Copilot Intelligent Search — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing content base: 78,774 files across 58 users. Intelligent Search helps Copilot find the right information as content grows.

Recommendation: Encourage teams to organise content with consistent metadata. This improves Copilot's ability to find and reference the right documents.

Reference: https://learn.microsoft.com/microsoftsearch/overview-microsoft-search

Copilot Service Dependency Readiness — Attention Required | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: 2 of 6 Copilot capabilities are ready or partially ready. 5 critical blocker(s) identified in the prerequisite chain.

Recommendation: Resolve these prerequisite findings first: Microsoft Entra ID P1, Microsoft Entra ID P2, Azure Rights Management. These block the most downstream capabilities and should be prioritised in your remediation roadmap.

Copilot in SharePoint — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing SharePoint usage: 78,774 files across 10 active sites. Copilot can help teams create and manage content more efficiently.

Recommendation: Pilot Copilot in SharePoint with teams that create frequent site content. Measure time savings on page creation and content updates.

Reference: https://learn.microsoft.com/sharepoint/sharepoint-copilot-best-practices

Graph Connectors Search Index — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: 1 external connection(s) configured, enriching Copilot's data sources beyond M365.

Recommendation: Review and expand Graph Connectors to bring more external data into Copilot's reach. Each connector enriches Copilot responses with additional organisational knowledge.

Reference: https://learn.microsoft.com/graph/connecting-external-content-connectors-overview

Microsoft 365 Copilot Chat — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: User base: 23 users likely need secure web AI for research and competitive intelligence.

Recommendation: Train users on Microsoft 365 Copilot Chat for web-grounded AI tasks: competitive research, industry analysis, technical documentation lookups. Emphasise data protection vs consumer ChatGPT — prevents corporate context leakage. Position as M365 Copilot companion: Copilot for internal data, Copilot Chat for web knowledge.

Reference: https://learn.microsoft.com/microsoft-365-copilot/microsoft-365-copilot-chat

Microsoft 365 Copilot in Apps — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Copilot Apps pilot opportunity: 23 users with 78,774 organizational files. Ready for targeted Copilot in Apps deployment.

Recommendation: Pilot Copilot in Apps with key user groups - document-heavy teams (Word), data analysts (Excel), frequent presenters (PowerPoint), email-intensive roles (Outlook). Track productivity gains, gather feedback, refine prompting techniques before broader rollout.

Reference: https://learn.microsoft.com/microsoft-365-copilot/microsoft-365-copilot-setup

Microsoft 365 Phone System — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing Teams usage: 18 users with 416 meetings. Phone System can extend AI capabilities to voice communications.

Recommendation: Pilot Phone System with customer service teams. Test voicemail transcription and call summaries before expanding to full organisation.

Reference: https://learn.microsoft.com/microsoftteams/what-is-phone-system-in-office-365/

Microsoft Forms (Plan E1) — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing organization: 23 users with 18 email users. Forms can enable structured AI-analyzed feedback.

Recommendation: Pilot Forms for team feedback collection. Test automated post-meeting surveys and Copilot analysis of responses before scaling organization-wide.

Reference: https://learn.microsoft.com/microsoft-forms/

Microsoft Forms (Plan E5) — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Smaller user base of 23 active M365 users. Forms E5 can establish structured feedback culture essential for agent improvement and adoption insights.

Recommendation: Create intelligent Forms for continuous Copilot feedback collection. Use branching logic to gather detailed insights from different user personas (beginners vs. power users).

Reference: https://learn.microsoft.com/microsoft-forms/

Microsoft Queues — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing call activity: 478 calls with 18 active users. Queues can streamline call management as volume increases.

Recommendation: Pilot Queues with customer-facing teams. Test Copilot-generated call summaries and queue analytics before broader rollout.

Reference: https://learn.microsoft.com/microsoftteams/manage-phone-numbers

Microsoft Teams — Warning | Medium | Complex | 1-3 days | IT / Digital Workplace

Observation: Low Teams adoption detected: Only 18 active users. Limited collaboration activity reduces Copilot meeting intelligence value

Recommendation: Address low Teams adoption BEFORE deploying Copilot. Few active users means limited value from meeting summaries, chat recaps, and collaborative AI. Run Teams adoption campaign, migrate from legacy tools (Skype, Zoom recordings to Teams), enable meeting transcripts, train users on chat vs email. Copilot's value is directly proportional to Teams usage.

Reference: https://adoption.microsoft.com/microsoft-teams/

Microsoft eCDN — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing Teams usage: 18 active users with 416 meetings. eCDN can improve event delivery as your organisation scales.

Recommendation: Pilot eCDN for upcoming large events. Monitor bandwidth savings and content delivery quality for AI-generated captions.

Reference: https://learn.microsoft.com/ecdn/

MyAnalytics Full — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Moderate collaboration: 23 users with 416 meetings. MyAnalytics can track how Copilot changes work patterns.

Recommendation: Use MyAnalytics to establish productivity baselines. Focus on measuring Copilot impact on email drafting time, meeting summarisation, and document creation efficiency.

Reference: https://learn.microsoft.com/viva/insights/

Nucleus — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing data layer: 78,774 SharePoint files and 18 email users. Nucleus orchestrates this data for Copilot access.

Recommendation: Continue building Microsoft Graph content through SharePoint, Teams, and email adoption. As data layer grows, Copilot's responses become more relevant and contextual.

Reference: https://learn.microsoft.com/graph/overview

Office for the Web (SharePoint) — Warning | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Low web usage: Only 148 SharePoint page views. Office for web adoption appears minimal - establish browser-based Office usage for seamless Copilot integration without desktop installations.

Recommendation: Drive Office for web adoption for browser-based productivity. Users may be missing opportunities for quick edits, mobile access, and real-time collaboration. Educate users on browser-based editing capabilities.

Reference: https://support.microsoft.com/office

People Skills Foundation — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing expertise signals: 78,774 files and 18 email users. Skills graph is building but needs more content to be highly effective.

Recommendation: Encourage SharePoint document creation and Teams collaboration to enrich the skills graph. As users create content and collaborate, Copilot becomes better at connecting people with experts.

Reference: https://learn.microsoft.com/microsoft-365/topics/

Phone System Virtual User — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing call activity: 478 calls with 18 active users. Virtual user accounts can streamline call handling with automated attendants.

Recommendation: Pilot auto attendants for departments with high call volumes. Test AI-powered call routing before expanding to the wider organisation.

Reference: https://learn.microsoft.com/microsoftteams/manage-resource-accounts

SharePoint (Plan 2) — Warning | Medium | Complex | 1-3 days | IT / Digital Workplace

Observation: Only 10 SharePoint site(s) deployed - limited content for Copilot to access

Recommendation: Expand SharePoint deployment to maximize Copilot's effectiveness. Copilot's value grows with content volume - more sites with documents, lists, and knowledge bases mean better AI responses. Create dedicated sites for departments, projects, and knowledge areas. Migrate file shares and local drives to SharePoint to make content searchable by Copilot. Encourage teams to centralize documentation, policies, and procedures in SharePoint for comprehensive AI-powered knowledge retrieval.

Reference: https://learn.microsoft.com/sharepoint/plan-sites-for-copilot

Teams Premium Custom — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing Teams usage: 18 users with 416 meetings. Custom branding can enhance the professionalism of Copilot-generated meeting content.

Recommendation: Pilot custom branding for Copilot-generated meeting content with teams that frequently engage external participants.

Reference: https://learn.microsoft.com/microsoftteams/enhanced-teams-experience

Teams Premium Management — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing Teams usage: 18 users with 416 meetings. Meeting management policies can ensure Copilot governance as adoption scales.

Recommendation: Pilot meeting management policies with departments that handle sensitive content to establish governance patterns before broader rollout.

Reference: https://learn.microsoft.com/microsoftteams/enhanced-teams-experience

Teams Premium Protection — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing Teams usage: 18 users with 416 meetings. Meeting protection can safeguard Copilot-generated content as adoption grows.

Recommendation: Pilot meeting protection policies with teams handling confidential content to establish protection patterns before broader rollout.

Reference: https://learn.microsoft.com/microsoftteams/enhanced-teams-experience

Teams Premium Virtual Appointments — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing meeting activity: 416 meetings with 18 active users. Virtual appointments can enhance external-facing meeting experiences.

Recommendation: Pilot premium virtual appointments with customer-facing teams to test Copilot appointment intelligence and SMS notification features.

Reference: https://learn.microsoft.com/microsoft-365/frontline/virtual-appointments

Teams Premium Webinar — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing Teams usage: 18 users with 416 meetings. Webinar features can enhance large-scale event delivery with Copilot assistance.

Recommendation: Pilot premium webinar features with marketing or training teams to test Copilot content creation and attendee engagement analytics.

Reference: https://learn.microsoft.com/microsoftteams/enhanced-teams-experience

Virtual Appointments — Insight | Medium | Moderate | Half day to 1 day | IT / Digital Workplace

Observation: Growing meeting activity: 416 meetings with 18 active users. Virtual Appointments can improve external meeting efficiency.

Recommendation: Pilot Virtual Appointments with teams that frequently meet external clients. Test Copilot-generated appointment summaries and follow-ups.

Reference: https://learn.microsoft.com/microsoft-365/frontline/virtual-appointments

Viva Insights — MyAnalytics (P2) — Insight | Medium | Simple | 1-2 hours | IT / Digital Workplace

Observation: Smaller user base of 23 active M365 users. MyAnalytics can establish data-driven productivity culture alongside Copilot.

Recommendation: Enable MyAnalytics for leaders and power users first. Use personal productivity insights to demonstrate Copilot ROI through measurable time savings and improved focus.

Reference: https://learn.microsoft.com/viva/insights/

Mesh Avatars for Teams — Insight | Low | Simple | 1-2 hours | IT / Digital Workplace

Observation: Moderate meeting volume (416 meetings). Mesh Avatars can reduce video fatigue while Copilot continues meeting transcription and summaries.

Recommendation: Pilot Mesh Avatars with teams experiencing meeting fatigue. Focus on long-duration meetings (standups, planning sessions) where video fatigue is highest.

Reference: https://learn.microsoft.com/mesh/

Mesh Avatars for Teams (Additional) — Insight | Low | Simple | 1-2 hours | IT / Digital Workplace

Observation: Heavy meeting load: 416 meetings suggest video fatigue risk. Avatar-based meetings offer alternative engagement while Copilot continues to provide real-time assistance.

Recommendation: Pilot Mesh avatars with meeting-heavy teams experiencing video fatigue. With 416 meetings, users may benefit from avatar-based participation while Copilot handles meeting intelligence.

Reference: https://learn.microsoft.com/mesh/

Microsoft Places (Core) — Insight | Low | Simple | 1-2 hours | IT / Digital Workplace

Observation: Smaller workforce of 23 active users. Microsoft Places can establish hybrid work coordination patterns early.

Recommendation: Implement Microsoft Places early to build hybrid work coordination culture. Even small teams benefit from knowing when colleagues plan to be in office.

Reference: https://learn.microsoft.com/microsoft-365/places/overview

Microsoft Places (Enhanced) — Insight | Low | Simple | 1-2 hours | IT / Digital Workplace

Observation: With 18 Teams users in hybrid work, Places Enhanced can optimize when teams come together for high-impact collaboration.

Recommendation: Deploy Places Enhanced AI features for your 18 hybrid Teams users. Enable predictive space planning and intelligent scheduling to maximize in-person collaboration value.

Reference: https://learn.microsoft.com/microsoft-365/places/overview

Sway (Retiring) — Insight | Low | Simple | 1-2 hours | IT / Digital Workplace

Observation: Sway is Success in SPE_E3. Microsoft is retiring Sway — existing Sways will become read-only and eventually inaccessible. Migrate any active Sway content to SharePoint pages, PowerPoint, or OneNote before the retirement deadline.

Recommendation: Plan migration of Sway content to supported platforms. SharePoint pages provide similar web-native, responsive content capabilities. PowerPoint with Copilot can generate visually appealing presentations from existing content. Prioritise migrating any Sways used for onboarding, newsletters, or knowledge sharing.

Reference: https://support.microsoft.com/office/sway-retirement-faq

Collaboration Maturity — Insight | Simple | 1-2 hours | IT / Digital Workplace

Observation: Moderate collaboration maturity — Teams adoption at 31% with 23 meetings and 95 messages per user monthly. Copilot can accelerate existing collaboration habits.

Content Ecosystem Health — Insight | Simple | 1-2 hours | IT / Digital Workplace

Observation: Growing content ecosystem — SharePoint activity at 2%, OneDrive adoption at 82%, 678,984 total files. Copilot has a reasonable content base to work with.

Copilot ROI Readiness Score — Insight | IT / Digital Workplace

Observation: High ROI potential: your collaboration profile — 416 meetings (23 per user), 78,774 SharePoint files, and 100% email-active users — indicates strong Copilot value. Priority use cases: meeting summarisation, Business Chat knowledge retrieval, and email drafting.

Microsoft Loop — Insight | Simple | 1-2 hours | IT / Digital Workplace

Observation: Organisation has 417 SharePoint sites and 416 Teams meetings, indicating moderate collaboration readiness for Loop.

Reference: https://support.microsoft.com/office/get-started-with-microsoft-loop-9f4d8d4f-dfc6-4518-9ef6-069408c21f0c

Multi-Platform Readiness — Insight | Simple | 1-2 hours | IT / Digital Workplace

Observation: Moderate platform readiness — 100% desktop activation, 28% user coverage. Copilot will be accessible to most active users.

SharePoint Content Deployment — Insight | IT / Digital Workplace

Observation: SharePoint content deployment: 224 site(s) with content, 10 active, 417 total. Copilot searches content across all accessible sites.

Reference: https://learn.microsoft.com/sharepoint/copilot-sharepoint-overview

Identity & Access (Entra)

MFA registration stands at 95.0% across 20 active members (95.5% across 22 directory accounts). 12 conditional access policies are active (10 requiring MFA). 7 users are flagged as risky (0 high-risk). No permanent global administrator assignments exist.

21 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

Copilot Licence–Security Baseline Alignment — Critical | High | Moderate | Half day to 1 day | Identity & Access Team

Observation: CRITICAL: approximately 19% security baseline exposure (MFA registration 95.0% across 20 active members (95.5% across 22 directory accounts), device compliance 81%) affecting up to 1 Copilot-licensed users. AI access should be restricted until gaps are remediated.

Recommendation: Remediate security gaps for all Copilot-licensed users before deployment: enforce MFA registration, block Copilot access from non-compliant devices via Conditional Access, and investigate any risky user flags via Entra ID Protection.

Reference: https://learn.microsoft.com/entra/fundamentals/concept-fundamentals-security-defaults

Microsoft Entra ID P2 — Action Required | High | Moderate | Half day to 1 day | Identity & Access Team

Observation: 1. Risky applications detected: 9 with high-privilege permissions, 312 from unverified publishers - potential unauthorized access to Copilot-generated content 2. No active access reviews configured for user access governance 3. No access reviews

configured - Copilot license assignments and privileged access not recertified 4. Cross-tenant access settings not configured, allowing unrestricted B2B collaboration with external organizations accessing Copilot content

Recommendation: 1. Audit and restrict 321 risky application(s) with access to M365 data and Copilot content. 2. Implement periodic access reviews for users with Copilot licenses and admin roles. Regular reviews ensure only authorized users maintain access to AI assistants. 3. Implement quarterly access reviews for Copilot governance: groups with Copilot licenses, guest user access, and privileged roles. 4. Configure cross-tenant access policies to control B2B collaboration with specific partner organizations and restrict Copilot data exposure.

Reference: https://learn.microsoft.com/defender-cloud-apps/app-governance-manage-app-governance

Microsoft Intune (Plan A) — Action Required | High | Moderate | Half day to 1 day | Identity & Access Team

Observation: 4 of 22 managed devices (18.2%) are non-compliant - may access Copilot despite policy violations

Recommendation: Block Copilot access from 4 non-compliant device(s) using Conditional Access. Create CA policy targeting Microsoft 365 requiring 'Require device to be marked as compliant'.

Reference: https://learn.microsoft.com/mem/intune/protect/device-compliance-get-started

Conditional Access Graph API Coverage — Attention Required | Medium | Simple | 1-2 hours | Identity & Access Team

Observation: Conditional Access covers all cloud apps but no sign-in risk policy is active. Copilot's Graph API access path is protected by CA but lacks risk-based evaluation.

Recommendation: Enable a sign-in risk Conditional Access policy to add risk-based protection to the Graph API access path used by Copilot.

Reference: https://learn.microsoft.com/entra/identity/conditional-access/howto-conditional-access-policy-risk

Copilot MFA Coverage — Attention Required | Medium | Simple | 1-2 hours | Identity & Access Team

Observation: MFA registration is 95.0% across 20 active members (95.5% across 22 directory accounts) — close to full coverage but gaps remain for 1 Copilot users.

Recommendation: Complete MFA registration for all users to ensure full protection of Copilot-accessed data.

Reference: https://learn.microsoft.com/entra/identity/authentication/concept-mfa-howitworks

Microsoft Entra ID P1 — Action Required | Medium | Moderate | Half day to 1 day | Identity & Access Team

Observation: 1. 1 group(s) use license assignment, but none configured for Copilot licenses 2. 18 Conditional Access policy(ies) configured, but none specifically target Copilot applications

Recommendation: 1. Extend group-based licensing to Copilot license management. You have 0 dynamic group(s) - leverage these for automated Copilot access. 2. Create Copilot-specific Conditional Access policies targeting Microsoft 365 Copilot and Graph Connector applications. Apply stricter controls for AI access.

Reference: https://learn.microsoft.com/entra/identity/users/licensing-groups-assign

Microsoft Entra Internet Access — Not Licensed | Medium | Moderate | Half day to 1 day | Identity & Access Team

Observation: Global Secure Access (Entra Internet Access) is not enabled in your tenant

Recommendation: Enable Global Secure Access to protect against Shadow AI and unauthorized cloud service usage. This feature provides web content filtering to block unauthorized AI platforms, traffic forwarding for DLP inspection, and conditional access integration.

Reference: https://learn.microsoft.com/entra/global-secure-access/overview-what-is-global-secure-access

Microsoft Entra Private Access — Not Licensed | Medium | Moderate | Half day to 1 day | Identity & Access Team

Observation: Global Secure Access (Entra Private Access) is not enabled in your tenant

Recommendation: Enable Global Secure Access Private Access to provide secure zero-trust connectivity to internal applications for Copilot and custom agents.

Reference: https://learn.microsoft.com/entra/global-secure-access/overview-what-is-global-secure-access

Permanent Admin Copilot Risk — Attention Required | Medium | Moderate | Half day to 1 day | Identity & Access Team

Observation: 11 privileged role(s) have only permanent assignments — consider enabling PIM for these roles.

Recommendation: Enable PIM for all privileged roles to ensure just-in-time access before Copilot deployment.

Reference: https://learn.microsoft.com/entra/id-governance/privileged-identity-management/pim-configure

Conditional Access for Entra Private Access — Not Licensed | Low | Simple | 1-2 hours | Identity & Access Team

Observation: Conditional Access for Private Access is not applicable — Private Access is not enabled

Recommendation: Enable Global Secure Access Private Access first, then apply conditional access policies for agent connections.

Reference: https://learn.microsoft.com/entra/identity/conditional-access/

Entra Internet Access for Frontline — Not Licensed | Low | Moderate | Half day to 1 day | Identity & Access Team

Observation: Entra Internet Access for Frontline is not available — Global Secure Access is not enabled

Recommendation: Enable Global Secure Access to provide secure internet connectivity for frontline workers accessing organizational agents and basic AI services.

Reference: https://learn.microsoft.com/entra/global-secure-access/

Security Posture (Defender)

The security posture shows 139 alerts (61 phishing, 47 malware) and 214 incidents (9 active, 4 high severity). Secure Score is 83%. No high-risk OAuth applications were identified.

16 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

Copilot Data Governance — Critical | High | Complex | 1-3 days | IT Security

Observation: 1. UNPROTECTED: no DLP policies configured, no sensitivity labels configured, unified audit logging disabled, 4 high-severity incidents. 2. NEEDS IMPROVEMENT: no information barriers configured, no insider risk policies, no communication compliance policies, no retention labels configured, 47 malware alerts detected.

Recommendation: 1. Resolve critical data governance gaps before allowing Copilot to access organisational data. DLP, sensitivity labels, and audit logging are essential for AI data protection. 2. Review data governance policies and address gaps to strengthen Copilot data protection.

Reference: https://learn.microsoft.com/en-us/purview

Copilot Security Posture — Critical | High | Moderate | Half day to 1 day | IT Security

Observation: NOT READY for Copilot: 1 critical risk factor(s) — 4 high-severity incidents, 61 phishing alerts, no DLP policies configured, no sensitivity labels configured, unified audit logging disabled.

Recommendation: Resolve all critical security gaps before deploying Copilot. High-severity incidents and compromised users represent immediate threats to data accessed by AI assistants.

Reference: https://learn.microsoft.com/copilot/microsoft-365/microsoft-365-copilot-privacy

Defender for Endpoint — Action Required | High | Complex | 1-3 days | IT Security

Observation: 4 high-severity endpoint incidents detected on devices that may access Copilot.

Recommendation: Investigate and resolve high-severity endpoint incidents before expanding Copilot rollout.

Reference: https://learn.microsoft.com/microsoft-365/security/defender-endpoint/

Defender for O365 P1 — Action Required | High | Moderate | Half day to 1 day | IT Security

Observation: 61 phishing alerts detected indicating active email-borne threats targeting Copilot users.

Recommendation: Investigate phishing threats and strengthen Safe Links/Safe Attachments policies.

Reference: https://learn.microsoft.com/microsoft-365/security/office-365-security/mdo-about

Defender for O365 P2 — Action Required | High | Moderate | Half day to 1 day | IT Security

Observation: 61 phishing alerts and 9 active incidents detected targeting Copilot-enabled users.

Recommendation: Investigate active threats and leverage automated investigation to remediate before expanding Copilot access.

Reference: https://learn.microsoft.com/microsoft-365/security/office-365-security/mdo-about

Copilot Threat Intelligence — Action Required | Medium | Moderate | Half day to 1 day | IT Security

Observation: Active threats detected: 3 device(s) with suspicious process patterns.

Recommendation: Investigate and remediate all active threats before enabling Copilot access to organisational data.

Reference: https://learn.microsoft.com/microsoft-365/security/defender/advanced-hunting-microsoft-365-copilot

Compliance & Governance (Purview)

No sensitivity labels, auto-labelling policies, or DLP policies are currently configured. This is a critical gap — Copilot will surface unclassified content without any protection controls. Unified audit logging is also NOT enabled.

9 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

AI-Generated Content Retention Gap — Action Required | High | Moderate | Half day to 1 day | Compliance / Information Governance

Observation: Compliance risk: no retention labels are configured and 1 users hold active Copilot licences. Copilot meeting summaries, Business Chat history, and agent conversation logs will not be retained or governed. For regulated organisations this may constitute a compliance breach.

Recommendation: Create retention labels for Copilot-generated content categories: meeting summaries (retained as meeting records), Business Chat transcripts (retained as communications), Copilot-drafted documents (inherit document retention). Align retention periods with sector-specific obligations.

Reference: https://learn.microsoft.com/purview/records-management

---

AIP Premium P1 — Action Required | High | Moderate | Half day to 1 day | Compliance / Information Governance

Observation: Azure RMS is not enabled — CRITICAL for AIP Premium P1

Recommendation: Enable Azure RMS immediately. Without RMS, premium encryption and usage rights cannot be applied to content that Copilot processes.

Reference: https://learn.microsoft.com/azure/information-protection/

Auto-Labelling Readiness — Missing Prerequisite | High | Complex | 1-3 days | Compliance / Information Governance

Observation: Unable to assess auto-labelling readiness — no sensitivity labels configured.

Recommendation: Create sensitivity labels before configuring auto-labelling policies.

Reference: https://learn.microsoft.com/purview/apply-sensitivity-label-automatically

---

Azure Rights Management — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance *— See Quick Wins above.*

Content Marking Coverage — Missing Prerequisite | High | Simple | 1-2 hours | Compliance / Information Governance *— See Quick Wins above.*

Content-to-Label Coverage — Critical | High | Complex | 1-3 days | Compliance / Information Governance

Observation: No sensitivity labels or DLP policies for 78,774 SharePoint files — Copilot will surface all content without classification.

Recommendation: Create sensitivity labels and DLP policies immediately to protect content before Copilot deployment.

Reference: https://learn.microsoft.com/purview/sensitivity-labels

Copilot Data Exposure Surface — Critical | High | Complex | 1-3 days | Compliance / Information Governance

Observation: UNPROTECTED: Copilot has unrestricted access to 78,774 unclassified files. No sensitivity labels are configured, no DLP policies exist, and 1 users hold active Copilot licences. AI will surface sensitive content with no classification or restriction.

Recommendation: Deploy sensitivity labels immediately before any Copilot rollout. Minimum viable set: Public, General, Confidential, Highly Confidential. Enable auto-labelling policies targeting SharePoint. Configure DLP policies for Exchange, Teams, and SharePoint.

Reference: https://learn.microsoft.com/purview/sensitivity-labels

Copilot Interaction Audit Trail — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance *— See Quick Wins above.*

Information Protection for O365 Standard — Action Required | High | Simple | 1-2 hours | Compliance / Information Governance *— See Quick Wins above.*

Label Encryption Coverage — Missing Prerequisite | High | Moderate | Half day to 1 day | Compliance / Information Governance

Observation: Unable to assess label encryption — no sensitivity labels configured.

Recommendation: Create sensitivity labels with encryption to control Copilot content access.

Reference: https://learn.microsoft.com/purview/encryption-sensitivity-labels

Label Hierarchy Completeness — Missing Prerequisite | High | Moderate | Half day to 1 day | Compliance / Information Governance

Observation: Unable to assess label hierarchy — no sensitivity labels configured.

Recommendation: Create sensitivity labels to enable Copilot content classification.

Reference: https://learn.microsoft.com/purview/sensitivity-labels

Label Policy Scope — Missing Prerequisite | High | Simple | 1-2 hours | Compliance / Information Governance

Observation: No label policies published — sensitivity labels are defined but not available to users.

Recommendation: Publish label policies to all users to ensure universal content classification before Copilot deployment.

Reference: https://learn.microsoft.com/purview/create-sensitivity-labels#publish-sensitivity-labels-by-creating-a-label-policy

Shadow AI Data Governance — Warning | High | Half day to 1 day | Compliance / Information Governance

Observation: Partial data governance for shadow AI: 6 GenAI apps detected with 20 users. Gaps: no DLP policies covering cloud apps; only 0 sensitivity labels configured.

Recommendation: Extend DLP policies to cover cloud app sessions and ensure sensitivity labels are deployed to classify content before it reaches external AI services.

Reference: https://learn.microsoft.com/defender-cloud-apps/proxy-intro-aad

DLP Communication Coverage — Attention Required | Medium | Simple | 1-2 hours | Compliance / Information Governance

Observation: No DLP policies configured — consider adding DLP coverage for communication channels.

Recommendation: Create DLP policies for Exchange and Teams to protect sensitive data shared through communications.

Reference: https://learn.microsoft.com/purview/dlp-learn-about-dlp

Power Platform

The Power Platform environment contains 7 environments (0 production, 0 sandbox). 0 apps and 128 flows are deployed. 0 DLP policies govern the platform.

17 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

Common Data Service for Copilot Studio — Action Required | High | Simple | 1-2 hours | Power Platform Admin / Centre of Excellence *— See Quick Wins above.*

Copilot Agent Governance Readiness — Action Required | High | Complex | 1-3 days | Power Platform Admin / Centre of Excellence

Observation: Agent deployment is ungoverned: Copilot Studio is active across 7 environments with no DLP policies and no environment separation strategy. Agents can be

published to production with unrestricted connector access. Establish DLP policies and a dev/test/prod environment strategy before enabling agent development.

Recommendation: Configure Power Platform DLP policies in each tier. Implement an approval workflow for promoting agents from dev to production. Assign a Power Platform admin as agent governance owner before enabling self-service agent creation.

Reference: https://learn.microsoft.com/power-platform/admin/wp-data-loss-prevention

---

Copilot Agent Permission Scope Risk — Action Required | High | Moderate | Half day to 1 day | Power Platform Admin / Centre of Excellence

Observation: Agent data access is ungoverned: 7 Copilot Studio environments have no Power Platform DLP policies restricting connector scope. Agents can be built with unrestricted SharePoint access and no data boundary enforcement. Configure DLP policies before deploying agents to production.

Recommendation: Configure Power Platform DLP policies in each Copilot Studio environment to restrict which connectors agents can use. For environments handling sensitive data, configure Information Barriers to prevent cross-group data access.

Reference: https://learn.microsoft.com/power-platform/admin/wp-data-loss-prevention

---

Power Automate for Copilot Studio - Action Agents — Action Required | High | Simple | 1-2 hours | Power Platform Admin / Centre of Excellence *— See Quick Wins above.*

Copilot Studio

The Power Platform environment contains 7 environments (0 production, 0 sandbox). 0 apps and 128 flows are deployed. 0 DLP policies govern the platform.

13 checks passed successfully in this domain, confirming that these features are correctly configured for Copilot readiness.

No findings requiring action were identified in this domain. The organisation's configuration meets the recommended posture.

Shadow AI Detection

Cloud App Discovery has identified 6 generative AI applications in use across the organisation, accessed by 20 users. Of these, 5 are sanctioned, 0 unsanctioned, 0 monitored, and 1 untagged (no governance decision recorded). The risk distribution shows 0 high-risk, 1 medium-risk, and 5 low-risk applications.

Total data traffic to these generative AI services is 0.6 GB, across 2,214 transactions. This traffic volume represents data potentially leaving the organisation's governance perimeter.

Most-Used Generative AI Applications

Application	Trust Score	Users	Status	Last Seen
Google Gemini	7/10	9	Sanctioned	2026-05-07
GitHub Copilot	10/10	5	Sanctioned	2026-05-07
ChatGPT (Consumer & Enterprise)	9/10	3	Sanctioned	2026-05-06
DeepSeek	5/10	1	Untagged	2026-05-04
Microsoft Copilot	10/10	1	Sanctioned	2026-05-06
Grammarly	9/10	1	Sanctioned	2026-05-07

Copilot Capability Readiness

The overall Copilot capability readiness is assessed as "Partially Ready". Each Copilot capability depends on specific service prerequisites; the table below shows which capabilities are ready for deployment and which are blocked by unresolved findings.

Capability	Status	Summary	Blocking Findings
Meeting Intelligence	At Risk	1 finding(s) require attention	Microsoft Teams
Document Drafting and Summarisation	Not Ready	2 critical finding(s) blocking this capability	SharePoint (Plan 2); Content-to-Label Coverage
Email Assistance	Partially Ready	Some key findings not yet assessed	—
Chat and Collaboration	At Risk	1 finding(s) require attention	Microsoft Teams
Security and Compliance Readiness	Not Ready	2 critical finding(s) blocking this capability	Defender for O365 P1; Content-to-Label Coverage
Power Platform Integration	Partially Ready	Some key findings not yet assessed	—

Critical Blockers

The following findings are blocking one or more Copilot capabilities and must be resolved before those capabilities can function correctly:

- Content-to-Label Coverage
- Microsoft Entra ID P1
- Microsoft Entra ID P2
- Azure Rights Management
- Information Protection for O365 Standard

Remediation Roadmap

The remediation roadmap organises all findings into five phases, ordered by urgency and dependency. Each phase has a target timeline and contains specific actions with their estimated complexity. Organisations should work through the phases sequentially — later phases assume earlier items have been resolved.

Phase 0 — Blockers — resolve before any rollout (Immediate)

These are blocking issues that must be resolved before any Copilot deployment can proceed. They typically represent missing security prerequisites or critical configuration gaps that would expose the organisation to unacceptable risk.

Domain	Feature	Complexity	Summary
Security Posture (Defender)	Copilot Security Posture	Moderate	NOT READY for Copilot: 1 critical risk factor(s) — 4 high-severity incidents, 61 phishing alerts, no DLP policies configured, no sensitivity labels configured, unified audit logging disabled.
Identity & Access (Entra)	Copilot Licence–Security Baseline Alignment	Moderate	CRITICAL: approximately 19% security baseline exposure (MFA registration 95.0% across 20 active members (95.5% across 22 directory accounts), device compliance 81%) affecting up to 1 Copilot-licensed users. AI access should be restricted until gaps are remediated.
Security Posture (Defender)	Copilot Data Governance	Complex	UNPROTECTED: no DLP policies configured, no sensitivity labels configured, unified audit logging disabled, 4 high-severity incidents.
Compliance & Governance (Purview)	Content-to-Label Coverage	Complex	No sensitivity labels or DLP policies for 78,774 SharePoint files — Copilot will surface all content without classification.
Compliance & Governance (Purview)	Copilot Data Exposure Surface	Complex	UNPROTECTED: Copilot has unrestricted access to 78,774 unclassified files. No sensitivity labels are configured, no DLP policies exist, and 1 users hold active Copilot licences. AI will surface sensitive content with no

Domain	Feature	Complexity	Summary
			classification or restriction.

Phase 1 — Pre-deployment — complete before Copilot rollout (1–2 weeks)

These items should be addressed in the one to two weeks before a pilot rollout begins. They harden the tenant's security and compliance posture to the level expected for responsible AI deployment.

Domain	Feature	Complexity	Summary
Productivity & Collaboration (M365)	Microsoft 365 Copilot - Business Chat	Simple	Rich knowledge graph: 78,774 files and 416 meetings create massive Business Chat value. Copilot can synthesize across this organizational memory.
Productivity & Collaboration (M365)	Microsoft 365 Copilot in Teams	Simple	High meeting volume: 416 meetings (23.1 per user) indicate meeting overload. Teams Copilot essential.
Productivity & Collaboration (M365)	Skype for Business Online (Plan 1)	Simple	Skype for Business Online (Plan 1) is active in Microsoft_Teams_Enterprise_New - CRITICAL: Blocks Copilot adoption.
Productivity & Collaboration (M365)	Skype for Business Online (Plan 1)	Simple	Limited Teams adoption: 18 users on Teams. Skype to Teams migration required for Copilot access.
Productivity & Collaboration (M365)	Viva Insights	Simple	High collaboration activity: 416 meetings across 18 Teams users (23.1 avg/user). Viva Insights can identify meeting overload patterns where Copilot summaries save maximum time.
Power Platform	Common Data Service for Copilot Studio	Simple	Organization with 7 environments ready for Copilot Studio agents
Power Platform	Power Automate for Copilot Studio - Action Agents	Simple	Organisation with 7 environments and 128 flows - ready for action-oriented agents

Domain	Feature	Complexity	Summary
Compliance & Governance (Purview)	Azure Rights Management	Simple	Azure Rights Management licence active but RMS is not enabled in Exchange
Compliance & Governance (Purview)	Content Marking Coverage	Simple	Unable to assess content marking — no sensitivity labels configured.
Compliance & Governance (Purview)	Copilot Interaction Audit Trail	Simple	Copilot interactions are not being audited: the unified audit log is disabled. 1 users hold Copilot licences with no audit trail. This creates compliance exposure and removes forensic capability. Enable audit logging before any Copilot deployment.
Compliance & Governance (Purview)	Information Protection for O365 Standard	Simple	Information Protection for O365 Standard licence active but ZERO sensitivity labels configured — no content classification
Compliance & Governance (Purview)	Label Policy Scope	Simple	No label policies published — sensitivity labels are defined but not available to users.
Security Posture (Defender)	Defender for O365 P1	Moderate	61 phishing alerts detected indicating active email-borne threats targeting Copilot users.
Security Posture (Defender)	Defender for O365 P2	Moderate	61 phishing alerts and 9 active incidents detected targeting Copilot-enabled users.
Identity & Access (Entra)	Microsoft Entra ID P2	Moderate	Risky applications detected: 9 with high-privilege permissions, 312 from unverified publishers - potential unauthorized access to Copilot-generated content
Identity & Access (Entra)	Microsoft Intune (Plan A)	Moderate	4 of 22 managed devices (18.2%) are non-compliant - may access Copilot despite policy violations
Power Platform	Copilot Agent Permission Scope	Moderate	Agent data access is ungoverned: 7 Copilot Studio environments have no

Domain	Feature	Complexity	Summary
	Risk		Power Platform DLP policies restricting connector scope. Agents can be built with unrestricted SharePoint access and no data boundary enforcement. Configure DLP policies before deploying agents to production.
Compliance & Governance (Purview)	AI-Generated Content Retention Gap	Moderate	Compliance risk: no retention labels are configured and 1 users hold active Copilot licences. Copilot meeting summaries, Business Chat history, and agent conversation logs will not be retained or governed. For regulated organisations this may constitute a compliance breach.
Compliance & Governance (Purview)	AIP Premium P1	Moderate	Azure RMS is not enabled — CRITICAL for AIP Premium P1
Compliance & Governance (Purview)	Label Encryption Coverage	Moderate	Unable to assess label encryption — no sensitivity labels configured.
Compliance & Governance (Purview)	Label Hierarchy Completeness	Moderate	Unable to assess label hierarchy — no sensitivity labels configured.
Security Posture (Defender)	Defender for Endpoint	Complex	4 high-severity endpoint incidents detected on devices that may access Copilot.
Power Platform	Copilot Agent Governance Readiness	Complex	Agent deployment is ungoverned: Copilot Studio is active across 7 environments with no DLP policies and no environment separation strategy. Agents can be published to production with unrestricted connector access. Establish DLP policies and a dev/test/prod environment strategy before enabling agent development.
Compliance &	Auto-Labelling	Complex	Unable to assess auto-labelling

Domain	Feature	Complexity	Summary
Governance (Purview)	Readiness		readiness — no sensitivity labels configured.
Productivity & Collaboration (M365)	Defender for Endpoint (SMB)	—	Defender for Endpoint (SMB) is not provisioned.
Compliance & Governance (Purview)	Shadow AI Data Governance	—	Partial data governance for shadow AI: 6 GenAI apps detected with 20 users. Gaps: no DLP policies covering cloud apps; only 0 sensitivity labels configured.

Phase 2 — Early lifecycle — address within 30 days (30 days)

These items can be addressed during the first 30 days of Copilot adoption. They strengthen the governance framework and close gaps that, while not blocking, could undermine user confidence or compliance requirements.

Domain	Feature	Complexity	Summary
Copilot Studio	Power Virtual Agents (Base) - Agent Planning	Simple	High Teams activity indicates strong potential for agent automation
Security Posture (Defender)	Safe Documents	Simple	47 malware alerts detected in documents that Copilot users may access.
Identity & Access (Entra)	Conditional Access Graph API Coverage	Simple	Conditional Access covers all cloud apps but no sign-in risk policy is active. Copilot's Graph API access path is protected by CA but lacks risk-based evaluation.
Identity & Access (Entra)	Copilot MFA Coverage	Simple	MFA registration is 95.0% across 20 active members (95.5% across 22 directory accounts) — close to full coverage but gaps remain for 1 Copilot users.

Domain	Feature	Complexity	Summary
Productivity & Collaboration (M365)	Content Freshness	Simple	SharePoint activity rate is 2% — stale content risks inaccurate Copilot responses for 1 licensed users.
Productivity & Collaboration (M365)	Copilot Graph Connectors	Simple	Growing connector usage: 1 external connections with 78,774 SharePoint files. Additional connectors would broaden Copilot's data coverage.
Productivity & Collaboration (M365)	Copilot Intelligent Search	Simple	Growing content base: 78,774 files across 58 users. Intelligent Search helps Copilot find the right information as content grows.
Productivity & Collaboration (M365)	Copilot in SharePoint	Simple	Growing SharePoint usage: 78,774 files across 10 active sites. Copilot can help teams create and manage content more efficiently.
Productivity & Collaboration (M365)	Microsoft 365 Copilot Chat	Simple	User base: 23 users likely need secure web AI for research and competitive intelligence.
Productivity & Collaboration (M365)	Microsoft 365 Copilot in Apps	Simple	Copilot Apps pilot opportunity: 23 users with 78,774 organizational files. Ready for targeted Copilot in Apps deployment.
Productivity & Collaboration (M365)	Microsoft Forms (Plan E1)	Simple	Growing organization: 23 users with 18 email users. Forms can enable structured AI-analyzed feedback.
Productivity & Collaboration (M365)	Microsoft Forms (Plan E5)	Simple	Smaller user base of 23 active M365 users. Forms E5 can establish structured feedback culture essential for agent improvement and adoption insights.
Productivity & Collaboration (M365)	Microsoft Queues	Simple	Growing call activity: 478 calls with 18 active users. Queues can streamline call management as volume increases.
Productivity & Collaboration (M365)	Microsoft eCDN	Simple	Growing Teams usage: 18 active users with 416 meetings. eCDN can improve event delivery as your

Domain	Feature	Complexity	Summary
			organisation scales.
Productivity & Collaboration (M365)	MyAnalytics Full	Simple	Moderate collaboration: 23 users with 416 meetings. MyAnalytics can track how Copilot changes work patterns.
Productivity & Collaboration (M365)	Nucleus	Simple	Growing data layer: 78,774 SharePoint files and 18 email users. Nucleus orchestrates this data for Copilot access.
Productivity & Collaboration (M365)	Office for the Web (SharePoint)	Simple	Low web usage: Only 148 SharePoint page views. Office for web adoption appears minimal - establish browser-based Office usage for seamless Copilot integration without desktop installations.
Productivity & Collaboration (M365)	People Skills Foundation	Simple	Growing expertise signals: 78,774 files and 18 email users. Skills graph is building but needs more content to be highly effective.
Productivity & Collaboration (M365)	Viva Insights — MyAnalytics (P2)	Simple	Smaller user base of 23 active M365 users. MyAnalytics can establish data-driven productivity culture alongside Copilot.
Compliance & Governance (Purview)	DLP Communication Coverage	Simple	No DLP policies configured — consider adding DLP coverage for communication channels.
Copilot Studio	Copilot Studio in Microsoft 365 Copilot - Environment-Based Agent Development	Moderate	Power Platform infrastructure: 7 environments as agent lifecycle environments
Security Posture (Defender)	Copilot Data Governance	Moderate	NEEDS IMPROVEMENT: no information barriers configured, no insider risk policies, no communication compliance policies, no retention labels configured, 47

Domain	Feature	Complexity	Summary
			malware alerts detected.
Security Posture (Defender)	Copilot Threat Intelligence	Moderate	Active threats detected: 3 device(s) with suspicious process patterns.
Identity & Access (Entra)	Microsoft Entra ID P1	Moderate	1 group(s) use license assignment, but none configured for Copilot licenses
Identity & Access (Entra)	Microsoft Entra ID P1	Moderate	18 Conditional Access policy(ies) configured, but none specifically target Copilot applications
Identity & Access (Entra)	Microsoft Entra ID P2	Moderate	No active access reviews configured for user access governance
Identity & Access (Entra)	Microsoft Entra ID P2	Moderate	No access reviews configured - Copilot license assignments and privileged access not recertified
Identity & Access (Entra)	Microsoft Entra ID P2	Moderate	Cross-tenant access settings not configured, allowing unrestricted B2B collaboration with external organizations accessing Copilot content
Identity & Access (Entra)	Microsoft Entra Internet Access	Moderate	Global Secure Access (Entra Internet Access) is not enabled in your tenant
Identity & Access (Entra)	Microsoft Entra Private Access	Moderate	Global Secure Access (Entra Private Access) is not enabled in your tenant
Identity & Access (Entra)	Permanent Admin Copilot Risk	Moderate	11 privileged role(s) have only permanent assignments — consider enabling PIM for these roles.
Productivity & Collaboration (M365)	Copilot Service Dependency Readiness	Moderate	2 of 6 Copilot capabilities are ready or partially ready. 5 critical blocker(s) identified in the prerequisite chain.
Productivity & Collaboration (M365)	Graph Connectors Search Index	Moderate	1 external connection(s) configured, enriching Copilot's data sources beyond M365.

Domain	Feature	Complexity	Summary
Productivity & Collaboration (M365)	Microsoft 365 Phone System	Moderate	Growing Teams usage: 18 users with 416 meetings. Phone System can extend AI capabilities to voice communications.
Productivity & Collaboration (M365)	Phone System Virtual User	Moderate	Growing call activity: 478 calls with 18 active users. Virtual user accounts can streamline call handling with automated attendants.
Productivity & Collaboration (M365)	Teams Premium Custom	Moderate	Growing Teams usage: 18 users with 416 meetings. Custom branding can enhance the professionalism of Copilot-generated meeting content.
Productivity & Collaboration (M365)	Teams Premium Management	Moderate	Growing Teams usage: 18 users with 416 meetings. Meeting management policies can ensure Copilot governance as adoption scales.
Productivity & Collaboration (M365)	Teams Premium Protection	Moderate	Growing Teams usage: 18 users with 416 meetings. Meeting protection can safeguard Copilot-generated content as adoption grows.
Productivity & Collaboration (M365)	Teams Premium Virtual Appointments	Moderate	Growing meeting activity: 416 meetings with 18 active users. Virtual appointments can enhance external-facing meeting experiences.
Productivity & Collaboration (M365)	Teams Premium Webinar	Moderate	Growing Teams usage: 18 users with 416 meetings. Webinar features can enhance large-scale event delivery with Copilot assistance.
Productivity & Collaboration (M365)	Virtual Appointments	Moderate	Growing meeting activity: 416 meetings with 18 active users. Virtual Appointments can improve external meeting efficiency.
Productivity & Collaboration (M365)	Microsoft Teams	Complex	Low Teams adoption detected: Only 18 active users. Limited collaboration activity reduces Copilot meeting

Domain	Feature	Complexity	Summary
			intelligence value
Productivity & Collaboration (M365)	SharePoint (Plan 2)	Complex	Only 10 SharePoint site(s) deployed - limited content for Copilot to access

Phase 3 — Optimisation — enhance over time (90 days)

These optimisation items can be addressed over the first 90 days. They improve the effectiveness of Copilot and the organisation's ability to measure and govern AI usage at scale.

Domain	Feature	Complexity	Summary
Copilot Studio	CDS Virtual Agent Base Messages - Dataverse Message Planning	Simple	Entity-driven agent message capacity: 7 environments - Dataverse queries consume additional messages
Copilot Studio	Copilot Studio (Viral) - Trial Setup	Simple	SharePoint content available - establish trial environment for agent experimentation
Copilot Studio	Flow Virtual Agent Base Messages - Workflow Message Planning	Simple	Action agent message capacity: 128 workflows (action-agent automation) - workflow-triggered agents use more messages per session
Identity & Access (Entra)	Conditional Access for Entra Private Access	Simple	Conditional Access for Private Access is not applicable — Private Access is not enabled
Productivity & Collaboration (M365)	Clipchamp	Simple	Moderate meeting volume of 416 Teams meetings. Clipchamp can create video summaries, training clips, and stakeholder updates.
Productivity & Collaboration (M365)	Mesh Avatars for Teams	Simple	Moderate meeting volume (416 meetings). Mesh Avatars can reduce video fatigue while Copilot continues meeting transcription and summaries.
Productivity &	Mesh Avatars for	Simple	Heavy meeting load: 416 meetings

Domain	Feature	Complexity	Summary
Collaboration (M365)	Teams (Additional)		suggest video fatigue risk. Avatar-based meetings offer alternative engagement while Copilot continues to provide real-time assistance.
Productivity & Collaboration (M365)	Microsoft Places (Core)	Simple	Smaller workforce of 23 active users. Microsoft Places can establish hybrid work coordination patterns early.
Productivity & Collaboration (M365)	Microsoft Places (Enhanced)	Simple	With 18 Teams users in hybrid work, Places Enhanced can optimize when teams come together for high-impact collaboration.
Productivity & Collaboration (M365)	Microsoft Planner	Simple	Moderate collaboration: 416 Teams meetings. Consider Planner integration to capture meeting action items
Productivity & Collaboration (M365)	Sway (Retiring)	Simple	Sway is Success in SPE_E3. Microsoft is retiring Sway — existing Sways will become read-only and eventually inaccessible. Migrate any active Sway content to SharePoint pages, PowerPoint, or OneNote before the retirement deadline.
Power Platform	Common Data Service (Viral) - Dynamics Trial	Simple	Viral Dataverse license provides trial-grade storage for building proof-of-concept Dynamics agents (customer service bots, sales assistants) without upfront investment.
Power Platform	Common Data Service for Office 365 (Plan 2)	Simple	Enterprise organization may need premium Dataverse capacity.
Power Platform	Common Data Service for Office 365 (Plan 2) - Dynamics - Dynamics Agents	Simple	Plan 2 Dataverse ready for Dynamics agent scenarios
Power Platform	Power Automate (Free) - Trial	Simple	Free Power Automate tier lets you prototype Copilot-triggered

Domain	Feature	Complexity	Summary
	Workflows		workflows (send emails, create Teams messages when user prompts agent) to prove automation value before purchasing licenses. You have 128 flow(s) (0 with HTTP triggers for Copilot integration).
Identity & Access (Entra)	Entra Internet Access for Frontline	Moderate	Entra Internet Access for Frontline is not available — Global Secure Access is not enabled
Productivity & Collaboration (M365)	Exchange Online (Plan 2)	Moderate	Email activity data available: 18 active users, averaging 32.9 emails sent per user. Baseline established for measuring Copilot impact.
Power Platform	Power BI Pro	Moderate	Power BI Pro enables users to ask Copilot questions about business data in natural language ('Show me sales trends') instead of building manual reports.

Time-to-Ready Estimate

Based on the volume and complexity of findings in Phase 0 (Blockers) and Phase 1 (Pre-deployment), the estimated time to reach deployment readiness is 3-7 weeks.

Based on 5 Phase 0 blockers and 26 Phase 1 findings. Assumes one dedicated resource working full-time on remediation.

Phase	Findings	Estimated Hours
4-11 days	5	32–88
10-23 days	26	80–184

These estimates are indicative and assume a single dedicated resource working full-time on remediation. Actual timelines will vary based on organisational change management processes, testing requirements, and resource availability.

Collaboration Maturity

The organisation's collaboration maturity is assessed as "Developing" (Level 2 of 5). This score reflects how deeply Microsoft 365 collaboration tools are embedded in daily work, which directly correlates with the potential return on investment from Copilot. Organisations with mature collaboration habits see faster Copilot adoption because employees already produce the content and communication patterns that Copilot can augment.

Maturity Factors

Factor	Assessment	Detail
Teams Adoption	Low	18 of 58 users (31%)
Meeting Culture	High	23.1 meetings per active user
SharePoint Engagement	Low	2% activity rate
Email Maturity	Low	18 active users (31%)
Multi-Platform Activation	High	2+ platforms with activations

Next Steps

Based on the assessment findings, the following actions are recommended to progress towards Copilot deployment readiness:

1. Resolve 5 Phase 0 blockers before Copilot licence provisioning — these are critical pre-deployment requirements.

2. Prioritise Compliance & Governance (Purview) (57%) — lowest readiness score with 7 critical and 1 warning findings.

3. Address Identity & Access (Entra) (72%) — 8 findings requiring attention before full deployment.

4. Plan a phased pilot with the existing 1 Copilot-licensed users, then expand to the broader 58-user base.

5. Schedule a follow-up assessment in 30 days to track remediation progress and validate deployment readiness.

Contact JFDI Consulting for guidance on your Copilot deployment journey.

Appendix A: Complete Findings Register

This appendix lists every finding from the assessment, including those with a Success status. The register serves as an auditable record of the full assessment scope and can be used for tracking remediation progress.

Phase and effort estimates for actionable findings are shown in the Remediation Roadmap section.

ID	Domain	Feature	Status	Priority	Owner
EC7E27D0	Copilot Studio	Copilot Studio in Microsoft 365 Copilot - Environment-Based Agent Development	Success	Medium	Power Platform Admin / Centre of Excellence
1B43391C	Copilot Studio	Power Virtual Agents (Base) - Agent Planning	Success	Medium	Power Platform Admin / Centre of Excellence
415866B1	Copilot Studio	CDS Virtual Agent Base Messages - Dataverse Message Planning	Success	Low	Power Platform Admin / Centre of Excellence
D4C9D970	Copilot Studio	Copilot Studio (Viral) - Trial Setup	Success	Low	Power Platform Admin / Centre of Excellence
A99DDC70	Copilot Studio	Flow Virtual Agent Base Messages - Workflow Message Planning	Success	Low	Power Platform Admin / Centre of Excellence
5072575E	Security Posture (Defender)	Copilot Data Governance	Critical	High	IT Security
8BB4BA3E	Security Posture (Defender)	Copilot Security Posture	Critical	High	IT Security
295080AB	Security Posture (Defender)	Defender for Endpoint	Action Required	High	IT Security
51C5FB54	Security Posture	Defender for O365 P1	Action Required	High	IT Security

ID	Domain	Feature	Status	Priority	Owner
	(Defender)				
9376B392	Security Posture (Defender)	Defender for O365 P2	Action Required	High	IT Security
E25E707B	Security Posture (Defender)	Copilot Threat Intelligence	Action Required	Medium	IT Security
CF46881A	Security Posture (Defender)	Safe Documents	Success	Medium	IT Security
FDC6D274	Security Posture (Defender)	Defender XDR Activation	Success	—	IT Security
31970C27	Security Posture (Defender)	Secure Score Readiness	Success	—	IT Security
6D1B20FD	Security Posture (Defender)	Shadow AI Exposure	Success	—	IT Security
E300FD27	Security Posture (Defender)	Vulnerable Device Copilot Risk	Success	—	IT Security
538C8ACE	Identity & Access (Entra)	Copilot Licence–Security Baseline Alignment	Critical	High	Identity & Access Team
B4224CF3	Identity & Access (Entra)	Microsoft Entra ID P2	Action Required	High	Identity & Access Team
00A21F2C	Identity & Access (Entra)	Microsoft Intune (Plan A)	Action Required	High	Identity & Access Team
9079B12D	Identity & Access (Entra)	Conditional Access Graph API Coverage	Attention Required	Medium	Identity & Access Team

ID	Domain	Feature	Status	Priority	Owner
45AEE375	Identity & Access (Entra)	Copilot MFA Coverage	Attention Required	Medium	Identity & Access Team
11E2BFAE	Identity & Access (Entra)	Microsoft Entra ID P1	Action Required	Medium	Identity & Access Team
DF62471D	Identity & Access (Entra)	Microsoft Entra Internet Access	Not Licensed	Medium	Identity & Access Team
B4ADEE75	Identity & Access (Entra)	Microsoft Entra Private Access	Not Licensed	Medium	Identity & Access Team
03F4D354	Identity & Access (Entra)	Permanent Admin Copilot Risk	Attention Required	Medium	Identity & Access Team
CD2A0B65	Identity & Access (Entra)	Conditional Access for Entra Private Access	Not Licensed	Low	Identity & Access Team
5E4AB128	Identity & Access (Entra)	Entra Internet Access for Frontline	Not Licensed	Low	Identity & Access Team
591A7972	Identity & Access (Entra)	Access Review Licence Alignment	Success	—	Identity & Access Team
05E68096	Identity & Access (Entra)	Guest Copilot Content Exposure	Success	—	Identity & Access Team
C952AE93	Identity & Access (Entra)	Legacy Auth Copilot Risk	Success	—	Identity & Access Team
A7854D1F	Identity & Access (Entra)	Mobile Copilot Compliance	Success	—	Identity & Access Team
0505D391	Identity & Access	Unmanaged Device	Success	—	Identity &

ID	Domain	Feature	Status	Priority	Owner
	(Entra)	Copilot Access			Access Team
D6259261	Productivity & Collaboration (M365)	Defender for Endpoint (SMB)	Disabled	High	IT / Digital Workplace
804AA714	Productivity & Collaboration (M365)	Microsoft 365 Copilot - Business Chat	Insight	High	IT / Digital Workplace
A54E8999	Productivity & Collaboration (M365)	Microsoft 365 Copilot in Teams	Insight	High	IT / Digital Workplace
E59E41D4	Productivity & Collaboration (M365)	Skype for Business Online (Plan 1)	Action Required	High	IT / Digital Workplace
F2AC5B1F	Productivity & Collaboration (M365)	Viva Insights	Action Required	High	IT / Digital Workplace
0219049E	Productivity & Collaboration (M365)	Content Freshness	Attention Required	Medium	IT / Digital Workplace
18692DE6	Productivity & Collaboration (M365)	Copilot Graph Connectors	Insight	Medium	IT / Digital Workplace
BA1C9F17	Productivity & Collaboration (M365)	Copilot Intelligent Search	Insight	Medium	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
66B18317	Productivity & Collaboration (M365)	Copilot Service Dependency Readiness	Attention Required	Medium	IT / Digital Workplace
E224AC83	Productivity & Collaboration (M365)	Copilot in SharePoint	Insight	Medium	IT / Digital Workplace
547F9048	Productivity & Collaboration (M365)	Graph Connectors Search Index	Insight	Medium	IT / Digital Workplace
375B2BC8	Productivity & Collaboration (M365)	Microsoft 365 Copilot Chat	Insight	Medium	IT / Digital Workplace
D1D289BF	Productivity & Collaboration (M365)	Microsoft 365 Copilot in Apps	Insight	Medium	IT / Digital Workplace
E231DCE3	Productivity & Collaboration (M365)	Microsoft 365 Phone System	Insight	Medium	IT / Digital Workplace
0B05FAF8	Productivity & Collaboration (M365)	Microsoft Forms (Plan E1)	Insight	Medium	IT / Digital Workplace
31C031E4	Productivity & Collaboration (M365)	Microsoft Forms (Plan E5)	Insight	Medium	IT / Digital Workplace
EB468D2F	Productivity & Collaboration (M365)	Microsoft Queues	Insight	Medium	IT / Digital Workplace
62BD0	Productivity	Microsoft Teams	Warning	Mediu	IT / Digital

ID	Domain	Feature	Status	Priority	Owner
E05	& Collaboration (M365)			m	Workplace
53A85902	Productivity & Collaboration (M365)	Microsoft eCDN	Insight	Medium	IT / Digital Workplace
38A546A7	Productivity & Collaboration (M365)	MyAnalytics Full	Insight	Medium	IT / Digital Workplace
C29A689F	Productivity & Collaboration (M365)	Nucleus	Insight	Medium	IT / Digital Workplace
989FE458	Productivity & Collaboration (M365)	Office for the Web (SharePoint)	Warning	Medium	IT / Digital Workplace
967914E9	Productivity & Collaboration (M365)	People Skills Foundation	Insight	Medium	IT / Digital Workplace
C74E2993	Productivity & Collaboration (M365)	Phone System Virtual User	Insight	Medium	IT / Digital Workplace
D7FBFB3B	Productivity & Collaboration (M365)	SharePoint (Plan 2)	Warning	Medium	IT / Digital Workplace
C90FA577	Productivity & Collaboration (M365)	Teams Premium Custom	Insight	Medium	IT / Digital Workplace
2B21D826	Productivity &	Teams Premium	Insight	Mediu	IT / Digital

ID	Domain	Feature	Status	Priority	Owner
	Collaboration (M365)	Management		m	Workplace
175B9630	Productivity & Collaboration (M365)	Teams Premium Protection	Insight	Medium	IT / Digital Workplace
A7024AFD	Productivity & Collaboration (M365)	Teams Premium Virtual Appointments	Insight	Medium	IT / Digital Workplace
3680C4EF	Productivity & Collaboration (M365)	Teams Premium Webinar	Insight	Medium	IT / Digital Workplace
A32C7CC4	Productivity & Collaboration (M365)	Virtual Appointments	Insight	Medium	IT / Digital Workplace
2B1D6525	Productivity & Collaboration (M365)	Viva Insights — MyAnalytics (P2)	Insight	Medium	IT / Digital Workplace
DA82719E	Productivity & Collaboration (M365)	Clipchamp	Success	Low	IT / Digital Workplace
E4DC8735	Productivity & Collaboration (M365)	Exchange Online (Plan 2)	Success	Low	IT / Digital Workplace
100D3966	Productivity & Collaboration (M365)	Mesh Avatars for Teams	Insight	Low	IT / Digital Workplace
37C002A7	Productivity & Collaboration	Mesh Avatars for Teams (Additional)	Insight	Low	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
	(M365)				
BE7A1D97	Productivity & Collaboration (M365)	Microsoft Places (Core)	Insight	Low	IT / Digital Workplace
09250195	Productivity & Collaboration (M365)	Microsoft Places (Enhanced)	Insight	Low	IT / Digital Workplace
F5DF8925	Productivity & Collaboration (M365)	Microsoft Planner	Success	Low	IT / Digital Workplace
8EEDD974	Productivity & Collaboration (M365)	Sway (Retiring)	Insight	Low	IT / Digital Workplace
39E3D8CA	Productivity & Collaboration (M365)	Adoption-Aligned Copilot Priority	Success	—	IT / Digital Workplace
CA2CCE4B	Productivity & Collaboration (M365)	Collaboration Maturity	Insight	—	IT / Digital Workplace
4A1DDEB2	Productivity & Collaboration (M365)	Communication Patterns	Success	—	IT / Digital Workplace
7ED9E527	Productivity & Collaboration (M365)	Content Ecosystem Health	Insight	—	IT / Digital Workplace
D2E498A2	Productivity & Collaboration	Copilot ROI Readiness Score	Insight	—	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
	(M365)				
211E1A78	Productivity & Collaboration (M365)	Digital Workplace Breadth	Success	—	IT / Digital Workplace
230A43D5	Productivity & Collaboration (M365)	Exchange Foundation	Success	—	IT / Digital Workplace
52C0638B	Productivity & Collaboration (M365)	Exchange Online Kiosk (Deskless)	Success	—	IT / Digital Workplace
C79DDE1C	Productivity & Collaboration (M365)	Graph Connector Coverage	Success	—	IT / Digital Workplace
4CE20A7E	Productivity & Collaboration (M365)	Graph Connectors Deployment	Success	—	IT / Digital Workplace
AC0CCE3C	Productivity & Collaboration (M365)	Graph Connectors for Copilot	Success	—	IT / Digital Workplace
F03A9757	Productivity & Collaboration (M365)	Insights by MyAnalytics	Success	—	IT / Digital Workplace
8B8FA17C	Productivity & Collaboration (M365)	Mesh Immersive Spaces (Standalone)	Success	—	IT / Digital Workplace
BF9EC6C7	Productivity & Collaboration	Mesh Immersive Spaces for Teams	Success	—	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
	(M365)				
F40670DA	Productivity & Collaboration (M365)	Microsoft 365 Apps for Enterprise	Success	—	IT / Digital Workplace
A5996731	Productivity & Collaboration (M365)	Microsoft 365 Lighthouse	Success	—	IT / Digital Workplace
3295A83E	Productivity & Collaboration (M365)	Microsoft Bookings	Success	—	IT / Digital Workplace
07F78849	Productivity & Collaboration (M365)	Microsoft Intune for Office 365	Success	—	IT / Digital Workplace
3DF7D8D4	Productivity & Collaboration (M365)	Microsoft Loop	Insight	—	IT / Digital Workplace
D5F3BF2A	Productivity & Collaboration (M365)	Microsoft Search	Success	—	IT / Digital Workplace
B44D8EB7	Productivity & Collaboration (M365)	Microsoft StaffHub	Success	—	IT / Digital Workplace
BA4B54D1	Productivity & Collaboration (M365)	Multi-Platform Readiness	Insight	—	IT / Digital Workplace
5FF712DC	Productivity & Collaboration	OneDrive Content Blind Spot	Success	—	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
	(M365)				
8E4C23BE	Productivity & Collaboration (M365)	OneDrive for Business (Plan 2)	Success	—	IT / Digital Workplace
C276F1B8	Productivity & Collaboration (M365)	Shadow AI Operational Risk	Success	—	IT / Digital Workplace
61691F76	Productivity & Collaboration (M365)	SharePoint Content Deployment	Insight	—	IT / Digital Workplace
01E788FB	Productivity & Collaboration (M365)	Skype for Business Online (Plan 2)	Success	—	IT / Digital Workplace
831A05ED	Productivity & Collaboration (M365)	Universal Print	Success	—	IT / Digital Workplace
7FED6EDC	Productivity & Collaboration (M365)	Viva Engage Core	Success	—	IT / Digital Workplace
676F1AFD	Productivity & Collaboration (M365)	Viva Insights (Backend)	Success	—	IT / Digital Workplace
D171FAE5	Productivity & Collaboration (M365)	Viva Learning (Seeded)	Success	—	IT / Digital Workplace
316B241D	Productivity & Collaboration	Windows 10/11 Enterprise	Success	—	IT / Digital Workplace

ID	Domain	Feature	Status	Priority	Owner
	(M365)				
5C05C173	Productivity & Collaboration (M365)	Windows Autopatch	Success	—	IT / Digital Workplace
92775370	Productivity & Collaboration (M365)	Windows Update for Business	Success	—	IT / Digital Workplace
86B5F71D	Productivity & Collaboration (M365)	Yammer Enterprise	Success	—	IT / Digital Workplace
C700B974	Power Platform	Common Data Service for Copilot Studio	Action Required	High	Power Platform Admin / Centre of Excellence
B0D22850	Power Platform	Copilot Agent Governance Readiness	Action Required	High	Power Platform Admin / Centre of Excellence
836EF4AD	Power Platform	Copilot Agent Permission Scope Risk	Action Required	High	Power Platform Admin / Centre of Excellence
B0297FEE	Power Platform	Power Automate for Copilot Studio - Action Agents	Action Required	High	Power Platform Admin / Centre of Excellence
EB1BB1C3	Power Platform	Common Data Service (Viral) - Dynamics Trial	Success	Low	Power Platform Admin / Centre of Excellence
9F397ED8	Power Platform	Common Data Service for Office 365 (Plan 2)	Success	Low	Power Platform Admin / Centre of Excellence
B4600420	Power Platform	Common Data Service for Office 365 (Plan 2) - Dynamics - Dynamics Agents	Success	Low	Power Platform Admin / Centre of Excellence

ID	Domain	Feature	Status	Priority	Owner
11C80344	Power Platform	Power Automate (Free) - Trial Workflows	Success	Low	Power Platform Admin / Centre of Excellence
61DF47E5	Power Platform	Power BI Pro	Success	Low	Power Platform Admin / Centre of Excellence
15E64102	Power Platform	Suspended Flow Plugin Risk	Success	—	Power Platform Admin / Centre of Excellence
A2F6C6BC	Compliance & Governance (Purview)	AI-Generated Content Retention Gap	Action Required	High	Compliance / Information Governance
BE37D48A	Compliance & Governance (Purview)	AIP Premium P1	Action Required	High	Compliance / Information Governance
E4AF591F	Compliance & Governance (Purview)	Auto-Labelling Readiness	Missing Prerequisite	High	Compliance / Information Governance
F0DE598D	Compliance & Governance (Purview)	Azure Rights Management	Action Required	High	Compliance / Information Governance
0E70CB3C	Compliance & Governance (Purview)	Content Marking Coverage	Missing Prerequisite	High	Compliance / Information Governance
63D9E252	Compliance & Governance (Purview)	Content-to-Label Coverage	Critical	High	Compliance / Information Governance

ID	Domain	Feature	Status	Priority	Owner
4AF8739E	Compliance & Governance (Purview)	Copilot Data Exposure Surface	Critical	High	Compliance / Information Governance
EB506796	Compliance & Governance (Purview)	Copilot Interaction Audit Trail	Action Required	High	Compliance / Information Governance
B375FD56	Compliance & Governance (Purview)	Information Protection for O365 Standard	Action Required	High	Compliance / Information Governance
EA942576	Compliance & Governance (Purview)	Label Encryption Coverage	Missing Prerequisite	High	Compliance / Information Governance
9BCFEBB6	Compliance & Governance (Purview)	Label Hierarchy Completeness	Missing Prerequisite	High	Compliance / Information Governance
4274FA2C	Compliance & Governance (Purview)	Label Policy Scope	Missing Prerequisite	High	Compliance / Information Governance
BEDECA77	Compliance & Governance (Purview)	Shadow AI Data Governance	Warning	High	Compliance / Information Governance
9375C748	Compliance & Governance (Purview)	DLP Communication Coverage	Attention Required	Medium	Compliance / Information Governance
A55D4C6E	Compliance & Governance (Purview)	Microsoft Purview eDiscovery	Success	—	Compliance / Information Governance

Appendix B: Assessment Methodology

This assessment was conducted using the JFDI M365 Copilot Readiness Assessment Tool, which programmatically evaluates tenant configuration across six service domains: Microsoft 365, Entra ID, Defender, Purview, Power Platform, and Copilot Studio.

Data Sources

Data was collected via the Microsoft Graph API (v1.0 and beta endpoints), Microsoft Defender for Endpoint API, Exchange Online PowerShell (for Purview compliance data), and Power Platform Management APIs. All data collection uses read-only permissions and does not modify tenant configuration.

Module Coverage

The assessment evaluated 91 recommendation modules out of 177 registered (86 skipped due to scope selection or missing permissions). Each module checks a specific feature or configuration against Microsoft's recommended posture for Copilot deployment.

Assessment Duration

The automated assessment completed in 24 seconds.

Finding Status Definitions

Status	Meaning	Action Required
Critical	A severe gap that blocks Copilot deployment or creates unacceptable risk	Immediate remediation required
Action Required	A feature is disabled or misconfigured and needs attention	Resolve before or during deployment
Warning	A potential risk or suboptimal configuration	Review and address as resources allow
Attention Required	A configuration that could be improved	Plan remediation within 90 days
Not Licensed	The required licence or SKU is not present in the tenant	Evaluate whether the licence is needed
Missing Prerequisite	A dependent service or permission is unavailable	Resolve the dependency first
Pending Activation	The feature is licensed but not yet activated	Complete activation in the admin centre
Pending Input	The feature requires additional configuration input	Provide the required configuration

Status	Meaning	Action Required
Insight	An informational observation with no action required	No action — context only
Success	The feature is correctly configured for Copilot readiness	No action — maintain current state

Limitations

This assessment represents a point-in-time snapshot of tenant configuration. It does not evaluate user behaviour, data quality, or content sensitivity. Findings should be validated against the organisation's specific security policies and risk appetite before remediation decisions are made. Some features may require additional licensing or permissions beyond what was available during the assessment.