Copilot readiness checklist

A working checklist for small and midsized businesses

Use this worksheet with your IT team or provider to review a proposed Copilot pilot in Microsoft 365, record evidence, and assign the work needed before you start or expand.

Business: _____ Review date: _____

Business sponsor: _____ IT contact: _____

Copilot experience and first workflow: _____

How to use it

Mark one status per item. Verified means you have checked the evidence for the proposed pilot. Gap means action is needed. Unknown means it has not been checked. Explain any N/A. Type into the document or print and mark the boxes.

Use the action log on page 4 for follow-up. Keep passwords, salary details, client records, and other sensitive contents out of this worksheet; record a reference to the evidence instead.

Business case and technical eligibility

Confirm there is a worthwhile first task, and that the people in the pilot can actually use the features you intend to test.

1. Define a useful first task

Choose a recurring task, the people who will test it, and what an acceptable result looks like. Record the current workflow so you can compare results.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Business sponsor

Evidence or next action: _____

2. Match the experience and licenses to the task

Ask IT to verify the exact Copilot experience, qualifying plans, and any additional licenses needed for the selected features and users.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT or license owner

Evidence or next action: _____

3. Test the apps and services people will use

Confirm the selected users can use the intended features. Check relevant app versions, services, network access, and settings using representative accounts.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT

Evidence or next action: _____

4. Review identities and access protections

Review company accounts, multifactor authentication, administrative access, and applicable sign-in protections. Confirm the safeguards appropriate to your business.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT or security lead

Evidence or next action: _____

Permissions and source information

Review sensitive locations and the sources your pilot will use. Record what was checked and which access or content issues need attention.

Copilot follows existing permissions. Overly broad access can make sensitive information easier to encounter. Ask IT to verify that access matches the business need.

5. Check access to sensitive information

Review relevant HR, compensation, finance, and confidential client files. Confirm who should have access, correct excessive permissions, and verify the change.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT and information owner

Evidence or next action: _____

6. Review sharing and departing user access

Check broad groups, sharing links, guests, inherited permissions, and access left after people change roles or leave. Log exceptions and the actions required.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT and site owner

Evidence or next action: _____

7. Identify current and approved sources

Name the approved documents and their owners. Review conflicting copies, superseded policies, and unclear dates. Check sources during representative pilot tasks.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Information owner

Evidence or next action: _____

8. Assign ownership of old and retained content

Decide who handles inactive sites, old files, and departing-user content. Check retention obligations before deleting, moving, or archiving information.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: IT and records owner

Evidence or next action: _____

Locations and sources reviewed

Record site names or evidence references, without copying sensitive information.

_____

_____

_____

A file cleanup is not a substitute for correcting access. Prioritize sensitive locations and pilot sources while keeping a wider remediation list.

People and pilot plan

Agree on how employees will use Copilot, who will support them, and what evidence will inform the next decision.

9. Agree on use and data handling rules

Define approved accounts and tasks, what information people may use, which outputs require review, and how to report a concern. Confirm applicable controls with IT.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Leadership and IT

Evidence or next action: _____

10. Prepare users and provide support

Show pilot users how to inspect sources, check accuracy, and correct outputs. Name a support contact and provide examples that match their actual work.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Training or support owner

Evidence or next action: _____

11. Set the pilot scope and stop conditions

Name users, workflows, approved sources, the decision-maker, and when to pause or escalate. Ask IT to verify what pilot users can actually access.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Business sponsor and IT

Evidence or next action: _____

12. Plan measurement and the expansion review

Record a baseline and check output quality, completion time including verification and rework, recurring errors, and user feedback. Set the decision date.

Status ☐ Verified ☐ Gap ☐ Unknown ☐ N/A

Owner: _____ Suggested reviewer: Business sponsor

Evidence or next action: _____

Pilot details

Pilot users or roles: _____

Start date: _____ Review date: _____ Sponsor: _____

Success criteria: _____

_____

Stop or escalation conditions: _____

_____

A small pilot group does not automatically limit the information its members can access. Review their actual permissions and any required technical restrictions.

Actions and the next decision

Turn each unresolved gap into an action with an owner and a due date. Prioritize issues affecting sensitive data or the features you plan to test.

Action log

Item	Action and evidence needed	Owner	Due date

Choose the next step

Do not decide by the number of completed boxes. One serious access issue or an unknown critical requirement can be enough to pause the affected scope.

☐ **Start or continue the defined pilot**

Required access and features are verified, relevant high-risk issues are addressed, and owners and review criteria are in place.

☐ **Fix gaps and review again**

Specific issues must be resolved before the affected users, information, or workflows are included.

☐ **Wait before proceeding**

Critical evidence is missing, a serious issue remains unresolved, or no one can oversee the pilot.

Decision owner: _____ Decision date: _____

Reason and conditions: _____

_____

Next review date: _____

Need help with an unresolved item

Discuss your Microsoft 365 readiness questions with Fidelis. Contact Fidelis

This worksheet supports planning for a defined pilot. It does not certify security, compliance, or readiness for every Copilot feature. Check current Microsoft requirements with IT.

Microsoft references: Requirements | Readiness report | Data and permissions