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# 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.
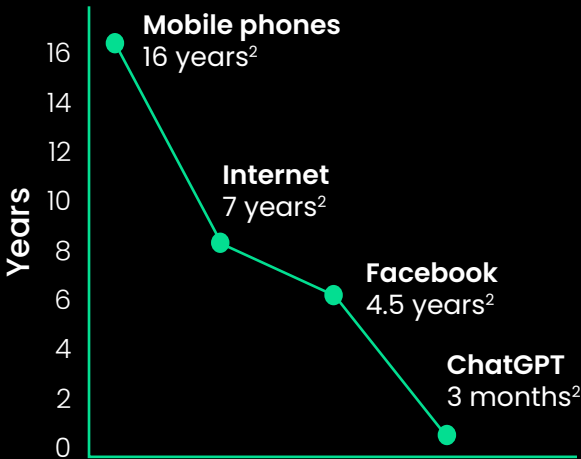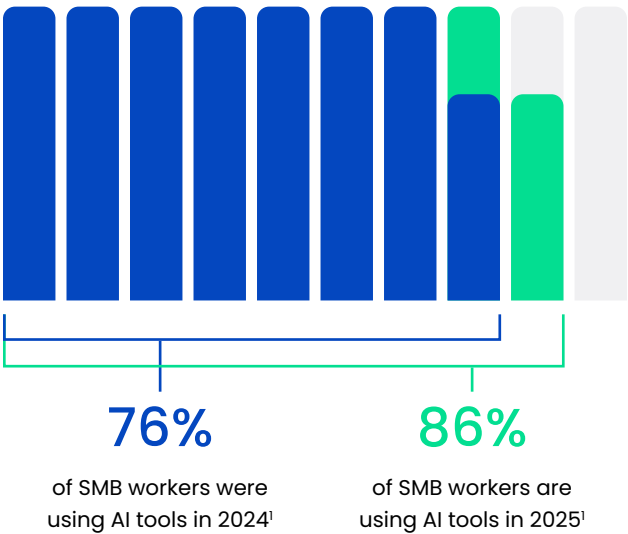
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Why is AI Readiness and Adoption Important for SMBs?

The technology landscape for SMBs is rapidly changing. AI is now seen as a scalable, affordable resource — not limited by headcount or expertise. This is redefining how businesses grow and compete. Over the past year, Copilot has helped provide immediate value for these organizations when it comes to improving business processes, productivity and much more. The landscape has changed from a futuristic approach to a tool that is providing immense value to businesses.

SMBs using Microsoft 365 Copilot are already seeing transformative results.

353%

projected ROI over a three-year period[1]

132% low-end ROI[1]
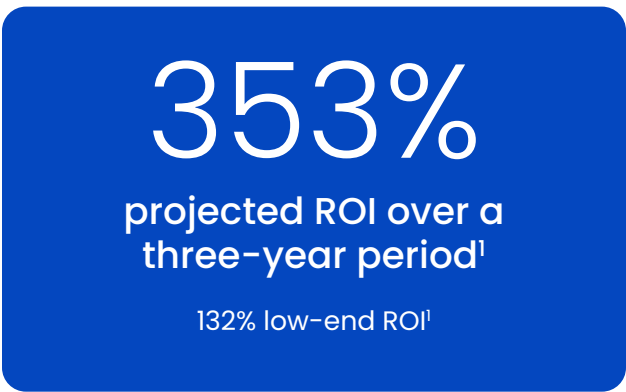
AI has quickly evolved from a futuristic concept to a practical, indispensable tool in everyday work.

76%

of SMB workers were using AI tools in 2024[1]

86%

of SMB workers are using AI tools in 2025[1]

Mobile phones 16 years[2]

Internet 7 years[2]

Facebook 4.5 years[2]

ChatGPT 3 months[2]

Years

16
14
12
10
8
6
4
2
0

# AI technology is being adopted faster than ever.

Make sure you don't miss out on this transformative tool.

Embracing AI Everywhere

The workforce is ready to take advantage of AI, recognizing its potential to boost productivity and delegate work. There's a growing mismatch between business demands and human capacity. Digital labor is emerging as the solution to bridge this gap.

82%
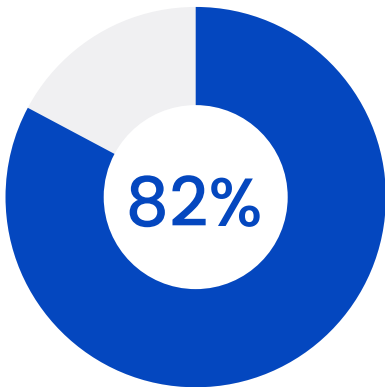
82% of business leaders believe 2025 is a pivotal year to rethink core aspects of strategy and operations.[1]

53%
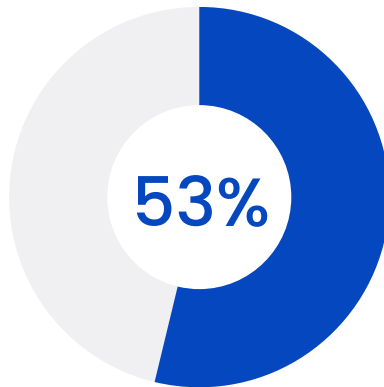
53% of leaders say productivity must increase, yet **80% of the global workforce** reports lacking the time or energy to do their job.[1]

2min

On average, employees are interrupted every **2 minutes** by meetings, emails or pings.[1]

82%
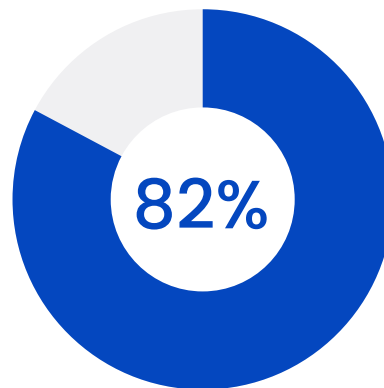
82% of leaders plan to use digital labor to expand their workforce in the next 12–18 months.[1]

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.
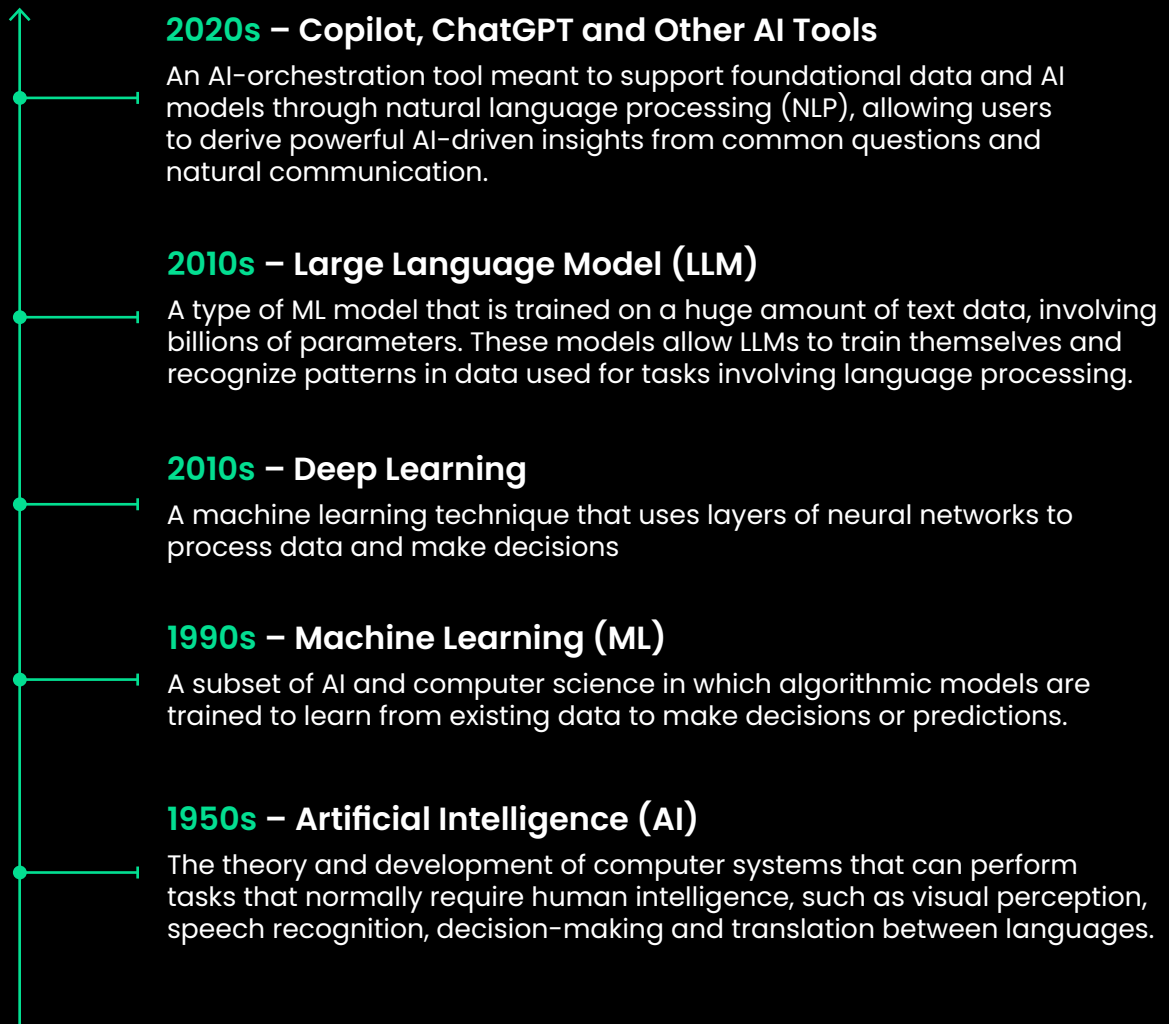
2020s – Copilot, ChatGPT and Other AI Tools

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.

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.

2010s – Deep Learning

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

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.

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.

AI Readiness
Make sure you and your clients are prepared for AI.

Before purchasing an AI tool, 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.

Developing an AI strategy

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

2. Transformation Strategy
- Unified security
- Identity access
- Data management
  - Governance
  - Orchestration
  - Estate modernization/ migration

3. 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

Business Strategy

Adopt AI principles

AI is an advanced technology with capabilities that can also advance risk. Partners need to develop ethical guidelines and Zero-Trust frameworks to manage AI solution adoption and reduce business risk. Work proactively within your business to establish responsible principles and lead customers with confidence in the era of AI.

Understand client goals

With 47% of companies prioritizing AI-specific skilling of their existing workforce,[1] customers need to understand and clarify their AI-driven goals through partner-led guidance and consultation. Consult on the deeper need with your customer and support them in driving their preferred AI outcomes.

Prepare for capabilities

Insecure environments and disparate data can create difficulty with AI adoption. Partners need a transformation strategy to manage customer adoption, with the ability to skill and scale solutions through Pax8-assisted support. Prepare customers for successful deployments through strategic-transformation actions.

Adopt 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. Pax8 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 and Safety	AI systems must be designed to perform reliably and safely.
Privacy and 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

Governance → **Rules** → **Training and practices** → **Tools and processes**
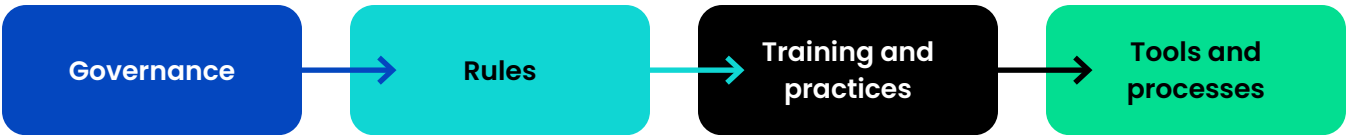
What Does AI Mean to Your Clients?

Talk with your clients and help them take the steps to be AI-ready.

From an organizational and cultural standpoint, you should:

- Define the operating model for AI.

- Secure — or develop a plan to secure — leadership support backed by resources.

- 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.

- 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 AI 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.

Data management

Fragmented data silos and a reliance on outdated, often on-premises, 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 to allow your AI solutions to perform at their best.

Data governance helps to ensure that data is trustworthy, consistent and does not get misused. It also 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 (Business Premium, E3, E5) align with CIS Controls to provide proactive security support to accelerate AI adoption.

Implement basic controls (CIS #1-6)	Apply foundational controls (CIS #7-16)	Adopt organizational controls (CIS #17-20)
Essential for any organization to defend against common cyberattacks, such as securing hardware and software inventory, managing vulnerabilities, controlling administrative privileges and more.	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.	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.

Enable 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. Advise customers to establish Copilot as an "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 data.

75%

of companies don't
trust their own data.[3]

65%

use Excel as a data
and analytics tool.[4]

40%

of companies don't
use a CRM solution.[5]

53%

of companies don't
use a cloud-based
ERP solution.[6]

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
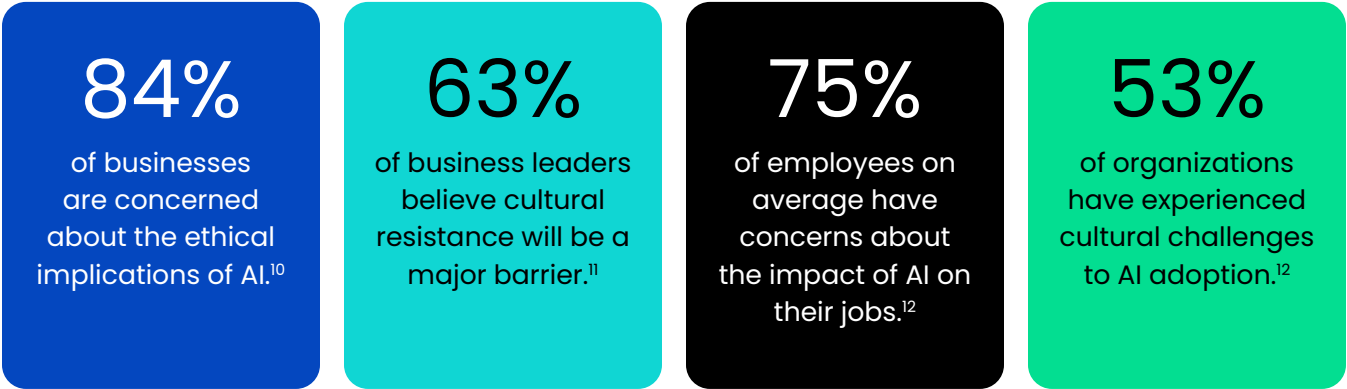understanding of what AI is or how
it can benefit them.[7]

72%

of businesses don't have a
dedicated AI strategy.[8]

23%

of businesses have
"some kind of" plan.[9]

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.[10]	**63%** of business leaders believe cultural resistance will be a major barrier.[11]	**75%** of employees on average have concerns about the impact of AI on their jobs.[12]	**53%** of organizations have experienced cultural challenges to AI adoption.[12]

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

- Spot trends sooner
- Pinpoint root causes
- Analyze employee sentiment in real-time

Enable a high-performance workforce

- Prepare employees faster
- Democratize information
- Summarize knowledge

Choosing the Right AI Tool
Drive Productivity with Microsoft Copilot

Microsoft Copilot is not just a tool; it's a transformative force that can reshape how MSPs operate and deliver value to clients. It offers many benefits that you can use directly in your business. Here are some key features available now that can help you optimize your MSP:

- Research and learning: MSPs can harness Copilot's advanced web search, image search and news search capabilities to effectively research and learn about topics, ensuring they stay ahead in the ever-changing tech landscape.
- Graphic artwork creation: The integration of Dall-E's AI art capabilities allows MSPs to create and present graphic artworks that align seamlessly with their prompts, enhancing the visual aspects of their presentations and communications.
- Specialized Copilot experiences: Microsoft extends Copilot experiences to various tools like Dynamics 365, Power Platform, Security Copilot and Copilot Studio, tailoring AI-powered assistance to specific business functions, security needs and customization requirements.

To get a complete understanding of the capabilities and value of Microsoft Copilot, read the blog. Don't know if you're AI ready? Take the Pax8 AI readiness assessment to uncover your technical gaps to leverage the full power of AI. For additional insights, explore our collection of resources designed to help you elevate your AI strategy.

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Get Expert Guidance

Want to enhance your Microsoft experience to make more possible for your clients? Your Microsoft experts are here to help. Schedule a Microsoft Business Review to uncover new ways to drive value, optimize your solutions and deliver better outcomes for your clients.

Connect with an expert

Build Your AI Expertise with Pax8

Want to unlock the full potential of Microsoft's Data and AI capabilities? Pax8 is here to guide you. Join our Guided Growth Track to build your knowledge, sharpen your skills and accelerate your journey with hands-on enablement and strategic insights.

Start your AI journey

Work Smarter with Microsoft Copilot

Ready to work smarter with AI? Your Microsoft experts are here to help. Discover how Microsoft Copilot can streamline your daily tasks, boost productivity and free up time for what matters most.

Get Copilot Now

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