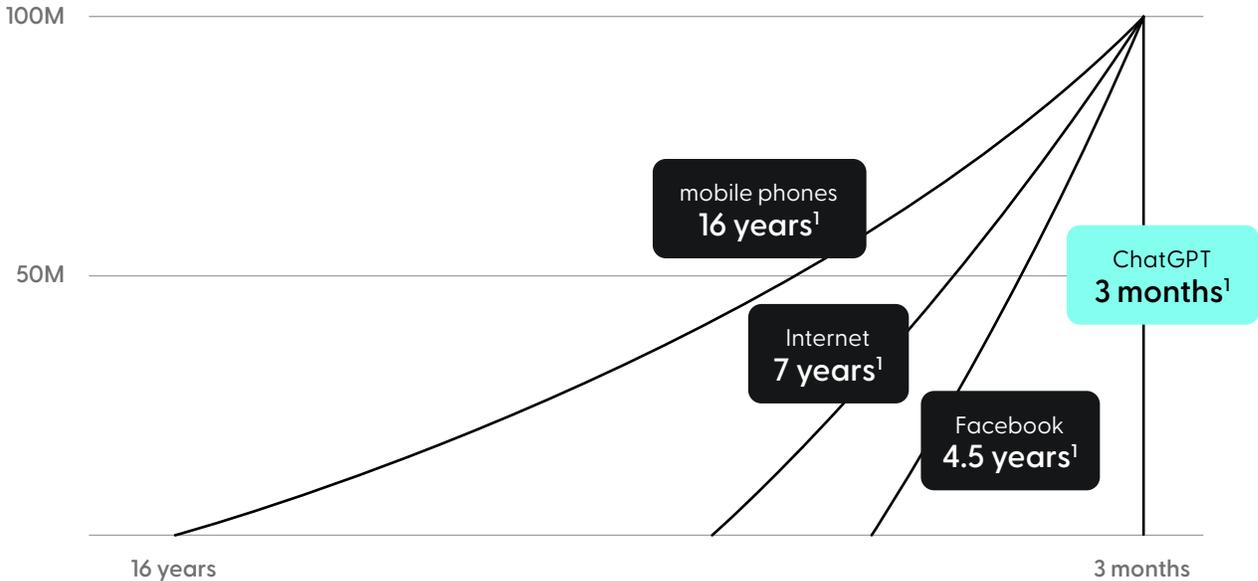pax8 | Microsoft

The AI Readiness Playbook

Discover how to get started with AI for business and take workplace productivity to new heights with Pax8 and Microsoft Copilot.

This guide was developed with the help of Microsoft Copilot.

AI technology is being adopted faster than ever. Make sure you don't miss out on this transformative tool.

100M

mobile phones
16 years[1]

50M

ChatGPT
3 months[1]

Internet
7 years[1]

Facebook
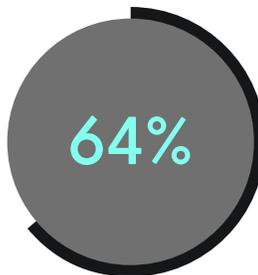**4.5 years**[1]

16 years

3 months

Embracing AI everywhere

The workforce is ready to take advantage of AI, recognizing its potential to boost productivity and delegate work. With the right approach, AI can enhance employee capabilities and productivity.

2x
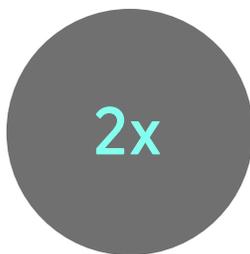
likelihood of a leader to say AI will provide value by boosting productivity versus cutting headcount.[2]

64%

of employees lack time and energy to do their job.[2]

70%
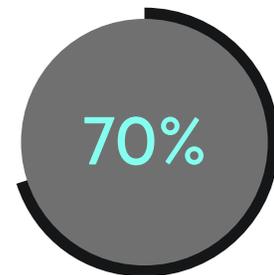
of employees willing to delegate work to AI.[2]

The evolution of AI

AI has come a long way since its inception, with numerous breakthroughs and advancements. See the timeline below to understand the evolution of this powerful tool.

1950s — **Artificial Intelligence (AI)**

The theory and development of computer systems that can perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages.

1990s — **Machine Learning (ML)**

A subset of AI and computer science in which algorithmic models are trained to learn from existing data to make decisions or predictions.

2010s — **Deep Learning**

A machine learning technique that uses layers of neural networks to process data and make decisions

2010s — **Large Language Model (LLM)**

A type of ML model that is trained on a huge amount of text data, involving billions of parameters. These models allow LLMs to train themselves and recognize patterns in data used for tasks involving language processing.

2020s — **Copilot**

An AI-orchestration tool meant to support foundational data and AI models through natural language processing (NLP), allowing users to derive powerful AI-driven insights from common questions and natural communication.

All about Copilot

The secure foundation for search and generation.

With Copilot, Microsoft embeds the power of AI-fueled communication and insights directly into its suite of products. It helps users be more productive by incorporating natural language processing and an organization's own data to increase data visibility and automate tasks that used to be time consuming.

Copilot is designed to complement users' productivity, helping them leverage their expertise by automating tasks or receiving intelligent recommendations based on former work. Natural language makes the tools easy to use, reducing the need to learn specific technical language.
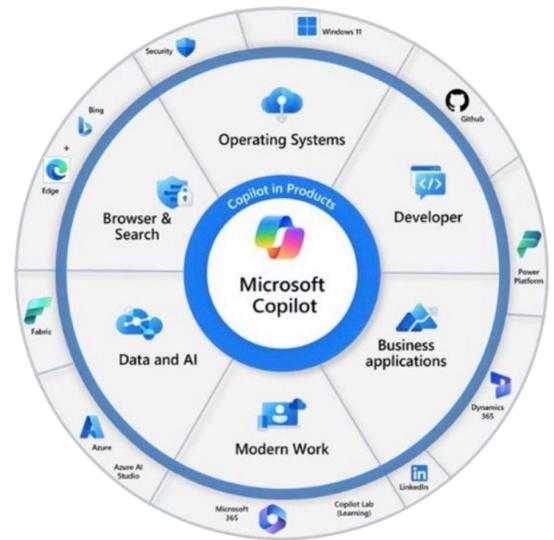
Copilot for the web

Search, analysis, and generation with commercial data protection.

Microsoft Copilot with commercial data protection (formerly Bing Chat Enterprise) unlocks productivity in the workplace by providing personalized and interactive ways to access the web. Copilot can help people find information, answer questions, and perform tasks using the power of AI. It can also generate creative and engaging content, such as recaps, summaries, articles, code, essays, and more.

Here are some examples of how Copilot can help your clients boost productivity in the workplace:

- Effectively research and learn about topics using advanced web search, image search, and news search capabilities.
- Synthesize web information to draft copy that can be repurposed for internal or external communications, such as emails, website copy, and more.
- Create and present graphics that match their prompts by using Dall-E's AI art capabilities.

Copilot is available for M365 users with an Entra ID – Use your Microsoft identity to login at https://copilot.microsoft.com/

Microsoft 365 Copilot

Integrated AI for productivity.

Microsoft 365 Copilot is an AI-powered productivity tool that integrates with the Microsoft Graph and Microsoft 365 apps and services. Copilot provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills. Copilot allows you and your clients to interact with Microsoft 365 apps and organizational data in a natural and conversational way.

- Microsoft 365 Copilot is a role-based AI assistant that helps users with various tasks and scenarios in Microsoft 365. It harnesses data within the Microsoft 365 Graph to support Microsoft 365 apps such as Word, Excel, PowerPoint, Outlook, Teams, and more.
- Microsoft 365 Copilot can help you with tasks such as summarizing important documents, catching up on communications, generating drafts of emails, searching for answers to key questions, and more.
- Work with your Pax8 team to plan your AI readiness journey for M365 Copilot.

How to prepare your customers' environment for Microsoft Copilot for M365

- Verify that your Microsoft 365 subscription includes licenses for assistant. See [available plans](#).

- Update your devices and apps to the latest versions in the Microsoft 365 admin center.

- Enable Microsoft Graph API (admin center or Azure portal) to connect your data across Microsoft Apps and services.

- Configure privacy and security settings based on customer needs and preferences (access, usage, communication) in the Microsoft 365 admin center, Copilot for M365 app, or individual app settings.

- Train your customers in ethical and legal standards and responsible AI use. [See resources](#).

A Copilot for every Microsoft Cloud experience

Microsoft 365 Copilot	Works alongside everyday productivity and communication apps such as Word, Excel, PowerPoint, Outlook, and Teams.
Dynamics 365 Copilot	Enhances productivity within customer relationship management (CRM) and enterprise resource planning (ERP) systems for sales, service, marketing, operations, and supply chain roles.
Copilot in Power Platform	Helps app creators use data from Excel to build, customize, and publish an app just by describing it.
Microsoft Security Copilot	Enables users to safeguard their operations and mitigate risk by combining a specialized LLM with a security-specific model developed by Microsoft.
Copilot Studio	A low-code tool that lets users easily create their own Copilots for Microsoft 365 and build standalone Copilots.

Dynamics 365 Copilot

Enhance your workforce with a Copilot for every job role.

Copilot works within Dynamics 365 alongside business professionals to help them create ideas and content faster, complete time-consuming tasks, and get insights and next-best actions – just by describing what's needed.

Sales

Recap sales meetings
Craft customer emails

Marketing

Generate content ideas
Create audience segments
Simplify customer insights

Service

Create customer responses
Enhance self-service bots

Supply chain

Predict disruptions

Operations

Create product descriptions

AI readiness

Make sure you and your clients are prepared for AI.

Before purchasing Copilot, it is important to take certain steps to ensure that your business and your clients are ready for AI. This includes developing an AI strategy, preparing for AI capabilities, and ensuring that your security measures are in place. Security is a crucial aspect of being ready for AI, as it helps to safeguard your employees, business, and data.

1

2

3

Business strategy

- Adopt AI principles
- Consult on AI outcomes
- Prepare for AI capabilities
  - Cloud migration
  - License optimization
  - User training and expectations

Transformation strategy

- Unified security
- Identity access
- Data management
  - Governance
  - Orchestration
  - Estate modernization/ migration

Drive adoption

- Start with a pilot projection
- Build business buy-in
- Monitor your AI solutions
- Work with Pax8 Professional Services to scale your service potential

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Business strategy

Adopt AI principles

Problem statement:
AI is an advanced technology with capabilities that can also advance risk.

Business need:
Partners need to develop ethical guidelines and Zero-Trust frameworks to manage AI solution adoption and reduce business risk.

Action to take:
Work proactively within your business to establish responsible principles and lead customers with confidence in the era of AI.

Consult on outcomes

Problem statement:
83% of businesses say AI is a top priority,[3] but what are their expectations for the solution?

Business need:
Customers need to understand and clarify their AI-driven goals through partner-led guidance and consultation.

Action to take:
Consult on the deeper need with your customer and support them in driving their preferred AI outcomes.

Prepare for capabilities

Problem statement:
Insecure environments and disparate data can create difficulty with AI adoption.

Business need:
Partners need a transformation strategy to manage customer adoption, with the ability to skill and scale solutions through Pax8-assisted support.

Action to take:
Prepare customers for successful deployments through strategic transformation actions.

Microsoft's responsible AI principles

Build a future where AI advances and benefits society.

As technology's rate of change accelerates, the work to govern AI responsibility must keep pace with it. Microsoft is committed to the advancement of AI driven by principles that put people first, from assessment through development and deployment.

Fairness

AI systems must be developed to treat all people fairly.

Reliability & Safety

AI systems must be designed to perform reliably and safely.

Privacy & Security

AI systems must comply with privacy laws.

Inclusiveness

AI systems must be designed to address a broad range of human needs and experiences.

Transparency

AI system behavior and functional components should be understood so that people can identify potential issues or unintended outcomes.

Accountability

People who design and deploy AI systems must be accountable for how their systems operate.

Building blocks to adopt principles

Tools & processes

↑

Training & practices

↑

Rules

↑

Governance

Consult on outcomes

What does AI mean to your clients?

If 83% of businesses are interested in AI,[3] you need to understand the outcome that you clients believe AI can provide them[3] through effective consultation.

By understanding the deeper need, you can more effectively choose the best AI-enhanced solution for your clients to fulfill that need.

Help your clients take the steps to be AI-ready

From an organization and culture standpoint, you should:

- Define the operating model for AI.
- Secure – or develop a plan to secure your customer environments.
- Develop strong relationships with a diverse range of subject matter experts in the business.
- Strengthen the organization's ability to manage change.
- Identify and implement the right learning and skill-building paths in place.
- Approach AI as a sustainable capability within the organization and culture.

As part of the business strategy and AI governance, you should:

- Review and share resources on responsible use of AI to identify the models and approaches that best suit the organization.
- Consider the enablement model that best fits the company's needs, such as hub-and-spoke, centralized, or distributed.
- Consider the principles of secure AI and how to ensure data is protected end-to-end from platform to applications and users.
- Consider the processes, controls, and accountability mechanisms that may be required to govern the use of AI, and how AI may affect data privacy and security policies.

Transformation strategy

Once you have an established business strategy, it's time to get your customers AI-ready, and for that you'll need a transformation strategy. AI is an advanced technology, which means that some environments may not be prepared for its adoption. At Pax8, we recommend focusing on three major pillars to prepare your customers for a cohesive Copilot experience: identity access, data management, and unified security.

Identity access

Inadequate identity and access management processes/policies hinder the seamless integration of AI solutions by impeding secure access, compromising data integrity, and raising concerns about privacy and regulatory compliance. Partners should ensure that the right users have the right access to the right resources at the right time. Pairing Microsoft 365 Premium SKUs (Business Premium, E3, E5) with CIS Controls (CSC) provides proactive security support to accelerate AI adoption.

- **Implement basic controls (CSC #1-6):** Essential for any organization to defend against common cyberattacks, such as securing hardware and software inventory, managing vulnerabilities, controlling administrative privileges, and more.

- **Apply foundational controls (CSC #7-16):** Technical in nature and can help protect your users' devices, apps, and data from more advanced threats by implementing secure configurations, encrypting data, monitoring network activity, and more.

- **Adopt organizational controls (CSC #17-20):** Process and procedural in nature and can help establish a culture of cybersecurity awareness and readiness, such as conducting security training, developing incident response plans, and more.

Work with Pax8 Professional Services for support in your AI readiness journey.

Data management

Fragmented data silos and a reliance on outdated legacy data solutions poses a significant barrier to the seamless integration of AI. That's why data management is important for AI because it affects the quality and performance of AI models and applications. Data management involves collecting, preparing, integrating, and governing data for AI purposes.

- **Data governance** helps to ensure that data is trustworthy, consistent, and does not get misused. Data governance involves creating and enforcing policies, standards, roles, and metrics that control how data is collected, stored, accessed, and used in an organization while also helping to improve data quality, security, privacy, and compliance.

- **Data orchestration** is the process of managing and coordinating the flow of data from various sources, systems, and applications. It helps to improve the efficiency and quality of data analysis and data management by automating tasks such as data collection, transformation, integration, and delivery. This can also help to optimize the performance and scalability of data pipelines.

- **Data estate modernization and migration** is the process of transforming and optimizing the organization's data infrastructure to take advantage of the latest technologies and capabilities. This can involve different steps and strategies, depending on your current data estate, your business objectives, and your budget.

Connect with your Pax8 sales team to migrate and modernize your customer's data.

Unified security

Insecure environments can experience increased risk with the integration of AI solutions, by accelerating privacy or compliance issues that remain uncorrected. Partners need to protect customer data, comply with regulations, and manage access. Microsoft 365 Premium SKUs combine Office with cloud security, reducing risk.

- **Microsoft 365 Business Premium:** This plan is designed for small- and medium-sized businesses with up to 300 users and includes the security features that are most relevant for this segment, such as Microsoft Defender for Business and Office 365, providing next-generation protection, endpoint detection and response, and threat and vulnerability management for your devices.

- **Microsoft 365 E3:** This plan includes the basic security features that are essential for any organization, such as antivirus, antimalware, ransomware protection, device and app management, data loss prevention, encryption, identity and access management, and more.

- **Microsoft 365 E5:** This plan includes everything in E3, plus more advanced security features that can help you prevent, detect, and respond to sophisticated cyberattacks, such as Microsoft Defender for Endpoint Plan 2, providing endpoint detection and response, threat and vulnerability management, and attack surface reduction.

Learn how to engage your customer upgrade opportunities with Cloud Ascent Data at Pax8 Academy.

AI adoption

Set and support the expectation

AI brings a new experience to the workplace, and with that new expectations arise. Partners should champion change with early adoption conversations supported by Copilot with commercial data protection.

- Develop AI thought leadership with skills training.
- Advise customers to establish Copilot as their "Approved AI solution" and provide environment management to support.

Blockers and considerations

Data challenges

AI algorithms are only as good as the data they are trained on. Businesses need to have access to large volumes of high-quality data to train and implement AI solutions effectively. However, many businesses struggle to collect, clean, and manage the data.

- 75% of companies don't trust their own data.[4]
- 65% use Excel as a data and analytics tool.[5]
- 40% of companies don't use a CRM solution.[6]
- 53% of companies don't use a cloud-based ERP solution.[7]

Lack of understanding

Many businesses still do not fully understand what AI is and how it can be used to benefit their business. This lack of understanding can lead to unrealistic expectations and disappointment with AI results.

- 64% of businesses don't have a clear understanding of what AI is or how it can benefit them.[8]
- 72% of business don't have a dedicated AI strategy.[9]
- Only 23% of business have "some kind of" a plan.[10]

Resistance

Some businesses have a cultural resistance to AI. There may be a fear that AI will replace human workers or lead to a loss of control over business processes. This fear and resistance can prevent businesses from fully embracing AI.

- 84% of businesses are concerned about the ethical implications of AI.[11]
- 63% of business leaders believe cultural resistance will be a major barrier.[12]
- 75% of employees on average have concerns about the impact of AI on their jobs.[13]
- 53% of organizations have experienced cultural challenges to AI adoption.[13]

Monitor the solution

Pilot where possible

Partners can guide customers through the strategic and internal adoption of pilot programs to develop use-case expertise and internal skills that boost customer buy-in and drive business value.

Resource feedback

Create a cadence of communication with customers that adopt advanced AI solutions to stay ahead of trends, needs, and insights.

Manage and monitor

Observe, analyze, and stay connected to AI projects to ensure success in customer adoption and use.

Create customer value with AI and boost buy-in

Drive mission and alignment

- Generate outcome-focused goals
- Motivates teams to achieve more
- Removes barriers for leaders

Measure engagement and productivity

- Spots trends sooner
- Pinpoints root causes
- Analyze employee sentiment in real-time

Enable a high-performance workforce

- Prepares employees faster
- Democratizes information
- Summarizes knowledge

How do I get started?

Prepare your organization and teams to embrace the power of AI

Calculate your customers' Copilot readiness and gain actionable advice on how to prepare for their AI adoption.

[Take the Copilot security assessment](#)

Secure your data with Microsoft Defender for Cloud

Explore all the ways Microsoft Defender for Cloud offers advanced, comprehensive threat protection and compliance assurance – crucial for AI integration in business environments.

[Read on about Defender for Cloud](#)

Get ready for Copilot with Microsoft 365

Understand how Microsoft 365 unifies identity, applications, management, security, and enterprise data to prepare your organization for AI.

[Check out M365 Business Premium](#)

Enhance your workforce with Dynamics 365 Copilot

Learn how AI capabilities can help generate ideas and content more efficiently, streamline time-consuming tasks, and unlock insights.

[Try Dynamics 365 Copilot today](#)

Build intelligent app experiences with Azure AI

See how you can build AI-powered applications for your organization on Azure.

[Review the OpenAI training course](#)

Build AI skills with Copilot on the web

M365 users can effortlessly connect with Copilot on the web using their Entra ID at copilot.microsoft.com.

[Connect with Copilot online](#)

Get ready for Microsoft security Copilot

Find out how Microsoft Security Copilot delivers unparalleled visibility, automation, and intelligence, enabling users to safeguard their operations and mitigate risk.

[Deploy Microsoft Defender for Business](#)

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Ready to take workplace productivity to new levels with Pax8 and Microsoft Copilot?

Start your AI journey

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