



Copilot Search Readiness Scorecard

Instructions: Review your Microsoft 365 environment and score each item from 0 to 10 (0 = Not Started/Poor, 10 = Fully Implemented/Excellent). Add up your score at the end to determine your Copilot Search readiness.

Phase 1: Content Hygiene & Architecture

| Score (0-10) | Audit Item | Action Required if Score is < 7 |
|--------------|--|---|
| [] | Stale Content Removal: Obsolete SharePoint sites, unused Teams, and abandoned OneDrive files are archived or deleted. | Run a site usage report and purge inactive sites older than 18 months. |
| [] | Naming Conventions: Shared files, Teams channels, and libraries follow clear, standardized naming rules. | Enforce naming policies for new Teams and rename top-tier organizational assets. |
| [] | Metadata Optimization: Key documents utilize appropriate tags, titles, and SharePoint column metadata. | Require mandatory metadata for libraries housing high-value or departmental data. |

Phase 2: Permissions & Security

| Score (0-10) | Audit Item | Action Required if Score is < 7 |
|--------------|--|--|
| [] | Oversharing Audit: Sensitive executive, HR, and financial | Run an oversharing audit in the M365 Admin Center; |



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|-----|---|--|
| | libraries are restricted strictly to required personnel. | remove organization-wide links. |
| [] | Sensitivity Labels: Microsoft Purview Information Protection labels (e.g., "Confidential") are actively applied. | Implement auto-labeling policies for documents containing PII or financial data. |
| [] | Guest Access Control: External guest access in Teams and SharePoint is regularly reviewed and pruned. | Set up automated expiration policies for external guest access. |

Phase 3: Microsoft Search Assets

| Score (0-10) | Audit Item | Action Required if Score is < 7 |
|--------------|---|--|
| [] | Acronym Dictionary: Internal business terms and project codes are mapped in the M365 Admin Center. | Interview department heads to compile and publish a list of top 20 company acronyms. |
| [] | Enterprise Bookmarks: Critical tools, HR portals, and IT support desks are bookmarked for search priority. | Configure Promoted Results/Bookmarks for the 10 most requested internal URLs. |

Phase 4: Integration & Licensing

| Score (0-10) | Audit Item | Action Required if Score is < 7 |
|--------------|------------|---------------------------------|
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|-----|---|---|
| [] | Connector Strategy: Third-party data sources (e.g., ServiceNow, Confluence) are securely connected and tested. | Deploy one Graph Connector in a sandbox environment before tenant-wide release. |
| [] | Pilot Feedback Loop: A system is in place to capture qualitative feedback from early Copilot adopters. | Create a dedicated Teams channel for the pilot group to report search hallucinations. |

Your Total Readiness Score: [] / 100

Score Interpretation:

- **85 - 100 (Green Light):** Your tenant is optimized. You are ready to scale Microsoft 365 Copilot with minimal risk of "garbage in, garbage out."
- **50 - 84 (Yellow Light):** Proceed with caution. You have a functional setup but must resolve permission gaps and clean up legacy data before a company-wide rollout.
- **0 - 49 (Red Light):** Stop. Deploying Copilot now will result in poor user trust and potential security breaches due to oversharing. Prioritize tenant governance immediately.