

23 Prerequisites for Copilot

The following technical aspects need to be in place for a successful rollout:

1. A Microsoft 365 Copilot subscription: Copilot is an additional feature on top of Microsoft 365, so you'll need a subscription to use it.
2. An existing license from the following:
 - a. Commercial tenants
 - i. Microsoft 365 E3 or E5 or E7
 - ii. Microsoft 365 F1
 - iii. Microsoft 365 F3 or Office F3
 - iv. Office 365 E1 (Office apps without Teams), E3 or E5
 - v. Microsoft 365 Business Basic
 - vi. Microsoft 365 Business Standard
 - vii. Microsoft 365 Business Premium
 - b. Edu tenants
 - i. Microsoft 365 A1/A1 Plus, A3, or A5
 - ii. Office 365 A3/A5
 - c. Government tenants
 - i. Microsoft 365 G3, G5, F1
 - ii. Office 365 G1, G3, G5, and F3
3. A device that meets the system requirements: Copilot is available on Windows, macOS, iOS, and Android devices that meet the system requirements for running Microsoft 365.
4. An internet connection: Copilot uses cloud-based AI technology, so you'll need an internet connection to use it.
5. The Microsoft 365 apps distributed via Current Channel or Enterprise Monthly Channel
6. Any modern browser with third-party cookies enabled for Microsoft 365 online apps (Word Online, Excel Online, PowerPoint Online). Recommended browsers: Microsoft Edge (best compatibility), Google Chrome, Mozilla Firefox, or Apple Safari.
7. Exchange Online mailbox
8. Data to search within the tenant
9. An Entra ID for each Copilot user

10. Mobile devices running a supported OS: iPhone with iOS 16.0 or later, iPad with iPadOS 16.0 or later, or Android 10 or later.
11. Uninhibited traffic flow to all the necessary Microsoft 365 URLs and FQDNs, ideally set dynamically by following <https://learn.microsoft.com/microsoft-365/enterprise/urls-and-ip-address-ranges>

In addition, some strongly recommended prep steps:

- A. Prewrite around policies, procedures, success criteria, and ROI / KPI metrics should be in place.
- B. A plan to protect your data (using Purview, SharePoint permissions, and the like).
- C. A plan to operationalize and internalize the tool using Organizational Change principles.
- D. A targeted set of users whose day-to-day business activities lend themselves to using AI, and a training plan to enable them.

Next up, let's get those targeted users onboard with a pilot of Copilot!