

# Microsoft 365 AI Readiness Assessment

Microsoft's incorporation of AI into their 365 suite of services means your credit union needs to take steps to make sure it's AI ready – and Optiri is here to help. Our team of experts are available to assess your Microsoft 365 environment and create a roadmap of action items to make sure your credit union is AI ready.





## Get AI Ready Today

With Optiri's holistic evaluation of your credit union's Microsoft environment, you can have optimized data classification and an established security framework to support your AI and data strategy in no time.

- Action plan based on your credit union's specific goals
- Analysis of current configurations within Purview, Teams, SharePoint, OneDrive and Copilot services



## AI Readiness Plan Development

Optiri experts will evaluate your current configurations within Purview, Teams, SharePoint, OneDrive and Copilot services.

- **Purview**

- Establish data classification and governance policies
- Implement Microsoft Purview Unified Catalog to curate, manage data quality and manager user access

- **Teams, SharePoint, OneDrive**

- Identify data repositories and areas of opportunity for data consolidation
- Identify and evaluate security on Teams groups, SharePoint sites and OneDrive accounts
- Provide best practices configurations for Teams, SharePoint and OneDrive services based on the credit union's size and needs

- **Copilot**

- Identify data sources across credit union data environment
- Establish Purview Information Protection policies and ensure access permissions are correctly configured to prevent data leakage
- Establish Copilot/AI governance risk strategy

**Start the process of becoming AI ready today – reach out to Optiri to learn more about our Microsoft 365 AI Readiness Assessment.**