

ASSUREAI RESOURCE

Microsoft 365 Copilot Readiness Self-Check

A simple 15-minute worksheet for public-sector teams preparing to introduce Copilot safely, consistently and proportionately.

Use this before buying licences, briefing managers, or asking staff to experiment with Copilot. It helps you spot practical readiness gaps without turning the exercise into a technical audit.

Separate useful Copilot opportunities from vague AI enthusiasm.

Identify where permissions, data quality or governance may create risk.

Give managers a clearer role in safe adoption.

Decide whether a practical readiness session would help.



SCORECARD

1. The readiness snapshot

Score each statement from 0 to 2, then add the total.

The aim is not to achieve a perfect score. The aim is to make adoption gaps visible before Copilot becomes a live workplace habit.

Scoring guide

0 = Not in place

1 = Partly in place

2 = Clear and in place

Area	Readiness statement	Score
Purpose	We can explain why Copilot is being introduced and which work problems it should help with.	0 / 1 / 2
Use cases	We have named practical use cases for Word, Outlook, Teams, Excel or PowerPoint.	0 / 1 / 2
Staff expectations	Staff know what Copilot can help with, and what remains their responsibility.	0 / 1 / 2
Prompting	Staff have basic guidance on how to ask clear, useful and safe prompts.	0 / 1 / 2
Data access	We understand that Copilot can surface information a user already has permission to access.	0 / 1 / 2
Permissions	We have reviewed obvious oversharing risks in SharePoint, Teams and OneDrive.	0 / 1 / 2
Information governance	We have rules for sensitive, confidential, personal and draft information.	0 / 1 / 2
Management	Managers know how to guide use, check quality and set team boundaries.	0 / 1 / 2
Adoption	We have a plan for pilots, feedback, support and measuring value.	0 / 1 / 2
Escalation	Staff know who to ask when a Copilot output looks wrong, risky or unclear.	0 / 1 / 2

Interpreting your score

Total score	Readiness indication
0-7	Not ready for broad use
8-14	Pilot with caution
15-20	Ready for structured adoption planning

WORKSHEET

2. Practical Copilot use-case planner

Good adoption normally starts with ordinary work. Use this page to identify where Copilot may save time, improve consistency or reduce blank-page work without handing judgement over to the tool.

Microsoft 365 area	Useful starter use case	Human check required
Outlook	Summarise long email threads; draft clearer first responses; extract action points.	Tone, factual accuracy, attachments, recipients.
Teams	Summarise meetings; identify decisions, actions and unresolved questions.	Whether the summary reflects what was actually agreed.
Word	Create first drafts, restructure notes, simplify policy or briefing language.	Policy accuracy, legal/compliance meaning, final wording.
PowerPoint	Turn an outline into a first-draft slide structure.	Audience fit, evidence, overclaiming, visual clarity.
Excel	Help explain data patterns or create formula suggestions.	Source data quality, formula logic, financial implications.

Your first three candidate use cases

#	Work task	Risk or check	Owner
1			
2			
3			

3. Data, permissions and information governance

Copilot is only as safe as the information environment around it.

A useful readiness question is not simply:

Can we switch it on?

The better question is:

What could Copilot reveal, repeat or repackage if our permissions are already too broad?

Before wider rollout, discuss these questions

- Which SharePoint sites, Teams channels or shared drives contain sensitive or outdated information?
- Are there legacy groups, old projects or inherited permissions that give staff access they no longer need?
- Do staff understand the difference between asking Copilot to help with work and asking it to decide for them?
- What information should not be pasted, uploaded, summarised or re-used without further checks?
- Do managers know when Copilot output needs a second-person review?
- Are retention, audit, sensitivity labelling and DLP policies understood by the people who need to apply them?

Practical rule

Treat Copilot readiness as a permissions and behaviour exercise, not just a licence deployment exercise.

Simple staff boundary statement

Copilot can help you draft, summarise, structure, compare and question information.

It does not remove your responsibility to check facts, protect sensitive information, apply professional judgement or follow organisational policy.

4. Manager controls and adoption plan

Managers are central to safe adoption because most Copilot risks appear in everyday judgement: what staff ask, what they trust, what they share and how outputs are used.

Manager question	Why it matters	Action
What are staff allowed to use Copilot for?	Avoids inconsistent or risky experimentation.	Create team-level do / do not examples.
Which outputs require review?	Prevents unchecked use in high-impact work.	Define when second-person review is needed.
How will quality be judged?	Stops time-saving from reducing standards.	Set expectations for evidence, accuracy and tone.
How will concerns be escalated?	Makes risk visible early.	Nominate a contact for data, policy and usage questions.
How will value be measured?	Keeps adoption linked to outcomes.	Track saved time, better consistency and reduced admin friction.

A simple 30-day pilot structure

Week 1: Agree pilot users, data boundaries, use cases and manager expectations.

Week 2: Run practical prompt exercises in Microsoft 365 apps using ordinary work examples.

Week 3: Capture wins, risks, unclear cases and repeated support questions.

Week 4: Decide what should become policy, training, guidance or phased rollout.

NEXT STEP

5. When a training session becomes useful

This worksheet should give you a quick readiness view.

The paid AssureAI **Microsoft Copilot Readiness** session goes further by turning these questions into guided training, practical exercises and clearer adoption actions for staff, managers and departments.

The session covers

- What Copilot changes
- Readiness questions
- Practical Microsoft 365 use cases
- Prompting in Microsoft 365
- Data and permissions risk
- Information governance
- Manager controls
- Adoption planning

Suggested next step

Run the self-check with a small group of managers, IT, information governance and operational staff.

If the score shows uncertainty around permissions, prompting or staff expectations, use the readiness session to create a clearer adoption baseline before wider rollout.

Microsoft Copilot Readiness course

The course page is available at assureai.co.uk/courses/copilot-readiness. Use a discovery call if you want to discuss audience, readiness gaps and the safest starting point for your organisation.

This resource is informed by Microsoft public guidance on Microsoft 365 Copilot adoption, secure and governed data foundations, data protection architecture, enterprise data protection and user enablement.

Microsoft 365 Copilot is a Microsoft product. AssureAI is independent and is not affiliated with Microsoft.

Reference areas:

- Microsoft Learn: Microsoft 365 Copilot adoption and onboarding
- Microsoft Learn: Secure and governed data foundation
- Microsoft Learn: Data, privacy and security for Microsoft 365 Copilot
- Microsoft Learn: Data protection architecture
- Microsoft Learn: User enablement strategies

Confident AI adoption for the public sector

Use this worksheet as a conversation starter before licences, pilots or broader training decisions.

Visit AssureAI.co.uk to request a discovery call or view the Microsoft Copilot Readiness course.

