Copilot for Microsoft 365

Customer Baseline Optimization Questionnaire

Instructions - Read me first.

The goal of this questionnaire is to convey needs and pinpoint areas for improvement. This activity serves as an initial stage to determine a recommended deployment approach and ascertain whether a more detailed assessment may be necessary. The Copilot for Microsoft 365 Baseline Optimization Questionnaire is designed to aid partners and customers in evaluating their organization's preparedness to embrace Copilot for Microsoft 365, focusing on four lenses.

Your organizational profile: Have you identified a business case in the right departments that can be supported by Copilot for Microsoft 365?

Your productivity and collaboration tools: Are you using the tools and services that will help your identified departments and users take advantage of the capabilities of Copilot for Microsoft 365?

Data security and governance: Has your organization identified and implemented controls and safeguards necessary to satisfy any organizational, country, or regulatory based requirements as it pertains to the use of Copilot for Microsoft 365?

Copilot Eligible Users (User Checklist) - An initial snapshot of the number of users that could immediately take advantage of Microsoft Copilot as they are most likely already meet all the pre-requisites.

The answers to the questions in the survey will help to produce a series of scores and a recommended deployment path that can help to provide a snapshot of organizational readiness to adopt Copilot for Microsoft 365 and guide the subsequent planning and rollout.

How to complete the questionnaire:

How to Complete the User Checklist:

For each question in the **user checklist, fill in the information, by entering a number in each answer box, using knowledge of the organization and information gathered from the Microsoft 365 usage reports. Use the guidance below to help you identify the correct number:**

1 - The total number of employees in an organization. If known, you can refine this number to the total number of users in the organization that are eligible for Microsoft 365.

2 - The total number of users who are assigned a supported pre-requisite license for Copilot for Microsoft 365. This can be obtained by adding together the assigned licenses from the **Licenses** page under **Billing** in the **Microsoft 365 Admin Centre.**

(https://learn.microsoft.com/en-us/microsoft-365/admin/admin-overview/admin-center-overview?view=o365-worldwide#admin-center-features-and-settings)

3 - The total number of active users for Microsoft 365 Apps for Enterprise. This can be obtained from the Overview page of the Usage Reports within the Microsoft 365 Admin centre. Use the highest value for Microsoft 365 Apps presented in the chart. (https://learn.microsoft.com/en-us/microsoft-365/admin/activity-reports/activity-reports?view=o365-worldwide)

4 - The total number of users who are scheduling or attending Teams meetings in the organization. This can be obtained from the User activity tab of the Microsoft Teams Product reports in the Usage reports within the Microsoft 365 Admin Centre. Use the highest value of Teams meetings for Licensed users (the middle graph) presented in the chart. (https://learn.microsoft.com/en-us/microsoft-365/admin/activity-reports/microsoft-teams-user-activity-preview?view=o365-worldwide#interpret-the-microsoft-teams-user-activity-report)

5 – The number of users who are using the current channel or monthly channel of Microsoft 365 Apps for Enterprise. For more information on the update channels, review the guidance provided here (https://learn.microsoft.com/en-us/deployoffice/updates/overview-update-channels)

How to complete the remaining sections

Each baseline question has a series of responses available to it. Choose the one that best fits the current state of the organization and select the radio button next to that response.

How to interpret the results:

While working to review and analyze the business requirements or needs behind each individual response will provide the most accurate outcome, the results of each score will help to facilitate and support the overall readiness conversation. A delivery partner can assist in evaluating the readiness using both the individual scores and the deployment path.

Copilot for Microsoft 365-ready users in your organization:

The number of Copilot ready users is a calculation of the number of users that most likely meet all the perquisites of Copilot for Microsoft 365 (base license, M365 apps, Teams usage) and would be immediately eligible to use a Copilot for Microsoft 365 license.

Copilot for Microsoft 365 deployment path:

The Copilot deployment path is part of the overall technical readiness guidance developed to help customers get started with their Copilot deployments quickly and continue to optimize their data security along the way. More information on how to complete the activities aligned to the recommended outcomes in the deployment path can be found
https://aka.ms/Copilot/TechnicalReadinessGuide

Organizational Profile and Productivity Tool Readiness scores:

The organizational profile and productivity tool readiness scores can help to facilitate the discussion on the organization's readiness to adopt Copilot for Microsoft 365. The results of each score can be interpreted as follows:

0% - 33%: The organization can achieve more with Copilot for Microsoft 365. Some effort may be required to receive the maximum value of Copilot for Microsoft 365.

34% - 66%: The current state of the organization is moderately aligned to Copilot for Microsoft 365. The organization can take advantage of many of the capabilities of Copilot for Microsoft 365. Additional work may still be required to align the full value of Copilot for Microsoft 365 to the requirements of the organization.

67% - 100%: The current state of the organization is well aligned to Copilot for Microsoft 365. The organization can take advantage of most or all the features of Copilot for Microsoft 365. Additional work to align Copilot for Microsoft 365 to organizational requirements will be lower than in situations with lower scores.

Blockers Identified: Copilot for Microsoft 365 has a set of minimum requirements (such as licensing level, application version, and tenant type) that are required pre-requisites to implementing Copilot for Microsoft 365. If the organization does not meet the requirements identified by questions in the questionnaire, the result page will list the number of blockers identified. This is meant to draw immediate attention to those areas to be addressed before continuing with the Copilot for Microsoft 365 conversation.

Determine path to address Security Gaps:

Customer Guidance

Assess your existing data security and compliance features within Microsoft 365. If you are a customer in need of advanced data security and compliance capabilities, contact your Microsoft account team to initiate a Partner-led engagement for these services. If further guidance is needed, reach out to your Microsoft account team for additional support.

Partner Guidance:

Highlight the existing data security and compliance capabilities possessed by your customers in Microsoft 365. If the customer is on seeks advanced data security and compliance capabilities and you are a certified security and compliance partner, proceed with a data security engagement and collaborate with the Microsoft account team. If you are not a certified partner in this area and the customer requires premium data security and compliance capabilities in Microsoft 365, consult with the Microsoft account team for guidance.

Using the additional information: For each question in the questionnaire, clicking on the ⓘ will provide additional background and supporting information. For questions where there is published information or guidance in the Microsoft documentation, links are provided to support deeper conversations. Note, not all questions currently have links to additional information.

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