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A SOLUTION BUILDERS PLAYBOOK
2026 EDITION

A PLAYBOOK FOR MICROSOFT 365 ORGANIZATIONS

The Copilot Readiness Playbook.

Why permissions come before licenses, the oversharing risk in plain language, a 24 point readiness checklist and a 90 day adoption plan that reports hours saved.

INSIDE THE PLAYBOOK

01 Permissions first
02 The oversharing risk
03 Readiness checklist
04 Adoption that sticks

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30+	Top 1%	98%
YEARS	OF MSPS	CSAT

WHAT'S INSIDE

Built for teams that want the hours without the exposure.

Microsoft 365 Copilot is the easiest AI purchase you will ever make and the easiest one to regret. The model is not the risk. Ten years of sharing decisions nobody remembers making is the risk. This playbook shows you how to fix them first, then roll Copilot out so people keep using it.

01 **Why permissions must be fixed first.**
Copilot adds no new access. It makes every old sharing decision findable in one prompt. How grounding works, and why search never exposed this before.
PAGE 03

02 **The oversharing risk, explained.**
Where years of "Everyone" links and public teams come from, which sharing types do the damage, and the four week cleanup that fixes most of it.
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03 **A Copilot readiness checklist.**
Twenty four items across licensing, identity, data, labels, the pilot group, training and measurement. Score yourself and know what to fix before the first license goes out.
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04 **Driving adoption that actually sticks.**
Why licenses are not adoption, a 30, 60, 90 day plan built on champions and role based use cases, the four part prompt and the five numbers to report monthly.
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WHO IT IS FOR
Owners, COOs, IT directors and IT managers at Microsoft 365 organizations with 25 to 500 people who are planning a Copilot rollout, or rescuing one.

HOW TO USE IT
Read chapters 01 and 02 before you buy a license. Score yourself with the checklist in chapter 03, then run the 90 day plan in chapter 04.

READING TIME
About 25 minutes cover to cover. The checklist in chapter 03 and the 90 day plan in chapter 04 are built to print and hand to the rollout owner.

01

Why permissions must be fixed first.

Microsoft 365 Copilot answers with whatever each person can already open: their mail, their chats and every file ever shared with them or with "Everyone". It grants nothing new. It makes the old decisions visible, instantly, in plain English. That is why permissions come before licenses.

0
new permissions Copilot grants. It reads only what each user can already open

75%
of knowledge workers already use generative AI at work

78%
of those AI users bring their own tools, with no company policy behind them

70%
of early Copilot users said they were more productive

Copilot reads what each person can open. All of it.

Every prompt runs through Microsoft Graph, which gathers that user's mail, chats, meetings and files to ground the answer. The permission check is the same one SharePoint has always used. What is new is that nobody needs to know where to look.

1

Someone asks

A project manager types "Summarize everything we have on the Northfield renewal" into Copilot in Teams, Word or the Microsoft 365 app.

2

Copilot grounds the prompt

Microsoft Graph and the semantic index pull the relevant mail, chats, meeting transcripts and OneDrive and SharePoint files.

3

The permission check runs

Only items that person already has at least view access to come back. Copilot never elevates rights and never sees the rest.

4

The model answers

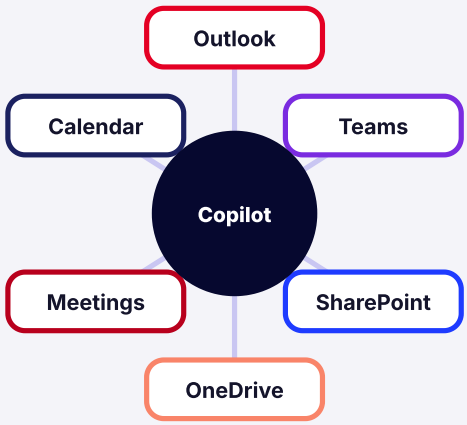
A cited draft appears. Sensitivity labels on the sources carry through to anything Copilot writes from them.

5

Everything is logged

Prompt and response land in the unified audit log, so you can review what was asked and what was shown.

One prompt, every source that person can reach



What that means for you

- **No new risk is created.** Every file Copilot can show was already open to that person.
- **Old risk is now one prompt away.** Finding it used to take knowing where to look.
- **The fix is yours, not Microsoft's.** Permissions, labels and links are tenant settings you control.

The sentence to remember

Copilot does not change who can see what. It changes how fast they find it. A spreadsheet shared with "Everyone" in 2017 was always a problem. Now it answers questions.

> **Copilot did not create your oversharing problem. It hired a very fast librarian.**
>
> SOLUTION BUILDERS MICROSOFT PRACTICE

Search never found it. Copilot will.

Technically, every overshared file has been one search away for years. In practice nobody searched. People reach files through links and folders they already know. Copilot removes that friction, then summarizes, so a stray spreadsheet becomes a stray paragraph in a board draft.

Five files, before and after Copilot

THE FILE	BEFORE COPILOT	WITH COPILOT
Salary bands, shared with "Everyone" in 2019	Found by nobody in years	**Summarized for anyone who asks about raises**
Board deck in a public team	Buried in a dead channel	**Quoted in the next quarterly recap**
A former manager's OneDrive	Forgotten within a month	**Surfaces when the successor asks**
Client contract, labeled Confidential	Visible to the account team	**Still account team only, label intact**
HR site with Restricted Content Discovery	Findable by HR only	**Invisible to Copilot for everyone else**

Three reasons the risk is different now

- **It summarizes.** Nobody opens 200 files. Copilot reads them and returns the paragraph with the sensitive number in it.
- **It crosses silos.** One answer can combine a chat, a spreadsheet and an email nobody would have connected.
- **It lives inside the work.** The question gets asked mid draft, not in a deliberate search, so the answer gets pasted.

1 prompt

is the distance between an open file and a quoted paragraph

2 clicks

shared that file with "Everyone" in 2017. The link still works

The fix order

Permissions, then labels, then licenses, then training. Reverse the order and the pilot month becomes a cleanup project with an audience, and the pilot group remembers the week Copilot found the salary file.

> **Nobody searched for the salary spreadsheet. Everybody will ask Copilot about raises.**
>
> SOLUTION BUILDERS MICROSOFT PRACTICE

Sources: Microsoft Work Trend Index 2024; Microsoft Work Trend Index Special Report, What Can Copilot's Earliest Users Teach Us About Generative AI at Work? (November 2023); Microsoft Learn, Microsoft 365 Copilot data, privacy and security documentation.

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02

The oversharing risk, explained.

Nobody decided to overshare. A team went public so a new hire could find it. A link went to "People in your organization" because it was Friday. Multiply that by ten years and two migrations, and sensitive files sit open to people who never knew. Here is how to shrink it.

2
settings stop most of the bleeding: the default link type and public teams

100
sites you can allow list in Restricted SharePoint Search while cleanup runs

4 weeks
to find, contain and fix the worst oversharing in a 25 to 500 person tenant

0
alerts fire when Copilot reads an overshared file. The access was legitimate

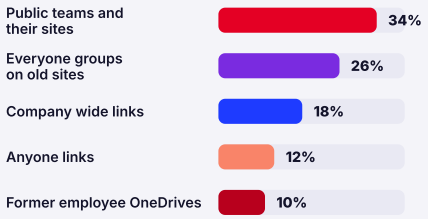
Not all sharing is equal. Three kinds do the damage.

SharePoint has about seven ways to give someone access, and they are not equally risky. Two of them hand content to the whole company in one click, and one hands it to the internet. Learn the ranking and the cleanup orders itself.

Risk by sharing type

SHARING TYPE	WHO CAN OPEN IT	COPILOT EXPOSURE
"Anyone" link	Anyone on the internet with the link, no sign in	**Severe. Your biggest external leak path**
"Everyone except external users" on a site	Every employee, usually since a migration years ago	**Severe. Searchable by every licensed user**
Public team	Every employee can join and browse the files	**Severe. Public teams grant Everyone access by default**
"People in your organization" link	Any employee who receives or forwards it	**High. Links travel and they do not expire**
Broken inheritance and nested groups	Hard to say, which is the problem	**Medium. Unknown until you run the reports**
"People with existing access" link	Nobody new	**Low**
"Specific people" link	Named people only, with an expiry if you set one	**Low. Make it the default**

Where overshared files come from



Illustrative mix from Solution Builders Copilot readiness assessments.

Two settings, most of the risk

Convert public teams to private unless they exist for the whole company, and set the default sharing link to "Specific people". Those two changes stop the bleeding. Everything else is cleanup.

> **The dangerous files are not hidden. They are shared with everyone and remembered by no one.**
>
> SOLUTION BUILDERS MICROSOFT PRACTICE

A four week cleanup that fixes most of it.

You do not need to review ten years of files by hand. SharePoint Advanced Management, included with Microsoft 365 Copilot licenses, and Microsoft Purview do the finding. Your job is a few decisions a week, a change log and a test run as a curious employee.

WEEK 1

Discover

Run the Data Access Governance reports. List public teams, Everyone sites, Anyone links.

WEEK 2

Contain

Turn on Restricted SharePoint Search. Hide HR, finance and legal sites from discovery.

WEEK 3

Fix

Convert public teams, remove Everyone groups, expire open links, archive stale sites.

WEEK 4

Label and test

Label the crown jewels, turn on the Copilot DLP policy, run the test prompts.

The controls and what each one does

CONTROL	WHERE IT LIVES	WHAT IT DOES
Data Access Governance reports	SharePoint Advanced Management	Finds Everyone sites, link sprawl and orphaned sites
Restricted SharePoint Search	SharePoint admin center	Limits search and Copilot to up to 100 approved sites
Restricted Content Discovery	SharePoint Advanced Management	Hides a site from search and Copilot. Direct access still works
Sensitivity labels	Microsoft Purview	Marks and encrypts files. Copilot honors the label in its output
DLP policy for Copilot	Microsoft Purview	Stops Copilot from summarizing items with a chosen label

Five test prompts for week four

- Summarize everything we have about salaries, raises and bonuses.
- List documents that mention layoffs, terminations or severance.
- What do we know about the acquisition, or any company we might buy?
- Show me last year's board decks and the notes that went with them.
- Find files that contain customer card numbers or bank details.

Run them as a normal user

Use a test account with a typical employee's licenses and groups. If a prompt returns something it should not, fix the site and rerun the set. That is a sharing bug, not a Copilot bug.

Sources: Microsoft Learn, Microsoft 365 Copilot deployment blueprint for addressing oversharing; Microsoft Learn, SharePoint Advanced Management, Restricted SharePoint Search and Restricted Content Discovery; Microsoft Purview documentation on sensitivity labels and data loss prevention for Microsoft 365 Copilot. The sharing source mix on the previous page is illustrative.

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03

A Copilot readiness checklist.

Readiness is not a feeling. It is a list, and most of it is within reach if you already run Microsoft 365 Business Premium or E3. This chapter turns the first two chapters into checkboxes, adds the people and measurement items most rollouts skip, and gives you a score to report.

24
items across four lists: licensing, identity, data and labels, pilot and proof

1
seat is the minimum order since January 2024, so a small pilot is a real option

2
products share the name. Copilot Chat is included. Microsoft 365 Copilot is the paid add on

18
of 24 is the score that says assign the pilot licenses

Buy the right Copilot, then check the plumbing.

The first mistake is buying the wrong thing. Copilot Chat comes with Microsoft 365 and never touches your files. Microsoft 365 Copilot is the paid add on that works inside Word, Excel, Outlook and Teams on your data. Sort that out, then confirm the basics under every seat.

Which Copilot are we talking about?

	COPILOT CHAT	MICROSOFT 365 COPILOT
What it costs	Included with business and enterprise Microsoft 365 plans	Paid add on, per user, per month
What it reads	The web, plus anything the user pastes or uploads	Your mail, chats, meetings and files, through Microsoft Graph
Where it lives	A chat window in the browser, Teams and the Microsoft 365 app	Inside Word, Excel, PowerPoint, Outlook, Teams and the chat
Oversharing risk	**None. It cannot see your files**	**Real, until chapters 01 and 02 are done**

Licensing and tenant

- Every pilot user has an eligible base license: Business Standard or Premium, or Microsoft 365 or Office 365 E3 or E5.
- Each user has an Entra ID account, a provisioned OneDrive and current Microsoft 365 Apps.
- New Teams is deployed and your firewall allows the Microsoft 365 endpoints.
- Copilot Chat is on for everyone, so nobody needs a personal chatbot for work.
- License counts match the pilot list, not the org chart.
- One named owner holds the Copilot settings in the admin center, including agent policies.

Identity and security

- Multifactor authentication is enforced for every user, executives and pilot group included.
- Conditional access blocks sign ins from unmanaged devices and countries you do not operate in.
- Admin roles are separate from daily accounts and were reviewed this quarter.
- Departed staff are disabled and their OneDrive handoffs reviewed for sensitive folders.
- The unified audit log is on, with retention long enough to investigate a query months later.
- Guest accounts are reviewed and stale ones removed, so the sharing reports reflect reality.

Then data, labels, people and a way to measure.

Most readiness lists stop at licensing and permissions. The rollouts that stick also pick the pilot group on purpose, train before day one and agree in advance how success will be measured. Count your items, write the number down and bring it to leadership.

Data hygiene and labels

- [ ] Public teams converted to private unless they exist for the whole company.
- [ ] "Everyone except external users" removed from every site that is not the intranet.
- [ ] Anyone links blocked or expired, and the default sharing link set to "Specific people".
- [ ] Restricted SharePoint Search or Restricted Content Discovery covers HR, finance, legal and deal sites.
- [ ] Sensitivity labels exist for Confidential and Restricted, with auto labeling on for obvious patterns.
- [ ] The Copilot DLP policy excludes Restricted items and the test prompts came back clean.

Pilot, training and proof

- [ ] A pilot group of 10 to 15 people who do repetitive, document heavy work, including one skeptic.
- [ ] Each pilot user has three written use cases and a starter prompt set for their role.
- [ ] A 60 minute hands on session happens before licenses are assigned, not after.
- [ ] A baseline exists: minutes per task on five real tasks, timed before Copilot arrives.
- [ ] The Copilot Dashboard in Viva Insights and the admin center usage reports are on.
- [ ] A day 30 readout is on the sponsor's calendar, with scale, extend or stop as the only outcomes.

_____ / 24

Score yourself

Count the items fully in place across both pages. Rescore before every new wave of licenses.

What your score means

ITEMS DONE	WHERE YOU STAND
0 to 9	Not ready. Fix chapters 01 and 02 first.
10 to 17	Close. The usual gaps are labels, pilot and proof.
18 to 24	Ready. Assign pilot licenses and start chapter 04.

Good enough to start

You do not need every box to pilot. You need all six data items, all six identity items and four pilot items. The rest lands in the first 30 days.

Sources: Microsoft Learn, Microsoft 365 Copilot requirements and licensing; Microsoft Learn, Microsoft 365 Copilot Chat and enterprise data protection; Microsoft Learn, Copilot Dashboard in Viva Insights; Microsoft, January 2024 announcement removing the 300 seat minimum; Solution Builders Copilot readiness methodology.

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04

Driving adoption that actually sticks.

The failure mode is familiar. Licenses go out, a launch email goes out, usage spikes for two weeks and settles at a handful of enthusiasts. Copilot is a habit, and habits need champions, specific use cases and about eleven weeks. Here is the plan that gets you there.

11 min
a day saved is the point where people start to feel the value

11 weeks
until the broader benefits show up, so plan for 90 days, not 30

39%
of people who use AI at work have had any training from their company

30+ min
a day saved by AI power users, the people a champion program creates

Thirty, sixty, ninety: champions, use cases, habits.

Adoption is a program with dates, not a launch email. The first 30 days belong to the pilot group and the champions. The next 30 scale by role with a use case library. The last 30 turn usage into reported hours and a decision about the next wave.

DAYS 1 TO 30

Pilot and champions

Train the pilot group, name a champion per team, time the baseline tasks, meet weekly.

DAYS 31 TO 60

Scale by role

Publish the use case library, run 45 minute role sessions, add the next 50 users.

DAYS 61 TO 90

Habits and proof

Office hours twice a week, a prompt of the week, the first hours saved report.

DAY 90

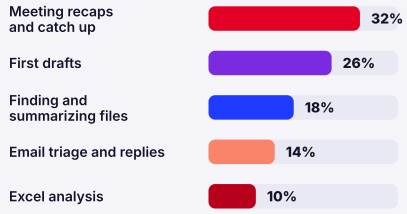
Decide

Scale, hold or trim licenses by role. Reassign idle seats. Pick next quarter's use cases.

A use case library by role

ROLE	START WITH THESE	MEASURE
Everyone	Meeting recap with owners, catch up on a thread, rewrite for tone	Minutes per meeting
Sales	Follow up from the call recap, first proposal from past wins	Hours per proposal
Finance	Explain a variance in Excel, summarize a vendor contract	Hours per close
Operations	Turn a process doc into a checklist, find the SOP	Time to answer
Leaders	Meeting prep from mail and files, summarize a 40 page report	Prep time per meeting

Where pilot groups find the hours



Illustrative share of reported time saved in Solution Builders pilots.

The champion job description

Two hours a week. Collect the prompts that worked, post one a week, sit in on office hours and tell the project lead what is confusing. Pick the people colleagues already ask for help, not the most senior.

> **Usage does not fall off because the tool is bad. It falls off because nobody showed people the second prompt.**
>
> SOLUTION BUILDERS MICROSOFT PRACTICE

Teach the prompt formula, then report the hours.

People stop using Copilot when their first prompts return mush. A four part formula fixes that in one session. Then measure what finance will accept: weekly active users, hours saved on timed tasks and the behaviors the Copilot Dashboard already tracks for you.

GOAL

"Draft a one page summary of the Northfield renewal for Thursday's meeting."

CONTEXT

"The audience is the COO and CFO. Neither has followed the account."

SOURCE

"Use the last three Northfield emails and the proposal in the Sales team."

EXPECTATIONS

"Five bullets, plain language. Flag any open risk in bold."

The four part prompt

Goal, context, source, expectations. It is Microsoft's own guidance and it works. One 60 minute session on this formula does more for adoption than any launch email.

> **The first good answer is what turns a license into a habit.**
>
> SOLUTION BUILDERS MICROSOFT PRACTICE

The five numbers to report monthly

METRIC	WHERE IT COMES FROM	HEALTHY BY DAY 90
Weekly active users	Admin center usage report	**70% of licensed users**
Apps per user	Copilot Dashboard	**Three or more**
Hours saved	Timed tasks vs. baseline	**Two or more per week**
Sentiment	Pulse survey in the dashboard	**"Would miss it" above 70%**
Idle seats	Usage report, 30 days	**Under 10%, reassigned**

29%

faster on search, writing and summarizing in Microsoft's early user study

64%

of early users said Copilot cut their email time

Sources: Microsoft Work Trend Index 2024; Microsoft WorkLab, AI Data Drop: The 11 by 11 Tipping Point (2024); Microsoft Work Trend Index Special Report on early Copilot users (November 2023); Microsoft Learn, Copilot prompting guidance and the Copilot Dashboard. Pilot figures are illustrative, from Solution Builders client engagements.

Copilot, ready for work.

Solution Builders has run Microsoft environments for Minnesota businesses since 1995. Copilot readiness sits inside our RISE framework, delivered by 50+ engineers and backed by a 24/7 security operations center and a SOC 2 Type II audited practice.

R

Resilient

Microsoft 365 backup and tested recovery, so Copilot runs on data you can restore.

I

Integrated

Copilot connected to Microsoft 365, Teams and your line of business systems, cleanly.

S

Secure

Sharing cleanup, sensitivity labels, DLP and 24/7 monitoring of the tenant behind it.

E

Evolving

Pilots, champions, role based training and monthly reporting that proves the hours.

01

Copilot Readiness Snapshot

A 30 minute conversation and a quick look at your tenant. You leave knowing your biggest oversharing risk and your first three use cases.

FREE · 30 MINUTES

02

Copilot Readiness Assessment

Two weeks covering sharing, labels, identity, licensing and the pilot plan, with a scored report and a 90 day rollout plan.

FIXED FEE · 2 WEEKS

03

Copilot Rollout Program

Everything in this playbook, run with you: cleanup, pilot, champions, training, dashboards and monthly reporting.

MONTHLY · ONGOING

Find out if your tenant is Copilot ready in 30 minutes.

Book a free Copilot Readiness Snapshot with a Solution Builders solution architect. No demo, just a clear read on your data and your first step.

Book my Copilot snapshot

THE SHORT VERSION

Three things to remember.

If this playbook ends up in a drawer, keep these three ideas. They separate the companies that get hours back from Copilot from the companies that get a surprise.

01 **Permissions before licenses.**

Copilot shows each person everything they can already open. Fix public teams, Everyone groups and open links first.

02 **Contain, then clean, then label.**

Restricted search and content discovery buy you time. Labels and the Copilot DLP policy keep the crown jewels out of answers.

03 **Adoption is a 90 day program.**

Champions, three use cases per role, a prompt formula and a monthly report with hours saved and idle seats.

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START THE CONVERSATION

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