



Microsoft Copilot Readiness

Contracting body

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CGI

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Service Definition overview

The Microsoft 365 Copilot Governance and Readiness Service prepares organisations to adopt Microsoft 365 Copilot in a secure, controlled and value-driven manner. Copilot introduces generative AI capabilities across the Microsoft 365 platform, enabling users to create, analyse and collaborate using natural language. Realising these benefits requires more than enabling licences; it depends on having the right data foundations, governance structures, security controls and operational processes in place.

This service provides a structured approach to assessing an organisation's readiness for Copilot and establishing the governance required to support responsible AI-assisted work. CGI examines the organisation's Microsoft 365 environment, including identity and access arrangements, information governance, data protection, collaboration patterns and the current security and compliance posture. The assessment is combined with an understanding of organisational objectives, risk appetite and regulatory requirements to form a holistic view of readiness.

Using these insights, CGI defines a practical operating model for Copilot. This includes clear roles and accountabilities, decision-making processes, oversight mechanisms and the policies and controls necessary to manage Copilot throughout its lifecycle. Technical and policy recommendations are developed to ensure that the Microsoft 365 tenant is appropriately configured for secure Copilot usage, covering areas such as data classification, sensitivity labelling, information protection, DLP, external sharing controls and Restricted Content Discovery.

The service also provides an evidence-based approach to identifying and prioritising Copilot use cases, evaluating each for benefit, risk and readiness. Organisations receive a structured plan for pilot activities and phased adoption, supported by guidance on training, communication and safe prompting practices.

The result is a clear, actionable and risk-aware framework that enables organisations to introduce Microsoft 365 Copilot confidently, safely and with measurable outcomes aligned to their strategic goals.

This service is particularly suited to public-sector and regulated organisations that require evidence-based governance, clear accountabilities and strong security controls for AI adoption. CGI embeds Responsible AI principles throughout the engagement to ensure that Copilot is introduced ethically, transparently, and in a manner consistent with organisational assurance standards. The following activities are not included in this service and may be provided separately upon request:

- Development of custom AI agents, plugins, or Copilot Studio orchestration
- Custom data ingestion, integration, or Graph Connector engineering
- Operational management or support of Microsoft 365 services
- Remediation of tenant or security issues identified during the assessment
- End-user licensing procurement or management.

Why CGI?

CGI is a trusted partner to UK public-sector and regulated organisations, with extensive experience delivering cloud advisory services that prioritise governance, security and operational assurance. Our Microsoft 365 Copilot advisory capability builds on CGI's established strengths in digital workplace transformation, information governance, identity and access management, and compliance-driven cloud adoption.

CGI combines deep Microsoft 365 technical expertise with practical experience gained through the Microsoft Copilot Early Access Programme. This allows us to provide informed, real-world guidance on the organisational, data and governance considerations required to introduce generative AI responsibly.

Our approach emphasises clarity, accountability and risk management. CGI works collaboratively with stakeholders across IT, security, information governance, data protection and business functions to ensure that recommendations are realistic, proportionate and aligned to existing assurance structures. Where organisations wish to progress beyond readiness into implementation or optimisation, CGI can support this through separate services under appropriate contracts.

1. Service Description

CGI supports organisations in preparing for the adoption of Microsoft 365 Copilot through a structured, advisory-led approach focused on readiness assessment, governance design and adoption planning. Microsoft 365 Copilot introduces generative AI capabilities across the Microsoft 365 suite, fundamentally changing how information is created, analysed and shared. These capabilities bring significant opportunity, but also introduce material considerations around data protection, information governance, security and organisational assurance.

Many organisations recognise the potential value of Copilot but lack clarity on whether their Microsoft 365 environment, governance model and operating practices are sufficiently mature to support its safe and responsible use. This service addresses that challenge by providing an evidence-based view of readiness and a clear set of recommendations to support informed decision-making.

Drawing on extensive Microsoft 365 expertise and experience gained through participation in the Microsoft Copilot Early Access Programme, CGI advises organisations on the technical, governance and operational factors that influence successful Copilot adoption. The service is designed to support public-sector and regulated environments where assurance, accountability and compliance are critical.

Microsoft 365 Copilot integrates with applications including Word, Excel, PowerPoint, Outlook, Teams and Power Platform to enable natural language interaction with organisational content. To realise these benefits without increasing risk, organisations require a well-governed Microsoft 365 tenant, clearly defined controls, and an agreed operating model that determines how Copilot is introduced, governed and evolved over time.

This service is advisory in nature. CGI does not enable Copilot, configure tenant settings or operate the Microsoft 365 environment as part of this engagement.

1.1. Scope Boundaries

This service does not include the following activities:

- Deployment or configuration of Microsoft 365 Copilot
- Development of custom AI agents, Copilot Studio bots or plugins
- Graph Connector development or data engineering activities
- Operational monitoring or support of Copilot or Microsoft 365
- Execution of pilots or rollout activities
- Remediation of technical issues identified during the assessment.

Where organisations wish to progress into implementation, pilot execution or advanced AI capabilities, CGI can support this under separate, optional service arrangements.

1.2. Service Deliverables

The service focuses on preparing organisations for the safe and effective adoption of Microsoft 365 Copilot. Typical advisory deliverables include:

- An assessment of the current Microsoft 365 environment and identification of Copilot readiness gaps
- Review of information governance, data protection, security and compliance arrangements
- Evaluation of controls relevant to Copilot usage, including sensitivity labels, DLP policies, sharing controls and Restricted Content Discovery
- Definition of a recommended Copilot governance and operating model
- Identification and prioritisation of potential Copilot use cases
- High-level recommendations for tenant configuration and policy controls (advisory only)
- A structured roadmap outlining next steps for pilot and phased adoption
- Guidance on organisational readiness, communication and user adoption considerations

All deliverables are provided as recommendations and planning artefacts. No changes are made to the live environment.

1.3. Delivery Approach

CGI delivers the service using a structured advisory approach designed to provide clarity, assurance and actionable outcomes.

Phase	Description	Typical Outputs
Discovery	Confirmation of objectives, scope and stakeholders	Agreed scope, stakeholder map
Assessment	Review of current environment, governance and risk posture	Readiness assessment, gap analysis
Design	Definition of governance, operating model and control recommendations	Governance framework, advisory recommendations
Planning	Development of an adoption and assurance roadmap	Prioritised roadmap and next-step guidance

This approach ensures that recommendations are proportionate, realistic and aligned with organisational priorities and regulatory expectations.

1.4. Requirements to deliver the service

Effective delivery of the service requires collaboration between CGI and the client organisation. Typical requirements include:

- Access to stakeholders across IT, security, information governance, data protection, HR and relevant business areas
- Availability of Microsoft 365 architecture documentation and existing governance policies
- Read-only access or exported configuration information from Microsoft 365 administrative portals (e.g. Entra ID, Purview, SharePoint, Teams) where required for assessment
- Agreed collaboration tools for workshops and document exchange.

CGI does not require privileged or administrative access to client systems.

1.5. Outcome of the service

At the conclusion of the engagement, organisations receive:

- A clear, evidence-based view of their readiness for Microsoft 365 Copilot
- Identified risks, gaps and dependencies affecting adoption
- A defined governance and operating model suitable for public-sector assurance
- Prioritised technical and policy recommendations
- A structured plan to progress from readiness assessment into pilot or deployment activities under separate arrangements.

This enables organisations to proceed with Microsoft 365 Copilot adoption confidently, with appropriate governance, controls and organisational alignment in place.

2. Delivery Methodology

CGI delivers the Microsoft 365 Copilot Governance and Readiness Service using a structured, repeatable and advisory-led methodology. The approach is designed to help organisations understand their readiness for Microsoft 365 Copilot, define appropriate governance and control frameworks, and plan a safe and well-governed path toward adoption.

The methodology brings together technical assessment, governance design, risk evaluation and organisational alignment. It ensures that recommendations are proportionate, evidence-based and aligned with public-sector and regulatory assurance expectations.

This service does not include deployment, configuration, pilot execution or operational management of Microsoft 365 Copilot. All activities are advisory in nature.

2.1. Methodology Stages

CGI’s methodology is structured into clearly defined stages, each producing documented outputs to support informed decision-making.

Stage	Description	Typical Outputs
Discovery	Confirmation of objectives, scope, stakeholders and constraints	Agreed scope, engagement plan
Assessment	Review of current Microsoft 365 environment and governance posture	Readiness assessment, gap analysis
Design	Definition of governance model, operating principles and control recommendations	Governance framework, advisory recommendations
Planning	Development of a structured adoption and assurance roadmap	Prioritised roadmap and next-step guidance

This approach provides clarity and traceability, enabling organisations to progress toward Copilot adoption at their own pace and risk tolerance.

2.2. Governance and Assurance

Governance and assurance considerations are embedded throughout the engagement. CGI applies a continuous governance lens to ensure that readiness findings, recommendations and planning activities align with:

- Organisational policies and assurance frameworks
- UK public-sector regulatory requirements
- Data protection and information governance expectations
- Responsible AI principles.

CGI defines recommended governance structures, roles and decision points, but does not operate governance bodies or provide ongoing assurance services as part of this engagement.

2.3. Readiness Assessment

The Readiness Assessment phase establishes a clear baseline of the organisation’s current position relative to Microsoft 365 Copilot adoption.

CGI reviews the Microsoft 365 tenant configuration and supporting governance artefacts to identify strengths, gaps, risks and dependencies that may influence Copilot readiness. This includes consideration of information governance maturity, security controls, data protection arrangements and organisational readiness factors.

Engagement with business, IT, security and governance stakeholders is used to clarify intended outcomes, constraints and expectations. The assessment also considers non-technical factors such as organisational culture, change readiness and risk appetite.

Assessment Focus Areas:

Assessment Area	Description	Typical Outcomes
Tenant Readiness	Review of Microsoft 365 configuration and governance controls	Identified gaps and readiness indicators
Requirements Definition	Clarification of organisational goals and success measures	Documented objectives and constraints

Assessment Area	Description	Typical Outcomes
Stakeholder Identification	Identification of key decision-makers and influencers	Stakeholder map and engagement model
Constraints and Risks	Identification of adoption barriers and assurance considerations	Risk and dependency summary

2.4. Exploration and Solution Shaping (Advisory)

Where appropriate, CGI facilitates structured discussions to help stakeholders understand Microsoft 365 Copilot capabilities and consider how these may align with organisational objectives.

This phase is exploratory and advisory. It is intended to support informed discussion and early thinking rather than pilot execution or solution delivery.

Activities may include:

- Guided walkthroughs of Copilot capabilities
- Discussion of illustrative use cases and scenarios
- Consideration of benefits, limitations and risks
- Early identification of candidate use cases for further evaluation.

These activities help organisations move from initial awareness to structured planning.

2.5. Planning and Design

The Planning and Design phase translates assessment findings into a structured set of recommendations and planning artefacts.

CGI works with stakeholders to define:

- Recommended user personas and adoption cohorts
- Candidate use cases aligned to organisational objectives
- Risk categorisation principles for use cases
- A high-level roadmap for pilot and phased adoption (planning only).

Key Planning Components:

Component	Purpose	Outputs
Personas and Use Cases	Identify who may benefit from Copilot and how	Prioritised use case list
Adoption Roadmap	Outline sequencing and dependencies	High-level roadmap
Change Considerations	Identify communication and readiness needs	Adoption guidance

CGI provides planning recommendations only. Execution remains the responsibility of the organisation or a separately contracted service.

2.6. Deployment Preparation (Advisory Readiness)

Where organisations intend to progress toward a pilot or deployment, CGI provides advisory guidance on the types of prerequisites that should be considered before an organisation enables Copilot under a separate implementation engagement.

This may include recommendations relating to:

- Governance and policy readiness
- Data protection and assurance considerations
- Organisational readiness and stakeholder preparation
- Support and operational considerations (planning only).

CGI does not configure tenant settings, enable Copilot or validate production readiness as part of this service.

2.7. Outcomes of the Methodology

At the conclusion of the Delivery Methodology, organisations receive:

- A documented understanding of Copilot readiness
- Defined governance and operating model recommendations
- Identified risks, dependencies and assurance considerations
- A structured, risk-aware adoption roadmap
- Clear guidance on next steps and decision points.

This ensures organisations can proceed toward Microsoft 365 Copilot adoption confidently and responsibly, supported by evidence-based planning rather than assumptions.

3. Data backup and restore

Microsoft 365 Copilot does not store or retain data outside the client's existing Microsoft 365 tenant. All data used or accessed by Copilot remains subject to the client's own Microsoft 365 backup, retention, and recovery configuration.

CGI's Governance and Readiness Service does not provide standalone data backup or restore services. Instead, CGI:

Reviews backup and retention configurations relevant to Copilot readiness (e.g., SharePoint, OneDrive, Teams, and Purview retention policies).

Provides recommendations to ensure that organisational backup and restore policies support secure AI adoption.

Ensures that required data lifecycle and recovery configurations are consistent with governance expectations for Copilot.

Backup and restore operations remain the responsibility of the organisation and Microsoft under their existing service agreements.

4. Service Continuity

This service is advisory in nature and does not include operational service continuity or disaster recovery for the client's Microsoft 365 environment.

CGI ensures continuity of its consulting service through:

- Resourced project teams with defined roles and documented deliverables
- Secure working practices to prevent service disruption
- Established business continuity and disaster recovery measures within CGI's consulting operations
- Contingency plans to maintain engagement progress in the event of unforeseen interruptions.

Business continuity and disaster recovery for Microsoft 365 services including Copilot remain the responsibility of Microsoft under the customer's M365 subscription.

5. Onboarding and Offboarding

This section applies to onboarding and offboarding for the advisory service, not to Microsoft 365 users.

5.1. Onboarding

CGI supports onboarding to the service through:

- Introductory engagement and scoping discussions
- Agreement of access requirements, documentation needs and stakeholder groups
- Establishment of collaboration channels (e.g., Microsoft Teams workspace)

- Scheduling of workshops, assessments and governance sessions
- Confirmation of project governance, reporting, and escalation pathways.

CGI will not require privileged access to client systems; read-only or exported configuration data may be requested where necessary.

5.2. Offboarding

At completion of the engagement, CGI provides:

- Final governance documentation and readiness assessment outputs
- high-level tenant configuration recommendations (advisory only)
- Knowledge transfer sessions for relevant client teams
- Handover of all deliverables agreed within the Statement of Work
- Adoption planning artefacts and advisory outputs relating to pilot readiness (where applicable).

CGI ensures a clean and orderly service exit without operational dependencies

5.2.1. Access to Data Upon Exit

CGI does not store or retain client production data. Upon exit, the organisation retains full ownership and control of:

- All documentation produced during the engagement
- All system configurations within Microsoft 365
- Any workshop outputs, readiness assessments or policy frameworks.

CGI removes any temporary access or document-sharing privileges granted for the engagement, in accordance with CGI's internal data-handling policy and the client's security requirements.

6. Service constraints

This service operates under the following constraints:

- CGI does not modify client production environments unless explicitly contracted under a separate implementation service.
- CGI relies on the availability of client stakeholders for workshops, interviews, decision-making and validation.
- CGI requires timely access to documentation and configuration exports to complete assessments.
- The service does not include custom AI development, Copilot Studio agent building, plugin development, or integration work.
- All Copilot functionality is dependent on Microsoft's service availability under the client's existing Microsoft 365 subscription.
- The service is advisory and does not provide 24/7 operational support.

7. Service levels

This is a professional services engagement, not an operational support service; therefore, traditional service-level metrics (e.g., uptime, incident response SLAs) do not apply.

CGI provides:

- Agreed timelines and delivery milestones
- Defined engagement governance
- Project progress reporting
- Access to consultants during normal UK business hours (unless otherwise agreed)
- High-quality deliverables aligned with contractual requirements.

Service levels for Microsoft 365, Copilot and associated workloads remain the responsibility of Microsoft.

8. After sales support

After conclusion of the engagement, CGI can provide:

- Additional advisory support on governance, compliance or use-case development
- Further workshops or stakeholder briefings
- Support for controlled rollout or Phase 2 implementation
- Optional managed services for ongoing governance, monitoring and optimisation (under separate contract).

This after-sales support is available on request through the CGI account team.

9. Technical requirements

To deliver this service, CGI typically requires:

- Access to relevant documentation (governance, policies, architecture, M365 configuration)
- Ability to meet with stakeholders from IT, security, data protection, HR and business functions
- Exported or read-only configuration data for readiness assessment
- Use of secure collaboration channels (e.g., Microsoft Teams).

No elevated or administrative access to client systems is required.

10. Outage and maintenance management

As the service is advisory, outages or maintenance of Microsoft 365 do not materially impact CGI's ability to deliver the engagement.

CGI will:

- Coordinate workshop scheduling around client availability
- Adjust delivery timelines if Microsoft platform outages delay access to configuration data
- Notify clients of any CGI-side service disruption affecting planned interactions.

Operational outage management for Copilot and Microsoft 365 remains under Microsoft's responsibility.

11. Hosting options and locations

This advisory service does not involve hosting any systems or data.

All work is performed within CGI's secure corporate environment or client-approved collaboration channels.

Any client data remains within the client's Microsoft 365 tenant.

CGI consultants operate within the UK unless otherwise agreed.

There is no storage of client production data on CGI systems.

12. Security

Security is a core foundation of the Microsoft 365 Copilot Governance and Readiness Service. The service is designed and delivered in alignment with UK Government security expectations and CGI's ISO 27001–certified security framework.

CGI ensures that all activities are performed securely and in accordance with established data-handling, privacy and governance standards. As this is an advisory service, CGI does not require privileged access to client environments and does not process or retain any client production data.

12.1. Security Classification

This service is suitable for use at:

- OFFICIAL
- OFFICIAL-SENSITIVE (when the client applies appropriate access and data-handling controls).

No components of this service require or use SECRET or TOP SECRET data.

12.2. Data Handling and Protection

CGI applies strict data-handling and confidentiality measures throughout the engagement:

- No client production data is extracted, stored or processed outside agreed collaboration channels.
- All information reviewed remains within the client's Microsoft 365 tenant or documents provided directly by the client.
- CGI consultants follow ISO 27001-aligned secure working practices, including encryption, controlled access and secure disposal.
- CGI does not retain personal or sensitive data after the engagement concludes.
- No data is transferred outside the UK unless explicitly authorised by the customer.
- Any personal data disclosed during workshops or documentation reviews is used solely for service delivery and removed in line with CGI retention policies.
- The client remains responsible for the security, configuration and operational management of their own Microsoft 365 tenant, including Copilot settings, access controls and compliance policies.

12.3. Security Activities Within the Service

As part of this advisory offering, CGI can provide:

- Support with Data Protection Impact Assessment (DPIA) inputs
- Security posture assessments and governance reviews
- Recommendations for AI safety, compliance alignment and responsible-use controls.

These activities are advisory; operational changes are applied by the client unless procured separately as an implementation service.

12.4. Security Standards and Frameworks

The service aligns with and supports the following standards and principles:

- ISO 27001 – Information Security Management
- ISO 9001 – Quality Management
- UK GDPR
- NCSC Cloud Security Principles
- G-Cloud 15 Information Assurance Requirements.

13. Service Pricing and Terms and Conditions

13.1. Pricing

Please refer to the associated Pricing Document relevant for this Service.

13.2. Terms and Conditions

Please refer to the associated Terms and Conditions Document relevant for this Service including termination by the Buyer or Supplier.

14. Further information

For more information about this or any of our G-Cloud services, please contact us:

Phone: +44 0845 070 7765. Ask to speak to the G-Cloud team.

Email: uk.gen.ccsframeworks@cgi.com, including the following information:

1. The name of this service.
2. The name of your organisation.
3. Your name and contact details.
4. A brief description of your business situation.
5. Your preferred timescales for starting the work.

We will prepare a quotation for you. Once the quotation is agreed upon, we will issue you the necessary documentation (as required by the G-Cloud Framework) and ask you to provide us with a purchase order.

Once we have received your purchase order, the services will be configured to the requirements agreed with invoices issued to you for the services procured.

On a monthly basis, we will also complete the mandated management information reports to Government Procurement.

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The information in this proposal is submitted on 30 Jan 2026 - Issue 1.0 on behalf of CGI by the following authorised representative:

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