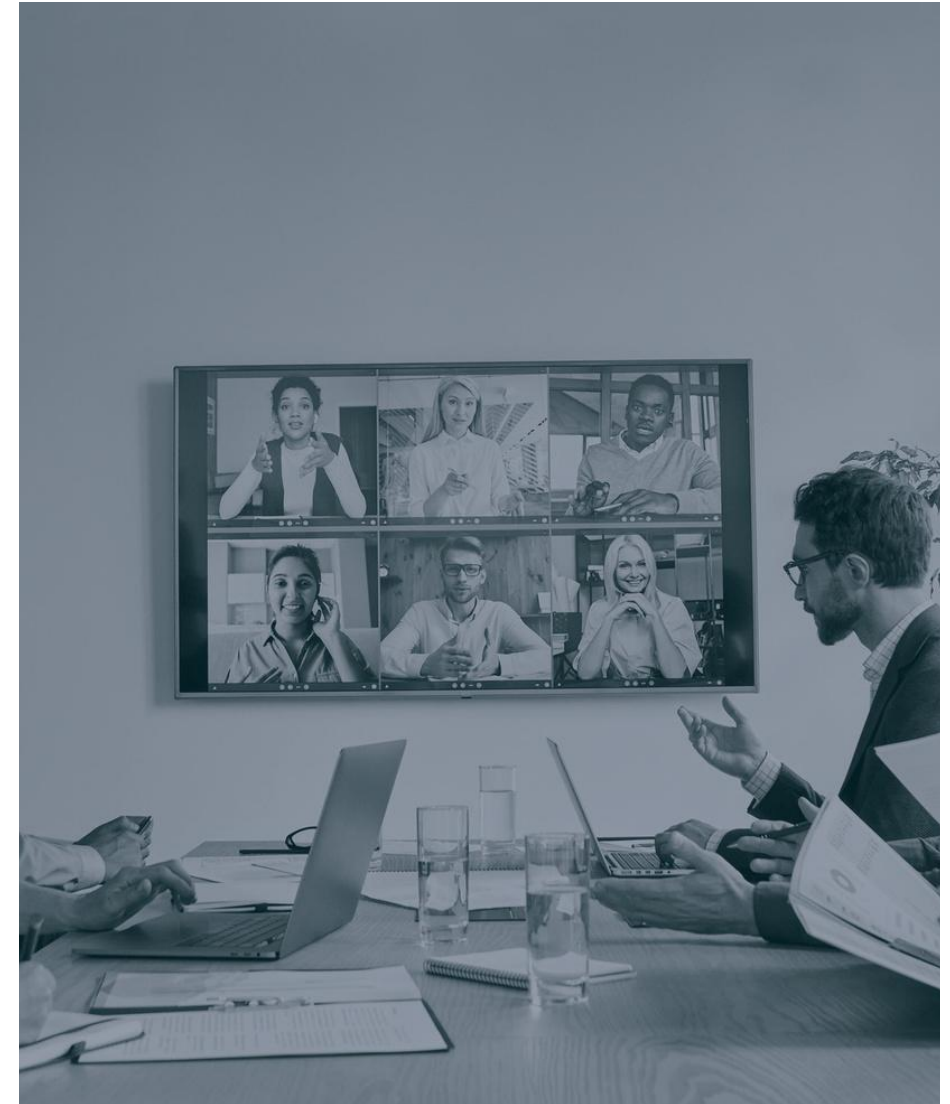


How to Find Opportunities for AI & Automation

A Webinar Presentation - May 1, 2025



Meet Your Presenters



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The Problems We Are Solving



I'll make two cases today for problems we are trying to solve:

1

There is an urgency to get started with AI and many are struggling to find their starting point.

2

Even if an organization has identified AI opportunities, there is a challenge in figuring out what to do first.

Outcomes From Today



AI solutions include a significant amount of value and there is an urgency to get started. Almost, too much and too fast.

However, there can be a structured and methodical approach to organizing yourselves and finding your own starting point...now!

We will discuss the **AI opportunity discovery, agentic AI and prioritization and engagement exercises** so that you are enabled to:

- **Get Started** - Find AI and automation opportunities in your organization.
- **Understand the role of Agents** - Agents are everywhere and you'll appreciate their role in the AI ecosystem and how they open new opportunities to integrate AI into your workplace.
- **Engage with Others** - Reach out to leadership and colleagues and help them understand the importance of getting started with AI and the roles that they play.

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 and recording will be sent to all registrants.
- The inventory spreadsheet will be made available to you at the end of the webinar. Fill it out and engage with us via a free consultative evaluation to analyze your findings!

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
- [Microsoft 365 Copilot](#)

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](#)
- [Copilot Studio](#)
- [Agents](#)
- [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**

01

The Challenge: Everyone Wants AI



Demands Everywhere!



We Want AI!

Do We Have AI?

Do We Need AI?

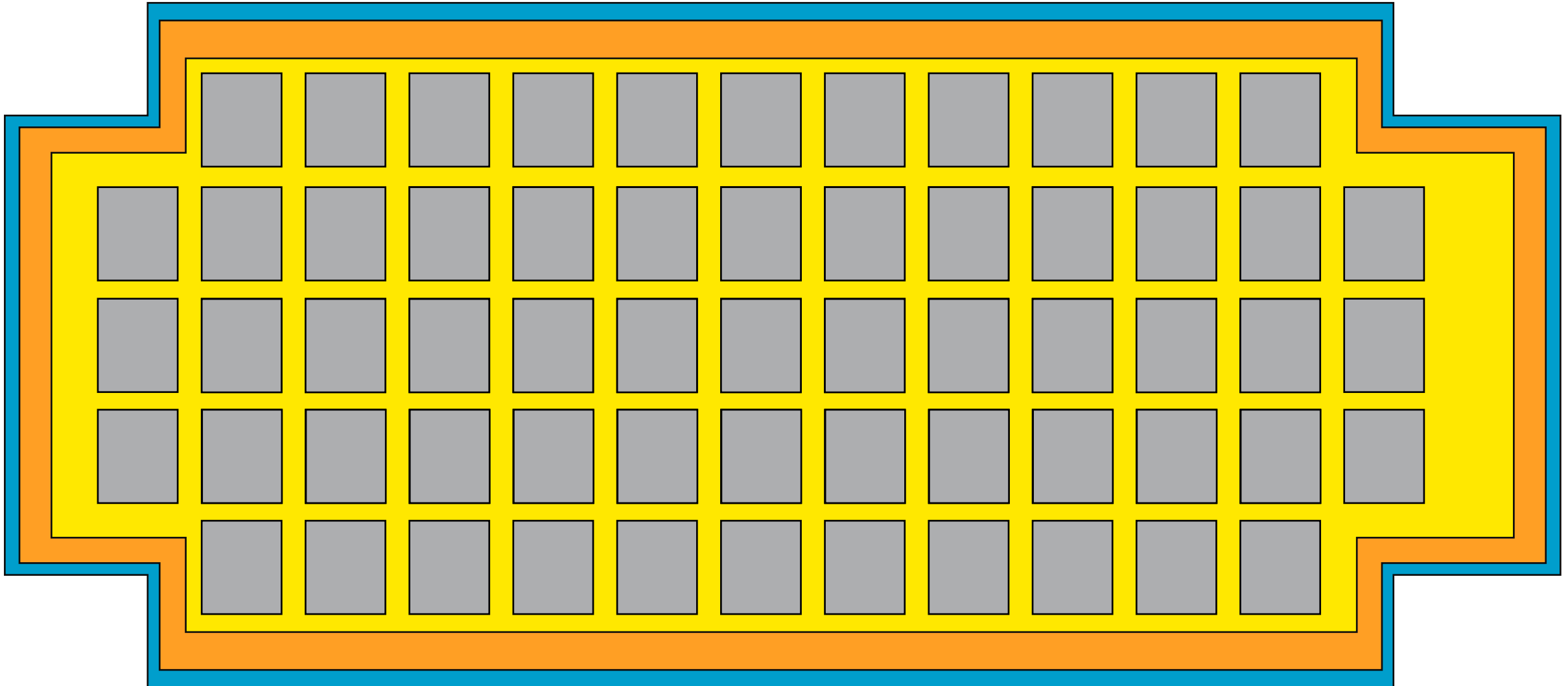
What is AI?

We Need AI!

Are We Secure?

**Never Mind -
I'll Use my Own AI...**

An AI and Automation Opportunity is a...



02

Looking for Symptoms



Finding Opportunities



1

They Find You

- Leadership requests / strategic objectives
- Business units/departments come with ideas and needs
- Customer feedback
- Market Trends
- System failures
- Out of compliance

2

You Find Them

- Manual, repetitive tasks.
- Email-based approvals and routing.
- Reporting and analytics insights.
- Discarded projects/roadmaps.
- Current initiatives.
- **A preposterous abundance of spreadsheets.**

03

Agents - A New Opportunity!



Introducing Agents



Copilot

Human augmentation

Private, Personal Assistant

Every employee will have a Copilot



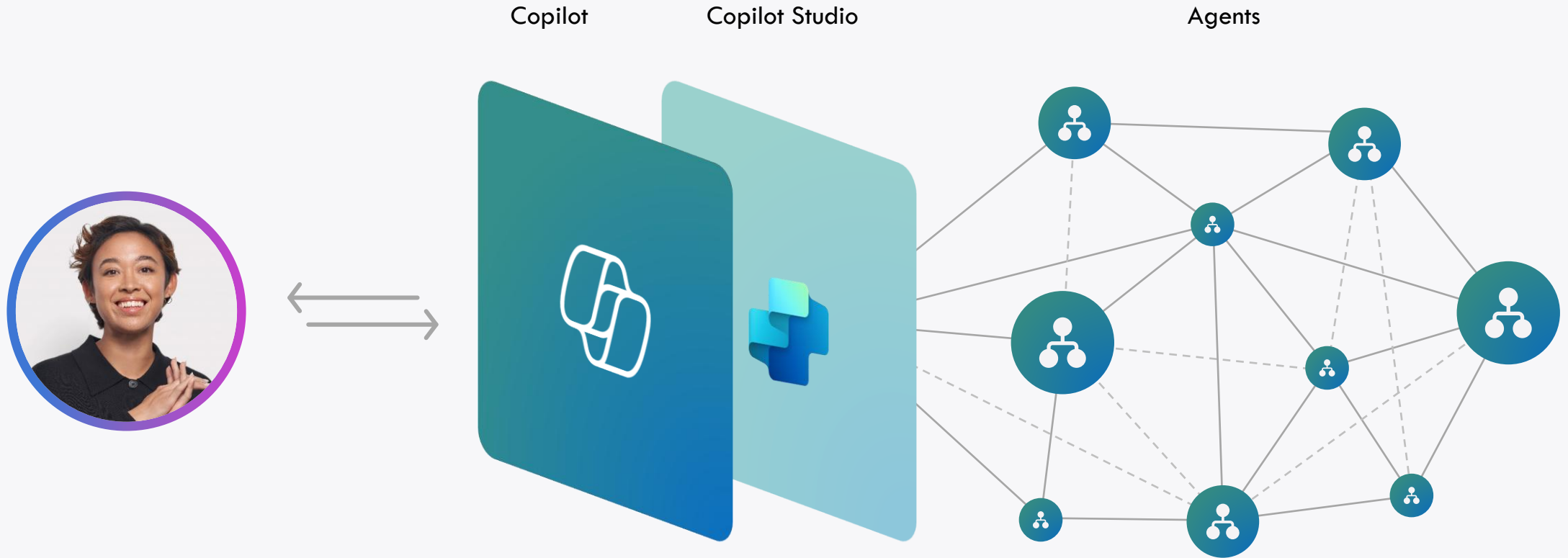
Agents

Connected to Copilot or autonomous

Automates tasks and processes

Every business process will have an agent

Copilot is the UI for AI



Spectrum of Agents



Copilot agents are AI assistants that can help optimize business processes and enhance productivity

Copilot agents vary in level of complexity and capabilities depending on your need

Simple



Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Copilot Chat agents with Agent Builder or
Custom agents with Copilot Studio



Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Custom agents with Copilot Studio



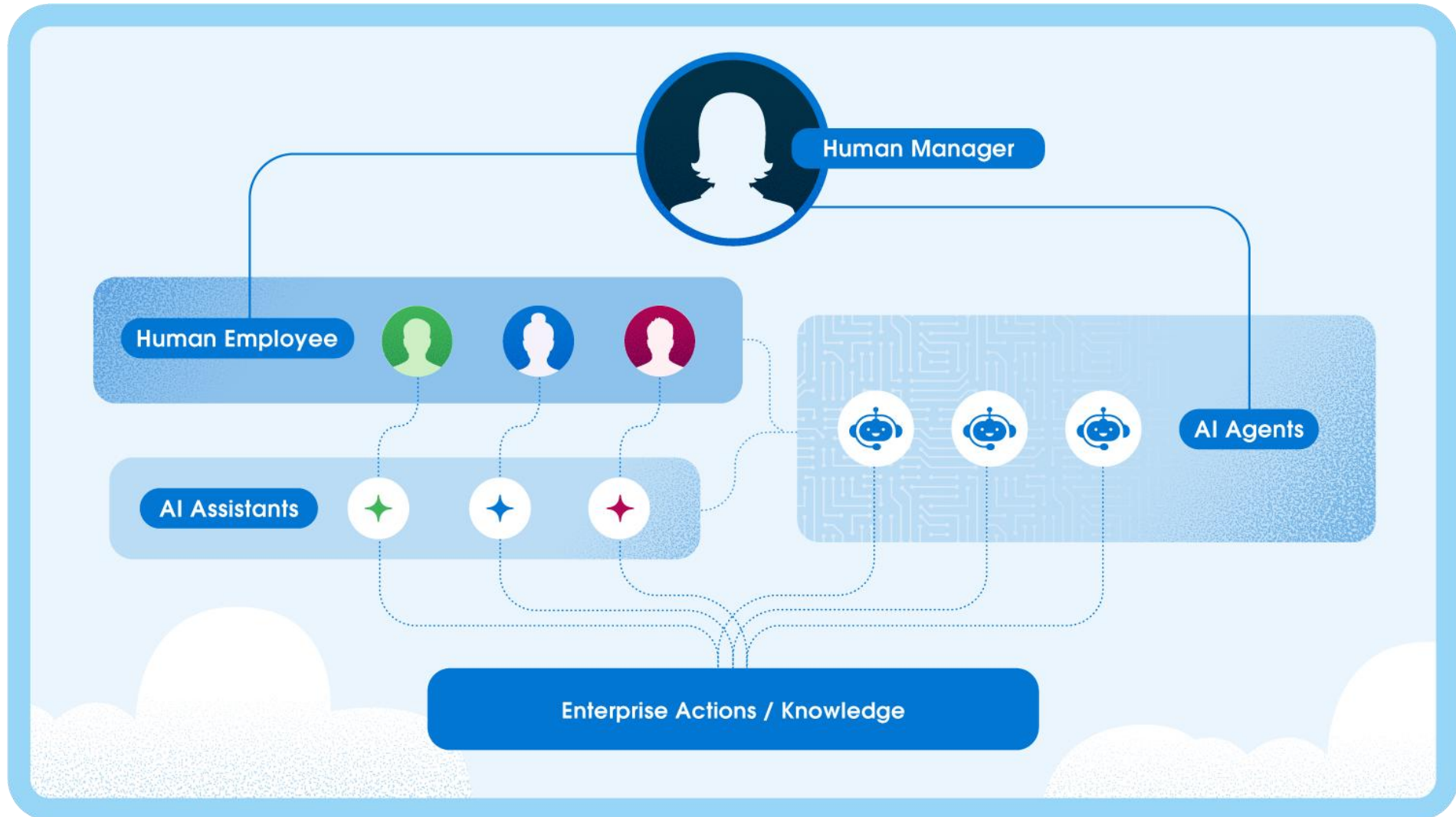
Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Custom agents with Copilot Studio

Advanced

Agents in the Workforce



A Change of Pace



Demo

Finding Opportunities - Part 2

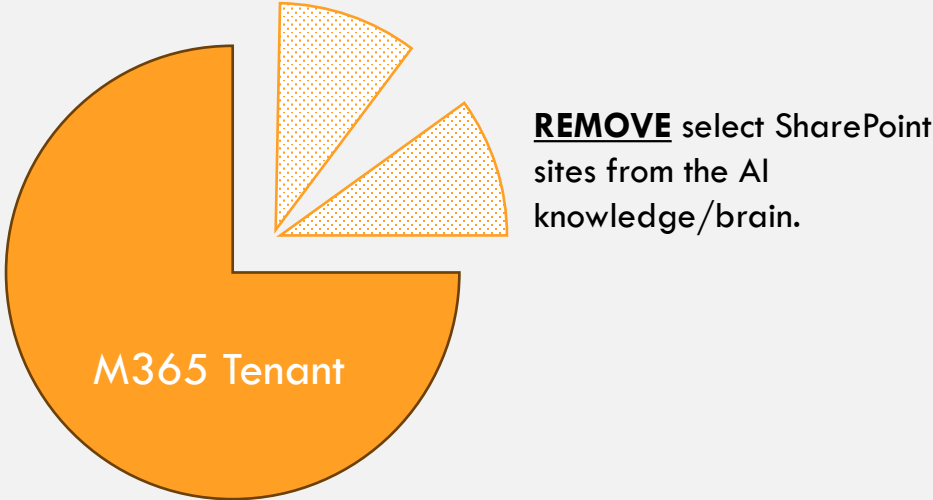


- Examine your job postings.
- Find areas of high turnover.
- Understand need for proprietary skill & process knowledge.
- Review Employee Feedback Surveys
- Identify where team growth is dependent on hiring disproportionately more people.

Agents Help Secure Your Content



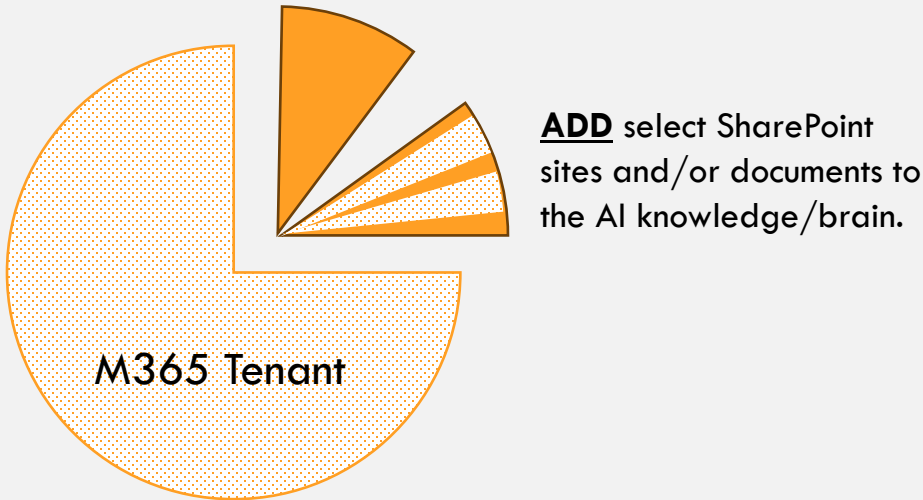
Security Through EXCLUSION (Microsoft 365 Copilot)



PROS	CONS
Quickly remove areas of concern from discovery.	Removes entire SharePoint sites/no fine tuning.
Deploy M365 Copilot while cleaning up content access.	Disables SharePoint search on excluded sites.
	Might still miss content in other sites.

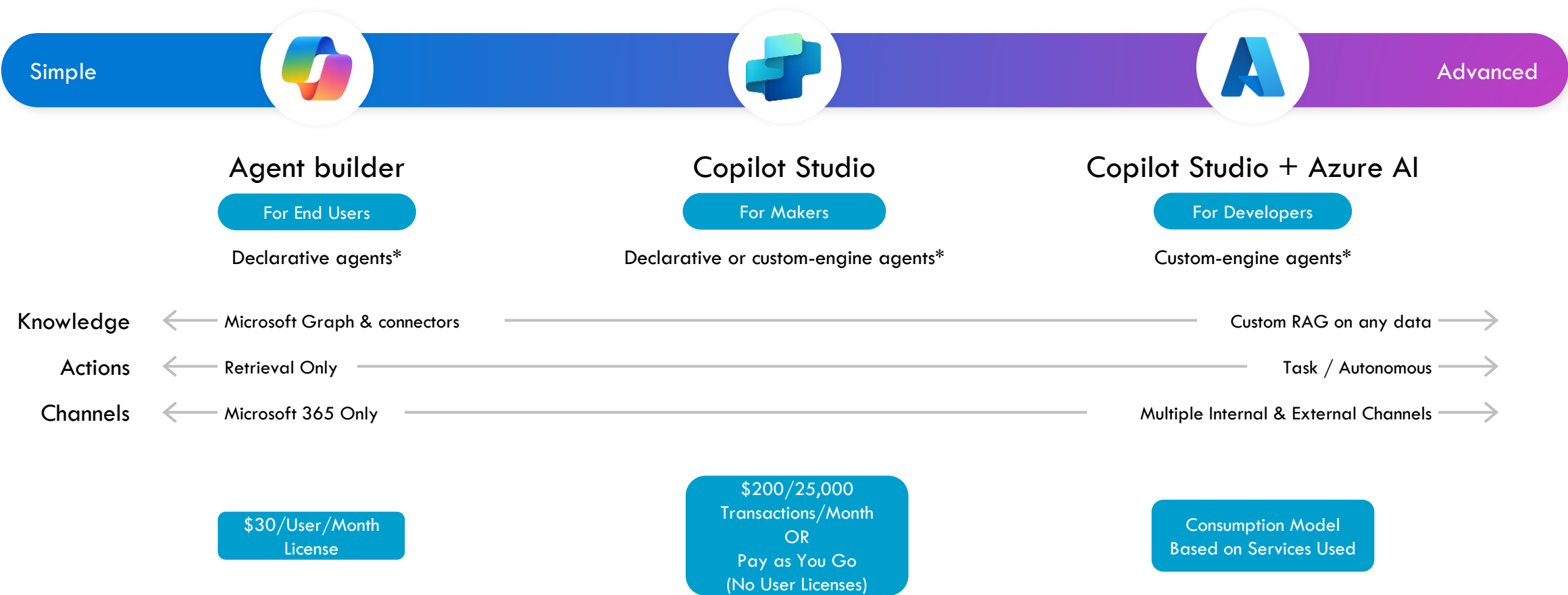
VS

Security Through INCLUSION (Agents)



PROS	CONS
Takes a surgical approach to including content.	Requires development of a custom agent.
Focus the AI on the content that is relevant to its function and audience.	

Agent Creation Tools



* Declarative = prompts handled by Microsoft 365 Copilot; Custom-engine = prompts handled by custom AI engine (i.e., orchestrator and foundation models)

04

The Last Pieces of the Puzzle: Collaboration & Prioritization



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:** AI Council



Human change

Manage the human transformation with robust user enablement programs

- ✓ User enablement program
- ✓ Communications and community
- ✓ Skilling and training
- ✓ **Best practice:** Measure the impact through feedback and analytics



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

What Contributes to Prioritization



- **Complexity and Risk:** How many capabilities and variations are we accounting for? How many systems and processes will be affected? How critical are these systems and processes to your organization's operations?
- **Technical Feasibility:** What existing infrastructure and technology support the initiative vs. net new components needed? Are there any technical challenges that could hinder the implementation?
- **Effort to Implement:** Estimated timeline for implementation? What resources (human/financial) are needed? How much coordination is required?
 - **Can we buy it?**
- **Alignment to Strategic Objectives:** How does this support your organization's long-term goals and vision?
- **Data Readiness:** Is the necessary data available, accurate, and in a usable format? What data governance and security measures need to be in place to support the technology.

AI and Automation Readiness



How can you prepare your key decision makers for the journey to AI and Automation?

It's time to accept that...

1. Privileged access to systems and data will be required for those building solutions. #SecurityFirst
2. Custom API Plugins may be required to integrate external systems (when building on Microsoft platforms).
3. The goal is progress, not perfection. Reaching a “final version” should happen through iterative rollouts.
4. Senior leadership buy-in sets the tone for adoption success.
5. Timely decision-making maintains momentum.
6. Good data in, equals good results out. It may take time to build and refine this foundation.

AI Matures Over Time



5. Leading

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

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

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

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

CULTURE

AI is a disrupter

BUSINESS ALIGNMENT

AI at core of profit model
Innovative processes
Defensible advantage

TECHNOLOGY & TOOLS

Customized AI models
Fine-tuning + prompt engineering
Advanced expertise + compute

DATA MANAGEMENT

Org-wide data literacy
Metadata management
Continuous monitoring + improvement

GOVERNANCE & MGMT

Proactive adjustments
Automated policy enforcement
Involved in setting standards

Ad-hoc Value

Business Outcomes

Competitive Advantage

05

Next Steps



Next Steps



1. Execute your discovery journey - find opportunities and fill out the inventory spreadsheet.
2. Email your completed worksheets to businesssolutionsdelivery@enablingtechcorp.com with your contact information and we will reach out to schedule a review of your opportunities.

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.

THANK YOU

