

Microsoft Copilot Readiness Checklist

A practical assessment for finding the gaps that can derail your rollout - before you buy more licences.

How to use this checklist

Bring together the people who own Microsoft 365, security and the business area you want to pilot with. For each statement, choose the rating that best reflects your current evidence - not your intention. Add an owner and next action wherever you score red or amber.

GREEN In place and evidenced	AMBER Partly in place or uncertain	RED Not in place or material gap
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Your details

Organisation:

Assessment date:

Assessment lead:

Pilot group:

1. BUSINESS VALUE AND USE CASES

Business value and use cases

Confirm there is a useful business case before focusing on licences or features.

READINESS CHECK	RATING	EVIDENCE / OWNER / NEXT ACTION
1. We have identified specific, high-frequency tasks where Copilot may save time or improve quality.	G / A / R	
2. Each proposed use case has a named business owner and a clearly defined user group.	G / A / R	
3. We have estimated the current time, cost or quality baseline for our priority use cases.	G / A / R	
4. We can explain what a successful pilot would change in measurable, observable terms.	G / A / R	
5. Our priority use cases are suitable for Microsoft 365 Copilot, rather than requiring a different tool or custom solution.	G / A / R	
6. We have selected a pilot group small enough to support closely and large enough to produce useful evidence.	G / A / R	

2. DATA AND INFORMATION QUALITY

Data and information quality

Copilot can surface what users can already access. Make sure that data is useful and appropriately shared.

READINESS CHECK	RATING	EVIDENCE / OWNER / NEXT ACTION
1. Important information is stored in approved Microsoft 365 locations rather than personal drives or disconnected systems.	G / A / R	
2. Priority SharePoint sites, Teams and document libraries have clear owners.	G / A / R	
3. Obsolete, duplicated and low-quality content has been identified in the areas relevant to the pilot.	G / A / R	
4. File names, locations and basic metadata make important information reasonably easy to find.	G / A / R	
5. We know which business processes depend on data outside Microsoft 365 and how that affects our initial use cases.	G / A / R	
6. We have a practical plan to improve the highest-impact information gaps before or during the pilot.	G / A / R	

3. SECURITY, PERMISSIONS AND GOVERNANCE

Security, permissions and governance

Reduce oversharing risk and set clear guardrails before people start experimenting.

READINESS CHECK	RATING	EVIDENCE / OWNER / NEXT ACTION
1. We have reviewed permissions and external sharing in the Teams, sites and libraries most relevant to the pilot.	G / A / R	
2. Sensitive information has appropriate labels, access controls or handling rules.	G / A / R	
3. We can identify and address broad or inherited permissions that no longer reflect business need.	G / A / R	
4. Our acceptable-use guidance explains what users should and should not enter, generate, share or rely on.	G / A / R	
5. Accountability for Copilot governance, risk decisions and issue escalation is clear.	G / A / R	
6. We have a process for monitoring emerging risks, incidents and changes to Microsoft 365 Copilot.	G / A / R	

4. PEOPLE, ADOPTION AND MEASUREMENT

People, adoption and measurement

A supported behaviour change is what turns licences into business value.

READINESS CHECK	RATING	EVIDENCE / OWNER / NEXT ACTION
1. Leaders understand what Copilot can and cannot do and reinforce realistic expectations.	G / A / R	
2. Pilot users have role-relevant training, example prompts and time to practise.	G / A / R	
3. We have nominated champions who can answer questions, share examples and surface problems.	G / A / R	
4. Users know how to check outputs, protect confidential information and report poor or unsafe results.	G / A / R	
5. We will measure adoption, user experience and business outcomes - not just licence activation.	G / A / R	
6. There is a decision point and clear criteria for improving, expanding, pausing or stopping after the pilot.	G / A / R	

READINESS SUMMARY

Turn your findings into a clear next step

Count your ratings, agree on the most important gaps and decide what must be true before you begin or expand the pilot.

GREEN	AMBER	RED
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Our strongest readiness area	
Our biggest rollout risk	
The first gap we will address	
Owner and target date	
Our pilot success measures	

Need help completing the assessment?

Optello can facilitate a guided readiness session, help validate the evidence and turn your gaps into a practical rollout plan. Visit optello.co/copilot-readiness to get started.