



# Service Description — Microsoft Copilot Readiness Assessment

## 1. Overview

The Microsoft Copilot Readiness Assessment is a time-boxed, point-in-time engagement designed to help an organization determine whether it is ready to deploy Microsoft Copilot capabilities safely and effectively, and what actions are required before moving to pilot or broad rollout.

The service focuses on evaluating technical readiness, data protection/governance posture, and user enablement readiness, then producing prioritized planning artifacts and a practical roadmap for next steps.

## 2. Project elements

Deliverables included in this assessment:

- Readiness scorecard — Executive-friendly summary of readiness across key domains, highlighting strengths, gaps, and priorities.
- Risk & oversharing snapshot — Focused view of top exposure/oversharing risk themes that can impact Copilot safety and outcomes, with prioritized recommendations.
- Technical readiness plan — High-level plan sequencing prerequisites and environment optimizations required to prepare for Copilot.
- User enablement plan — High-level adoption and change approach (communications, training approach, roles, and measurement considerations).
- Roadmap and next steps — Consolidated, prioritized roadmap of actions and recommended follow-on engagement options (e.g., remediation sprint, pilot accelerator, governance hardening, adoption launch).

## 3. Estimate duration

This is delivered as a short, fixed-scope readiness engagement (point-in-time).

Typical delivery includes a kickoff, limited working sessions as needed to collect inputs and validate findings, and a final readout with the deliverables. The exact schedule is finalized based on stakeholder availability and approved access to required information.



#### **4. Roles and responsibilities required**

Consultant (Delivery Lead)

- Plan and facilitate kickoff and scope confirmation.
- Collect approved inputs (or customer-provided exports/screenshares) needed to evaluate readiness and oversharing risk at a high level.
- Analyze findings and produce all deliverables listed in Section 2.
- Conduct a readout and align stakeholders on prioritized next steps.

Customer roles (recommended)

- Executive sponsor / business owner — Confirms goals, risk tolerance, and success criteria.
- IT admin (Microsoft 365) — Provides required access/inputs and validates feasibility of technical actions.
- Security / compliance owner — Validates governance and risk considerations.
- Adoption / change lead (or delegated owner) — Coordinates communications and training aligned to the enablement plan.

#### **5. Project boundaries**

In scope

- Point-in-time readiness evaluation culminating in the five deliverables listed in Section 2.
- High-level analysis sufficient to support a go/no-go decision, define remediation priorities, and plan a pilot or rollout approach.

Out of scope (unless separately contracted)

- Hands-on remediation or tenant configuration changes.
- Custom Copilot extensions/agents/plugins development.
- Ongoing managed services, continuous monitoring, or long-term adoption program execution.

#### **6. Service location and working hours**

Service location: Remote delivery by default unless otherwise agreed.

Working hours: Standard business hours aligned to stakeholder availability. Meeting cadence and working sessions are confirmed during kickoff.

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*Document purpose: Service description for use in proposals/RFP responses and statements of work.*