Microsoft Copilot Maturity Assessment

Are you ready for Microsoft 365 Copilot?

A strategic 4-week readiness program to empower safe, secure, and scalable adoption of AI in your business.

Unlock the power of Microsoft 365 Copilot with confidence. Cloud Essentials' Copilot Maturity Assessment helps you understand your organisation's readiness to adopt generative AI securely and effectively. Our structured assessment framework balances innovation with information risk management, ensuring responsible deployment.

The Assessment Journey

Why it Matters?

Deploying Copilot without adequate planning introduces risk - from data exposure to compliance violations. Our structured assessment ensures your Microsoft 365 environment is secure, your teams are empowered, and your deployment is fully aligned with your governance priorities.

This comprehensive 4-week service is designed to provide a definitive path towards Copilot adoption. We systematically gather insights into your current processes, capabilities, and performance to establish benchmarks, assess maturity levels, and pinpoint any gaps. This groundwork allows us to develop a detailed plan tailored to your specific needs.

M365 Copilot Maturity Model

Our Copilot Maturity Model outlines the journey from a reactive to a fully optimised and proactively managed organisation.

Structured across five progressive stages, it provides a framework for understanding and improving your readiness for Microsoft 365 Copilot adoption. Each stage builds on the last, with success requiring intentional investment, strategic alignment, and continuous improvement.

What We Do

Step-by-Step Framework:

1. Identify Key Areas
2. Define Criteria for Each Level
3. Evaluate Current Processes
4. Assign a Maturity Level
5. Identify Gaps
6. Develop a Remediation Plan
7. Implement a Remediation Plan
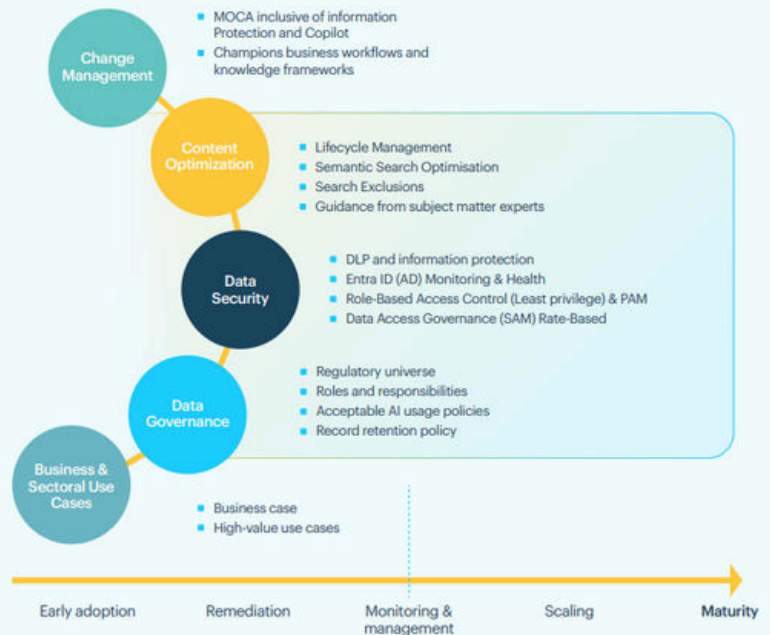8. Regularly Review Your Maturity Level

Remember, the goal is not just to achieve a higher maturity level, but to improve your organisation's effectiveness and efficiency. It's about making better decisions, reducing risks, and achieving your business objectives.

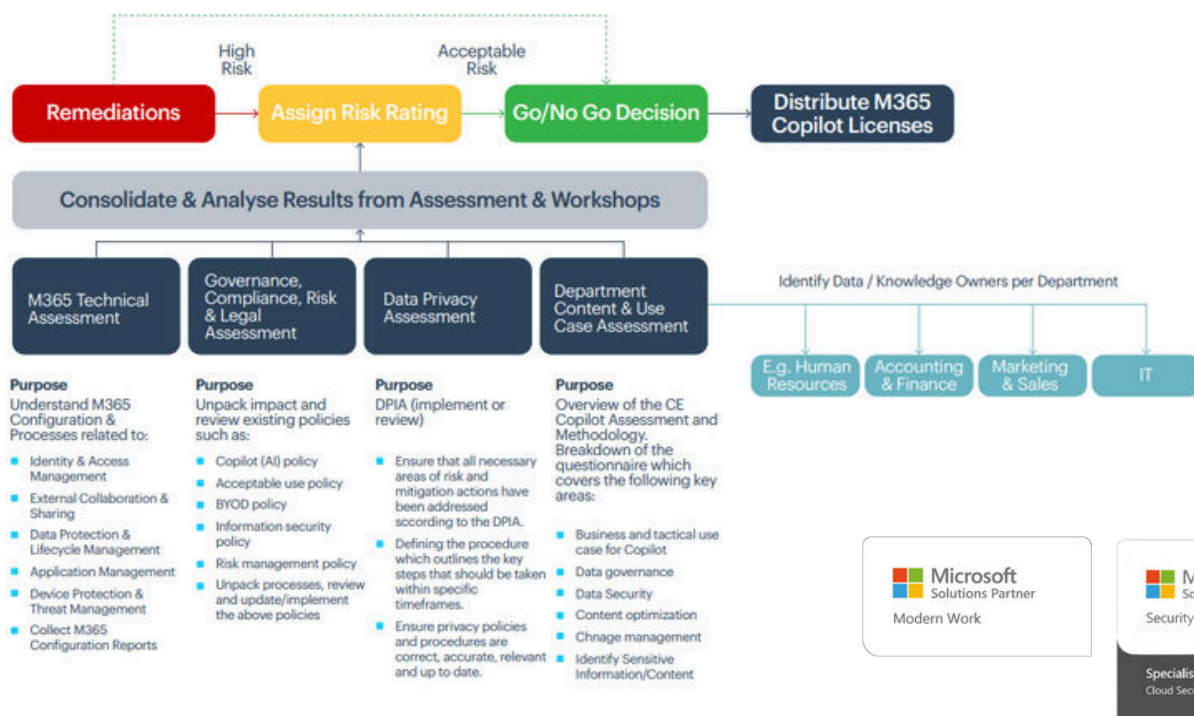| Initial & Reactive	Managed Awareness often Reactive	Defined	Quantitively and Predictably Managed	Optimized
Primarily reacting to events as they occur. No formal process or strategy in place to anticipate or prevent issues. Focus is on resolving problems after they have already impacted the business.	Basic understanding of the importance of proactive management and at the start of implementation of basic monitoring tools and processes. Efforts are often inconsistent and not fully integrated into the organization's operations.	Defined processes for managing and anticipating issues. Processes are consistently followed but not fully optimized. Organization begins to see the benefits of proactive management in terms of reduced downtown and improved operational efficiency.	Well-managed, proactive strategy in place. Processes are not only defined, but also continuously monitored and improved upon. The organization is able to anticipate and prevent many issues before they impact the business.	Proactive management strategy is fully integrated and optimized. The organization can predict and prevent nearly all potential issues, leading to maximum operational efficiency and minimal downtime.
Level 1 10 - 100	Level 2 100 - 200	Level 3 210 - 300	Level 4 310 - 400	Level 5 410 - 500

The Five Lenses for Copilot Maturity

During the assessment, we evaluate your organisation across five critical lenses to capture a clear picture of your current capabilities and information security posture.

Change Management
- MOCA inclusive of information Protection and Copilot
- Champions business workflows and knowledge frameworks

Content Optimization
- Lifecycle Management
- Semantic Search Optimisation
- Search Exclusions
- Guidance from subject matter experts

Data Security
- DLP and information protection
- Entra ID (AD) Monitoring & Health
- Role-Based Access Control (Least privilege) & PAM
- Data Access Governance (SAM) Rate-Based

Data Governance
- Regulatory universe
- Roles and responsibilities
- Acceptable AI usage policies
- Record retention policy

Business & Sectoral Use Cases
- Business case
- High-value use cases

Early adoption → Remediation → Monitoring & management → Scaling → **Maturity**

M365 Copilot Maturity Assessment

We conduct a Microsoft 365 Copilot Maturity Assessment starting with IT, Cybersecurity, GRC, and the Data Privacy Office to benchmark information security maturity and understand regulatory requirements. We then engage key business unit stakeholders to identify sensitive, high-value data that may require enhanced protection or exclusion from Copilot's knowledge base. Findings and recommendations are delivered in a Microsoft 365 Copilot Readiness Report, visualised through an interactive Power BI dashboard, with follow- up services to fast-track implementation of the necessary data security and governance controls.

Remediations → **Assign Risk Rating** → **Go/No Go Decision** → **Distribute M365 Copilot Licenses**

High Risk / Acceptable Risk

Consolidate & Analyse Results from Assessment & Workshops

M365 Technical Assessment

Purpose
Understand M365 Configuration & Processes related to:
- Identity & Access Management
- External Collaboration & Sharing
- Data Protection & Lifecycle Management
- Application Management
- Device Protection & Threat Management
- Collect M365 Configuration Reports

Governance, Compliance, Risk & Legal Assessment

Purpose
Unpack impact and review existing policies such as:
- Copilot (AI) policy
- Acceptable use policy
- BYOD policy
- Information security policy
- Risk management policy
- Unpack processes, review and update/implement the above policies

Data Privacy Assessment

Purpose
DPIA (implement or review)
- Ensure that all necessary areas of risk and mitigation actions have been addressed according to the DPIA.
- Defining the procedure which outlines the key steps that should be taken within specific timeframes.
- Ensure privacy policies and procedures are correct, accurate, relevant and up to date.

Department Content & Use Case Assessment

Purpose
Overview of the CE Copilot Assessment and Methodology. Breakdown of the questionnaire which covers the following key areas:
- Business and tactical use case for Copilot
- Data governance
- Data Security
- Content optimization
- Chnage management
- Identify Sensitive Information/Content

Identify Data / Knowledge Owners per Department
- E.g. Human Resources
- Accounting & Finance
- Marketing & Sales
- IT

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Modern Work

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Security

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Let's Get You Ready

Whether you're preparing for a pilot or scaling Copilot organisation-wide, our maturity assessment ensures your business is ready—technically, legally, and ethically.