



# COPILOT FOR MICROSOFT 365 PREPARATION CHECKLIST

Trusted Tech Team is here to help you prepare for Copilot for Microsoft 365 – now generally available as of January 16, 2024. Please refer to the checklist below to prepare your environment.

## STEP 1: USE THE RIGHT MICROSOFT 365 LICENSES

Before you are able to use Copilot for Microsoft 365, make sure that you have one of the eligible licenses below:



Microsoft E3



Microsoft E5



Microsoft Business  
Standard



Microsoft Business  
Premium

## STEP 2: HAVE YOUR APPLICATIONS READY

Ensure that your apps are up to date and at the current channel before implementation. If you are on Microsoft E3, E5, Business Standard, or Business Premium, then you already meet most of these prerequisites.

- Have environment prepared by following the [Microsoft 365 Apps](#) requirements
- Move legacy files into Microsoft 365 applications
- Make sure data governance policy is properly implemented

## STEP 3: LIMIT & CONTROL ACCESS TO SENSITIVE DATA

Copilot will only query accessible data based on the controls you set up in your organization. To prevent data leakage among users, groups, and tenants, set up permissions and control access.

Examples:

- Set up user-specific permissions to your organization's content to limit access (SharePoint)
- Prohibit access to confidential and sensitive information (Data Loss Prevention DLP)
- Ensure that employees have "just enough access" to get their work done

## STEP 4: SCHEDULE YOUR ASSESSMENT

Our Copilot for Microsoft 365 Readiness Assessment is designed to guide your IT team in setting up your environment with the necessary permissions to safely utilize its applications. Upon completion of the assessment, you will receive a summary of findings, recommendations, and a roadmap with practical next steps. [Schedule your consultation](#) with one of our trusted advisors today.