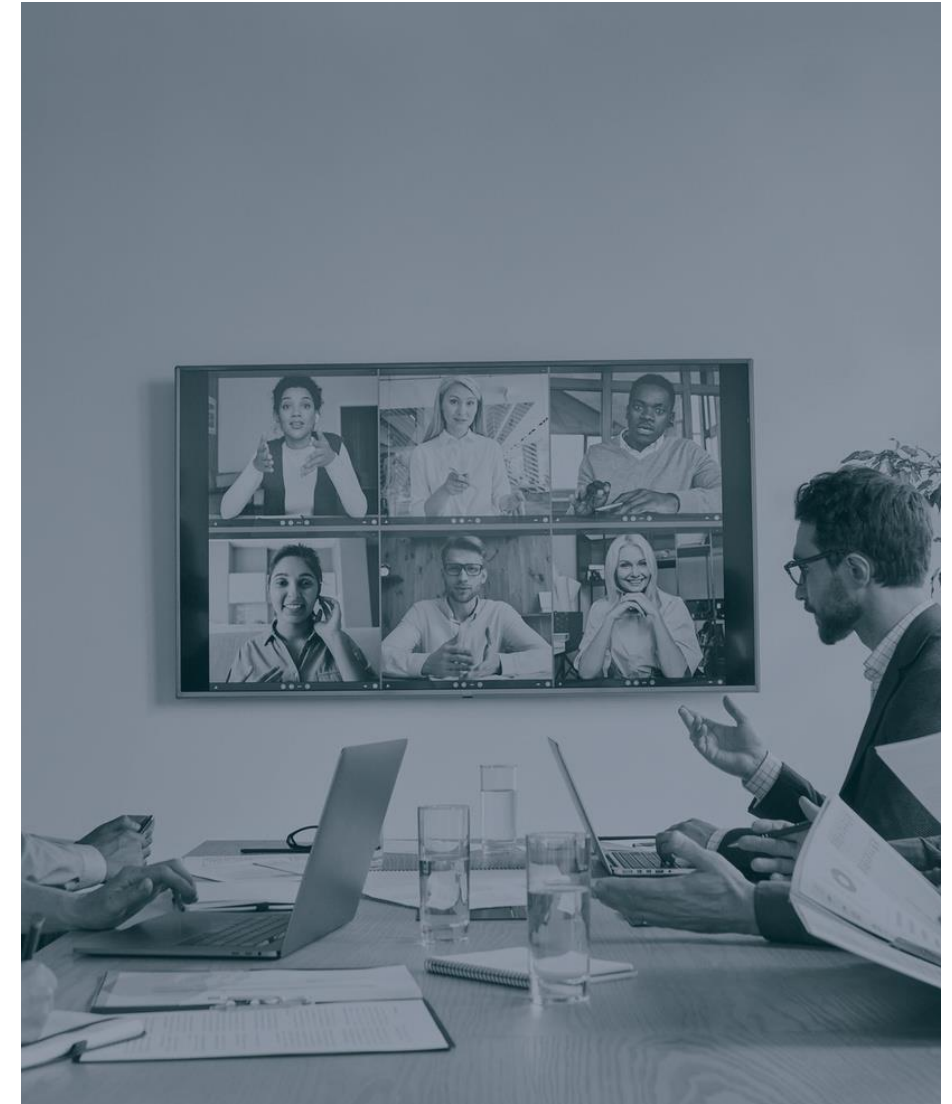


How to Establish an AI Center of Excellence for Scalable Success

A Webinar - March 13, 2025



Agenda



Goal

Our goal today is to help you appreciate the importance of establishing an AI Center of Excellence (CoE) and the roles that this important governance construct has in your organization.



Agenda

Welcome and Introductions

Introducing the CoE (Center of Excellence)

Function #1 - Governing

Function #2 - Nurturing

Getting Started

Meet Your Facilitators



Kai Andrews

- Director of Data, AI, & Power Platform Solutions



Hayley Meese-Cherry

- Manager, Organizational Change Management

Who We Are



Microsoft Advanced Specializations

Modern Work

- ✓ Teamwork Deployment
- ✓ Meetings & Meeting Rooms for Microsoft Teams
- ✓ Calling for Teams
- ✓ Adoption & Organizational Change Management
- ✓ Endpoint Management

Security & Compliance

- ✓ Information Protection & Governance
- ✓ Threat Protection
- ✓ Identity & Access Management
- ✓ Cloud Security

Azure Apps & Infrastructure

- ✓ Azure Virtual Desktop
- ✓ Infra and Database Migration to Azure

Member of
**Microsoft Intelligent
Security Association**



2022 Microsoft US Partner of the Year: Modern Endpoint Management

2022 Microsoft US Partner of the Year: Meetings, Calling, & Devices for Microsoft Teams

2020 Microsoft US Modern Workplace Partner of the Year: Teams Calling and Meetings

2018 Microsoft US Modern Workplace Partner of the Year: Intelligent Communications

2015 Microsoft Unified Communications Partner of the Year (including 2009, 2010)

2015 Microsoft Global Communications Partner of the Year

2010 Microsoft East Region Overall Partner of the Year: All Competencies

2009 Microsoft Global Unified Communications Partner of the Year

2008 Microsoft US Higher Education Partner of the Year



Microsoft Partner of the Year

What We Do



Microsoft 365

- Exchange Online
- OneDrive
- Microsoft Teams Calling, Meetings, Rooms
- Endpoint Management
- SharePoint
- Copilot for Microsoft 365

Microsoft Azure

- Azure Migrations
- Entra ID (fka AAD)
- Azure Storage
- Azure VMware Solution (AVS)
- Nutanix Cloud Clusters on Azure

Modern Datacenter Architecture

- Nutanix
- Cohesity
- Cisco
- VMware
- Pure Storage

Security & Compliance

- Microsoft 365 Security
- Microsoft Intune
- Microsoft Purview
- Azure Security
- Arctic Wolf
- ThreatHunter MXDR

Virtual Desktops

- Azure Virtual Desktop
- Citrix
- Horizon

Data, AI, Apps & Automation

- Azure
- Azure Open AI
- Custom Copilots
- Microsoft Power Platform
- Microsoft Fabric

Consulting Services

- Organizational Change Management
- Strategic Advisory Services
- Licensing Optimization Workshop
- Incident Response Tabletop Exercise

Cloud Data Protection

- Rubrik
- Cohesity

Disaster Recovery

- Azure Site Recovery
- Nutanix
- Zerto

Networking

- Cisco
- Meraki

**Managed Services to
Support All Solutions**

Housekeeping Items



- Let's keep it interactive! Please use the chat to ask questions – we will respond live or in the chat as appropriate.
- The webinar slide deck, and recording will be sent to all registrants.

01

Introducing the CoE



Three Essentials for AI Success



Leadership

Develop leadership capabilities to leverage AI for business outcomes

- ✓ Executive sponsorship
- ✓ Align AI to business strategy
- ✓ Providing clarity and prioritization
- ✓ **Best practice:** Center of Excellence



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Center of Excellence



Technical readiness

Build and iterate technical skills to deliver on business results

- ✓ Secure your data infrastructure
- ✓ Risk management
- ✓ Technical skilling
- ✓ **Best practice:** Center of Excellence

Responsible AI principles

AI Center of Excellence Framework



Building an AI Center of Excellence involves establishing a framework of various components that contribute to its success in managing AI initiatives within your organization.

At a minimum, CoE's must consider, address, and establish the following: strategy and governance, technology and talent, performance measurement, scalability and flexibility.

AI-related CoE's should always look to foster a culture of innovation, collaboration, continuous improvement, and community building, in addition to the governance considerations.



Roles for an AI CoE



AI Center of Excellence Team

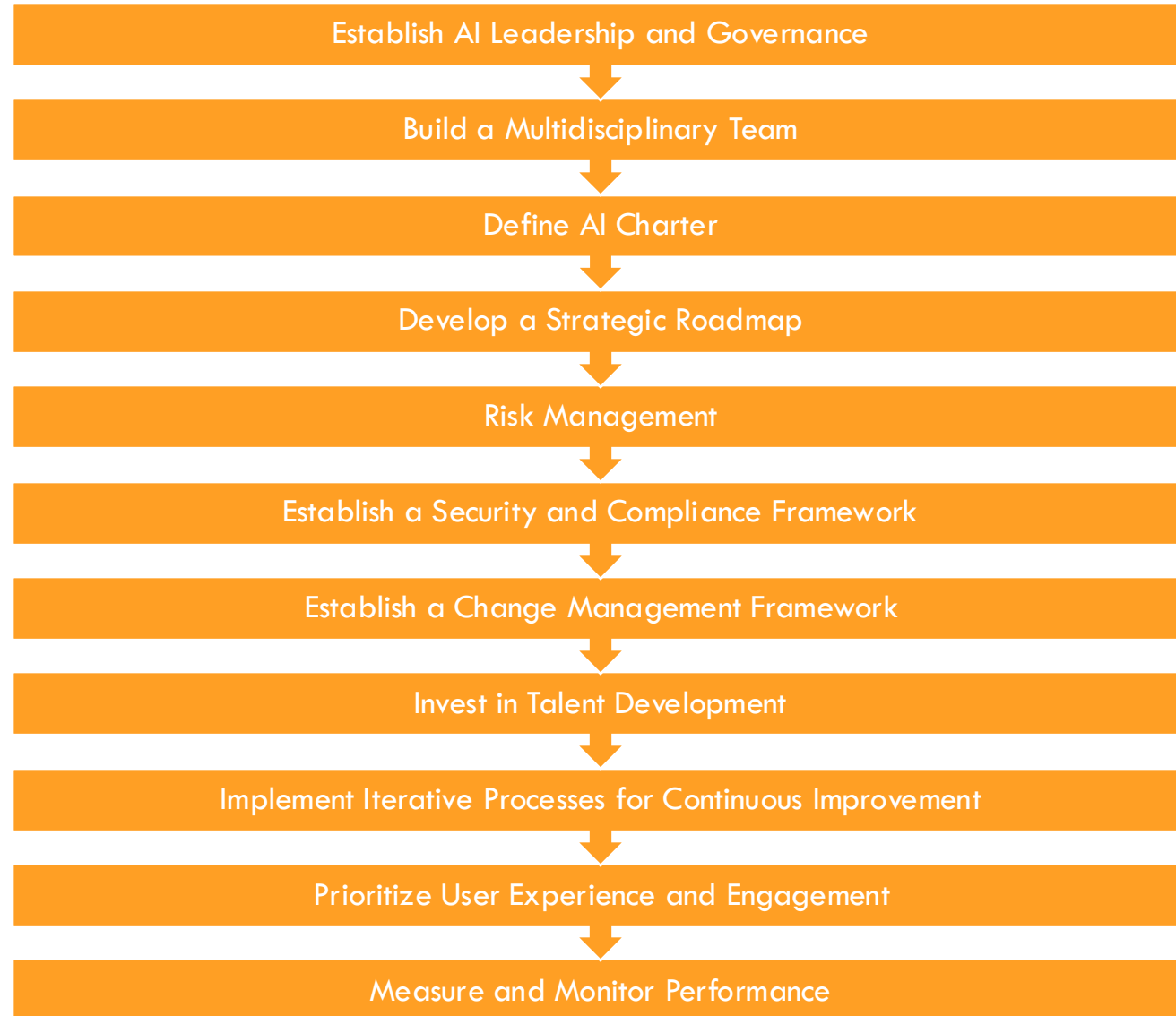
The Governing Body

- Consults AI Charter and regulations
- Sets rules, guidelines, principles and makes decisions rooted in compliance
- Prioritizes next steps and timelines
- Considers overall organizational value of any new area of focus
- Made of stakeholders, sponsors, and those who will execute on decisions

The Nurturing Body

- Helps facilitate collaboration and communication
- Seeks feedback and integrates into deployment and preparation plans
- Change Champions help evangelize new technology and benefits and support user community
- Prioritizes user experience and knowledge sharing

Steps in Setting up a CoE

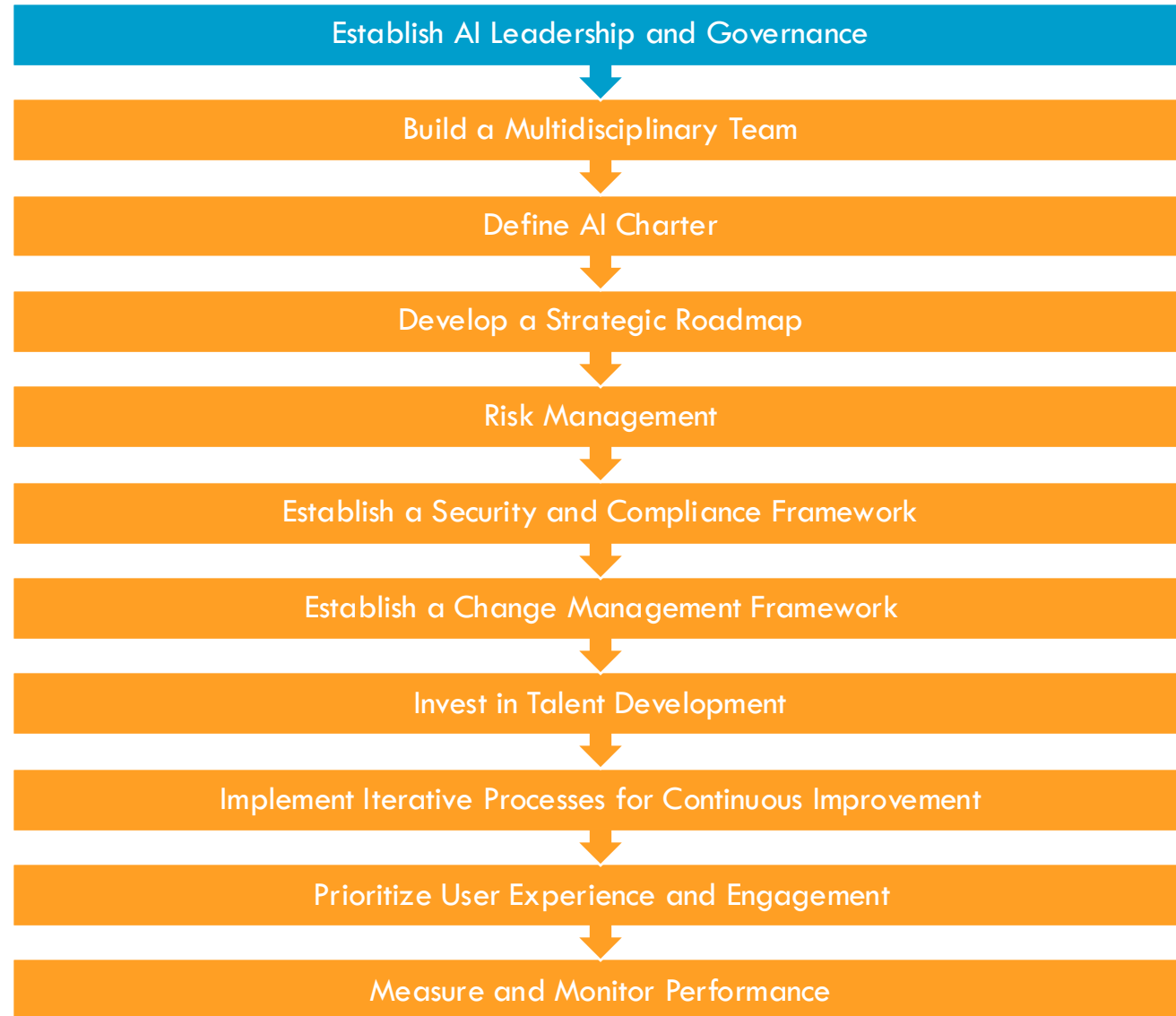


02

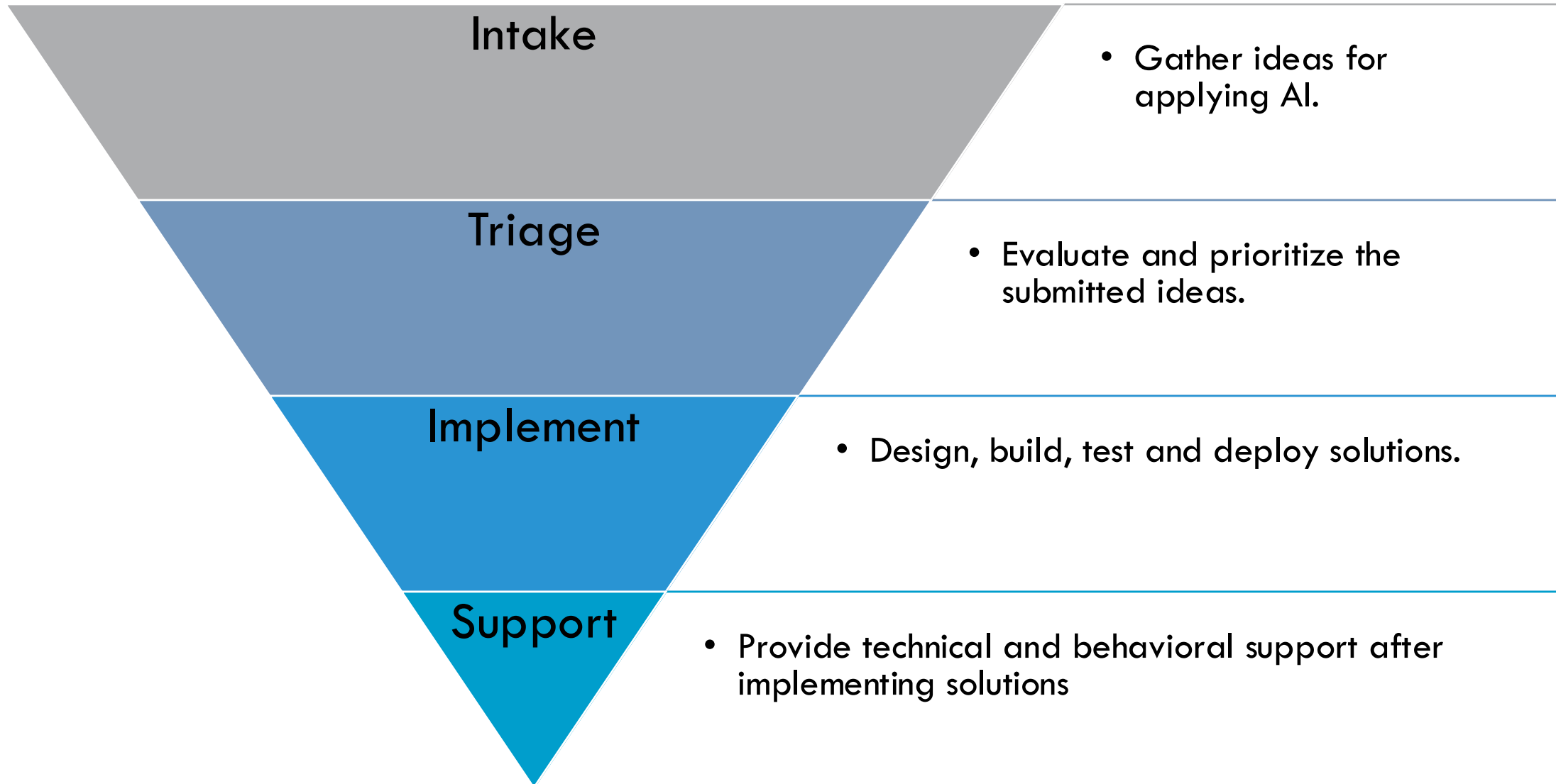
Function #1 - Governing

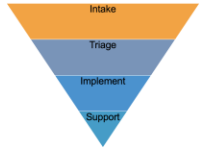


Steps in Setting up a CoE



Establish Governance Model





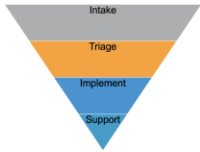
Intake - Best Practices



- ✓ Open idea submission process to entire organization.
- ✓ Use tools such as Microsoft Forms to gather ideas.
 - Name
 - Idea Title
 - Challenge being Addressed
 - Solution being Recommended
 - Estimated ROI
- ✓ No idea is too big or too small.
- ✓ Respond to each submission to personalize the process.
- ✓ Engage through gamification
 - Prize drawing each month/quarter for new submissions

The screenshot shows a Microsoft Forms survey titled "Automation and AI Initiatives Idea Collection". The form is set against a background of green silhouettes of people's heads, some with lightbulbs. The form content includes:

- Title:** Automation and AI Initiatives Idea Collection
- Introductory text:** We are collecting ideas for potential automation and AI initiatives. Please provide detailed information about your idea to help us understand its impact and feasibility.
- Personalization:** Hi, Kai. When you submit this form, the owner will see your name and email address.
- Required field indicator:** * Required
- Question 1:** 1. Title *
Enter your answer
- Question 2:** 2. Description *
Enter your answer
- Question 3:** 3. Impacted Practices *
Please list the practices that will be impacted by this idea
Enter your answer
- Question 4:** 4. Current Challenges/Pain Points *
Describe the current challenges or pain points that this idea aims to address

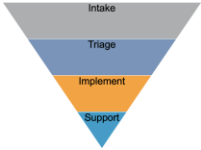


Triage - Best Practices



- ✓ Establish easily understood and consistent evaluation rules.
 - Technical Feasibility
 - Data Readiness
 - Cost
 - Timeline
 - ROI
- ✓ OK to break large initiatives into smaller parts.
- ✓ Be transparent with decision making.
- ✓ OK to anonymize submitters and obscure idea details...but no invisible items.
- ✓ Periodically revisit older items on the list.

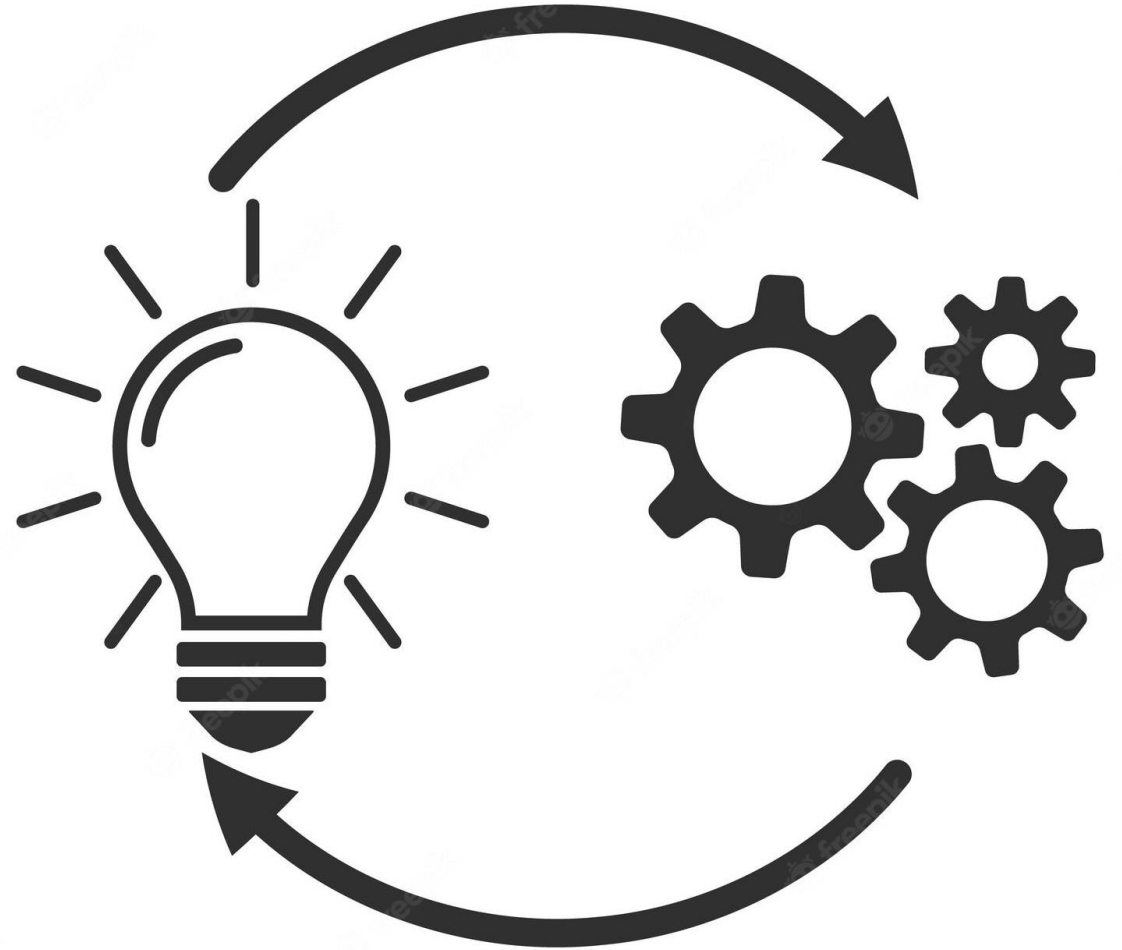


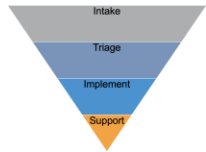


Implement - Best Practices



- ✓ Assign adequate resources to accomplish goals in a timely and effective manner.
- ✓ Have clear accountability and responsibility (RACI).
- ✓ Aim for a “Minimum Viable Product” (MVP) to get started.
- ✓ Use a continuous improvement mindset to iterate on a solution over time (OK to have breaks between improvements).
- ✓ Do your best to measure current state and future state to understand true ROI.
- ✓ Did someone say change management?





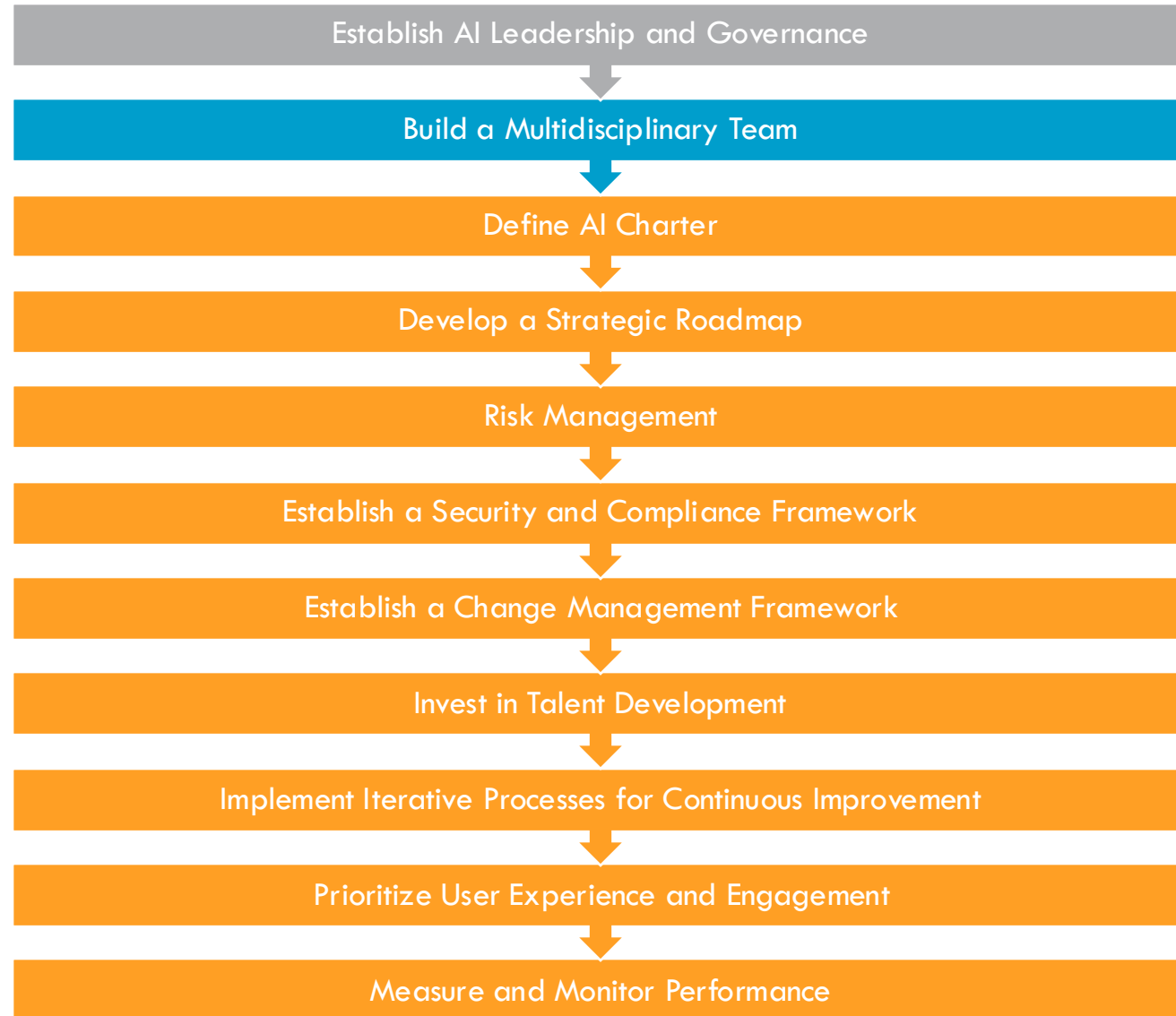
Support - Best Practices



STAY
TUNED!



Steps in Setting up a CoE



Building a Multidisciplinary Team



- ✓ Forming a multidisciplinary team is crucial for a CoE. This diversity not only enhances the quality of decision making but also promotes a culture of continuous learning.
- ✓ The collaboration of individuals with varied skills, including business, technical, and change management, ensures comprehensive coverage and effective execution of the CoE’s initiatives.

CoE Director / Manager	Executive Leadership	Steering Committee
Project Manager	IT Integration Specialist	Data Governance Specialist / Team
Technical Experts	Business Representatives	Business Analyst
Financial Analyst	Security and Compliance Officer	Help Desk Support
Change Management Specialist	User Adoption Specialist	Communication Specialist
Training Specialist	User Experience (UX) Specialist	Training Coordinator
Champion Representative for End-Users	Subject Matter Experts	Quality Assurance Specialist

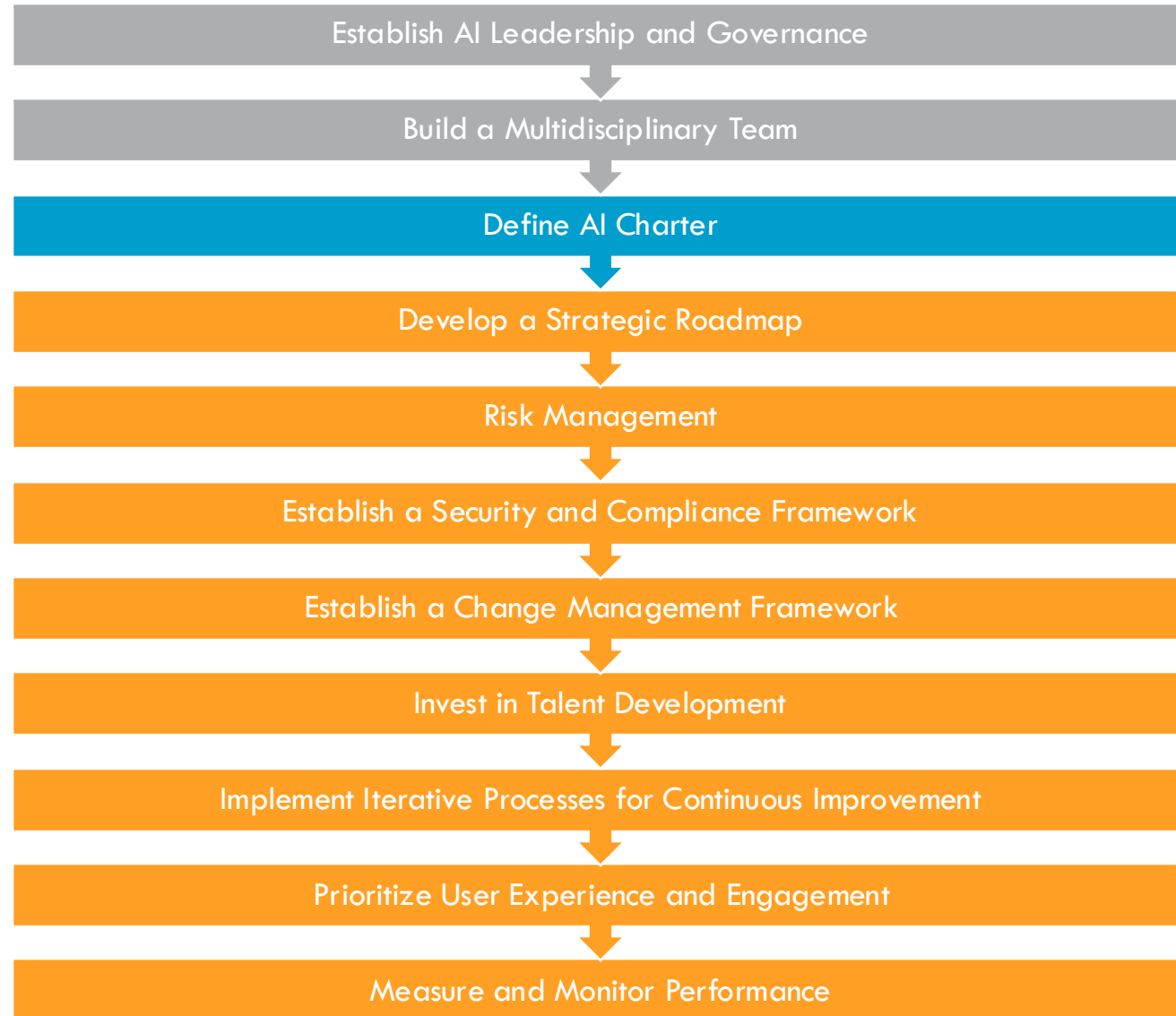
Building a Multidisciplinary Team



- ✓ Don't make the team too big. Smaller teams can be nimbler. Rotate membership if you want more diverse opinions.
 - **Core Team** = Program Manager, Executive Sponsor, 1 Permanent IT Member, 1 Permanent Business Member
 - **Rotating Participants** = 2-4 individuals most immediately impacted by prioritized initiatives

CoE Director / Manager	Executive Leadership	Steering Committee
Project Manager	IT Integration Specialist	Data Governance Specialist / Team
Technical Experts	Business Representatives	Business Analyst
Financial Analyst	Security and Compliance Officer	Help Desk Support
Change Management Specialist	User Adoption Specialist	Communication Specialist
Training Specialist	User Experience (UX) Specialist	Training Coordinator
Champion Representative for End-Users	Subject Matter Experts	Quality Assurance Specialist

Steps in Setting up a CoE



Define AI Charter



- ✓ A strategic document outlining the principles, guidelines, and ethical framework for how an organization plans to develop, deploy, and use AI in the workplace.
- ✓ AI charters typically address the organization's foundational principles – the core beliefs and values that underpin any framework.
- ✓ Does not have to be a lengthy document to get started - 1-2 pages typically suffices to establish base guidelines and communicate intent.

AI Charter Components



AI Charters Often Address the Following		
Ethical Principles & Values	Responsible Use	Transparency
Accountability	Data Privacy & Security	Stakeholder Engagement & Concerns
Fairness & Bias Mitigation	Inclusivity & Diversity	Compliance & Regulations
Continuous Improvement	Data Governance	Sustainability
Risk Management	Education & Training	Monitoring & Evaluation
Research & Development Guidelines	Oversight & Guidance	Audit & Review
Resource Allocation	Communication & Reporting	Incident Response

AI Charter Components



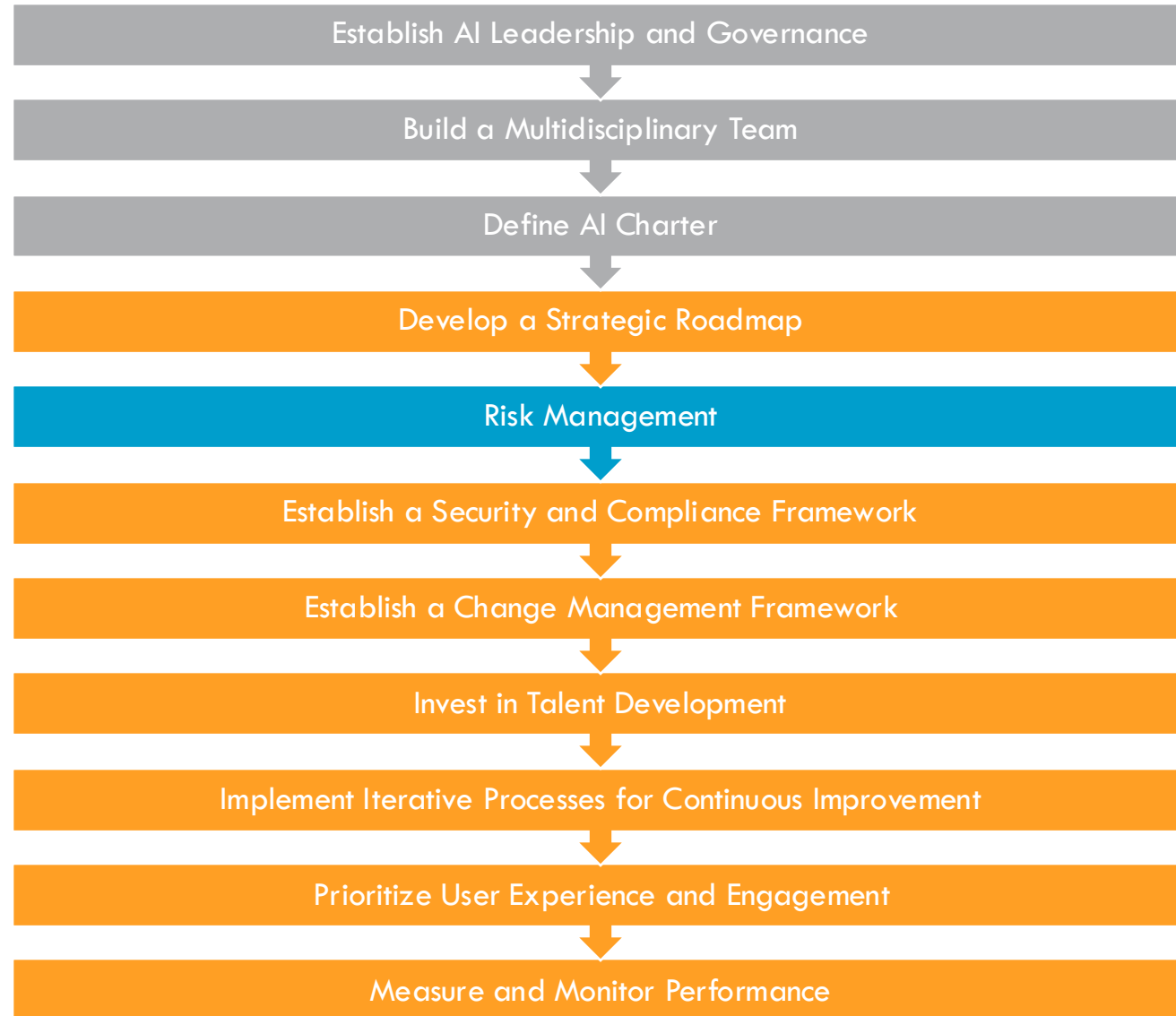
AI Charters Often Address the Following		
Ethical Principles & Values	Responsible Use	Transparency
Accountability	Data Privacy & Security	Stakeholder Engagement & Concerns
Fairness & Bias Mitigation	Inclusivity & Diversity	Compliance & Regulations
Continuous Improvement	Data Governance	Sustainability
Risk Management	Education & Training	Monitoring & Evaluation
Research & Development Guidelines	Oversight & Guidance	Audit & Review
Resource Allocation	Communication & Reporting	Incident Response

03

Function #2 - Nurturing



Steps in Setting up a CoE

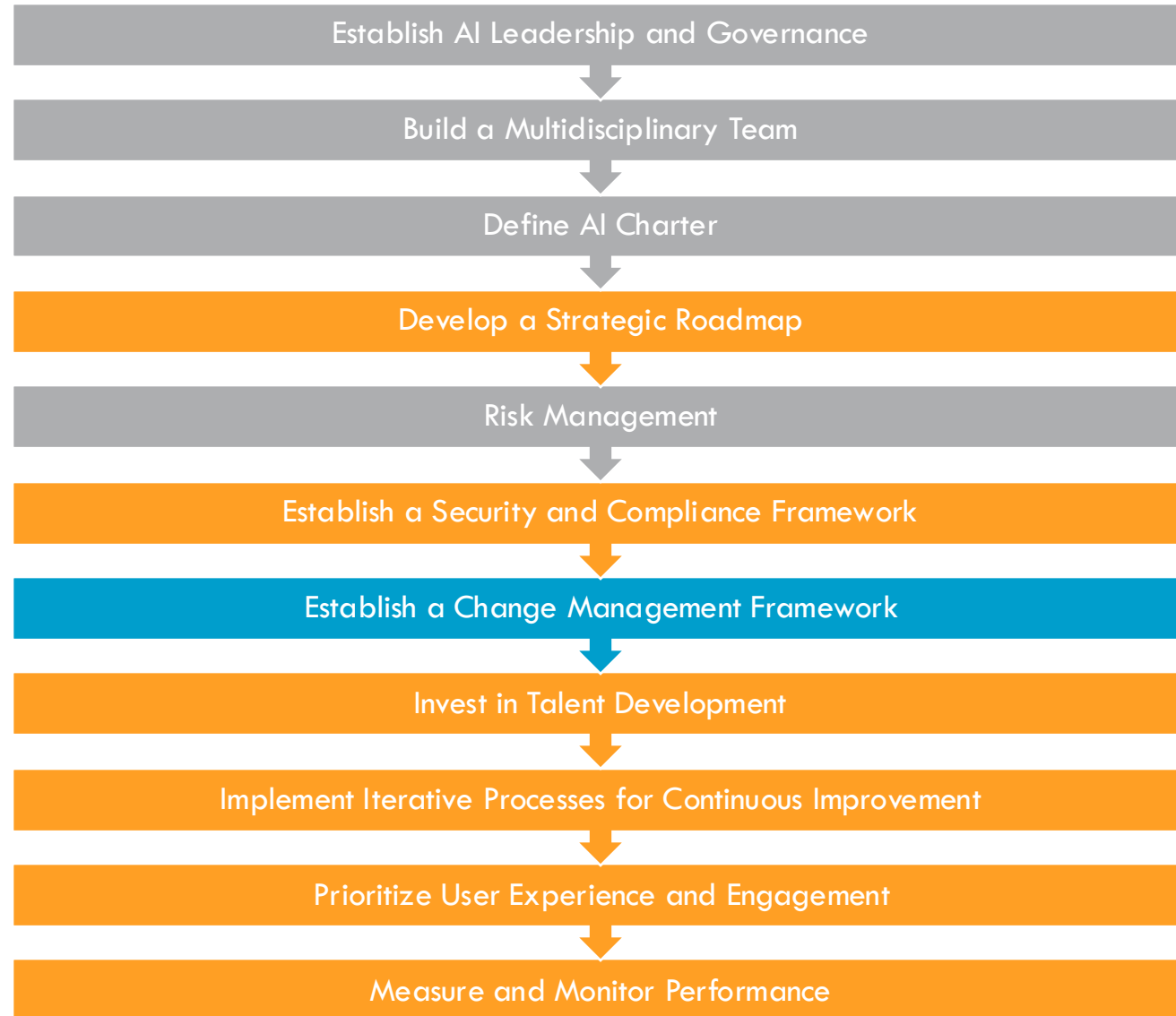


Risk Management

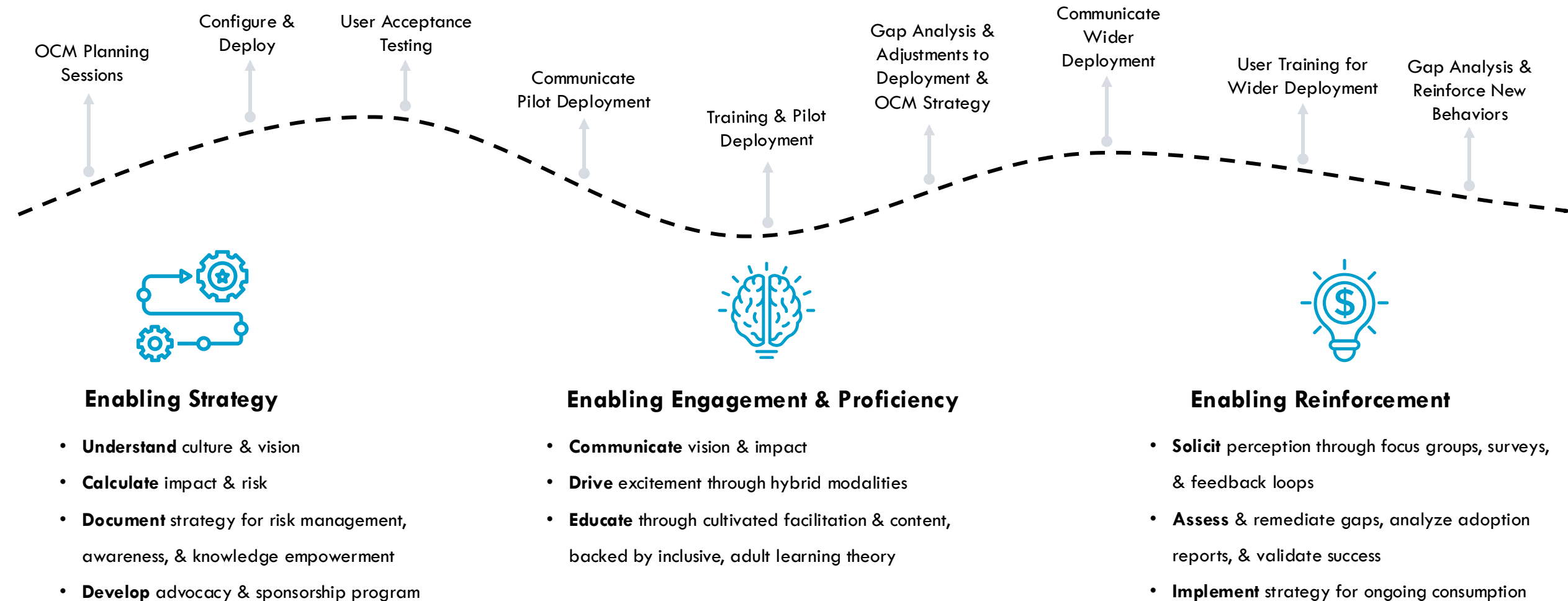


- How aware are key stakeholders of the upcoming AI launch, and is there sufficient leadership buy-in? What risks are associated with lack of support or awareness from key leaders?
- How will the team identify and address potential risks related to stakeholder engagement and involvement throughout the deployment period?
- How are expectations being managed regarding the benefits and limitations of AI? What is the balance of realistic and unrealistic expectations today?
- How will the progress of the change be tracked, and what risks are associated with not monitoring the change process effectively?
- What mechanisms are already in place to support employees through change within your organization, and what risks are associated with insufficient support?
- How will feedback from users be incorporated into future iterations of AI tools, and what risks exist if this loop is neglected?

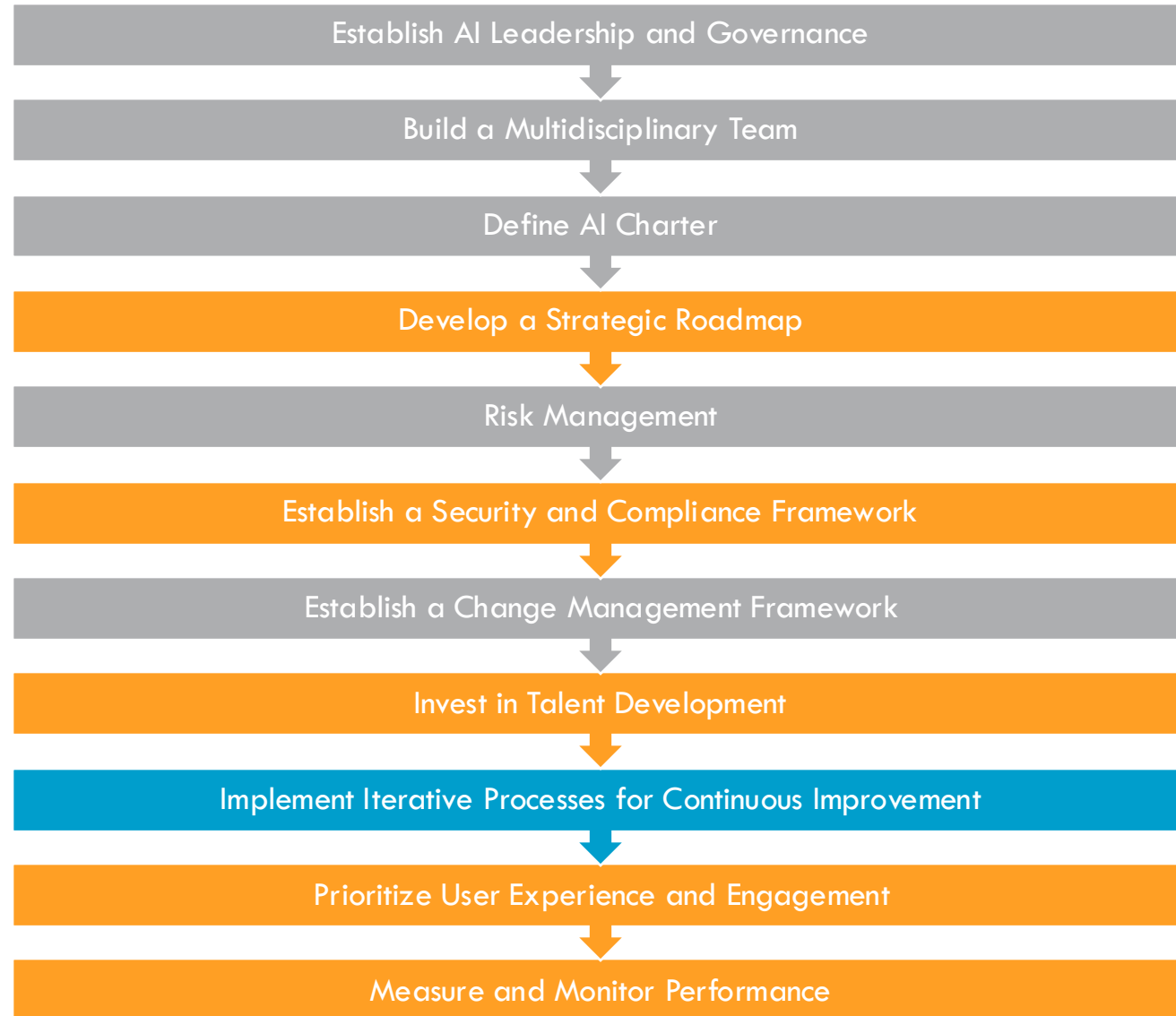
Steps in Setting up a CoE



Nurturing <> Training



Steps in Setting up a CoE



Building Continuous Improvement – AI Solution



1

Reinforcement (by persona).

2

Support (by persona).

3

Feedback process including communicating resolution or remediation.

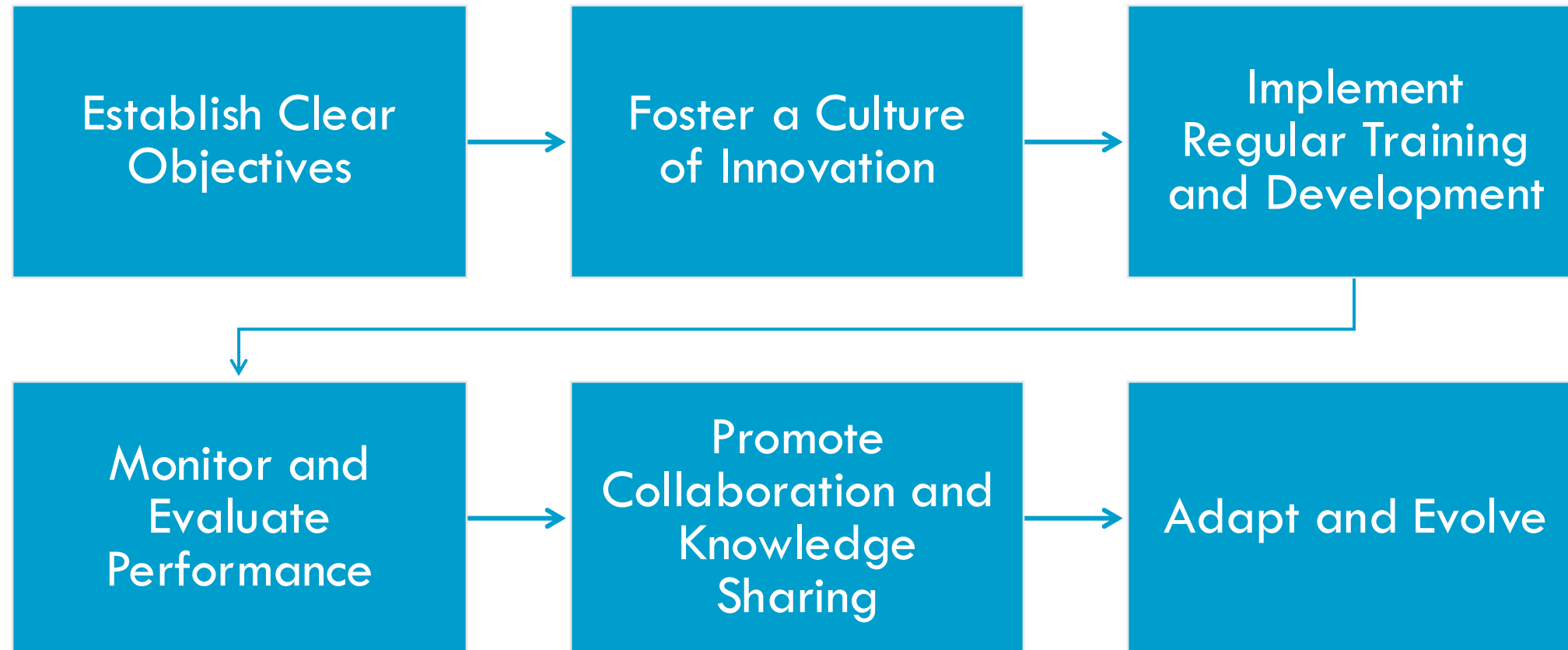
4

Content updates based on feedback.

Support & Reinforce

- ✓ Who typically provides ongoing support and reinforcement for technology change?
- ✓ Do you track user feedback?
- ✓ How do you recognize feedback?
- ✓ How do you communicate resolutions and remediations of feedback?
- ✓ What methods work? Which don't?

Building Continuous Improvement - COE



04

Getting Started



AI Matures Over Time



5. Leading

4. Innovating

CULTURE

AI is a growth engine

BUSINESS ALIGNMENT

Org has AI vision and strategy
AI-enabled products+services
Org-wide process alignment
Creation of new value

TECHNOLOGY & TOOLS

Consolidated UXs
In-house expertise using cloud resources

DATA MANAGEMENT

LOBs develop data literacy
Quality validation processes
Unified data platforms
Trustworthy, reliable output

GOVERNANCE & MGMT

Governance monitored/audited
Highly-functional SLAs
Policies enforced within LOBs
Ethics and safety embedded
HR manages disruption

3. Standardizing

CULTURE

AI is essential

BUSINESS ALIGNMENT

LOBs + CoE have vision
Strategic roadmap developed
Intentional investments Sustained adoption
Processes current but siloed

TECHNOLOGY & TOOLS

In-house tech skills grow
Build vs buy decision tree
Investments in accuracy, relevance, and confidence

DATA MANAGEMENT

Data owners assigned
AI taps into org's critical data
Policies for collection, storage, use + disposal

GOVERNANCE & MGMT

Formalized IT support
Defined frameworks
CIO/CISO enforce policy

2. Experimenting

CULTURE

AI is a tool

BUSINESS ALIGNMENT

Interest groups see vision
Org lacks strategy
ROI under investigation
Processes doc'd but dated

TECHNOLOGY & TOOLS

POCs of enterprise tools
Constraints of LLMs noted
R&D of other AI

DATA MANAGEMENT

Compliance-driven controls
Classification and retention
Data protection + deletion
Dashboards in place

GOVERNANCE & MGMT

Compliance-focused
Policies defined, not enforced
Risks known, not controlled
Best effort support

1. Learning

CULTURE

AI is intriguing

BUSINESS ALIGNMENT

Incubators see potential
No LOB/Org-wide vision
Undocumented processes

TECHNOLOGY & TOOLS

Pilots of public tools
Potential + limits noted

DATA MANAGEMENT

Data discovery
Disparate sources
Garbage in, garbage out

GOVERNANCE & MGMT

Shadow IT
Individual decisions
No policies
Reactive measures
Insecure blind spots

Ad-hoc Value

Business Outcomes

Competitive Advantage

Other Ways we can Help



We meet you where you are on your AI journey.

<https://www.egroup-us.com/ai/>



Education Workshops

1 Day Session

Facilitated workshop where participants learn about modern technologies including Copilot Studio, Azure AI Studio, Microsoft Fabric, and Power Platform.

You will have an expert available to answer your questions!

Come away with high-level ideas of how to apply modern technologies in your organization.



Action Accelerator

2 Day Session

Action Accelerator Workshops provide you with a prioritized list of AI technology initiatives in your enterprise.

The first day focuses on facilitated discovery where we will help you identify opportunities.

The second day prioritizes those opportunities into a roadmap with high-level effort and potential technologies.



Design Sprints

2-4 Week Engagements

In the Design Sprint, you will receive a detailed implementation plan for a custom developed solution built on well-architected data and intelligent automation.

The plan includes effort, resources, cost, and timeline, including Organizational Change Management considerations.

Optional proof-of-concept.



Solution Implementations

Variable Sprint-Based Engagements

If you already have design plans or recently completed a design sprint with us, it's time to bring those ideas to life!

Within the Result-Yielding Implementation, you will receive a designed, developed, tested, and implemented technical solution, including Organizational Change Management and solution support.

What are your thoughts?

- What didn't we cover that you were hoping to learn about?
- What do you want clarified?
- What do you want to learn more about?



Want 1:1 time to discuss
your ideas?

Scan QR Code to set up a
30-minute consultative
session.



THANK YOU

