AI

How to prepare your business for **Copilot and AI**

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*The past few years have seen **countless conversations** about AI.*

Business owners see demonstrations online and immediately start thinking about how it could help their company.

They hear stories about people creating reports in minutes, writing emails with a few prompts, analyzing data instantly, or producing marketing content at remarkable speed.

It's easy to understand the excitement.

Tools like Microsoft Copilot have the potential to remove a lot of the small tasks that eat away at the working day.

The appeal is the possibility of getting more done without needing more hours.

But it's easy to miss what's behind those impressive demonstrations.

When you watch someone using AI successfully, you're usually seeing the final step in a much bigger process.

You don't see how their files are organized or how their systems are managed.

And you don't see whether they've spent years building good habits around security and data management.

We've worked with businesses at every stage of that journey.

Some are already in a strong position to take advantage of AI. Their systems are organized, their security is in good shape, and information is stored where people can find it.

Others are carrying around years of digital clutter. Documents are scattered across different locations, employees have access to things they shouldn't, and nobody's sure which version of an important file is the latest one.

Introducing AI into those environments can still work, but the results aren't always as impressive.

Think about it this way: If you hired a new employee tomorrow, you'd want them to have access to accurate information, clear processes, and the right tools to do their job properly.

AI works much the same way. The better the environment you give it, the more useful it becomes.

Start with the problem, **not the technology**

One of the easiest mistakes to make with any new technology is becoming fascinated by the tool itself.

It happens every time something new arrives.

Years ago, businesses were asking whether they should move to the cloud. Then it was collaboration platforms. Then automation tools.

Now it's AI.

The conversation starts with the technology rather than the business issue that needs solving.

A better starting point is to look at where time disappears during a normal week.

Perhaps your team spends hours writing follow-up emails after meetings. Maybe managers are creating reports manually every month. Perhaps finding business information takes far longer than anyone would like.

These are the kinds of situations where AI can make a difference.

Let's imagine you're interested in Copilot because you've seen a demonstration online.

Someone asks what you'd like it to do for your business.

The answer isn't immediately obvious.

After thinking about it for a while, you realize your management team spends several hours each week pulling information together for internal reporting.

That's the task causing frustration and consuming valuable time.

Once you've identified the problem, it becomes much easier to decide whether AI could help and what success would look like.

That produces far better results than starting with the technology and hoping a use case appears later.

AI delivers the biggest gains when it's applied to specific tasks that already consume time, create frustration, or slow people down.

For example, Copilot can help draft documents, summarize meetings, analyze spreadsheets, produce first versions of reports, and assist with research.

Those capabilities are genuinely useful.

The businesses seeing the strongest results are usually clear about where those tools fit into their day-to-day work.

Before looking at licenses, products, or AI features, spend some time identifying where your team loses time today.

Get your information **under control**

The quality of the answers AI produces is heavily influenced by the quality of the information it can access.

This is one of the reasons some businesses are delighted with tools like Copilot while others struggle to see the value.

Imagine hiring a new member of staff and asking them to find information about a customer, a project, or a process.

If every document is stored logically, named consistently, and kept up to date, they'll find what they need quickly.

Now imagine the same task in an environment where documents are spread across shared drives, desktops, email inboxes, and personal folders.

There are multiple versions of the same file, nobody is sure which one is current, and important information mainly exists in people's heads.

Finding the right answer becomes much harder.

AI faces the same challenge.

Many businesses have accumulated information over years, sometimes decades.

New systems have been introduced. Old systems have been retained. Staff have developed their own ways of storing files. Departments have created processes that made sense at the time but have never been reviewed.

AI has a remarkable ability to expose these weaknesses.

When people search manually, they may compensate for poor organization because they already know where things are hidden. They know which folder contains the latest version and which document should be ignored.

AI doesn't have that advantage.

Before investing in AI, it makes sense to spend some time reviewing how information is stored and managed.

Can employees easily find documents?

Are files stored in consistent locations?

Are old versions being archived or removed?

Is information sitting inside individual inboxes when it should be available to the wider team?

Businesses that have embraced platforms like SharePoint, Teams, and OneDrive are in a stronger position because information is already centralized and easier to manage.

The goal is making sure that valuable business information is accessible, organized, and reliable.

The more confidence you have in your data, the more confidence you'll have in the answers AI produces.

Review who has **access to what**

One conversation that often follows discussions about AI is access permissions.

Many business owners assume AI creates new security risks, but AI highlights risks that already exist.

For example, if an employee can ask Copilot to find salary information, customer contracts, or confidential reports, that usually means they already had access to those files.

The difference is that AI can locate information much faster than a person manually browsing folders.

This makes it a good time to review who can access what across the business.

Permissions often become more complicated than anyone intended.

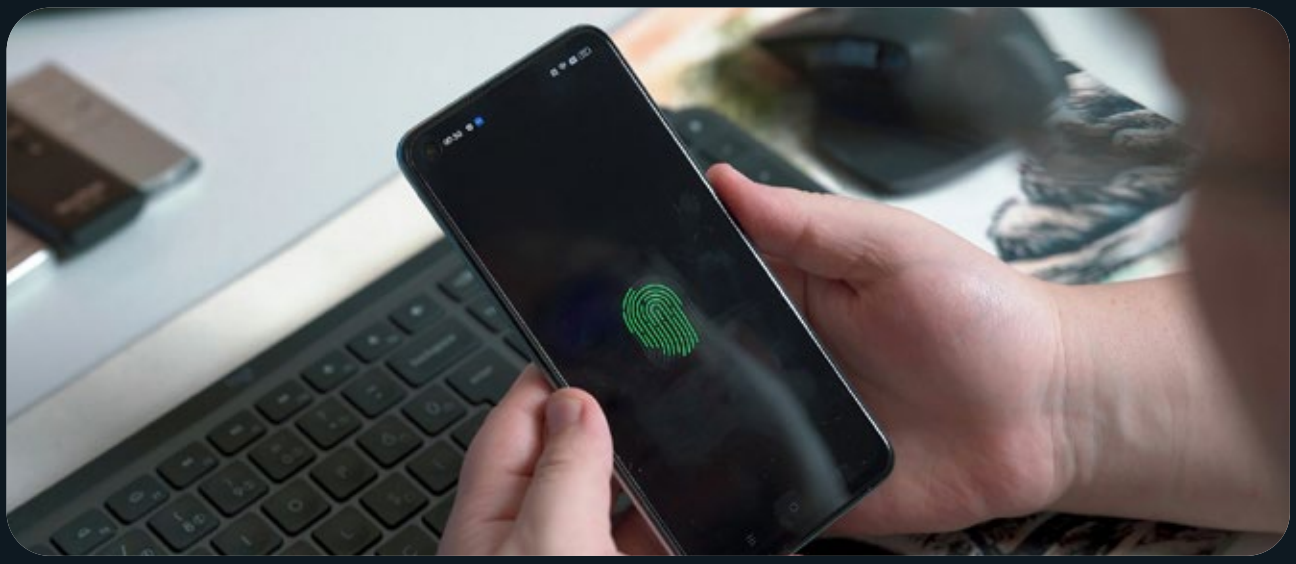
Employees change roles, new folders are created or temporary access becomes permanent. Sometimes former employees remain attached to systems long after they've left.

Eventually, few people have a clear picture of who can see which information.

Financial records, HR documents, legal information, customer data, and strategic plans should only be accessible to people who genuinely need them.

A permissions review isn't the most exciting project on the list, but it's one of the most valuable pieces of preparation a business can make before introducing AI tools.

Once access rights are properly managed, AI becomes more useful. People can trust that they're seeing the correct information.



Strengthen your **security foundations**

Security should always be part of technology planning, regardless of whether AI is involved.

AI provides a good opportunity to review those foundations.

Businesses are storing more data than ever. Customer information, financial records, supplier agreements, employee details, and intellectual property are all valuable assets.

Protecting that information is important.

There are still organizations operating with weak passwords, missing security updates, shared user accounts, or systems that haven't been reviewed in years.

Those weaknesses can hide in the background for a long time.

AI makes data more valuable and more accessible to the people using it.

And that makes security even more important.

Multi-factor authentication is a good example.

Many employees see it as a minor inconvenience because it adds an extra step when signing in.

From a security perspective, it provides one of the most effective ways to protect business accounts.

The same applies to keeping devices updated, managing access properly, and ensuring staff know how to recognize suspicious emails.

These are the foundations that allow newer technologies to be adopted safely.

AI capabilities can be used with confidence when you have a strong security posture.

Help your team **use AI sensibly**

Introducing AI is a people project as much as a technology project.

Employees need guidance on how to use the tools effectively.

Without that guidance, people often make one of two mistakes: They either avoid AI completely because they're unsure how to use it, or they trust it far more than they should.

Neither approach is helpful.

AI can be incredibly useful when treated as an assistant.

It can help produce first drafts, summarize information, generate ideas, and handle routine tasks.

That doesn't mean every answer it provides is correct.

Like any tool, it requires human judgment.

Information should still be checked. Important decisions should still involve people. And customer communications should still be reviewed before they're sent.

Businesses should also think carefully about what information employees are entering into AI systems.

Public AI platforms operate differently from business-focused solutions like Microsoft Copilot.

Staff should understand what's appropriate to share and what should remain confidential.

A short conversation about expectations can prevent problems later.

Check your processes **make sense**

AI can make good processes faster. It struggles to rescue poor processes.

You may hope that introducing AI will solve inefficiencies that have existed for years. But AI usually works best when there is already a clear process to support.

Take customer onboarding as an example.

If everyone follows a documented process, AI may be able to help create documentation, draft communications, summarize information, and reduce administrative work.

If the process changes every time, varies between employees, and relies on memory, the opportunities become more limited.

The same principle applies across many areas of the business:

- Reporting
- Proposal creation
- Customer service
- Internal administration

The more consistency there is, the easier it is to spot where AI can provide support.

That doesn't mean every process needs to be documented in minute detail before AI can be introduced. But you should have a reasonable understanding of how work flows through the business.

Small improvements to existing processes deliver immediate benefits, even before AI enters the picture.

Is your Microsoft 365 **environment ready?**

Many businesses exploring Copilot already have most of the building blocks in place. They just haven't connected everything together yet.

Copilot works most effectively when it can access information stored across Microsoft 365.

That includes emails, documents, Teams conversations, calendars, meetings, and files stored in OneDrive and SharePoint.

The more consistently your business uses those platforms, the more useful Copilot becomes.

This makes AI adoption a good opportunity to review how Microsoft 365 is currently being used.

Are documents being stored in SharePoint or sitting on an old server?

Are employees collaborating through Teams or relying heavily on email attachments?

Is information accessible from the right locations?

Are security settings configured appropriately?

Lots of businesses find they're paying for powerful tools without taking full advantage of them.

Addressing those gaps can immediately improve productivity, regardless of whether Copilot is introduced tomorrow or six months from now.

AI rewards **prepared businesses**

AI will undoubtedly change the way your business operates.

In some areas the changes will be dramatic. In others, they'll be smaller.

What's most important is whether your business is ready to make practical use of the technology.

Organized information, sensible security practices, well-managed access permissions, clear processes, and a strong Microsoft 365 environment all contribute to better outcomes.

If you've invested time in those areas, you'll find that AI will deliver value much more quickly.

If you skip those foundations, you may wonder why the results don't match the demonstrations you've seen.

The exciting part of AI is easy to see. The preparation behind it is much less visible.

Whether you're considering Microsoft Copilot or exploring AI more broadly, a little preparation can make a huge difference to the results you achieve.

If you'd like guidance assessing your current setup and understanding what steps would put your business in the strongest position, we'd be happy to help.

Get in touch.

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