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I N F O T E C H

Preparing for Microsoft Copilot

When Microsoft released Copilot to non-enterprise license holders in January, they expected small businesses to adopt the tool immediately. However, lots of businesses are still unsure how to leverage AI properly. The deployment of such sophisticated technology requires a well-prepared Microsoft Tenant, and Mason Infotech have helped a number of businesses to prime themselves for Copilot with our Copilot Readiness Assessment. Below, we've detailed all the areas to consider before enabling your Copilot licensing.

Understanding Data Architecture and File Structures

Your business data is the driving force behind a successful AI integration. Begin by understanding your existing data architecture and file structures. This process includes understanding your server setup, SharePoint data, and what third party applications you use. The goal is to ensure that data can flow and is readily accessible to Copilot.

If you're not on top of your business data, Copilot won't be able to function to it's fullest capacity.

Get a Hold on Security

The adoption of AI tools has made security even more important. We thoroughly evaluate the security posture and Microsoft environment of any business looking to adopt Copilot. We review Microsoft secure score, conditional access polociies, and data retention policies.

Microsoft's secure score is a handy tool for pointing out process improvements. Most small businesses score less than 30%, so mapping your score will tell you if you're ready for an AI tool. Conditional access policies include things like Multi-Factor Authentication or location policies. These are vital for maintaining a secure and controlled environment pre- and post-deployment.

Before you can launch Copilot, you'll need to make sure you are using Entra ID to control these policies. You'll also need to update to the new versions of all Microsoft Office apps, like Outlook and Teams, and review your connected experiences settings for all M365 apps.

So What Next?

If you've already decided to implement Copilot but don't know where to start, our Readiness Assessment is a great tool to allow businesses to understand the next steps. By addressing critical aspects of data architecture and security posture, businesses can ensure a smooth and secure adoption of Copilot. With our expertise, businesses can confidently adopt Copilot with a robust, intelligent, and responsible approach.