



People Search Copilot Readiness & Audit Checklist

Phase 1: Infrastructure & Licensing

- **License Verification:** Confirm Copilot-related service plans are assigned to all target users in the Microsoft 365 admin center.
- **Identity Health:** Ensure users can authenticate via Microsoft Entra ID without persistent MFA or token session loops.
- **Endpoint Access:** Verify that Zero Trust and Conditional Access policies do not silently block Copilot-related endpoints.

Phase 2: Data Integrity & Semantic Signals

- **Profile Standardization:** Audit job titles, departments, and office locations for naming consistency (e.g., no mixed formats like "Sr. Mgr" vs "Senior Manager").
- **Microsoft Graph Connectivity:** Confirm that "Graph Connectors" (if used) are properly feeding external expertise data into the tenant.
- **Expertise Mapping:** Ensure the "Skills" and "About Me" fields are populated for at least 80% of the core team to provide enough signal for the Semantic Index.

Phase 3: Governance & Security

- **Permissions Audit:** Review SharePoint site ownership and sensitivity labels via Microsoft Purview to prevent oversharing in search results.
- **HR System Sync:** Verify that the sync cadence between Workday/SAP SuccessFactors and Entra ID is set to a minimum of 24-hour cycles.
- **Search Intelligence:** Check the Search & Intelligence portal for active "Acronyms" and "Bookmarks" that might conflict with AI-driven discovery.