

FREE RESOURCE — MICROSOFT 365 COPILOT

Copilot Tenant Readiness Checklist

Turning on Microsoft 365 Copilot before your tenant is ready surfaces every oversharing problem you have accumulated for years — instantly, to whoever asks the right prompt. This checklist covers licensing, data governance, SharePoint and OneDrive permission hygiene, Teams sprawl and the security baseline you need in place before rollout.

5

READINESS
AREAS
COVERED

30+

CHECKS
TO TICK

Pre

COMPLETE
BEFORE
LICENCE
ASSIGNMENT

Fillable

TICK & TYPE
IN ANY VIEWER

LICENSING

SHAREPOINT

TEAMS

SECURITY BASELINE

PREPARED FOR

Cloudswitched Knowledge
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

01

Licensing & data governance

Copilot is only as safe as the data estate it reads. Before assigning a single licence, confirm the prerequisites and lock down the governance settings that decide what Copilot is allowed to surface.

Licensing prerequisites

- **Qualifying base licence confirmed** for every user in scope — Microsoft 365 E3/E5, Business Standard/Premium as required by the Copilot SKU.
- **Copilot licence count agreed** against a named pilot group, not a blanket tenant-wide purchase on day one.
- **Semantic index / Microsoft Graph connectors** reviewed — confirm which content sources feed Copilot beyond core M365 apps.
- **Data residency & tenant boundary** confirmed: Copilot does not train the foundation model on your tenant data, and processing region is understood.

Data governance

- **Sensitivity labels deployed** across M365 (Confidential, Highly Confidential, Public) with auto-labelling policies where practical.
- **Default sharing link setting reviewed** in SharePoint admin centre — “Anyone” links disabled or restricted before rollout.
- **Label-based DLP and encryption** confirmed to still apply correctly when content is surfaced or summarised via Copilot.
- **Content search & eDiscovery** confirmed to capture Copilot interactions for compliance and legal hold purposes.
- **Restricted SharePoint Search / Restricted Content Discovery** considered for highly sensitive sites that should not be Copilot-indexed at all.

COPILOT DOES NOT CREATE OVERSHARING — IT REVEALS IT

Copilot only ever surfaces what the signed-in user already has permission to see. If a shared drive has had “Everyone except external users” access for five years, Copilot will now summarise it for anyone who asks. Fix permissions before rollout, not after the first awkward conversation.

02

Permission hygiene, Teams sprawl & security baseline

SharePoint & OneDrive permission hygiene

- **SharePoint Advanced Management** (or equivalent audit) run to identify overshared sites before rollout.
- **Site permissions reviewed** against actual team membership; stale access from leavers and completed projects removed.
- **OneDrive sharing defaults** set to “specific people” rather than organisation-wide as the standard behaviour.

Teams sprawl

- **Inactive Teams and channels archived** — abandoned project teams are a common source of stale, overshared content.
- **Teams creation policy reviewed** to prevent uncontrolled proliferation of new teams with default-open membership.
- **Guest access reviewed** across all Teams; external members audited and removed where no longer required.

Security baseline

- **MFA enforced** on 100% of accounts in scope for Copilot licensing — no exceptions for “power users”.
- **Conditional Access policies** cover Copilot and Microsoft Graph in the same way as other sensitive M365 workloads.
- **Privileged accounts excluded** from the initial pilot licence group; admin accounts should not be early Copilot testers.

Success criteria

READINESS CHECKS
COMPLETE

/ 30

All must be ticked before licences are assigned.



Readiness sign-off

Once every check above is ticked, you are ready to move to a controlled pilot — see the Copilot Pilot Rollout Plan Template for the phased rollout structure.

Outstanding items & notes

Sign-off

READINESS CONFIRMED BY

ROLE / TITLE

DATE

Need your tenant assessed before rollout?

Cloudswitched runs Copilot readiness assessments for UK SMEs — oversharing audits, permission remediation and a phased rollout plan included.

info@cloudswitched.com

cloudswitched.com/services/microsoft-365



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OPTIMIZE YOUR IT AND THRIVE

info@cloudswitched.com

New London House, 6 London St
London EC3R 7LP · United Kingdom