F12’S GUIDE TO SECURE AI ADOPTION

A Comprehensive Approach for Microsoft 365

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Introduction

The rapid rise of generative artificial intelligence (AI) has been nothing short of remarkable. According to Gartner, 80% of enterprises will incorporate generative AI by 2026, a significant increase from less than 5% in 2023. AI holds the promise of transforming how we work by streamlining manual tasks, enhancing employee skills, and driving innovation more rapidly. Beyond productivity, the economic potential of AI is vast; McKinsey estimates that AI could contribute as much as $4.4 trillion annually to the global economy by 2030.

With such potential, it’s no surprise that organisations are eager to capitalise on these new solutions. A popular choice for many is Microsoft 365 Copilot, which integrates AI seamlessly into everyday tools, making it easier and faster to realise a return on investment (ROI). Users can adopt the technology quickly without significant behavioural changes, and the ongoing benefits of AI integration can improve efficiency over time, leading to better outcomes and productivity.

However, simply acquiring the software and necessary licenses is not enough to ensure your teams can fully benefit from the new product. A study by McKinsey found that the most common barrier to AI adoption is the lack of a clear AI strategy. Companies that successfully scale their AI adoption see three times the return on their AI investment compared to those stuck in the pilot stage.

This guide was designed to help your organisation prepare for and scale AI using Microsoft 365 Copilot. We’ll walk you through key actions to achieve optimal results, covering everything from preparing and securing your data to optimising your operations. With a well-planned strategy, you can ensure that your organisation is fully equipped to take advantage of everything Microsoft 365 Copilot has to offer.

Let’s dive in!

1 F12's Best Practices for Sustainable AI Adoption

To fully leverage Microsoft 365 Copilot, follow these three best practices:

1

Optimise Your Operations

levate your data management practices and implement governance controls to fuel sustainable AI success.

2

Secure Your Data

Understand where you have sensitive and overshared content in Microsoft 365 and implement robust security measures to protect it.

3

Prepare Your Data

Centralise your data within Microsoft 365 and improve its quality to enhance AI recommendations.

These best practices are not mutually exclusive. Even if you have a solid information management infrastructure in place, strengthening your data security might still be necessary. By implementing the appropriate strategies where needed, you'll establish a strong foundation for Microsoft 365 Copilot and equip your team for AI success.

2 Preparing Your Data for Microsoft 365 Copilot

High-quality, well-organised data is one of the most critical factors for successful AI implementation. Generative AI algorithms rely on large amounts of data to learn and make accurate predictions. The quality of the output directly depends on the quality of the data it is trained on. If your data is decentralised, disorganised, or contains errors, the algorithms may produce inaccurate results, leading to poor decision-making and business outcomes. That's why it's essential to take the time to prepare your data before feeding it into an AI system like Microsoft 365 Copilot.

By properly managing your data, you can make data-driven decisions with confidence and improve the overall efficiency and effectiveness of your operations.

How to Prepare Your Data for Microsoft 365 Copilot

1. **Centralise Business-Critical Data in Microsoft 365**

   Ask yourself: Are there repositories outside of Microsoft 365 where some departments store business-critical data?

   Microsoft 365 Copilot bases its recommendations and outputs on the data available within the Microsoft 365 environment. To provide the most accurate and comprehensive insights, any data stored elsewhere—such as in self-hosted databases or other cloud services—must be migrated into your Microsoft 365 tenant. This allows Microsoft 365 Copilot to analyse and make recommendations based on all relevant data, ensuring accuracy and completeness.

   To achieve this, migrate all content to Microsoft 365 using F12's recommended migration tools, which simplify the process by offering real-time monitoring, granular scheduling, and robust security measures. These tools ensure a smooth and secure transition to Microsoft 365, enabling Copilot to access all relevant data.

2. **Complete a Data Inventory**

   Once your data is in the right environment, it's time to improve its quality. Start by conducting a discovery and analysis exercise to understand what data you have and how it's currently organised within your environment. Effective information management solutions can offer this capability and more, making it easy to gain a full picture of your data landscape.

   This exercise provides a clear understanding of your data landscape, allowing you to make informed decisions about how to improve it. Additionally, a data assessment helps identify redundant, outdated, or trivial (ROT) data that may clutter your environment and potentially skew AI results.

   With this inventory in hand, you can clean up your data by removing duplicates or redundancies and begin establishing information management processes and data governance policies. This helps maintain high data quality over time, ensuring that Microsoft 365 Copilot continues to provide valuable insights.

3. **Classify Your Content to Improve Results**

   Now that you have a data inventory, it's time to organise the data to enhance the results of AI tools like Microsoft 365 Copilot. One effective way to do this is by using metadata labels and tags to classify your content within Microsoft 365.

   Metadata provides descriptive information about your data, while labels and tags assign categories to it. By doing this, you can make your data more searchable, discoverable, and manageable, which, in turn, improves the accuracy and relevance of your AI results.

   If managing your data effectively is challenging, F12's data management tools can help. These tools allow organisations to identify high-value content, tagging and classifying it at scale while automatically applying the appropriate lifecycle policies. This prepares your data for AI, even without significant manual input.

3 Securing Your Data for Microsoft 365 Copilot

1. **Run a Risk Assessment**

   You control the management of access to your data in Microsoft 365, so it's vital to protect it by having visibility into the state of access controls within your organisation. Running a risk assessment will help you identify sensitive and overshared data in Microsoft 365, such as unprotected Personally Identifiable Information (PII), financial data, or content with anonymous sharing links.

   You can manually assess your environment for security risks by reviewing each workspace's content and corresponding site permissions or automatically with F12's security tools, which scan and aggregate sensitivity and activity data across your Microsoft 365 tenant, seamlessly identifying permissions issues for action.

   Completing this step is crucial to prevent Microsoft 365 Copilot and users from inadvertently discovering your data security vulnerabilities.

2. **Clean Up Permissions and Enforce Policies**

   Ask yourself: What sensitive data should Microsoft 365 Copilot not have access to?

   Once you've identified risks in your environment, it's time to act. Clean up any concerning permissions—consider implementing a least-privilege access model, especially for sensitive content—to ensure Microsoft 365 Copilot's output excludes information your entire organisation shouldn't see. This is not only a critical step for Copilot adoption but also a gold standard for modern security postures to prevent unauthorised data access.

   Additionally, implementing policies that mandate secure practices, such as limiting membership for Microsoft Teams or sites that contain confidential data, and training users on proper controls to keep data secure are wise practices.

   Alternatively, leave no room for error and use F12's policy tools to automatically apply the necessary security rules to your Teams, Groups, Sites, and OneDrives—or your entire Microsoft 365 tenant if needed. These tools proactively monitor configuration drift and revert out-of-policy changes as often as every two hours, ensuring proper access controls and permissions are applied without relying on end-user execution.

   By implementing these measures, you create guardrails that Microsoft 365 Copilot will respect, ensuring the continued security and compliance of your data.

3. **Maintain Your Security Measures**

   Once your environment is in good shape, you'll want to keep it that way. Regularly review and update your security policies to ensure they remain up-to-date. This includes monitoring user activity, permissions, and access controls, as well as implementing new policies to address emerging concerns.

   F12's security tools offer automated reporting for IT with at-a-glance dashboards and proactive alerts to flag anything amiss. If an issue is detected, you can adjust your security measures directly within the tool, making it fast and easy to act on any potential concerns.

4 Securing Your Data for Microsoft 365 Copilot

As AI adoption grows and data volumes increase, maintaining effective governance and data management processes becomes crucial for long-term success. 75% of C-suite executives believe that failing to scale AI within the next five years could put their businesses at risk. However, manually scaling Microsoft 365 Copilot is neither sustainable nor cost-effective in the long run, especially as organisations' AI usage increases exponentially.

For instance, businesses are generating more data than ever before, with the volume of digital data doubling every two years. As you begin to leverage AI like Microsoft 365 Copilot, you'll generate even more data. The challenge then becomes managing and governing this data safely to ensure its accuracy, security, and compliance.

Without proper maintenance, cracks can begin to surface, and Microsoft 365 Copilot's output could become inaccurate or inconsistent. That's why effective governance and data management are essential to ensuring that the way you leverage Microsoft 365 Copilot today remains safe and secure years down the road.

How to Optimise Your Operations for Microsoft 365 Copilot

1. **Establish a Management Framework**

   As Microsoft 365 Copilot transforms the way we work, managing content like data and workspaces will become more complex. Users will be working faster, creating content more quickly, and producing large volumes of data. To keep up with this rapid pace, IT teams need a consistent and structured framework that dict ates what type of content Microsoft 365 Copilot can access, who is responsible for this content, and how often the content's settings are reviewed, among other concerns.

   F12's governance tools play a crucial role in establishing this framework by automating the delivery of certain IT services, such as provisioning Teams, Sites, and Groups, or applying conditional permissions and settings. These tools ensure that content is created and maintained in accordance with your governance policies, providing tighter control of Microsoft 365 Copilot without requiring end-user or IT intervention.

2. **Implement Content Lifecycle Management**

   To ensure optimal performance of Microsoft 365 Copilot, it's important to recognise that not all data is useful, and retaining data for the sake of retention can impact the quality of Copilot's output. It's crucial to keep data only as long as necessary to ensure that AI models are trained with high-quality and relevant data.

   Automate content lifecycle management with F12's lifecycle management tools. By automating business rules, you can manage the entire content lifecycle—from creation and classification to archiving or disposal. This not only improves the quality of your Microsoft 365 Copilot output but also helps reduce storage costs.

3. **Automate Reviews and Renewals**

   Even with a strong governance strategy, it's important to double-check that appropriate controls are applied to your content, especially when using Microsoft 365 Copilot. This tool provides users with unparalleled access to content, making it essential to establish additional safeguards to ensure that content is secure and well-managed.

   Content owners are best positioned to know who should have access and whether content is still serving the organisation's goals. Requiring owners to regularly review permissions, membership, and access controls ensures content remains secure. Additionally, content owners should regularly renew content if it's still adding value or remove it if it's no longer necessary.

   F12's governance tools can help establish these activities as part of a larger automated governance strategy. Organisations can decide how often they'd like content owners to receive automated alerts to review and renew content, streamlining security and management efforts..

Bringing It All Together

Microsoft 365 Copilot offers organisations a powerful solution to optimise their Microsoft 365 environment and achieve their business goals. However, with great power comes great responsibility. That's why secure and sustainable AI adoption requires sufficient preparation and governance controls.

By taking the necessary steps to harness the power of AI and implementing effective data practices, organisations can reap all the benefits of Microsoft 365 Copilot, including saving time, increasing productivity, enhancing employee skills, and driving rapid innovation.

F12 offers a holistic approach to Microsoft 365 Copilot adoption. Our expertise and support help you build a robust data foundation, security, and approach to sustainable adoption, enabling you to harness the power of Microsoft 365 Copilot fully.

Get Started with F12

Accelerate your AI journey with Microsoft 365 Copilot and F12's expert guidance. We're committed to helping you build trust, enhance security, and foster resilience in your organisation.?

Contact F12.net today to explore how we can support your AI adoption strategy.