

Decisions to Make Before You Add Another AI Tool to Your Business

A business-first workbook for evaluating opportunity, fit, governance, adoption, and measurable value.

TECHNOLOGY EXPERTISE. BUSINESS JUDGMENT.
ACCOUNTABLE RESULTS.



WHY THIS GUIDE EXISTS

More AI is not automatically better AI.

**AI adoption rarely begins with one coordinated decision.**

A capability appears inside Microsoft 365. A business application introduces an assistant. One department buys a specialized tool. Employees create individual accounts to make recurring work easier.

**Each decision may appear reasonable on its own.**

Together, they can create overlapping licenses, inconsistent practices, uncertain information handling, uneven adoption, and activity that is difficult to connect to a business result.

**The answer is not to stop useful exploration. It is to bring the important decisions together.**

This guide helps leadership evaluate AI before adding another tool or expanding an existing one. It begins with the business condition, then examines current capabilities, workflow fit, information, people, implementation readiness, ownership, and measurement.

**THIS GUIDE IS A DECISION AID**

It is not a certification, risk assessment, legal opinion, privacy review, compliance determination, or substitute for qualified technical and professional review.



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Work through the decisions in order.

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BY THE END OF THIS GUIDE

You should have one clearly stated business priority, a working capability inventory, a candidate workflow, a preliminary governance view, a role-based adoption plan, a 90-day validation outline, named ownership, and an initial measurement approach.

HOW TO USE THIS GUIDE

Bring the people who know the work and the risk.



RECOMMENDED WORKING GROUP

- Business or executive sponsor
- Process owner
- Technology representative
- Security, privacy, legal, HR, or compliance reviewer when appropriate
- One or two employees who perform the work being examined



WORKING METHODS

- 1 Read each decision principle.
- 2 Complete the worksheet using facts where available.
- 3 Mark unknowns as Validation Required.
- 4 Score the decision from 0 to 2.
- 5 Assign the next action, owner, and date. Do not select a platform merely to complete the workbook.



THE 0-1-2 READINESS SCALE

0**UNCLEAR**

The decision has not been addressed.

1**PARTIAL**

Some information exists, but meaningful gaps remain.

2**READY TO EVALUATE**

Enough clarity exists to validate a responsible next step.

**IMPORTANT**

A higher score does not mean every AI use case is appropriate. Each workflow still requires its own business, technical, information, and governance review.

Readiness is a sequence of decisions, not a software feature.

Move from purpose to evidence.
Choose technology only after the work is clear.



QUICK SELF-CHECK

Are we solving a named business problem? Do we know what capabilities we already own? Can we name the workflow? Do we know what information it requires? Have users been selected by role? Is there a controlled validation plan? Does someone own the outcome?

DECISION 1

What business result are we trying to improve?

"Use AI" is not an operational objective. A useful starting point describes what is slow, repetitive, inconsistent, difficult to find, difficult to hand off, or difficult to measure.



A STRONG OPPORTUNITY STATEMENT EXPLAINS

- Who is affected
- What work is involved
- What happens today
- Why the condition matters
- What a better result would look like
- What must not be compromised



QUALITYIP POINT OF VIEW

If the problem cannot be explained without naming an AI product, it is probably too early to select the product.



ILLUSTRATIVE EXAMPLE

Weak: We want to deploy an AI assistant.

Stronger: Account managers spend substantial time reconstructing client follow-up from meeting notes, email, and CRM records. We want a more consistent reviewed follow-up process without allowing unapproved information to leave authorized systems.

WORKSHEET

Business Outcome Brief



BUSINESS PRIORITY

What leadership wants to improve



DEPARTMENT OR PROCESS



PEOPLE AFFECTED



CURRENT CONDITION

Describe the work as it happens today



OPERATIONAL OR FINANCIAL CONSEQUENCE



DESIRED IMPROVEMENT

Direction, not a guaranteed result



CURRENT BASELINE, IF KNOWN



CONSTRAINT THAT MUST BE RESPECTED



EXECUTIVE OWNER



INFORMATION STILL REQUIRING VALIDATION



NEXT ACTION / OWNER / DATE



DECISION CHECK

- ☐ We can describe the problem without naming a product.
- ☐ People performing the work agree it is worth addressing.
- ☐ The desired result can be observed or measured.

business owner is accountable.

- ☐ We recorded what must not be compromised.

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

DECISION 2



What AI capabilities do we already have?



AI may already exist inside Microsoft 365, communications platforms, CRM systems, line-of-business applications, and employee-created accounts. A new purchase should not begin until the current environment is visible.



THREE ASSUMPTIONS TO CHALLENGE

- A purchased license is not evidence of useful adoption.
- A free tool is not consequence-free.
- Similar feature labels do not mean two tools solve the same business problem.



ILLUSTRATIVE EXAMPLE

A sales team may already have meeting transcription, drafting, CRM assistance, and knowledge-search capabilities across several platforms. The first useful decision may be consolidation, access review, or workflow design rather than another license.

WORKSHEET



Capability and License Inventory

Platform / capability	Owner	Users / dept.	Intended use	Information accessed	License / renewal	Adoption	Status / decision

DISCOVERY PROMPTS

- Which existing platforms introduced AI features?
- Which employees created individual accounts?
- Are departments purchasing separately?
- Is access assigned by role or simply made available?
- Can the organization see usage and cost?
- Is a renewal approaching before value has been evaluated?



STATUS OPTIONS

Approved / Restricted / Unreviewed. Decision options: Keep / Evaluate / Consolidate / Discontinue / Unknown.

DIAGNOSTIC



Find duplication before adding complexity.



SAME WORK

Do multiple tools draft, summarize, search, transcribe, or route the same information?



SAME USERS

Are the same roles receiving overlapping access?



SAME INFORMATION

Do tools need access to the same source systems?



DIFFERENT CONTROLS

Are retention, identity, administration, and reporting materially different?



OUTPUT

CAPABILITIES TO EVALUATE FIRST

POTENTIAL CONSOLIDATION OPPORTUNITY

UNREVIEWED EMPLOYEE USE REQUIRING ATTENTION

RENEWAL DECISION AND DATE

INVENTORY OWNER

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

WORKSHEET

3

Role-to-Capability Matrix

Map each proposed role to the capability, workflow, platform, people, and support needed to perform it well. Use this matrix to uncover gaps, overlaps, and ownership dependencies.

Role / group	Primary workflow	Current platform	Candidate capability	Required information	Human review	Training / support	Recommendation

DIAGNOSTIC PROMPTS

- Is the capability close to work the person already performs?
- Does the role have a recurring use case?
- Would an existing platform be a better fit?
- Does the person have appropriate source access?
- Who will support the user?
- What would justify continued access?

USE THIS MATRIX FOR



New role proposals



Existing role changes



Access reviews



SPECIFICITY MATTERS

A capability name should reflect what the person needs to do, not how the tool is marketed.

Instead of

- AI Chatbot User
- Report Viewer Pro
- Data Explorer Access

Use

- ✓ Summarize Policy Documents
- ✓ Run Sales Trend Reports
- ✓ Analyze Customer Churn Data



WATCH FOR

Overly broad capability names

Platform names in place of job tasks

Unclear or duplicated responsibilities



RECOMMENDATION OPTIONS

Pilot / Later / Not recommended. Record the evidence required before adding another role or license.

WORKSHEET



Workflow Opportunity Card

WORKFLOW NAME AND TRIGGER

PEOPLE INVOLVED

PROCESS OWNER

CURRENT STEPS AND SYSTEMS

INFORMATION INPUTS

CURRENT OUTPUT

FREQUENCY / VOLUME

FRICTION OR FAILURE POINT

PROPOSED AI-ASSISTED STEP

STEPS THAT REMAIN HUMAN-OWNED

REQUIRED HUMAN REVIEW

EXPECTED BUSINESS BENEFIT

KNOWN CONSEQUENCES OR RISKS

VALIDATION REQUIRED



TRIGGER



SOURCE INFO



CURRENT WORK



ASSISTED STEP



HUMAN REVIEW



FINAL ACTION

DIAGNOSTIC



Find duplication before adding complexity.

**SAME WORK**

- ☐ Do multiple tools draft, summarize, search, transcribe, or route the same information?

**SAME USERS**

- ☐ Are the same roles receiving overlapping access?

**SAME INFORMATION**

- ☐ Do tools need access to the same source systems?

**DIFFERENT CONTROLS**

- ☐ Are retention, identity, administration, and reporting materially different?

**OUTPUT**

CAPABILITIES TO EVALUATE FIRST

POTENTIAL CONSOLIDATION OPPORTUNITY

UNREVIEWED EMPLOYEE USE REQUIRING ATTENTION

RENEWAL DECISION AND DATE

INVENTORY OWNER

**JUDGMENT STILL MATTERS**

Do not choose an easy demonstration simply because it looks impressive. Start with work that matters and can be responsibly evaluated.

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

WORKSHEET

Map the information flow



1

SOURCE

2

ACCESS

3

PROCESSING

4

OUTPUT

5

REVIEW

6

STORE / ACT

1

INFORMATION SOURCE AND OWNER

7

CLASSIFICATION / SENSITIVITY

2

APPROVED SYSTEM OF RECORD

8

AUTHORIZED USERS

3

PROPOSED PLATFORM AND ACCOUNT TYPE

9

OUTPUT PRODUCED

4

INFORMATION SUBMITTED

10

OUTPUT DESTINATION

5

HUMAN APPROVAL POINT

6

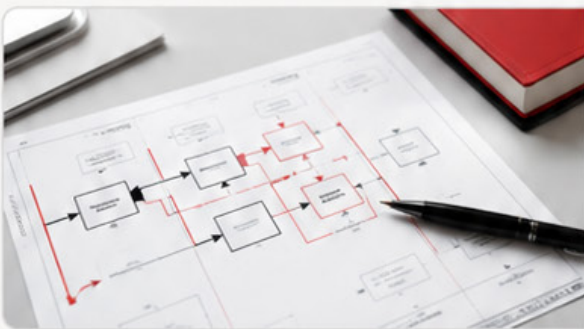
RETENTION / DELETION REQUIREMENT

12

LOGGING / REPORTING REQUIREMENT

11

ADDITIONAL REVIEW REQUIRED



ILLUSTRATIVE EXAMPLE

A meeting-summary workflow may involve attendee consent, recording rules, customer information, storage, access permissions, output review, and CRM retention. The summary is only one part of the decision.



PLAIN-ENGLISH TAKEAWAY

Low use may indicate poor fit, unclear expectations, insufficient training, weak workflow design, or access friction. It does not automatically mean employees are resistant.



REVIEWER NOTE

Use this worksheet to trace the full lifecycle of the information and identify owners, controls, and downstream dependencies.

DECISION 4



What information may AI access, and what must be protected?



Responsible adoption requires clarity about information, identity, access, employee behavior, output review, and oversight. Governance should make appropriate work possible; it should not remain a vague prohibition.



BEFORE TESTING, DETERMINE

- What information is required
- Who owns it and where it resides
- Who should access it
- What the proposed platform does with prompts, files, outputs, and activity records
- Which existing obligations and review requirements apply



PLAIN-ENGLISH TAKEAWAY

Do not enter sensitive business, customer, employee, legal, financial, health, regulated, confidential, or proprietary information into an unreviewed service.



REVIEWER NOTE

Involve technology, cybersecurity, privacy, legal, compliance, HR, and records-management reviewers when the use case warrants it.

Compare candidate workflows

Candidate workflow	Business value	Frequency / consequence	Feasibility	Information readiness	Employee readiness	Risk manage ability	Tot al

HOW TO INTERPRET THE RESULT



HIGH VALUE / MANAGEABLE READINESS

Validate first



HIGH VALUE / LOW READINESS

Resolve prerequisites



LOWER VALUE / EASY

Avoid easy-demo bias



LOW VALUE / LOW READINESS

Hold



JUDGMENT STILL MATTERS

Do not let the total score make the decision by itself. A high-value workflow with unclear information rights, unacceptable consequences, or no accountable owner remains gated.

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

WORKSHEET

Workflow Opportunity Card



WORKFLOW NAME AND TRIGGER

PEOPLE INVOLVED

PROCESS OWNER

CURRENT STEPS AND SYSTEMS

INFORMATION INPUTS

CURRENT OUTPUT

FREQUENCY / VOLUME

FRICTION OR FAILURE POINT

PROPOSED AI-ASSISTED STEP

STEPS THAT REMAIN HUMAN-OWNED

REQUIRED HUMAN REVIEW

EXPECTED BUSINESS BENEFIT

KNOWN CONSEQUENCES OR RISKS

VALIDATION REQUIRED



TRIGGER

SOURCE INFO

CURRENT WORK

ASSISTED STEP

HUMAN REVIEW

FINAL ACTION



WATCH FOR

Adoption fails when people don't trust the process or see their role in it.
Map the work. Confirm the value. Design with them.

DECISION 3



Which workflow deserves attention first?

A promising use case is not merely something AI can do. It is work worth improving, with appropriate information, manageable consequences, clear ownership, and enough repetition or significance to justify validation.

USE-CASE FILTERS

- Is the work recurring or materially important?
- Is the current condition understood?
- Is the source information available and appropriate?
- Can a human review the output?
- Is the workflow owner willing to participate?
- Could a simpler process or configuration change solve the problem?



SPECIFICITY MATTERS

Too broad: Use AI in operations.

Usable: Prepare a reviewed first draft of the weekly service summary using approved ticket data.

WATCH FOR

Do not choose an easy demonstration simply because it looks impressive. Start with work that matters and can be responsibly evaluated.

OPERATING PLAN

Access is only the beginning.



- 1 **CONTEXT** Why this workflow was selected
- 2 **INSTRUCTION** How to use the capability for the approved task
- 3 **PRACTICE** Safe, role-relevant exercises
- 4 **SUPPORT** A place to ask questions and report problems
- 5 **FEEDBACK** A regular way to improve the workflow

TRAINING PLANNER

User group	Required competency	Training format	Trainer / owner	Job aid	Support route	Feedback date

PLAIN-ENGLISH TAKEAWAY

Low use may indicate poor fit, unclear expectations, insufficient training, weak workflow design, or access friction. It does not automatically mean employees are resistant.

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

DECISION 6



How will we validate adoption before we scale?



A controlled pilot tests business fit, employee adoption, workflow design, and governance before a broader commitment. Keep the first validation narrow enough to learn.

A PILOT NEEDS

- One workflow
 - defined participant group
- Approved platform and information access
 - baseline
- Training and support
- Review dates
- Success signals
- Stop and escalation conditions

ILLUSTRATIVE EXAMPLE

Rather than assigning a capability to an entire department, begin with five users performing one recruiting workflow. Review output quality, appropriate use, adoption barriers, and business impact before adding users or workflows.

WORKSHEET



Pilot Charter

PILOT NAME

BUSINESS OWNER

BUSINESS PROBLEM AND WORKFLOW IN SCOPE

WORK EXPLICITLY OUT OF SCOPE

PILOT USERS

TECHNICAL OWNER

GOVERNANCE REVIEWER

PLATFORM / ACCOUNT APPROVED

INFORMATION ALLOWED

BASELINE

SUCCESS SIGNAL

QUALITY REQUIREMENT

TRAINING AND SUPPORT ROUTE

REVIEW DATES

STOP / ESCALATION CONDITION

EVIDENCE REQUIRED TO EXPAND

PILOT RULE

Start small enough to observe the work. Define what would cause the team to continue, revise, pause, or stop before the pilot begins.



Validate. Expand. Scale.

DAYS 1-30

VALIDATE

- Confirm workflow and baseline
- Configure approved access
- Train pilot users
- Observe actual use
- Capture issues and exceptions
- Hold first evidence review

GATE

Continue only if the workflow remains useful, controllable, and measurable.

DAYS 31-60

EXPAND

- Correct workflow, access, training, or governance issues
- Add a limited user group or adjacent step only when justified
- Confirm measures and data collection
- Document what remains out of scope

GATE

Expand only when evidence shows appropriate use and a plausible business benefit.

DAYS 61-90

SCALE

- Decide whether to continue, revise, broaden, consolidate, or stop
- Define operating ownership
- Confirm license, support, policy, and reporting requirements
- Set the next roadmap review

GATE

Scale is a leadership decision, not an automatic end state.

PLANNING NOTE

Use the page 25 scorecard and page 23 evidence log at every gate. Do not wait until day 90 to discover that the baseline or data source was never established.



Pilot Evidence Log

Date	User / workflow	What worked	Friction or quality issue	Information / policy concern	Corrective action	Owner	Status

DECISION REVIEW PROMPTS

- Is the original problem still worth solving?
- Is AI improving the workflow or adding review burden?
- Are users following the intended process?
- Has any unplanned information use appeared?
- Is the output good enough for the intended purpose?
- What must change before the next gate?

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

DECISION 7

How will we define value and own the next step?

Activity is not the same as value. Logins, prompts, and generated content can help diagnose adoption, but leadership also needs to know whether the workflow improved and who will decide what happens next.

USE A BALANCED MEASUREMENT SET

- **Business outcome:** What condition should improve?
- **Operational:** Did work become faster, more consistent, or easier?
- **Quality:** Are outputs usable after required review?
- **Adoption:** Are intended users applying it appropriately?
- **Risk:** Are exceptions, policy issues, or review failures occurring?
- **Cost:** What license, support, integration, and oversight resources are required?
-



MEASUREMENT RULE

Do not claim time or financial savings without a credible baseline and repeatable measurement method.

PLAIN-ENGLISH TAKEAWAY

Usage tells you whether people are trying the capability. It does not tell you whether the business is better because of it.

WORKSHEET



Value and Accountability Scorecard

Measure	Baseline	Target direction	Data source	Review frequency	Owner	Continue / revise / expand / stop criteria
Business outcome						
Operational measure						
Quality measure						
Adoption measure						
Risk / exception measure						
Cost / resource measure						

POSSIBLE MEASURES

- Workflow cycle time and rework rate
- Completion consistency
- Intended-user adoption
- Outputs receiving required review
- Assigned-license use
- Exceptions or incidents
- User-reported usefulness
- Response time, where relevant

DECISION DATE

Set the date when the business owner, technical owner, and governance owner will decide whether the pilot continues, changes, expands, or stops.

DECISION SCORE

☐ 0 UNCLEAR

☐ 1 PARTIAL

☐ 2 READY TO EVALUATE

WORKSHEET



Name the owners before you expand.

OWNS THE BUSINESS RESULT	NAME / ROLE / BACKUP
OWNS THE WORKFLOW	NAME / ROLE / BACKUP
OWNS PLATFORM CONFIGURATION AND ACCESS	NAME / ROLE / BACKUP
OWNS INFORMATION / SECURITY REVIEW	NAME / ROLE / BACKUP
OWNS TRAINING AND SUPPORT	NAME / ROLE / BACKUP
COLLECTS EVIDENCE	NAME / ROLE / BACKUP
MAKES THE SCALE DECISION	NAME / ROLE / BACKUP
OWNS THE NEXT ROADMAP REVIEW	NAME / ROLE / BACKUP

QUALITYIP POINT OF VIEW
 Shared involvement is useful. Shared accountability without a named owner is not.

DECISION SCORE

☐ 0 UNCLEAR
 ☐ 1 PARTIAL
 ☐ 2 READY TO EVALUATE

FINAL SCORE

Use the score to find the next decision, not to certify readiness.

1	Business result			
		0	1	2
2	Existing capabilities			
		0	1	2
3	Workflow fit			
		0	1	2
4	Information and governance			
		0	1	2
5	People and roles			
		0	1	2
6	Pilot and adoption			
		0	1	2
7	Value and ownership			
		0	1	2

TOTAL ____ / 14

0-4 Clarify before selecting another tool | 5-9 Prepare for focused validation 10-14 Plan coordinated adoption and validate assumptions before expanding

INTERPRETATION

The score is a discussion tool, not a certification, security assessment, or compliance determination. A higher score means the decisions are better documented, not that every use case is appropriate.

WORKSHEET

One-Page Decision Summary

BUSINESS RESULT WE WANT TO IMPROVE

EXISTING CAPABILITIES TO EVALUATE FIRST

HIGHEST-PRIORITY WORKFLOW

INFORMATION OR GOVERNANCE ISSUE REQUIRING REVIEW

INITIAL USER GROUP

90-DAY VALIDATION OWNER

PRIMARY SUCCESS MEASURE

MOST IMPORTANT UNANSWERED QUESTION

DECISION REQUIRED

DECISION OWNER

DECISION DATE

RECOMMENDED NEXT STEP

LEADERSHIP USE

Share this page with the leadership group. Keep the detailed worksheets as evidence for how the team reached the recommendation.

WHAT YOUR RESULTS MAY BE TELLING YOU

Turn gaps into clear gates.

■ CLEAR OPPORTUNITY, UNCLEAR CONTROLS

Do not begin the pilot until information, access, account type, review, and escalation requirements are resolved.

■ MANY TOOLS, LITTLE EVIDENCE

Inventory current capabilities, usage, contracts, and renewal dates before purchasing more.

■ STRONG INTEREST, VAGUE WORKFLOW

Return to Decision 1 and observe how the work happens today.

■ USEFUL PILOT, WEAK OWNERSHIP

Pause expansion until operating, technical, and governance responsibilities are assigned.

■ GOOD USAGE, UNCLEAR VALUE

Do not confuse activity with outcome. Revisit the baseline and measurement design.

CLOSING PROMPT Which unresolved decision creates the greatest risk of wasting time, money, or trust?

60-MINUTE WORKING SESSION

Use the guide to produce one owned next step.

0-10 MIN

Agree on one business condition

10-20 MIN

Review existing capabilities

20-35 MIN

Map and compare candidate workflows

35-45 MIN

Identify information and governance gates

45-55 MIN

Assign pilot users, owners, and measures

55-60 MIN

Name the next action and decision date

FACILITATOR RULES

- Keep the conversation centered on one workflow.
- Separate facts from assumptions.
- Write Validation Required instead of debating unknowns.
- Do not select a product during the first half of the discussion.
- End with named ownership.

OUTPUT

One completed decision summary, one named owner, one next action, and one decision date.

PRACTICAL GLOSSARY

Plain language for the decisions in this guide.

AI CAPABILITY

A function that uses AI inside a platform, application, or workflow.

USE CASE

A specific job or workflow in which a capability may assist.

WORKFLOW

The sequence of people, information, systems, decisions, and actions used to complete work.

GENERATIVE AI

AI that produces new text, images, audio, code, or other content from instructions and source material.

MODEL

The underlying system used to interpret input and produce an output.

PROMPT

An instruction or context provided to an AI capability.

HUMAN REVIEW

A defined check by an accountable person before an output is accepted, published, or acted upon.

GOVERNANCE

Policies, ownership, access, review, monitoring, and decision processes used to guide appropriate AI use.

DATA CLASSIFICATION

A method for identifying information sensitivity and handling requirements.

PILOT

A limited test designed to collect evidence before a broader commitment.

ADOPTION

Appropriate, sustained use by the intended people for the intended work.

BASELINE

The documented current condition used to evaluate change.

SUCCESS SIGNAL

Evidence that supports continuing, revising, expanding, or stopping an approach.

SYSTEM OF RECORD

The authorized source where official business information is maintained.

AI OPPORTUNITY ROADMAP

QualityIP's structured assessment of opportunities, capabilities, licensing, governance, readiness, and implementation priorities.

SOURCES AND FURTHER READING

Independent guidance behind the decision framework.

- 1** **NIST AI Risk Management Framework (AI RMF 1.0)**
NIST AI 100-1, January 26, 2023
Official source: doi.org
- 2** **NIST Generative AI Profile**
NIST AI 600-1, July 26, 2024
Official source: doi.org
- 3** **NIST AI RMF Resources and Playbook**
Operational resources for GOVERN, MAP, MEASURE, and MANAGE
Official source: aic.nist.gov
- 4** **Engaging with Artificial Intelligence**
ASD ACSC with CISA, NSA, FBI, NCSC-UK and partners, January 24, 2024
Official source: www.cyber.gov.au
- 5** **Deploying AI Systems Securely**
NSA, CISA, FBI and international partners, April 15, 2024
Official source: www.cisa.gov
- 6** **AI Data Security: Best Practices**
NSA AI Security Center with partners, May 22, 2025
Official source: www.nsa.gov

USE OF SOURCES

These references support the guide's general decision principles. They do not make this workbook a legal, privacy, compliance, or cybersecurity assessment.

MICROSOFT COPILOT READINESS

Licenses are an implementation step, not a strategy.

7

Rollout Microsoft Copilot to your organization

Microsoft Learn, updated August 18, 2026

Official source: learn.microsoft.com

8

Secure and govern Microsoft Copilot

Microsoft Learn, foundational deployment guidance, updated August 18, 2026

Official source: learn.microsoft.com

9

Get ready for Microsoft Copilot with SharePoint Advanced Management

Microsoft Learn

Official source: learn.microsoft.com

10

Microsoft Copilot readiness report

Microsoft Learn, updated August 18, 2026

Official source: learn.microsoft.com

11

Copilot Control System measurement and reporting

Microsoft Learn, updated February 25, 2026

Official source: learn.microsoft.com**PRACTICAL SYNTHESIS**

Start with the work, not the tool. Choose one bounded workflow, name an accountable owner, classify the information it touches, define required human review, pilot with a small trained group, measure a baseline and business outcome, monitor risk and quality, then expand only when evidence supports it.

TURN YOUR COMPLETED GUIDE INTO A PRACTICAL NEXT STEP

Bring one priority, one workflow, or one unanswered question.

If this guide exposed unclear priorities, overlapping tools, a promising workflow, or unresolved governance questions, bring the completed worksheets to a complimentary 30-minute AI Opportunity Session with QualityIP.

The conversation focuses on your business priorities, current environment, and the decisions that need to be made next. It is an introductory working conversation, not a generic product demonstration.

SCHEDULE AN AI OPPORTUNITY SESSION

Where deeper discovery is appropriate, QualityIP can discuss an AI Opportunity Roadmap: a structured, paid engagement that examines opportunities, current capabilities, licensing, information, governance, readiness, and implementation priorities.

qualityip.com

Platform capabilities, licensing, and terms can change and should be confirmed during planning.

This workbook does not replace qualified legal, privacy, compliance, or cybersecurity review.

