

An Executive Playbook for GenAI Success





Goal

Create C-Suite awareness of the success factors and impacts of GenAI success.



Agenda

- AI Culture and Leadership's Role
- Business Alignment and Strategic Integration
- Technology and Tools for AI Adoption
- Data Management and Readiness
- AI Governance and Risk Management

ACQUIRE >

IMPLEMENT >

**OPERATIONAL
SUCCESS**

MANAGE >

What We Do



Microsoft 365

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

Microsoft Azure

- Azure Migrations
- Entra ID
- Azure Storage
- Azure VMware Solution
- Nutanix Cloud Clusters

Modern Datacenter Architecture

- Nutanix
- Cohesity
- Cisco
- VMware (Broadcom)
- Pure Storage

Security & Compliance

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

Virtual Desktops

- Azure Virtual Desktop
- Citrix
- Horizon

Data, AI, Apps & Automation

- Azure
- Azure Open AI
- 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

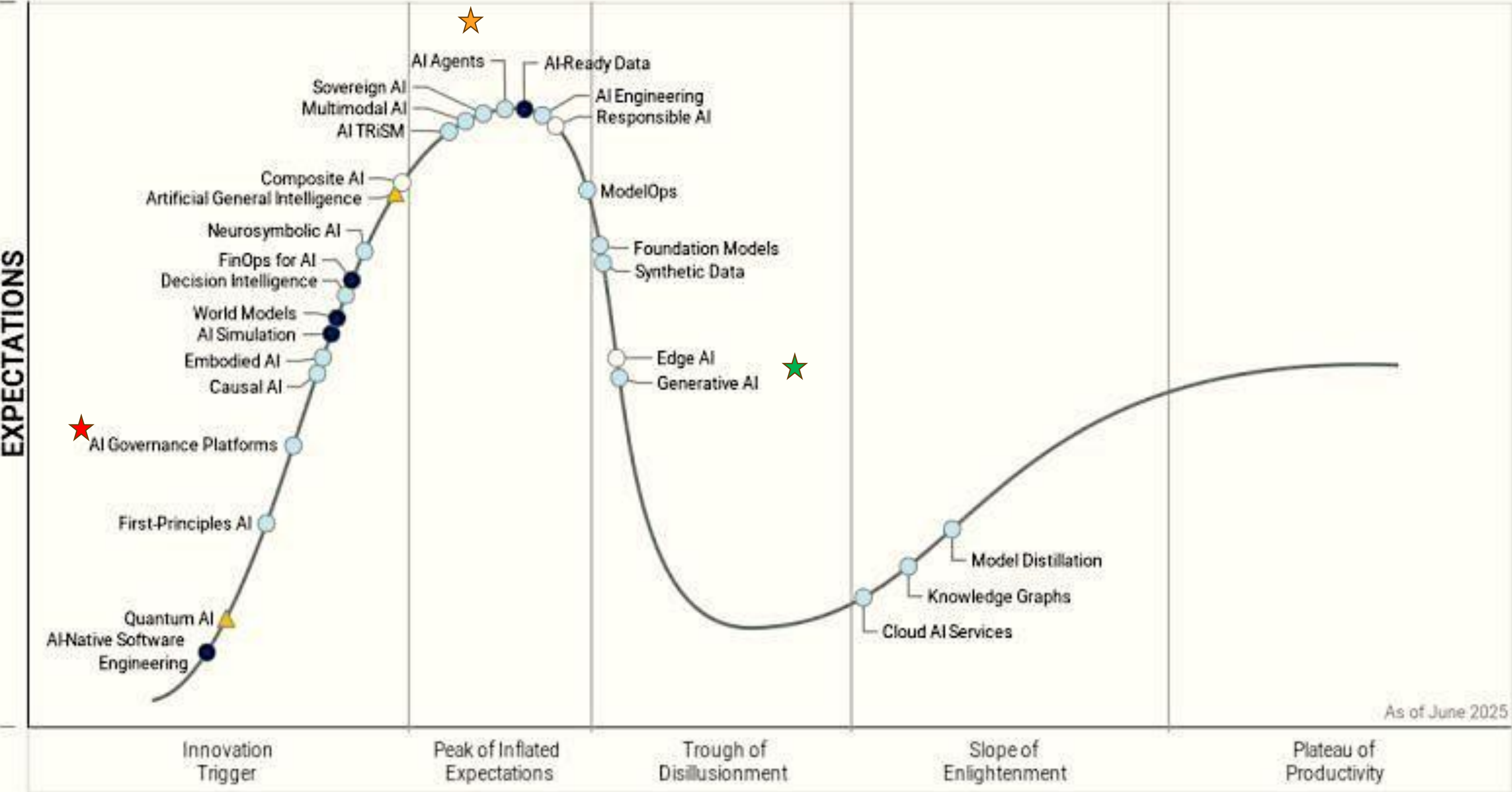
- Azure Site Recovery
- Nutanix
- Zerto

Networking

- Cisco
- Meraki

Managed Services to
Support All
Solutions

Hype Cycle for Artificial Intelligence, 2025



As of June 2025

Plateau will be reached: ○ <2 yrs. ● 2-5 yrs. ● 5-10 yrs. ▲ >10 yrs. ✗ Obsolete before plateau

Q3 2025 Observations



GEN AI'S ROI CAN
BE SIGNIFICANT



INTENTIONAL
ADOPTION LEADS
TO SUSTAINABLE
SUCCESS



DATA SECURITY AND
GOVERNANCE ARE
JOURNEYS



AGENTS CAN
ADDRESS SECURITY,
SPEED & COST
CHALLENGES

A Playbook for AI Success



5. Leading

4. Innovating

3. Standardizing

2. Experimenting

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

CULTURE

AI is a tool

BUSINESS ALIGNMENT

Interest groups see vision
Org lacks strategy
Piecemeal investments
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

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

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

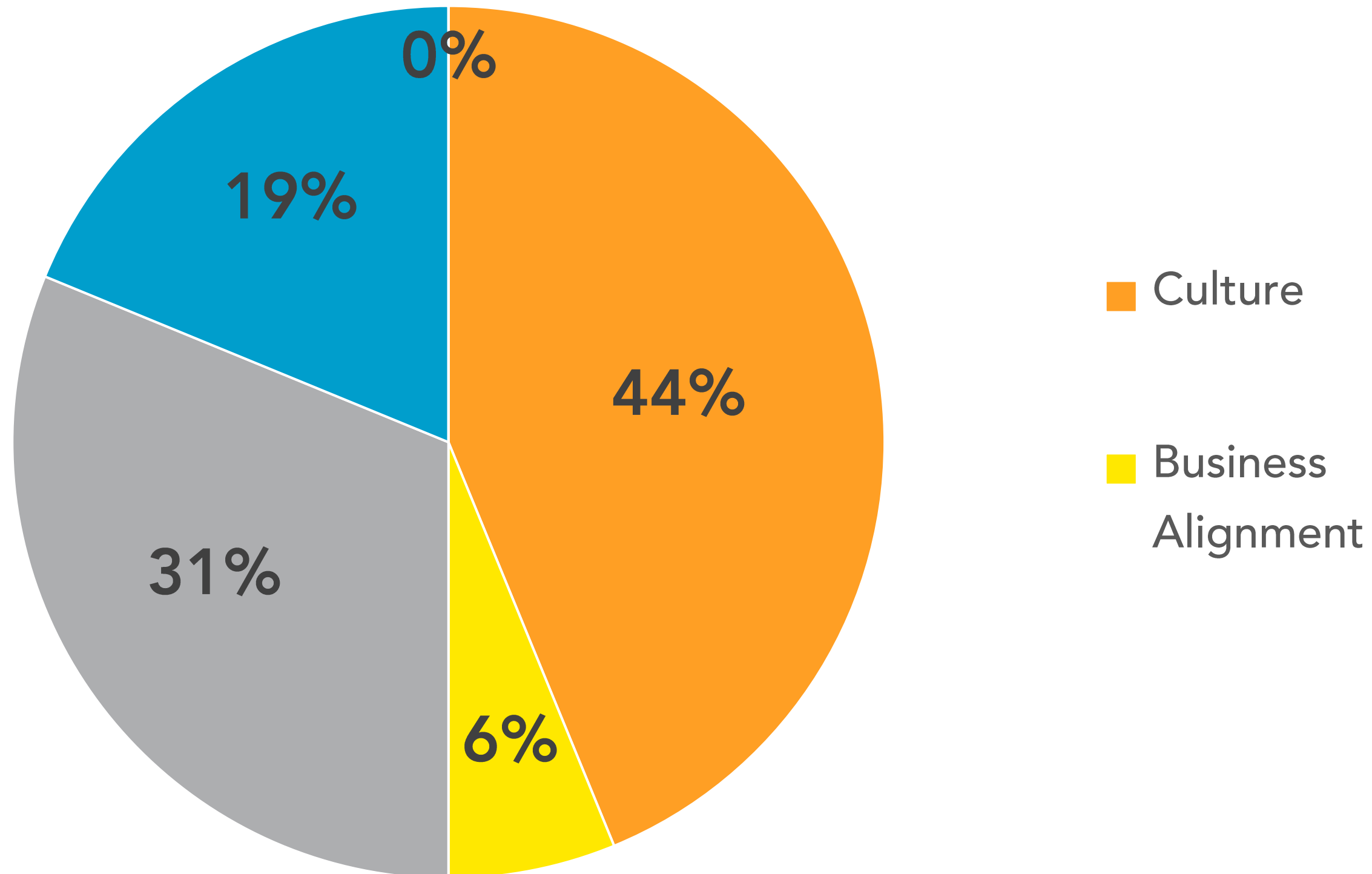
Ad-hoc Value

Business Outcomes

Competitive Advantage

People & Tech Lead; Alignment, Data & Governance Lag

In What Aspect Are You Furthest Ahead?



Culture & Leadership's Role



Dr. Dana Anderson
CEO

Mismatched Mindset Between Execs & Employees

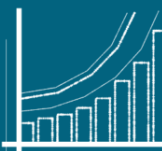


Leaders Employees



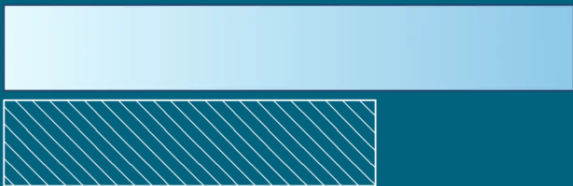
Familiarity with agents

67%
40%



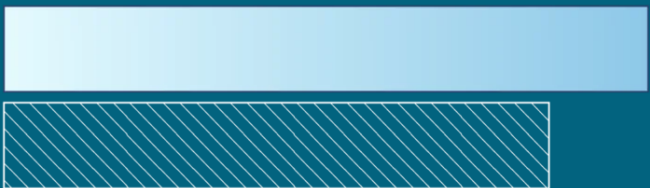
Regular AI usage

69%
45%



Trust AI for high-stakes work

78%
66%



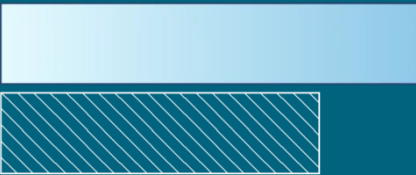
Expect to manage agents

36%
21%



Use AI as a thought partner

54%
41%



See AI as a career accelerator

79%
67%



Saving 1+ hour daily with AI

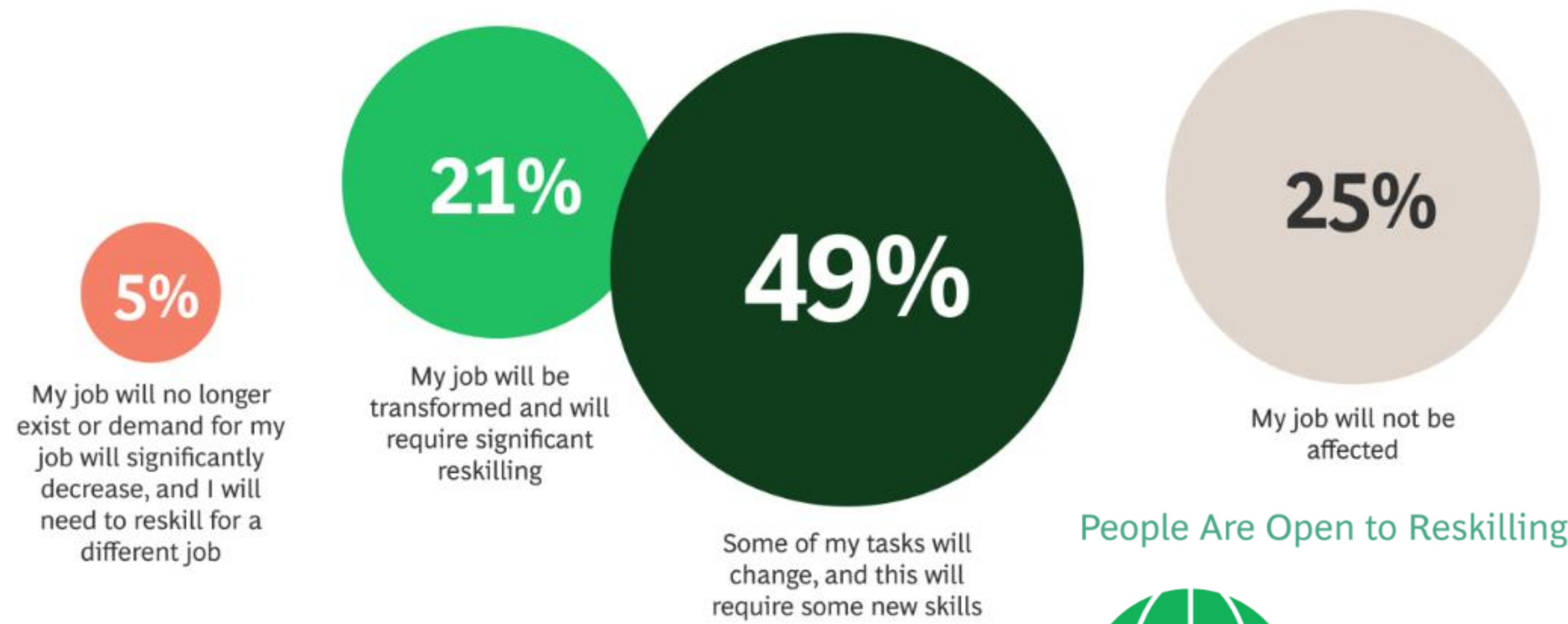
29%
20%



Disruption Or Opportunity?



How respondents expect GenAI to impact their job in the future



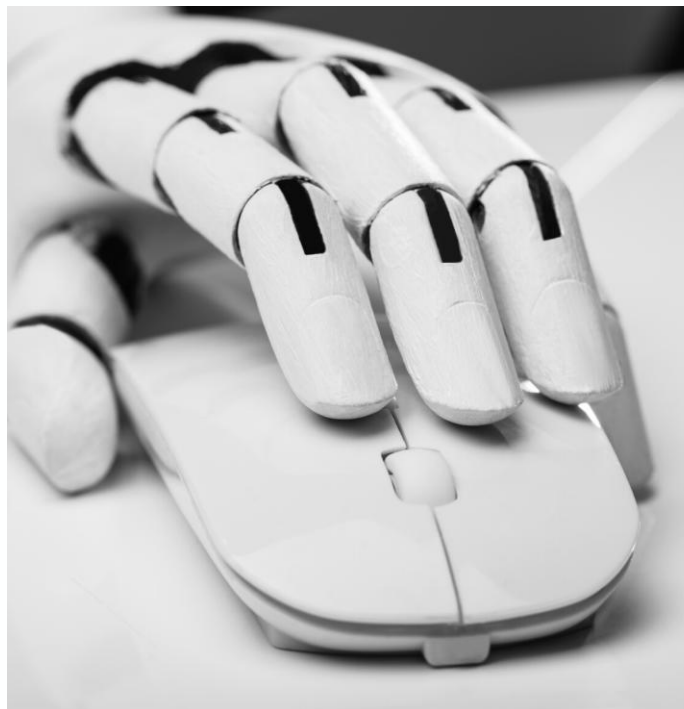
People Are Open to Reskilling



- 57% Yes
- 35% Yes, but only if I had serious difficulties
- 8% No

Source: 2023 BCG/The Network/The Stepstone Group proprietary web (conducted Q4 2023) and analysis.

Culture And Leadership's Influence On AI Success



Leadership's Role In AI

Strong CxO predisposition significantly influences early AI maturity and cultural readiness.



Democratize AI Tool Availability

Democratizing AI tools will lower staff's fear factor.

Upskilling & Reskilling

Leaders can cultivate AI literacy, while HR prepares the AI-empowered workforce.

Business Alignment & Strategic Integration



A CEO's Dual Vision For AI

"What can AI do for us?"

- Buy back time

"What can AI be for us?"

- Refine work and support growth



Sample Gen AI Use Cases



Internal Productivity & Enablement

- Automated meeting summaries with action tracking
- Knowledge base Q&A agent for employees
- IT Help Desk virtual assistant
- HR policy interpretation & onboarding assistant
- Internal content generation (presentations, reports)

Business Process Automation

- Contract analysis & risk flagging
- Financial forecasting & predictive analytics
- Supply chain optimization using scenario modeling
- Regulatory compliance document generation

Customer & Market Engagement

- AI-powered customer support agent
- Personalized product recommendations
- Sentiment & feedback analysis for product improvement
- Competitive product comparison for sales teams

Innovation & Strategy

- Market trend analysis & opportunity mapping
- New product ideation & concept validation
- Strategic scenario planning with AI simulations

Evaluate and prioritize each use case based on feasibility, complexity, technology options and value.

Business Alignment & ROI



Choose Wisely

Start with simple AI projects that deliver clear value, such as AI assistants or report automation.

Learning from Results

Promote a culture of experimentation by treating failures as learning and celebrating successes.





children
international



Survey Individuals

Measure their time spent before/after Copilot

Measure Departmental Savings & Revenue

For repeatable, end-to-end processes

Mix and Match Free & Licensed Tools

Including Copilot Chat and M365 Copilot

Gathering ROI Metrics

Mix & Match Your Gen AI



Feature	Copilot (Edge)*	Microsoft 365 Copilot Chat	Microsoft 365 Copilot	Copilot Studio
Cost	Free	Free with M365 License	\$30/User/Month	\$210/25,000 messages/month or pay-as-you-go
Generative Chat with Web Content	✓	✓	✓	✓**
Generative Chat with M365 Content	✗	✗	✓	✓**
Enterprise Content Protection	✗	✓	✓	✓
Integration with M365 Productivity Suite	✗	✗	✓	✓**
Prompt History	✗	✓	✓	✓
Extend with custom knowledge	✗	✗	✓	✓**
Extend with custom plug-ins	✗	✗	✓	✓**
Build Declarative Agents	✗	✗	✓	✓
Build Custom Engine Agents	✗	✗	✗	✓
Build Custom Actions	✗	✗	✗	✓

*Assumes non-enterprise version.
**Depends on agent design specifications.

Technology & Tools

ARTIFICIAL INTELLIGENCE

Large language models can do jaw-dropping things. But nobody knows exactly why.

And that's a problem. Figuring it out is one of the biggest scientific puzzles of our time and a crucial step towards controlling more powerful future models.

By Will Douglas Heaven

March 4, 2024

Options Beyond Gen AI



Generative AI

(Agents / "Chat Bots")

BUY Out-of-Box Copilots

Microsoft 365 Copilot

Copilot for Power BI

Copilot for Security

Copilot for Fabric

Copilot for GitHub

Copilot for Sales

Copilot for Power Platform

BUILD Custom Agents

Copilot Studio
(Low Code)

Azure AI Foundry
(Pro Code)

Other AI

- Automation
- Scalability
- Innovation

BUILD Custom AI Solutions

Azure AI
(Pro Code)

Document Intelligence
(Working with documents)

Azure AI Vision
(Working with pictures/images)

Azure Machine Learning
(Build predictive models)

Azure AI Speech

Azure AI Search

Azure AI
Language

Azure AI
Translator

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



MATHIS HOME®

FURNITURE SUPERSTORE

eGroup Enabling Technologies collaborated with Mathis Home to develop a custom sales manager chatbot. This copilot enables the sales team to quickly and securely ask questions and receive answers. By restricting the AI to specific documents and integrating generative AI on their website, the solution addressed security concerns while providing a powerful tool for sales associates.



It's given us the opportunity to really believe bigger, probably even more than we did when we started the process. I'm glad we started; it's important just to take a step forward so that you can learn from that.

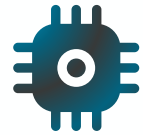
RICH MITTON (IT DIRECTOR, MATHIS HOME)

Agent Types



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



Task

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



Advanced

Autonomous

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

Technology & Tool Alignment

Set Expectations

AI alone can't fix flawed business processes.

Choose Wisely

Other types of AI or automation may be a better fit than GenAI.

Start Smart

Start with simple AI projects that deliver clear value, such as AI assistants or report automation.

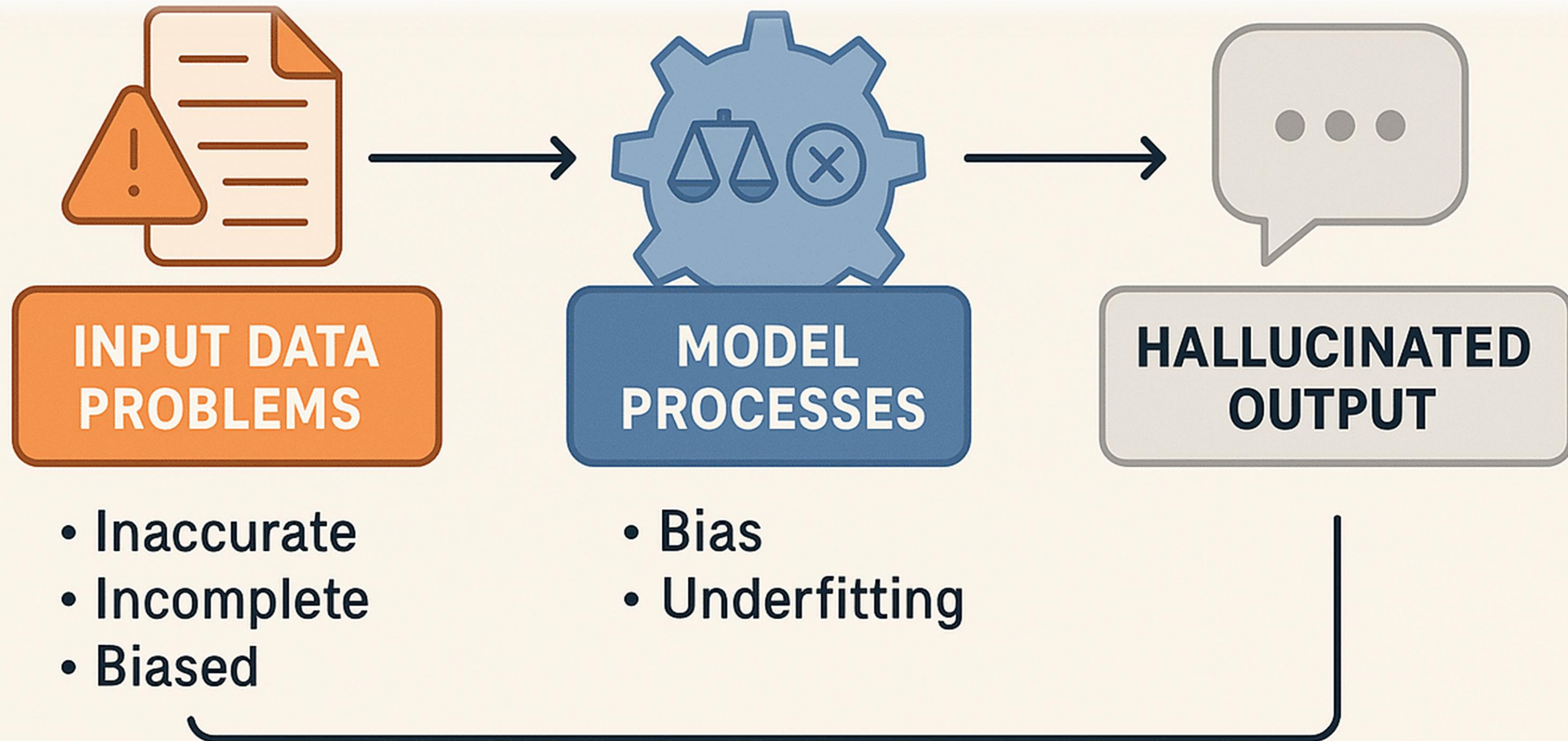
Prepare For Frequent Change

As innovations occur, things should get easier.



Data Management & Readiness

Bad Data Leads to Hallucinations



TRUST, COMPLIANCE, ACCURACY AT RISK

Leadership actions for data management and AI acceleration



Leadership Commitment

C-suite must champion data initiatives, ensuring investment and alignment *across departments*.

Data Stewardship Practices

Assign data stewards, create catalogs and enforce policies to build trust in AI data outputs.

Focused AI Data Access

Use curated, relevant data sets for AI agents to speed time to value and actionable insights.



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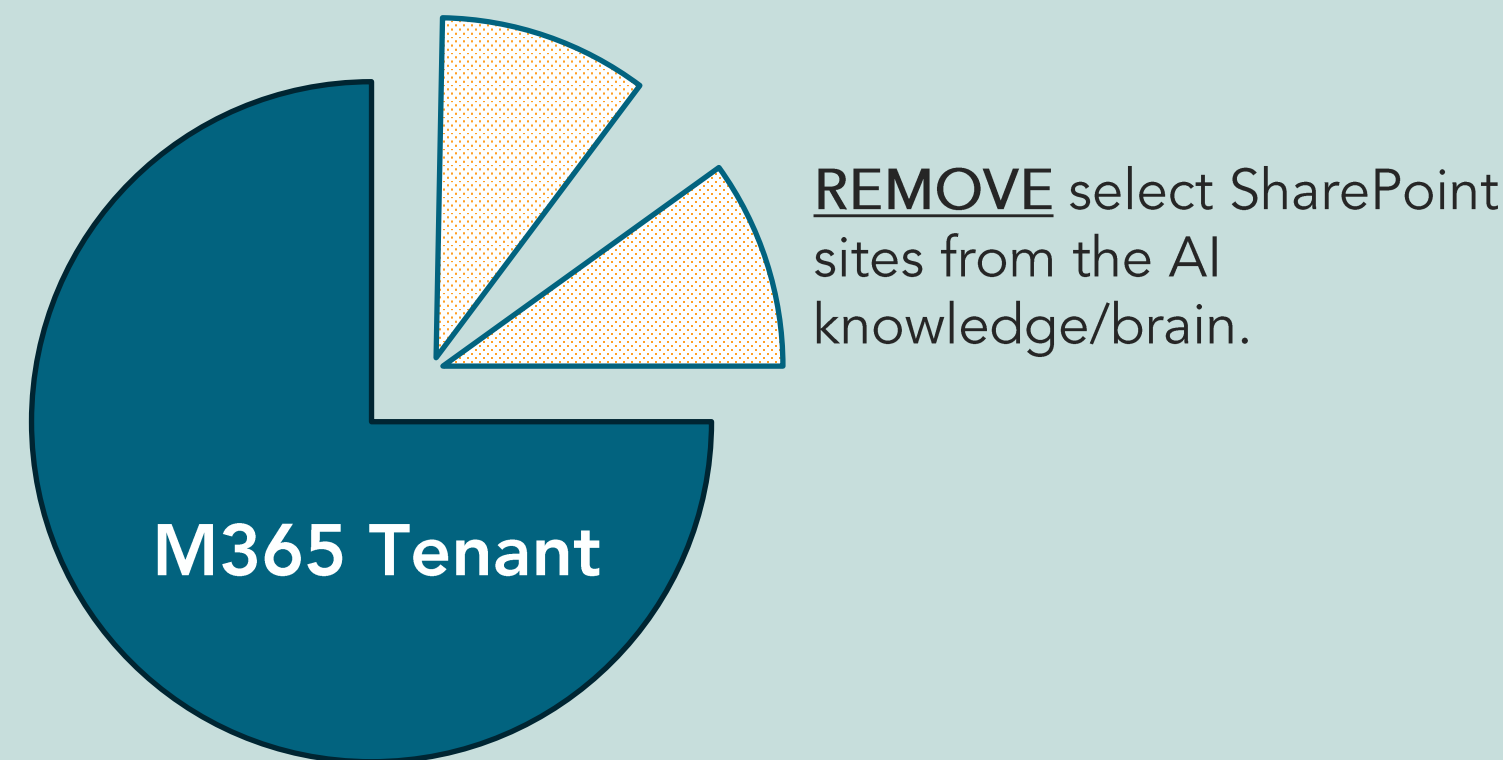
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Leadership Actions For Data Management & AI Acceleration

Make Progress While Securing Content



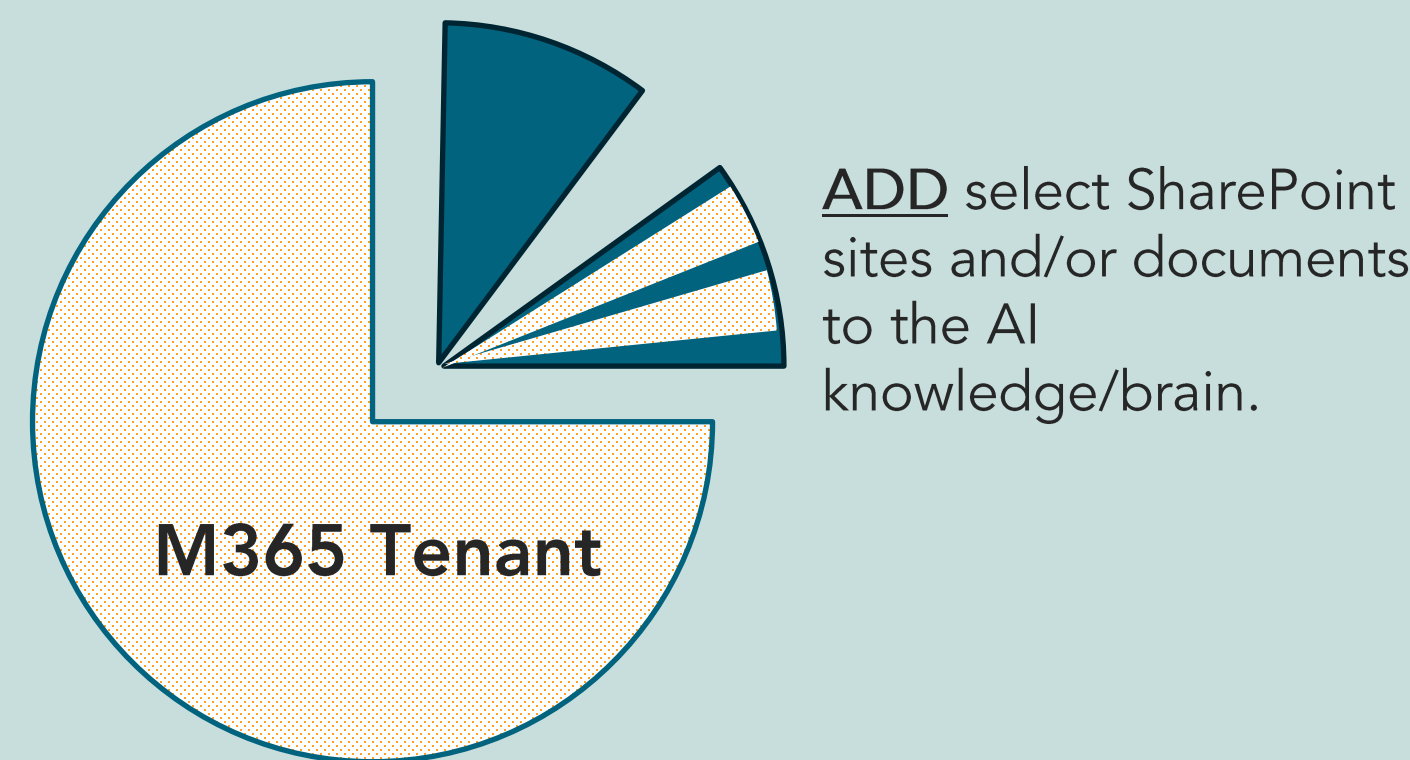
Security Through **EXCLUSION** (Microsoft 365 Copilot)



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** (Custom 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.	
Answers are more complete.	

AI Governance and Risk Management



Leadership Strategies For Strengthening AI Governance

Integrate AI Into IT Governance

Leverage existing IT governance frameworks to include AI-specific reviews and compliance checks.

Engage Business Stakeholders

Include business leaders in AI governance to align AI with organizational goals and guardrails.

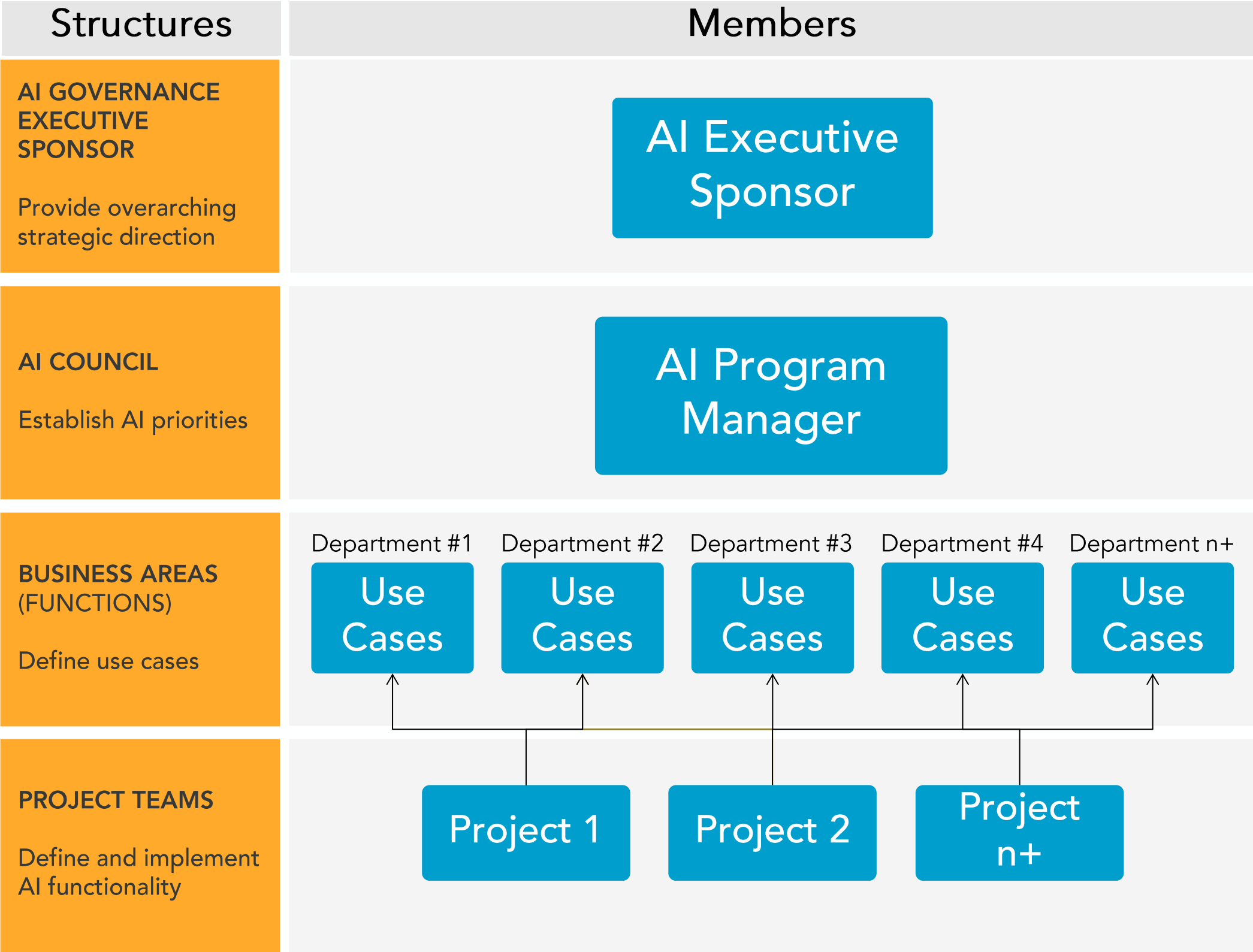
Establish AI Governance Structures

Create AI usage policies, governance committees, and support structures.

Promote Data Literacy and Awareness

Enhance understanding of AI data risks and ethics across the organization through education.

AI Governance Structure



Engaged Sponsorship - find an executive sponsor that has adequate time and is willing to invest and make difficult decisions.

Right Sized Council - engage only those members who are actively working on AI initiatives. Rotate membership as needed to keep perspectives fresh and relevant.

Focus on Business Ownership - use cases need to be identified by business teams, not IT or the AI governance program.

Fund Projects – the AI governance program does not execute change, projects do.

Generate Value - Demonstrate value early and often. Even a simple agent can spread goodwill. Iterate and don't focus on perfection.

Planning Your Next Plays



Democratize AI Tools

Make AI tools accessible organization-wide.

Lead and Prioritize Initiatives

Empower an AI committee to make build/buy decisions and lead AI literacy and adoption.

Allocate Resources and Organize Data

While funding quick wins, prepare data for long-term success.

Begin the Journey

The most important step is to start.

- Get Started• Contact info@eGroup-us.com to schedule an Agent Discovery or AI Roadmapping Session