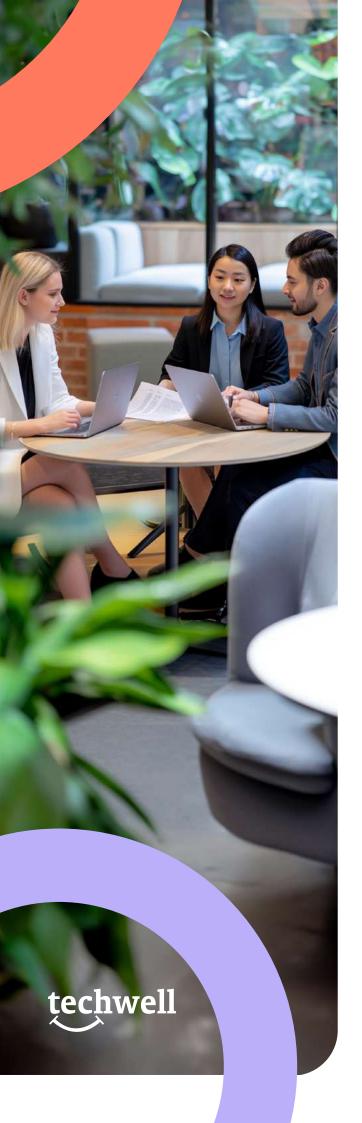# Leverage the most powerful productivity tool with our Microsoft Copilot readiness checklist

Microsoft Copilot is transforming workplace productivity through advanced artificial intelligence (AI) technologies and seamlessly integrating with popular Microsoft 365 applications to streamline workflows and enhance efficiency. However, to leverage the benefits of Microsoft Copilot, it's crucial to establish a robust IT foundation to ensure your employees can't access confidential information through Copilot's powerful query capabilities, while simultaneously ensuring your organisation can fully exploit its benefits. At Techwell, we've created a checklist with our top seven tips for Microsoft Copilot readiness, designed to guide organisations through the implementation process.

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1 Understand your data

Implement a robust data classification strategy to manage various data types efficiently. This approach ensures actions are based on factual insights, reducing wasted resources and misdirection.

If you have a good understanding of your data, then Copilot can effectively pull the relevant data points, freeing up your team to focus on actionable insights.

2 Label your data

Configure comprehensive labelling policies within the Microsoft 365 compliance centre to accurately reflect the sensitivity and importance of your data, enhancing protection and compliance.

If your data is accurately labelled, then Copilot can use this information to safeguard sensitive data, aligning with your security protocols.

3 Security and privacy with Copilot

Familiarise yourself with Copilot's security and privacy features to match your organisation's standards, strengthening your security posture for a secure AI adoption.

If you integrate Copilot with your security standards, then your adoption of AI becomes not only powerful but also secure.

4 Data protections

Adjust Copilot's data protection settings to meet your security and compliance requirements, safeguarding your assets in the AI-driven workflow.

If data protections are customised for Copilot, then it enhances the security of your sensitive information, ensuring robust data protection.

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5

Administrative controls

Manage Copilot licence assignments and monitor user activity through the Microsoft 365 admin centre to ensure alignment with your operational goals and security standards.

If administrative controls are efficiently managed, then you can maximise Copilot's benefits while maintaining operational control and security.

6

Prerequisites and licensing

Verify your organisation has the necessary licences and technical readiness for a successful Copilot integration, preparing you to leverage AI from the start.

If prerequisites and licensing are in place, then you ensure a seamless Copilot integration, fully prepared to leverage AI capabilities.

7

Drive adoption

Provide training and resources for end-users to enhance productivity and ensure data security practices are applied, maximising Copilot's value.

If end-users are well-prepared, then they can leverage Copilot to its fullest potential, enhancing productivity while adhering to data security practices.
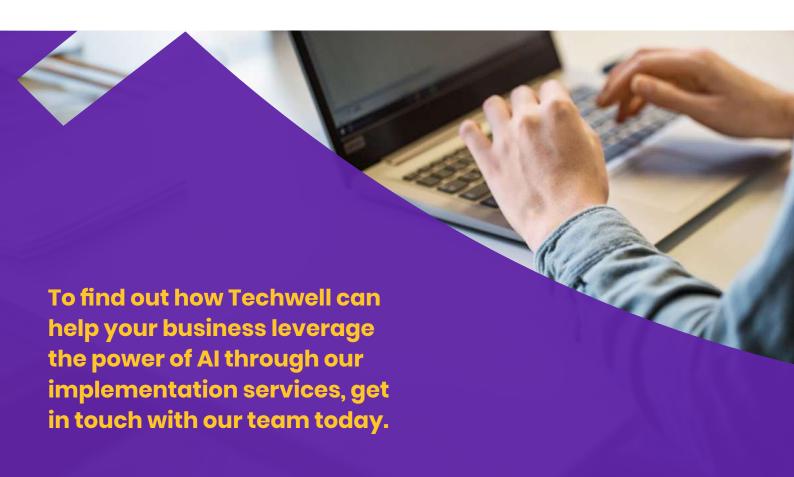
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How Techwell can help

Businesses adopting Copilot can experience significant reductions in time spent on administrative tasks by automating mundane tasks, generating content, and analysing data with unparalleled ease and accuracy, ultimately boosting overall productivity and empowering employees to focus on more strategic, creative, and meaningful work.

However, integrating AI technology like Microsoft Copilot into your business can seem complex, with its detailed setup and the need for ongoing management to get the most out of it while keeping your data safe and compliant. This involves gaining a comprehensive understanding of your organisation's current Microsoft 365 environment and potential customisation needs.

You must also navigate the setup process carefully, ensuring that Copilot integrates with your existing tools and workflows seamlessly. Custom configurations may be necessary to align Copilot with your unique business processes and data security protocols. By optimising the IT foundation, organisations like yours can maximise their return on investment (ROI) with Copilot, enhancing productivity and efficiency across the board.

At Techwell, our team has the expertise to seamlessly integrate Copilot into your operations, ensuring it enhances productivity, secures your data, and aligns with your current processes, so you can maximise the benefits of Copilot's smart features with confidence.

To find out how Techwell can help your business leverage the power of AI through our implementation services, get in touch with our team today.

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