



Copilot for Microsoft 365: A Step-by-Step Guide to Secure AI Adoption





COPILOT FOR MICROSOFT 365: A STEP-BY-STEP GUIDE TO SECURE AI ADOPTION

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Introduction

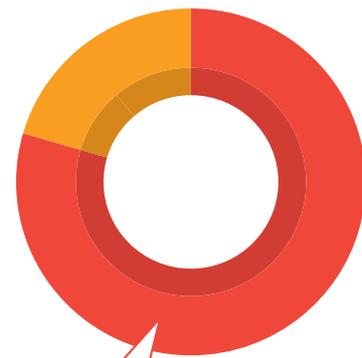
The rise of generative artificial intelligence (AI) has been nothing short of remarkable. In fact, [80% of enterprises](#) will incorporate generative AI by 2026, up from less than 5% in 2023, according to Gartner.

AI promises to transform how we work, streamlining manual and tedious tasks, enhancing employee skills, and fostering more rapid innovation. Beyond productivity, the economic potential of AI is massive; a report by McKinsey estimates that AI could generate the equivalent of [\\$4.4 trillion annually to the global economy by 2030](#).

It's no wonder so many organizations are rushing to capitalize on these new solutions. One popular choice for many organizations looking to harness the power of AI is **Copilot for Microsoft 365**.

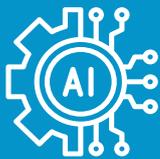
Built on the familiar tools you already use every day, Copilot for Microsoft 365 seamlessly integrates AI into your organization's day-to-day, making it easier and faster to realize the ROI of AI. Users can quickly adopt the technology without significant behavior change, and the ongoing benefits of AI integration can help improve efficiency over time, leading to better outcomes and productivity for your organization.

However, it's important to recognize that simply acquiring the software and necessary licenses are not enough to ensure that your leaders and their teams can take full advantage of the new product. A McKinsey study found that the most [common barrier to adoption](#) is the lack of a clear AI strategy.



80%

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Companies that scale successfully see 3x the return on their AI investments.

Notably, companies that scale their AI adoption successfully see [3x the return on their AI investment](#) compared to those who are stuck in the pilot stage.

That's where this guide comes in. This eBook was designed to help you prepare for Copilot for Microsoft 365 and scale AI to have a real impact. We'll walk you through key actions you should take to achieve optimal results, covering everything from preparing and securing your data to optimizing your operations.

With a well-planned strategy in place, you can ensure that your organization is fully equipped to take advantage of the benefits that Copilot for Microsoft 365 has to offer. Let's dive in!

Copilot for Microsoft 365 Adoption Made Easy

3 Best Practices to Prepare for Sustainable AI Adoption

Follow these three best practices to ensure you're fully equipped to reap the benefits of Copilot for Microsoft 365 in a secure and sustainable way.

OPTIMIZE YOUR OPERATIONS

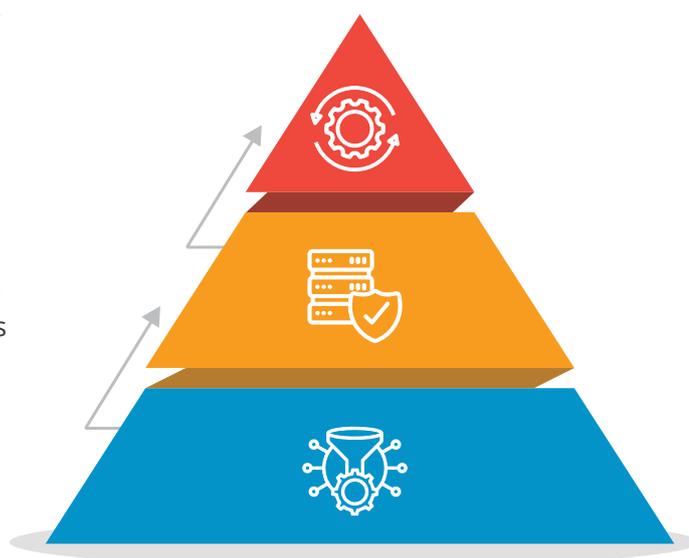
Elevate your data management practices and implement and enforce governance controls to fuel sustainable AI success.

SECURE YOUR DATA

Understand where you have sensitive and overshared content in Microsoft 365 and implement robust security measures to secure it.

PREPARE YOUR DATA

Centralize your data in Microsoft 365 and improve your data quality to enhance AI recommendations.



Keep in mind that these best practices are not mutually inclusive. You may have a solid information management infrastructure in place, but strengthening your data security could still be necessary. By implementing the appropriate strategies where you need them, you'll establish a strong foundation for Copilot for Microsoft 365 and equip your team and environment for AI success.

No matter where you're at in your Copilot for Microsoft 365 implementation, AvePoint can help you achieve Copilot for Microsoft 365 success.

➤ Learn more at <https://avpt.co/m365copilotsuccess>

PREPARE YOUR DATA

Centralize your data in Microsoft 365 and improve your data quality to enhance AI recommendations.



One of the most critical factors for successful AI implementation is **high-quality, well-organized data**.

Generative AI algorithms rely on large amounts of data to learn and make accurate predictions, and the quality of its output depends on the quality of data it is trained on. If the data is decentralized, disorganized, or contains errors, the algorithms may produce inaccurate results, which can lead to poor decision-making and business outcomes. That's why it's essential to take the time to prepare your data before feeding it into an AI system like Copilot for Microsoft 365.

By taking the time to properly manage your data, you will be able to make data-driven decisions with confidence and improve the overall efficiency and effectiveness of your operations.

How to prepare your data for Copilot for Microsoft 365

► **Centralize all business-critical data to Microsoft 365**

Copilot for Microsoft 365 bases its recommendations and outputs on the data available to it in Microsoft 365. To provide the most accurate and comprehensive insights, any data you store elsewhere – such as self-hosted databases or other clouds – must be brought into your Microsoft 365 tenant to allow Copilot for Microsoft 365 to analyze and make recommendations based on all relevant data. This will ensure that Copilot for Microsoft 365 can provide accurate and complete insights.

To achieve this, migrate all content to Microsoft 365 using [AvePoint Fly](#). Fly simplifies the migration process, providing flexibility and ease of use with real-time monitoring, granular scheduling, and robust security measures. Fly ensures a smooth and secure transition to Microsoft 365 so that Copilot for Microsoft 365 has access to all relevant data.

Ask yourself:

Are there repositories outside of Microsoft 365 where some departments store business-critical data?





➤ Complete a data inventory

Once you have your data in the right environment, you are ready to begin improving the quality of your data. To start, conduct a discovery and analysis exercise to understand the data you have and how it's currently organized in your environment. Effective information management solutions like [AvePoint Opus](#) offer this capability and more, making it easy to get a full picture of your data landscape.

This will provide a clear picture of your data landscape, allowing you to make informed decisions about how to improve it. Additionally, a data assessment helps identify any redundant, outdated, or trivial (ROT) data that may be cluttering your environment which can potentially skew AI results.

With this inventory in hand, you can clean up your data, removing duplicates or redundancies, and begin to establish information management processes and data governance policies to help maintain high data quality over time and ensure that Copilot for Microsoft 365 continues to provide valuable insights.

[Why A Robust Data Strategy Is The Key To Unlocking AI's Full Potential](#)

[READ NOW →](#)

➤ Classify your content to improve results

Now that you have a data inventory, it's time to organize the data properly to improve the results of your AI tools like Copilot for Microsoft 365. One effective way to do this is by using metadata, labels, and tags to classify your content within Microsoft 365.

Metadata provides information that describes your data, while labels and tags assign categories to your data. By doing this, you can make your data more searchable, discoverable, and manageable, which in turn will improve the accuracy and relevance of your AI results.

If you're struggling to manage your data effectively, [AvePoint Opus](#) can help. AvePoint Maestro, Opus's AI-powered classification capability, allows organizations to identify high-value content, tagging and classifying it at scale while automatically applying the appropriate lifecycle policies. This prepares your data for AI even without significant manual input.

Prepare your data with AvePoint's Copilot for Microsoft 365 readiness solutions



Migrate your content to Microsoft 365.

Explore AvePoint Fly today.



Take your information lifecycle management to the next level.

Explore AvePoint Opus today.



SECURE YOUR DATA

Understand where you have sensitive and overshared content in Microsoft 365 and implement robust security measures to secure it.



Data security is a top concern and potential downside associated with generative AI tools, according to [a recent Deloitte study](#). While many may focus on defending against external threats, it may be internal threats you should be most concerned about; [60% of organizations](#) that experienced an AI-related security or privacy incident reported internal parties as the cause of data compromise. This is why data security and permission management go hand-in-hand when it comes to AI implementation.

When using Copilot for Microsoft 365, it's essential to control its access to ensure the security of your data. Although the solution is designed to protect privacy and ensure compliance and security, it can access information from anywhere it has permission. Thus, it's critical to monitor and control its access stringently.

However, with over 40,000 types of permissions available to users, services, and devices, of which [50% are considered high risk](#), maintaining control over who can access what data across different cloud platforms is becoming increasingly challenging. To ensure your data remains secure while using Copilot for Microsoft 365, there are several steps you can take.

How to secure your data for Copilot for Microsoft 365



➤ Run a risk assessment

You control the management of access to your data in Microsoft 365, so you need to protect it by having visibility of the state of access controls in your organization. Running a risk assessment will help you identify your sensitive and overshared data in Microsoft 365, such as unprotected Personally Identifiable Information (PII) or financial data or content with anonymous sharing links.

You can assess your environment for any security risks manually by reviewing each workspace's content and corresponding site permissions, or automatically with [AvePoint Insights](#). Insights scans and aggregates sensitivity and activity data across your Microsoft 365 tenant, seamlessly identifying permissions issues for action.

It's important to complete this step to prevent Copilot for Microsoft 365 and users from inadvertently discovering your data security vulnerabilities.

[Protecting Your Information: The Intersection of Copilot for Microsoft 365 and Data Security](#)

[READ NOW →](#)

➤ Clean up permissions and enforce policies

Now that you know what risks exist in your environment, it's time to act on them. Clean up any concerning permissions – consider a least privilege access model, especially for sensitive content – to ensure Copilot for Microsoft 365's output excludes information your entire organization shouldn't see. This is not only a critical step for Copilot for Microsoft 365 adoption, but also a gold standard for modern security postures to prevent unauthorized access to your data.

It's also a good idea to implement policies that mandate secure practices, such as limiting membership for Microsoft Teams or sites that contain confidential data, and train users on the proper controls they should implement to keep data secure.

Alternatively, leave no room for error and use [AvePoint Policies](#) to automatically apply the necessary security rules to your Teams, Groups, Sites, and OneDrives, or your entire Microsoft 365 tenant if needed. Policies proactively monitors configuration drift and reverts out-of-policy changes as often as every two hours to ensure proper access controls and permissions are applied without relying on end-user execution.

By implementing these measures, you create guardrails that Copilot for Microsoft 365 will respect, ensuring the continued security and compliance of your data.

Ask yourself:

What sensitive data should Copilot for Microsoft 365 not have access to?



➤ Maintain your security measures

Once your environment is in good shape, you'll want to keep it that way. Regularly review and update your security policies to ensure they remain up-to-date. This includes monitoring user activity, permissions, and access controls, as well as implementing new policies to address new and emerging concerns.

[AvePoint Insights](#) offers automated reporting for IT in at-a-glance dashboards, as well as proactive alerts to flag anything amiss. If the solution detects an issue, you can adjust your security measures from within the tool in response to what it finds, making it fast and easy to act on any potential concerns.

Secure your data with AvePoint's Copilot for Microsoft 365 readiness solutions

Find, prioritize, and fix security controls.

Explore AvePoint Insights today.



Enforce robust security controls.

Explore AvePoint Policies today.



OPTIMIZE YOUR OPERATIONS



Elevate your data management practices and implement and enforce governance controls to fuel sustainable AI success.

[75% of C-suite executives](#) believe that if they don't scale artificial intelligence in the next five years, they risk going out of business entirely. However, manually scaling Copilot for Microsoft 365 is not sustainable or cost-effective in the long run, particularly as organizations' usage of AI increases exponentially.

For example, businesses are already creating more data than ever before; the volume of digital data being generated globally is [doubling every two years](#). As you begin to leverage AI like Copilot, you'll generate even more data. So how can you manage and govern this data safely to ensure its accuracy, security, and compliance?

Without proper maintenance, cracks can begin to surface, and Copilot for Microsoft 365's output could become inaccurate or inconsistent. That's why effective governance and data management are a must-have to ensure the way you leverage Copilot for Microsoft 365 years down the road is the same safe and secure way you use it today.

Proactively setting up effective governance and data management processes can help your organization scale its Copilot for Microsoft 365 use without sacrificing security or compliance, driving long-term benefits and avoiding the risk of management issues and IT burden.

Ask yourself:

As AI adoption and data volume grow, can we maintain these security controls and management processes?



How to optimize your operations for Copilot for Microsoft 365

➤ Establish a management framework

As Copilot for Microsoft 365 transforms the way we work, managing content, like data and workspaces, will become more complex. Users will be working faster, creating content more quickly, and producing large volumes of data. To keep up with this rapid pace, IT teams will need a consistent and structured framework that dictates what type of content Copilot for Microsoft 365 can access, who is responsible for this content, and how often this content's settings are reviewed, among other concerns, to ensure nothing falls through the cracks.



[AvePoint Cloud Governance](#) plays a crucial role in establishing this framework by automating the delivery of certain IT services, such as provisioning Teams, Sites, and Groups or applying conditional permissions and settings, ensuring content is created and maintained in accordance with your governance policies. By helping organizations implement extensible Microsoft 365 governance strategy, Cloud Governance offers tighter control of Copilot for Microsoft 365 without requiring end-user or IT intervention, giving organizations automated and secure management processes.

➤ **Implement content lifecycle management**

To ensure optimal performance of Copilot for Microsoft 365, it's important to recognize that not all data is useful, and retaining data for the sake of retention can impact the quality of Copilot for Microsoft 365's output. It's crucial to keep data only as long as necessary to ensure that AI models are trained with high-quality and relevant data.

Automate content lifecycle management for Copilot for Microsoft 365 with [AvePoint Opus](#). By automating business rules in AvePoint Opus, you can manage the entire content lifecycle from creation and classification to archiving or disposal. This will not only improve the quality of your Copilot for Microsoft 365 output but also help you reduce storage costs.

➤ **Automate reviews and renewals**

Even with a strong governance strategy, it's important to double check that the appropriate controls are applied to your content, especially when using Copilot for Microsoft 365. This innovative tool provides users with unparalleled access to content, making it essential to establish additional safeguards to ensure that content is secure and well-managed.

Content owners are in the best position to know who should have access and whether content is still serving the organization's goals. Requiring owners to regularly review permissions, membership, and access controls ensures content remains secure. Additionally, content owners should regularly renew content if it's still adding value or remove it if it's no longer necessary.

AvePoint Cloud Governance can help establish these activities as part of a larger automated governance strategy. Organizations decide how often they'd like content owners to receive automated alerts to review and renew the content, streamlining security and management efforts.

Optimize your operations with AvePoint's Copilot for Microsoft 365 readiness solutions

Automate a comprehensive governance strategy.
Explore AvePoint Cloud Governance today.



Take your information management to the next level.
Explore AvePoint Opus today.



Copilot for Microsoft 365 Quick Start Guide

Your checklist to secure AI adoption of Copilot for Microsoft 365



PREPARE YOUR DATA

Copilot for Microsoft 365 needs access to **quality and organized data** to enhance its recommendations and output.

- ✓ Centralize content in Microsoft 365
- ✓ Analyze your data landscape
- ✓ Get rid of Redundant, Obsolete and Trivial (ROT) data
- ✓ Ensure data is properly labeled and classified

SECURE YOUR DATA

Copilot for Microsoft 365 uses your organization's **permissions and security controls** as guardrails to control what data it can access.

- ✓ Run a risk assessment
- ✓ Identify, prioritize, and fix permission issues
- ✓ Enforce robust security policies
- ✓ Monitor for configuration drift and security concerns

OPTIMIZE YOUR OPERATIONS

Copilot for Microsoft 365 will drive long-term benefits if proper **governance and information management processes** are proactively implemented.

- ✓ Establish a management framework
- ✓ Implement data lifecycle policies
- ✓ Automate access reviews and content renewals
- ✓ Review and adapt processes to any technology updates

AvePoint can give the support and guidance you need as you embark on your Copilot for Microsoft 365 journey.

Learn more at <https://avpt.com/365copilotsuccess>

Bringing It All Together

Copilot for Microsoft 365 offers organizations a powerful solution to optimize their Microsoft 365 environment and achieve their business goals. Remember the old saying, though: with great power comes great responsibility.

That's why a secure and sustainable AI adoption requires sufficient preparation and governance controls. By taking the necessary steps to harness the power of AI and implementing effective data practices, organizations can reap all the benefits of Copilot for Microsoft 365, including:

- ✓ Save time and increase productivity
- ✓ Enhance employee skills
- ✓ Drive rapid innovation

AvePoint offers a holistic approach to Copilot for Microsoft 365 adoption: The AvePoint Confidence Platform can help you build a robust data foundation, security, and approach to sustainable adoption to harness the power of Copilot for Microsoft 365. With our expertise and support, you can establish a solid foundation for AI success.



Accelerate your AI journey with Copilot for Microsoft 365 and AvePoint.
Get Started: <https://avpt.co/m365copilotsuccess>



Additional Resources

Microsoft Copilot 101

- [Read the blog](#)
- [Watch the webinar](#)
- [Listen to the podcast](#)

Connect with an Expert

- [Contact Us](#)

Request a Demo

- [AvePoint Opus](#)
- [AvePoint Fly](#)
- [AvePoint Insights](#)
- [AvePoint Policies](#)
- [AvePoint Cloud Governance](#)



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