CHECKLIST

CONCENTRIC Ai

Is Your Data Copilot-Ready?

Here's the Checklist You Need

If Your Data's a Mess, Copilot Will Find It and Spill It

Microsoft Copilot helps your teams work faster, write better, and answer questions at lightning speed. But what it doesn't have is a built-in filter for data you don't want it to see.

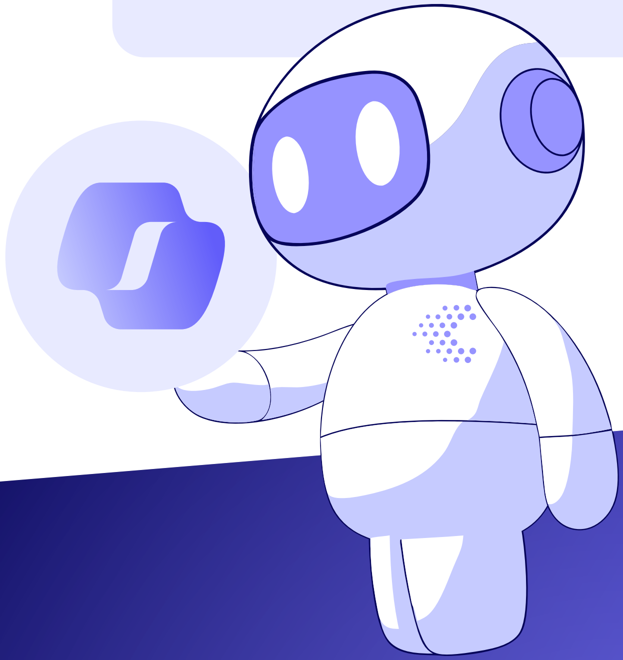
Copilot can surface anything it has access to: Draft M&A contracts, salary history spreadsheets, confidential IP, outdated sales pitches, and even that one folder labeled "old-confidential-final-FINAL-v2."

If your sensitive data isn't classified correctly, if access isn't locked down, or if your labeling is a mess (or missing altogether), Copilot will happily pull it into a Teams chat or suggest it in a Word doc. Whoops!

So, is your data Copilot-ready? Or are you about to knight your AI assistant as the world's most efficient over-sharer?

Top Three Copilot Missteps to Avoid

1. Letting Microsoft 365 default permissions run wild, amok, or both
2. Trusting manual tags or user-driven classification
3. Assuming Copilot "knows better" about what not to expose



The Copilot-Readiness Checklist

Before you turn on Copilot across your organization, it’s time to run through these must-haves:

✓ **Do you know where your sensitive data lives?**

It could reside in Teams, SharePoint, OneDrive, Exchange, and anywhere else in the unstructured wild west.

✓ **Are sensitivity labels accurate and widely applied?**

If they’re missing, wrong, or inconsistent, Copilot has no way of knowing what’s okay to surface.

✓ **Are permissions scoped to need-to-know?**

Least privilege isn’t a luxury. It’s how you stop Copilot from feeding interns board minutes.

✓ **Can you track how Copilot is accessing and surfacing data?**

Visibility is everything. You need usage monitoring, not just config dashboards.

✓ **Does your classification system understand context?**

Regex won’t cut it. You need AI that leverages semantics to tell a resume from a salary report.

✓ **Are you monitoring Copilot's downstream impact?**

Summarized data still creates risk, especially when it's pasted into slides or shared in chat.

Your Fast Path to Copilot-Ready Confidence

Run semantic discovery across Microsoft 365

1

Find and classify sensitive data automatically and with context.

Automate the application of sensitivity labels at scale

2

No manual tagging, no inconsistencies. Label smarter, and do it much less often.

Monitor usage and map risk

3

Understand how Copilot is interacting with your data—and where it's creating exposure.

Create policy triggers and auto-remediation

4

Flag or restrict sensitive content in Copilot workflows before it becomes a headache.

Final takeaway

Copilot is only as safe as the data it's connected to. If you wouldn't want it emailed, printed, or shown in a meeting—don't let Copilot find it by accident.

Want to test how Copilot-ready your data really is? Request a demo today.

Schedule a Demo ↘