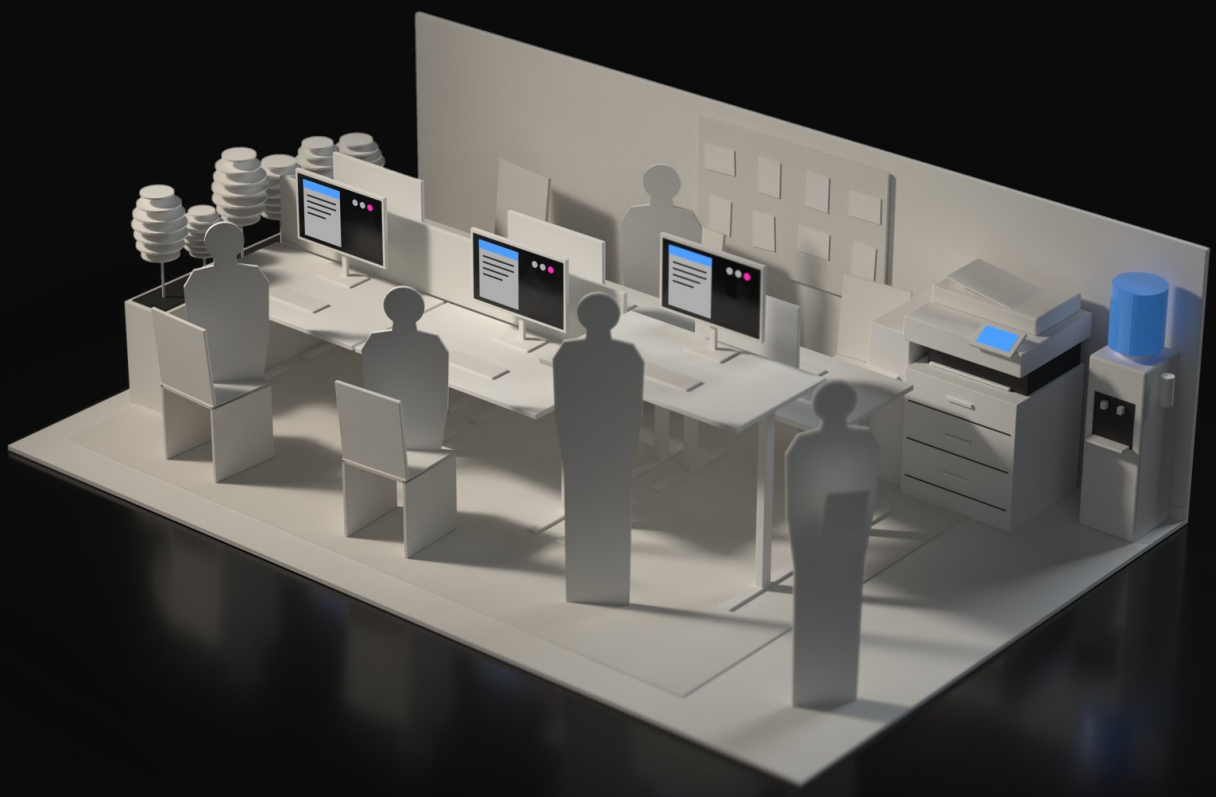


MICROSOFT 365 AND AI · AS OF NOVEMBER 2026

Copilot readiness. Simplified.

Six steps to switch on AI in Microsoft 365 without showing staff things they shouldn't see.

John Morgan · Initial Technology · November 2026

THE ONE THING TO KNOW

Copilot sees what each person can already see.

It doesn't get special access. It just finds things faster. So if the payroll folder was shared with everyone years ago, nobody noticed, because nobody went looking. Copilot will look, in seconds, for anyone who asks.

SIMPLIFIED

Fix who can see what. Switch it on for a few people. Measure. Then decide.

SIX STEPS AT A GLANCE

01

Decide who owns it

One name. Clear reasons. A small pilot group.

02

Fix who can see what

The step that matters most.

03

Label the important things

Protection that travels with the file.

04

Set the rules

A one-page AI policy staff have read.

05

Pilot, train, measure

30 to 60 days, with real club tasks.

06

Keep it safe

Permissions drift. Check every quarter.

WHAT GOOD LOOKS LIKE

1
named owner

5–10
people in the pilot

0
sensitive sites open to everyone

1
page of AI rules

60
days, then decide

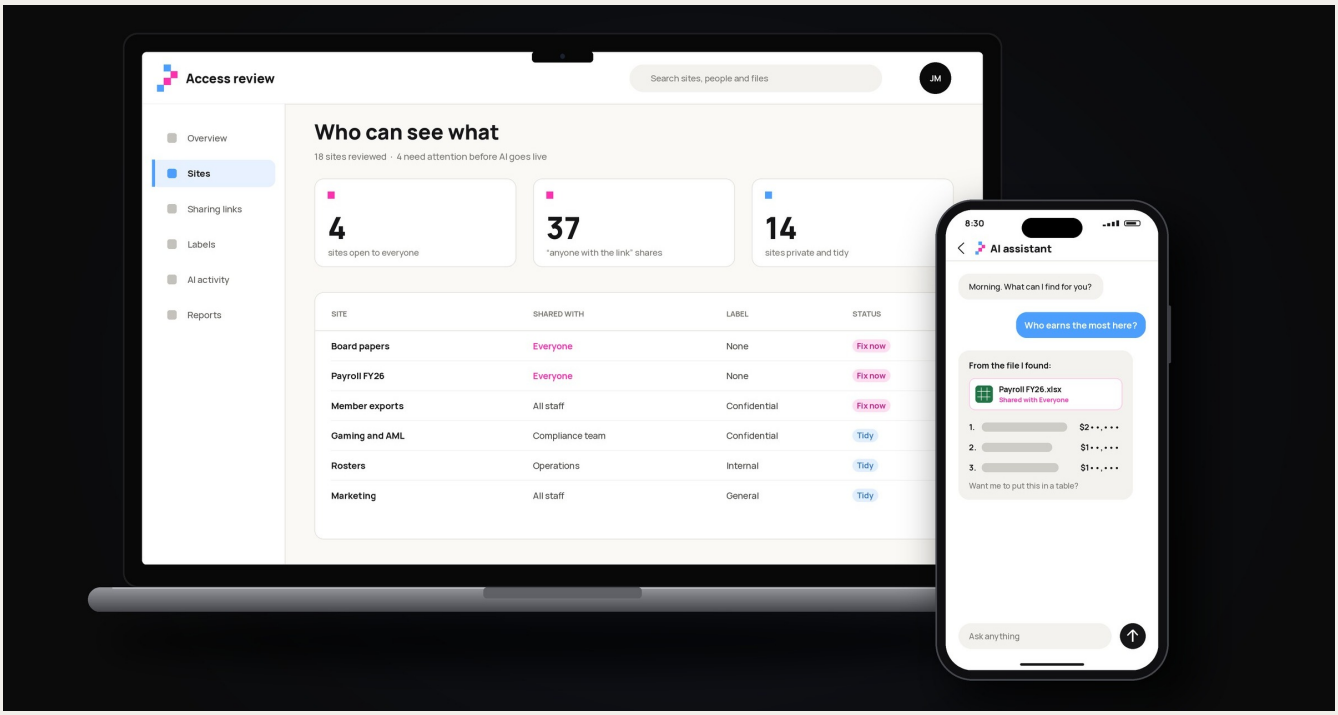


Illustration. If a file is shared too widely, an AI assistant will find it. Politely, and in seconds.

STEP 01

Decide who owns it

Interest is easy. Ownership gets it done.

- [ ] **Name one owner.**
  Approves who gets access and signs off the policy.
- [ ] **Pick a pilot group.**
  Five to ten people who write, summarise or search a lot.
- [ ] **Tell the board.**
  What you're trialling, the safeguards, when you'll report back.
- [ ] **Write down why.**
  Two or three outcomes, in plain words.
- [ ] **Budget the pilot first.**
  Full Copilot is a paid licence per person. Copilot Chat comes with Microsoft 365.
- [ ] **Agree a finish date.**
  A pilot without an end date is just a subscription.

HANDY TIP

Leave out your biggest fan and your biggest sceptic. You want honest, average users.

WRITE IT DOWN

OWNER _____

PILOT START _____

WHAT WE WANT IT TO DO

_____

_____

STEP 02

Fix who can see what

The step that matters most, and the one most often skipped.

- [ ] **Find the “everyone” sites.**
  Teams, sites and folders open to all staff.
- [ ] **Remove old sharing links.**
  “Anyone with the link” goes. New links expire.
- [ ] **Use the reports you already get.**
  One Copilot licence unlocks SharePoint Advanced Management's oversharing reports.
- [ ] **Lock down sensitive places.**
  HR, payroll, board, members, gaming and AML.
- [ ] **Remove old accounts.**
  Former staff, shared logins, generic accounts.
- [ ] **Hide what isn't fixed yet.**
  Restricted Content Discovery keeps chosen sites out of Copilot and search.

HANDY TIP

Hiding a site from Copilot isn't the same as locking it. People with access can still open it. Fix the permissions too.

WRITE IT DOWN

SENSITIVE SITES TO CHECK

CHECKED BY AND DATE

STEP 03

Label the important things

Labels travel with the file, wherever it ends up.

- [ ] **Create three or four labels.**
  General, Internal, Confidential, Board.
- [ ] **Set how long you keep things.**
  Decide once, then let Microsoft 365 enforce it.
- [ ] **Label the obvious first.**
  Board papers, HR files, contracts, member exports.
- [ ] **Block risky sharing.**
  Rules that stop card and licence numbers leaving.

HANDY TIP

Four labels staff actually use beats twelve they ignore.

WRITE IT DOWN

LABEL 1	LABEL 2	LABEL 3	LABEL 4

STEP 04

Set the rules

Staff are already using AI. Rules make it safe, not secret.

- [ ] **Write a one-page AI policy.**
  Approved tools, no-go information, who to ask.
- [ ] **Keep an AI register.**
  Each tool, its owner, what data it touches.
- [ ] **Say when AI helped.**
  On board papers and anything sent to members.
- [ ] **Keep personal details out of public AI.**
  That's the privacy regulator's best-practice advice.
- [ ] **Update your privacy policy.**
  New rules on automated decisions start 10 December 2026.
- [ ] **Check before you send.**
  A person reads it. Every time.

HANDY TIP

The National AI Centre has free AI policy and AI register templates. Start there, not from a blank page.

WRITE IT DOWN

APPROVED AI TOOLS

NEVER PUT INTO AI



Board papers are usually the first thing a club wants AI to help with. Make sure they're locked down first.

STEP 05

Pilot, train, measure

A short, honest pilot beats a big launch that fades.

- [ ] **Run it for 30 to 60 days.**
  Long enough to get past the novelty.
- [ ] **Train with real club tasks.**
  Board papers, long email threads, finding a policy.
- [ ] **Ask two questions each week.**
  Time saved? Anything it shouldn't have shown?
- [ ] **Decide at the end.**
  Expand, adjust or stop. Report it to the board.

HANDY TIP

Give everyone ten good starter prompts on day one. A blank box is where pilots go to die.

WRITE IT DOWN

WEEK	HOURS SAVED	ISSUES FOUND

STEP 06

Keep it safe after go-live

Permissions drift. New sites, staff and features arrive every month.

- [ ] **Review access every quarter.**
  Re-run the oversharing reports.
- [ ] **Make new sites private by default.**
  So the problem doesn't come back.
- [ ] **Approve agents like new systems.**
  They can reach more data than a person would.
- [ ] **Glance at the audit log.**
  Copilot activity is recorded in Microsoft Purview.

HANDY TIP

Put the quarterly review in the calendar now, as a recurring meeting. Future you will be grateful.

WRITE IT DOWN

Q1 REVIEW	Q2 REVIEW	Q3 REVIEW	Q4 REVIEW

DAY 60: THE DECISION

DECIDE AND SIGN

☐ Expand ☐ Adjust and re-test ☐ Stop

WHY

SIGNED OFF BY

Want a second pair of eyes before you switch it on?

A Copilot and AI readiness check tells you, in writing, what Copilot would turn up for your staff today, what to fix first, and a sensible pilot plan. Fixed price, plain English, and independent. I don't sell licences.

0401 539 456 · info@initialtech.com.au · initialtech.com.au/sharepoint-and-ai

THE SIMPLIFIED GUIDES

Free at initialtech.com.au/resources

01 Microsoft 365 security
02 Cyber basics and phishing
03 Ransomware readiness
04 Backup and recovery plan
05 Incident response
06 Working from home securely
07 Copilot readiness
08 Choosing an IT provider
09 Buying a major system
10 The board technology report
11 Copilot vs ChatGPT vs Claude

Sources, checked November 2026. Microsoft Learn: SharePoint Advanced Management licensing (included with Microsoft 365 Copilot); Restrict discovery of SharePoint sites and content; Microsoft 365 pricing and packaging updates, July 2026 (Copilot Chat enhancements in Business plans). OAIC: Guidance on privacy and the use of commercially available AI products. National AI Centre: Guidance for AI Adoption, AI policy guide and template, AI register template. Privacy and Other Legislation Amendment Act 2024: automated decision-making transparency from 10 December 2026. General information only, not legal advice. Microsoft changes features and licensing often, so check current details before you buy.