

Crimson Readiness Assessment

Microsoft Copilot best practice
adoption framework



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Readiness Assessment: ensuring your business is ready to benefit from Microsoft 365 Copilot

Because **Microsoft 365 Copilot** inherits your current permissions, it's essential that you have your **content management and security right** before rolling out Copilot. This will enable your organisation to realise productivity gains, within the confines of a controlled environment.

Our consultancy services include:

- Holistic RAG Executive level Readiness Summary
- Reviewing and verifying your licensing
- Defining your data & information governance
- Reviewing security & permissions
- Risk identification
- Establishing a rollout plan



Our readiness framework ensures you have the right foundations to benefit from AI.



License verification

Review current Microsoft 365 licensing and make recommendations on any required changes. Ensure you have the prerequisite Microsoft 365 SKUs.



Data & information governance

Review current processes and recommend necessary changes to content lifecycle, sensitivity labels, retention policies and over-sharing risks.



Security & permissions

Build on your governance to ensure Copilot surfaces appropriate data. Review approach to access control, conditional access & compliance settings.



Risk identification

Based on the previous two phases, identify and document potential risks (e.g., data leakage, regulatory compliance gaps) and define mitigation steps.



M365 Copilot rollout plan

Ensure a safe and structured deployment by defining test groups, sequencing and communication for both the test and rollout phases of M365 Copilot.

We'll leverage the Crimson Trust Framework to ensure your AI rollout delivers productivity safely.



Security

Solutions are developed on secure platforms, encrypted at rest with sensitive information anonymised. Access control ensures both people and AI only utilise task appropriate information.



Governance

Ensure there are clear rules, processes and ownership of how data is used by the business. Ensure that AI solutions are documented and maintained with clear auditability.



Compliance

The compliance landscape is evolving quickly with different layers of regulation and law governing how AI and the data underpinning it should be used by business.



Data Quality

The golden rule of “garbage in, garbage out” is even more relevant today. AI models rely on high quality inputs to deliver the right outcomes – getting underlying data & information right is critical.



Reliability

AI models diminish in value if they're not accurate, robust and scalable. Ensuring your AI solutions run efficiently, are monitored and, when required, recalibrated keeps outputs at the highest standard.



Ethics

It's important to step outside the technology to assess the broader impact of your AI solutions. The creation of an ethics board helps build unbiased, equitable solutions that are explainable & trusted.

Readiness Assessment: what do you get from our engagement?

Ensuring the foundations are in place to enable your **Microsoft 365 Copilot** productivity journey is critical. Making sure that the right information is powering your business in a **secure and compliant** manner will accelerate your business and increase adoption of AI in the future.

Our consultancy services include:

- Recommended changes to your licenses to get the most out of Copilot for the best price
- Review of internal practices against the Crimson Trust Framework; guidance to evolve and improve
- Validation of your security and access protocols to ensure Copilot is accessing the right information
- Identification of any risks in current and proposed use
- Collaborative creation of a rollout plan, detailing all the steps your organization needs to take for successful implementation and adoption

