Copilot Data Security Assessment

Microsoft Copilot is adopted across the enterprise to drive productivity through AI, organisations must ensure their data landscape is secure, governed, and appropriately configured.

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The **Copilot Data Security Assessment** provides a detailed evaluation of your Microsoft 365 environment, focusing on **identifying misconfigurations, data exposure risks, and gaps in governance that could undermine Copilot's safe use.** This service ensures your environment is **AI-ready and compliant** with modern data security standards.

Microsoft Solutions Partner

Methodology

Our assessment is based on a structured, multi-layered analysis of Microsoft 365 workloads and configurations that directly influence Copilot's access and behaviour. The process includes: .

- **Configuration Review**

  Analysis of Copilot-specific settings within the Microsoft 365 Admin Centre, including control systems, access permissions, and action restrictions.

- **Security Architecture Deep-Dive**

  Inspection of SharePoint Online (SPO) to identify inherited and broken permissions, exposing data at file, folder, and site levels.

- **Governance Controls Review**

  Evaluation of Microsoft Purview settings such as sensitivity labels, DLP policies, and data lifecycle management.

- **AI Security Posture Management**

  Use of Data Security Posture Management (DSPM) tools for AI to monitor Copilot prompt activity and prevent unauthorised AI use.

- **Microsoft Teams Configuration Review**

  Review of Teams access and sharing policies relevant to Copilot's integration.

Outcomes

By the end of the assessment, your organisation will receive a clear understanding of: The process includes:

- How Copilot is currently configured and what it can access
- Where sensitive data is at risk due to broken or overly broad permissions
- Gaps in governance that may impact compliance or responsible AI use
- Actionable recommendations to strengthen your AI readiness and data protection posture

Key Benefits

- AI-Ready Foundation
- Risk Mitigation
- Compliance & Governance
- Tailored Insights
- Expert Partnership

Discover how our Copilot assessments can support your next IT transformation.

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Deliverables

You will receive a tailored report with the following components:

Admin Centre Review:

Copilot control systems, user and data access settings, prompt/action permissions

SPO Security Findings:

- Files and folders with direct access
- Sites, libraries, and documents with broken inheritance
- Items shared via public or internal links
- Folder and document-level unique permissions

Governance Review (Purview):

- Sensitivity labels and classification
- DLP and retention policies
- Data lifecycle management
- DSPM for AI usage and enforcement

Microsoft Teams Insights:

Access and sharing settings related to Copilot usage in Teams

Recommendations Report:

Step-by-step remediation guidance to close identified security gaps and strengthen governance

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