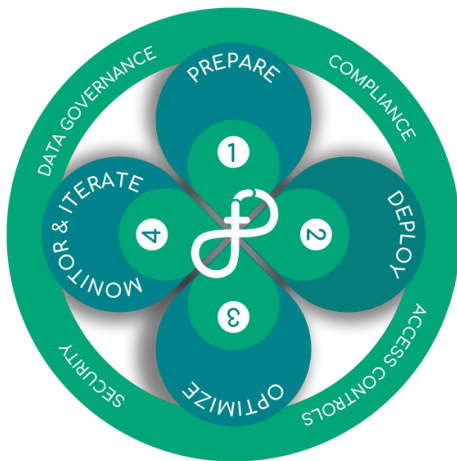# threadfin

Threadfin's Microsoft Copilot Deployment

Deploy Microsoft Copilot with confidence. Our framework ensures governance, security & and data protection, so you can experience Copilot's full potential while safeguarding your organization. With built-in DLP & compliance controls, we minimize AI-driven data exposure & ensure sensitive information stays protected.

1 PREPARE THE FOUNDATION

We establish a secure, well-governed environment by aligning stakeholders, assessing risks & implementing compliance frameworks.
- Align stakeholders on data policies & business goals
- Conduct Copilot-specific risk assessment for data exposure & access
- Implement Microsoft Purview Compliance Suite for data governance
- Implement Microsoft DLP to restrict unauthorized AI-driven data exposure
- Enforce access control & role-based security
- Enhance security posture with Secure Score

2 DEPLOY COPILOT EXPERIENCES

We strategically introduce Copilot into workflows through structured pilots, controlled rollouts & user training.
- Define key use cases (email automation, document summarization, code generation) to align business value
- Pilot & measure impact before full deployment, using Secure Score to assess baseline security benchmarks (identity controls, data-loss prevention, etc.)
- Apply adaptive DLP enforcement to continuously refine security settings based on Copilot usage insights
- Provide training on AI use, best practices & governance
- Activate Copilot across platforms (Teams, SharePoint, Outlook) & experiences (Copilot for Sales, Finance, Service, etc.)

3 OPTIMIZE

Post-pilot, we refine & enhance Copilot's functionality based on real-world feedback, fine-tuning security, compliance & performance.
- Track key adoption, security & productivity KPIs
- Establish structured user feedback loops
- Leverage Purview to enforce data security & compliance
- Align Copilot experiences with security policies & workflows
- Fine-tune system configurations & permissions
- Monitor & enhance AI-driven insights

**Minimize AI oversharing.
Deploy Microsoft 365 Copilot
without fear
of data compromise.**

4 MONITOR & ITERATE

Long-term, we continuously optimize security, refine policies & address evolving risks.
- Track key security & adoption metrics
- Use Secure Score to guide improvements
- Use Defender for Cloud Apps to monitor & refine DLP policies based on real-world use patterns
- Optimize settings based on usage patterns & feedback
- Automate compliance & security reviews
- Refine AI automation policies

**Click here for our
Readiness Assessment.**