imagine IT
MANAGED IT SERVICES



AI Risks & Opportunities for Small Biz & Gov

What Leaders Must Do Now (and NOT do)

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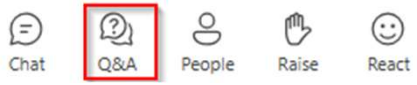
Housekeeping

Webinar Q&A Feature

- Ask questions here anytime during the webinar, and we will try to respond via chat on-the-fly. Afterwards, we will respond to all questions and send to attendees.



There will be a survey link at the end.

Presentation Slides (including hidden content) and the Recording Will Be Provided Soon After.

AGENDA

Learning how to effectively work with AI is becoming an important skill. Orgs and information workers that embrace it will be more efficient, effective, and competitive.

Today's Takeaways

- **Where does your org start?**
- **Examples of AI success**
- **Best-practices to reduce AI risk before & during rollout**
- **How to get full user adoption**
- **What a best-practice AI rollout looks like**
- **Next Steps & Homework**

The AI Adoption Story in 5 Beats

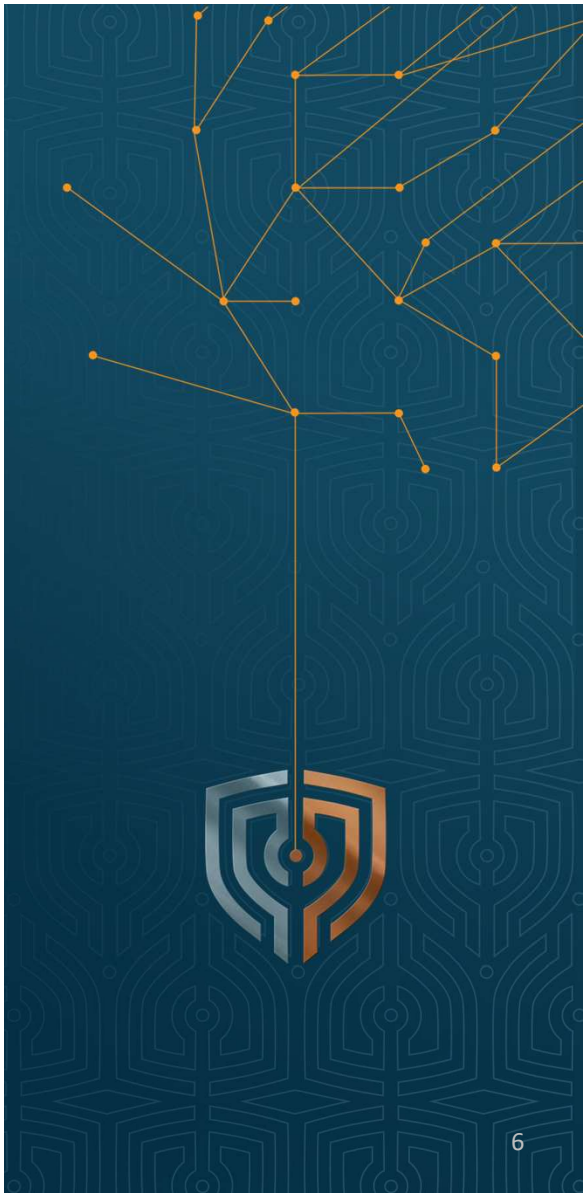
1. AI is here

2. But it introduces risk if unmanaged
   a) Paid AI access amplifies data exposure if identities, permissions, and Data Loss Prevention (DLP) controls are not remediated

3. So we need readiness AND guardrails
   a) Readiness assessments and remediation should precede deployment to prevent AI discovering, releasing, or exploiting sensitive org data

4. Then adoption AND training

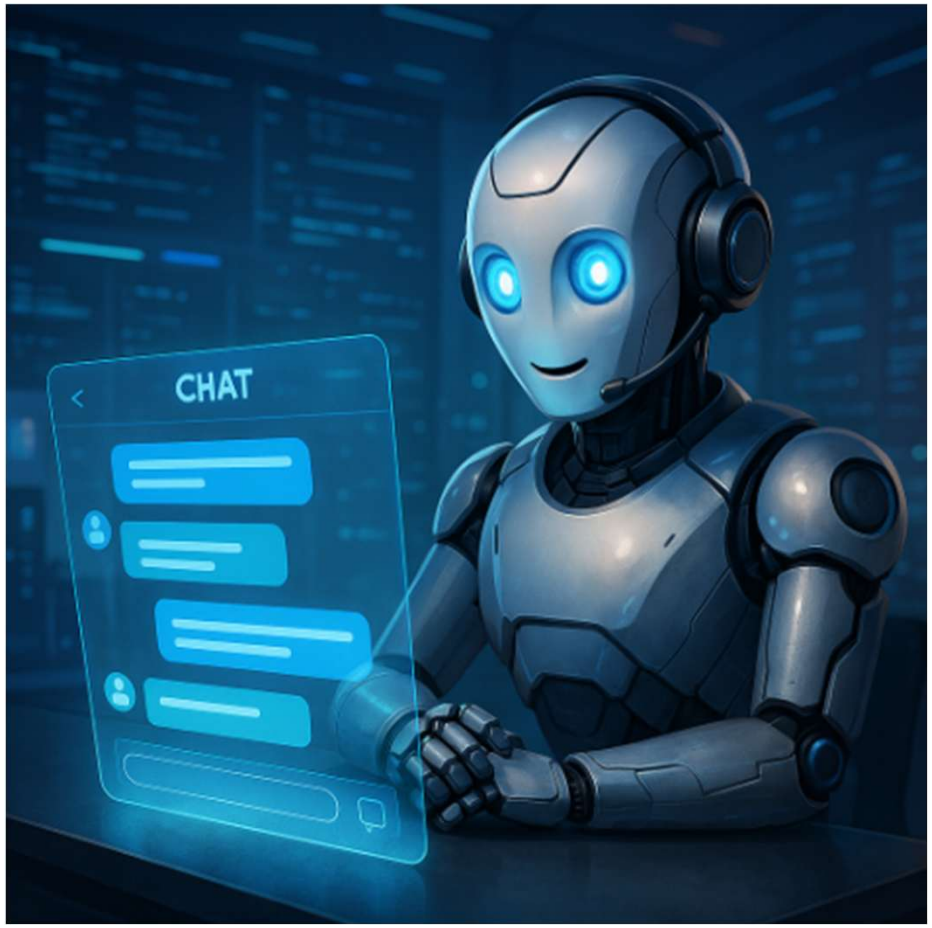
5. Then scale to agentic automation



POLL: WHERE IS YOUR ORG AT WITH AI TODAY?

In the “Poll”, select one of these answers to that question…

- No plan and unsure what’s in use
- Loosely approved experiments
- Rolling out structured AI now



BASIC AI DEFINITIONS

AI/Generative AI (GenAI)
AI that creates new content (text, images, code, audio, or video) by learning patterns from massive datasets and producing original outputs in response to prompts.

Agentic AI
GenAI configured to independently plan, make decisions, and take actions to complete a goal on your behalf; like a digital employee that can work 24/7.

Vibe Coding
Building software by describing what you want in plain language and letting AI generate the code, focusing on intent and outcomes rather than writing syntax yourself.

Harness
The "builder's tool" framework that connects an AI model to tools, data, memory, and guardrails, turning a raw model into a functioning, controllable application.

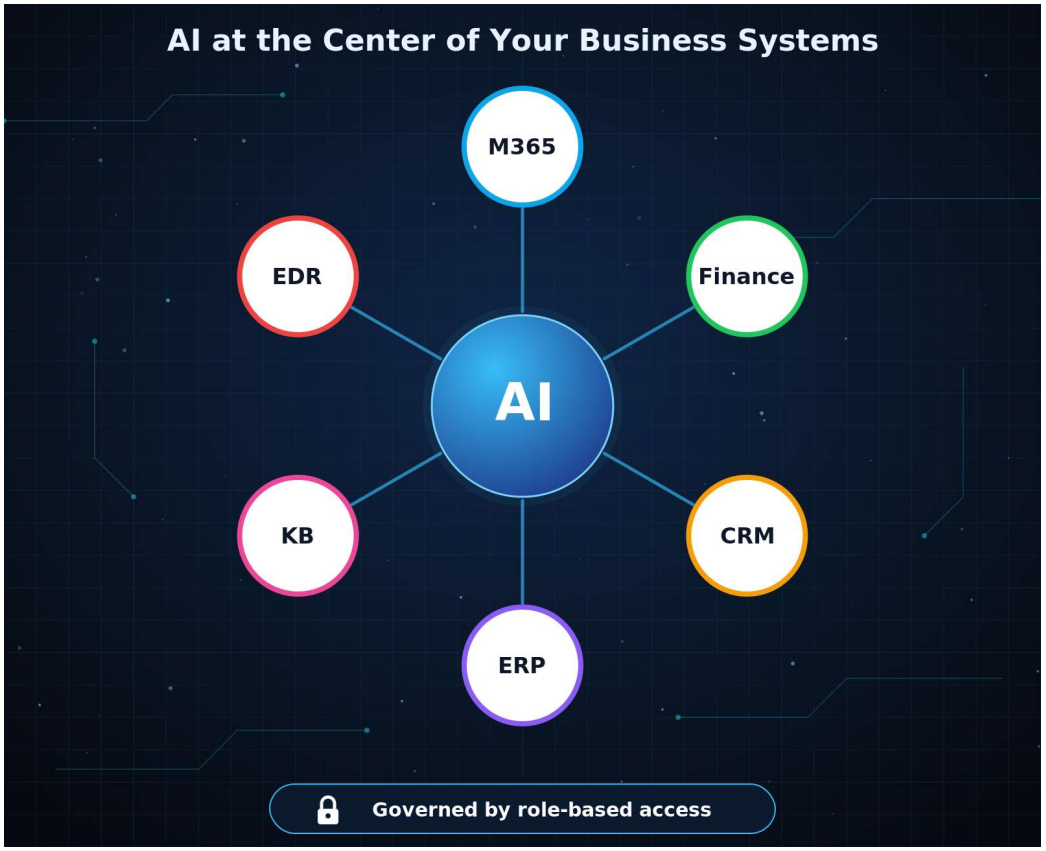
- **Popular Harnesses:** Claude Code, OpenAI Codex, Copilot Studio, Cursor, Gemini CLI, GitHub Copilot.

Tokens & Credits
When you talk to an AI, it breaks your words into tiny pieces called tokens; like cutting a sandwich into small bites. Every bite costs a little money. The more you type and the more the AI writes back, the more bites it takes, and the more it costs.

AI OPPORTUNITIES

AI-CONNECTED DATA

Connect AI to desired systems. Governance is controlled in each connected application, not by AI.



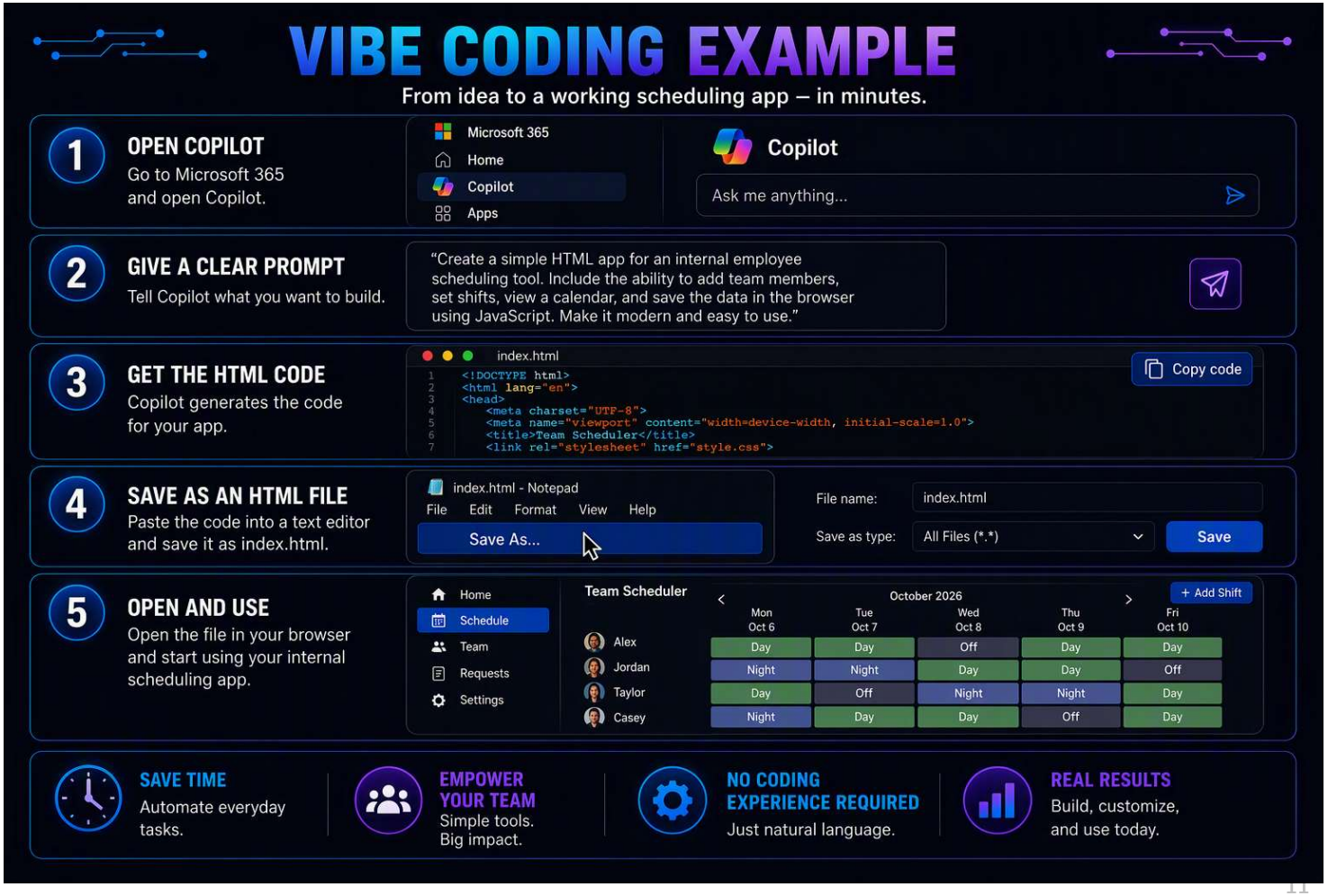
From a client that connected AI to their various systems…
"I would say the single biggest thing it has helped is being able to get summaries out of our database."

"For instance, I can say, **"look at the variance of these 8 jobs and tell me what is driving it"** and it will give me actionable information for what happened without having to query the data or even open the browser. So just from that, we're able to quickly make inventory corrections/etc."

"Second example is it can run an Aged Payables, payments, etc. from the ERP and input it directly into a shared Excel for a weekly report. So **I don't have to open four screens/reports etc. Just one prompt."**

BUILD WEB APPS

“I want to Vibe-Code a web app to be used internally. I have never done this. Ask me one question at a time, then let's build.”



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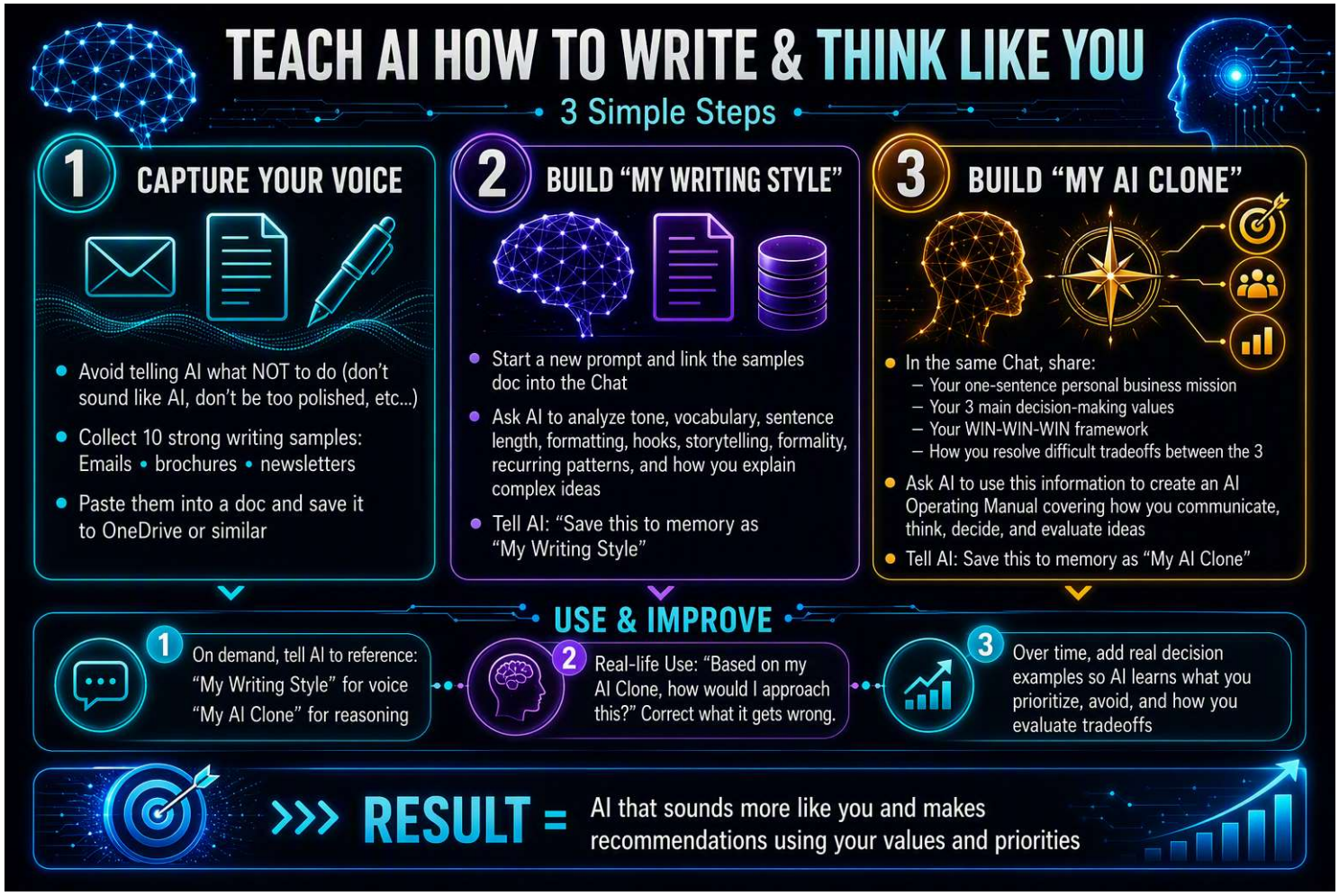
BUILD YOUR AI CLONE



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MEETING ASSISTANT AGENT



Credit to https://www.linkedin.com/in/paul-hylenski/ (consider following him)

CONTRACT ANALYSIS AGENT



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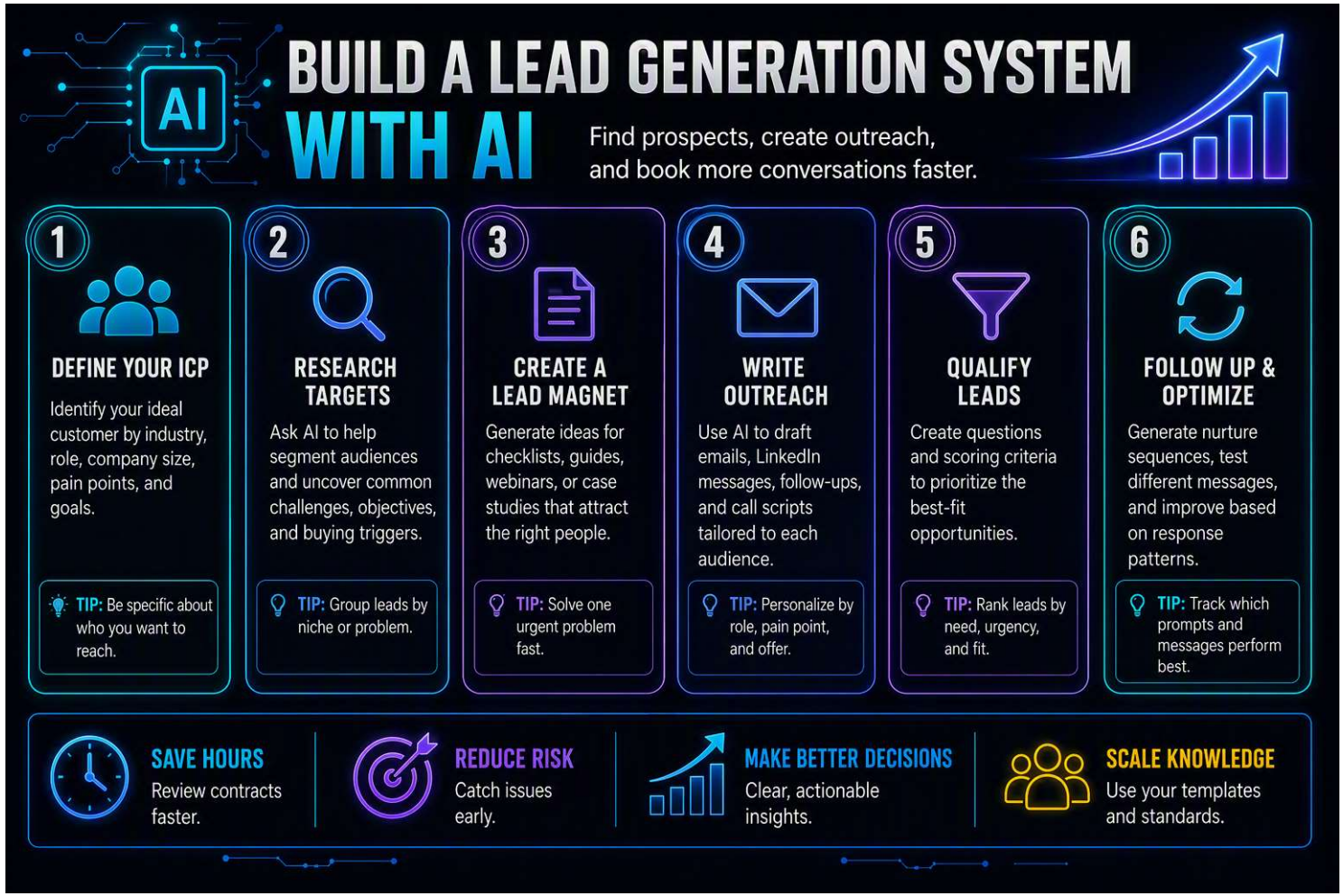
BUILD LEAD GENERATION



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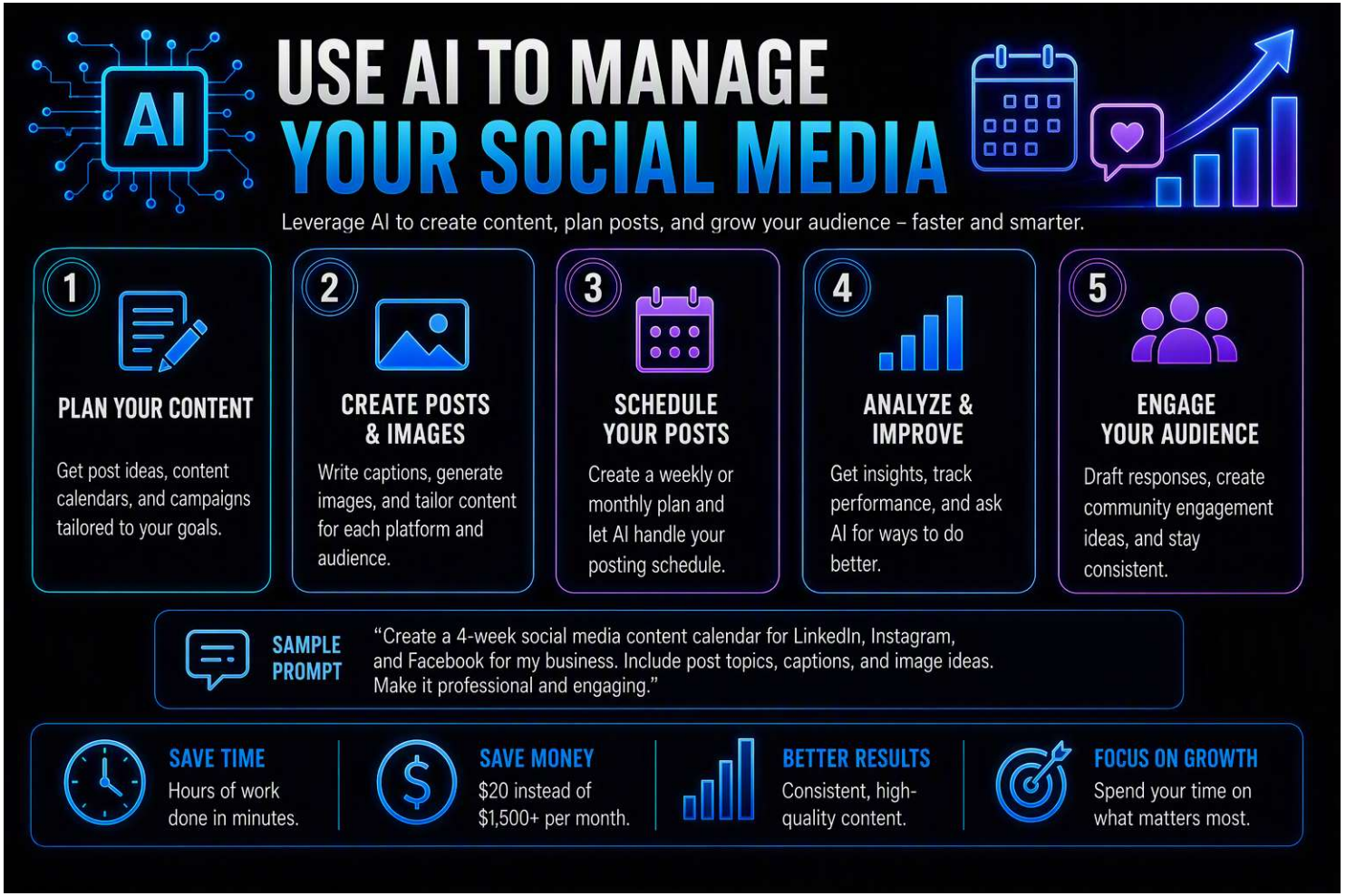
MANAGE SOCIAL MEDIA



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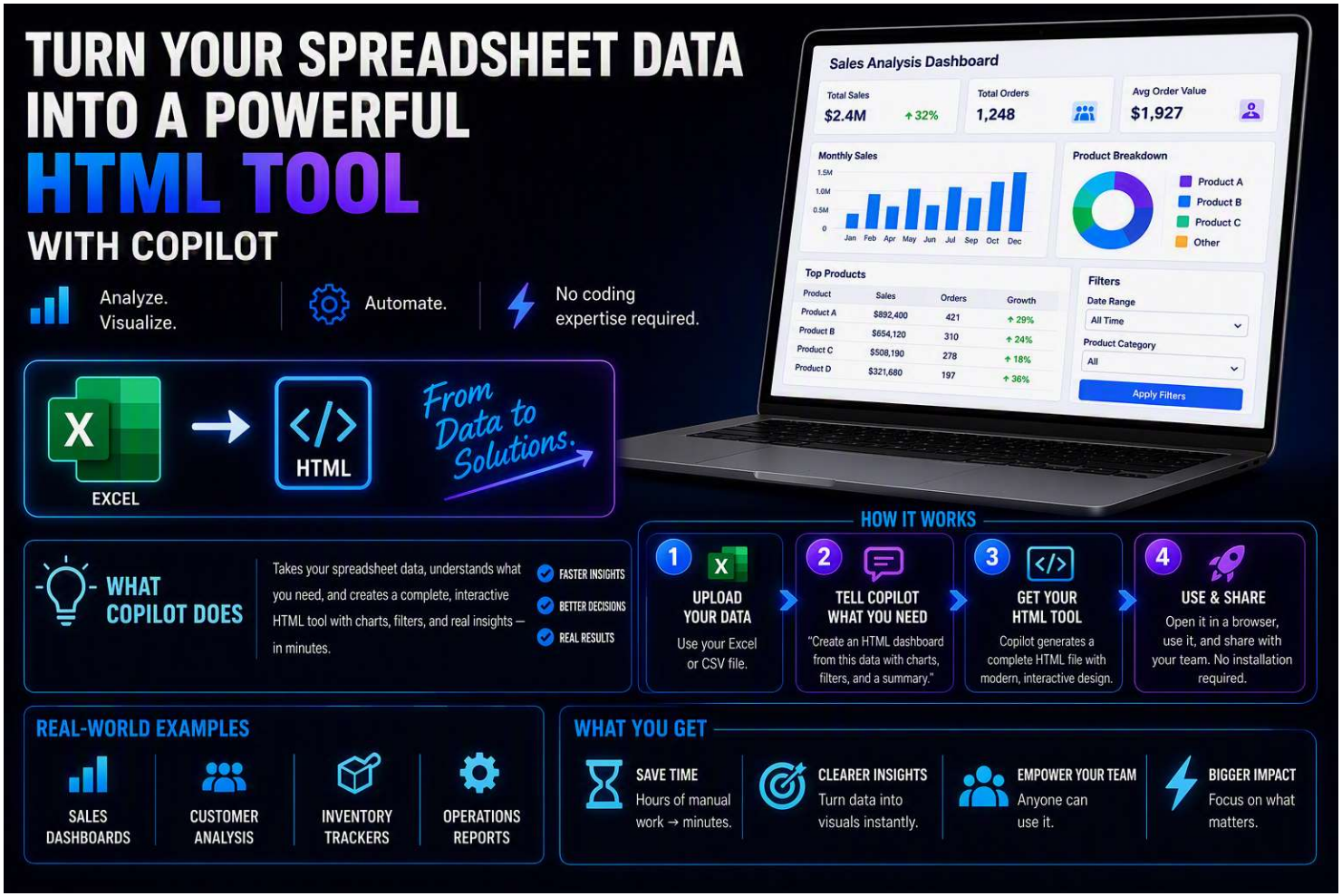
EXCEL DASHBOARD



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AI IN ACTION

Five things we actually run on AI

...and one that runs my personal life.

Rich Anderson
Chief Executive Officer, Imagine IT



HOW EACH STORY WORKS

Same four beats, every time

1

Before

The pain a leader would recognize

2

Why it was hard

The systems and steps involved

3

What we built

In plain English

4

What changed

The result, and a look at it

01 Meetings: prepared before, done after

02 One calendar from seven systems

03 One process we all own

04 Proposals in hours, not days

05 An AI chief of staff

06 At home: travel on autopilot

The thread through all six: AI connects the systems and does the busywork. A person makes the call.

01

PEOPLE

Walk in prepared. Walk out with everything done.

BEFORE

I'd often show up to a meeting unprepared: digging for last month's notes in the hallway. Afterward, decisions got re-argued, promises were forgotten, and the recap email went out days late, if at all. Transcription alone didn't fix it.

WHY IT WAS HARD

A meeting has a before and an after, and both are tedious. Before: pull the last recap, open items, who's attending and what they care about. After: match speakers to the staff directory, pull out decisions and the reasons, list every promise with an owner and a date, update each person's record, fix the calendar, write the emails.

WHAT WE BUILT

BEFORE: my morning brief spots the meeting (this week or today) and preps basic notes, or goes deeper if I ask. AFTER: I drop in the recording and give about 5 minutes of guidance. I get back a full audit: key topics, follow-up obligations, documentation filed, calendar impact, and emails drafted for my review. Nothing sends until I approve it.

WHAT CHANGED

5 min

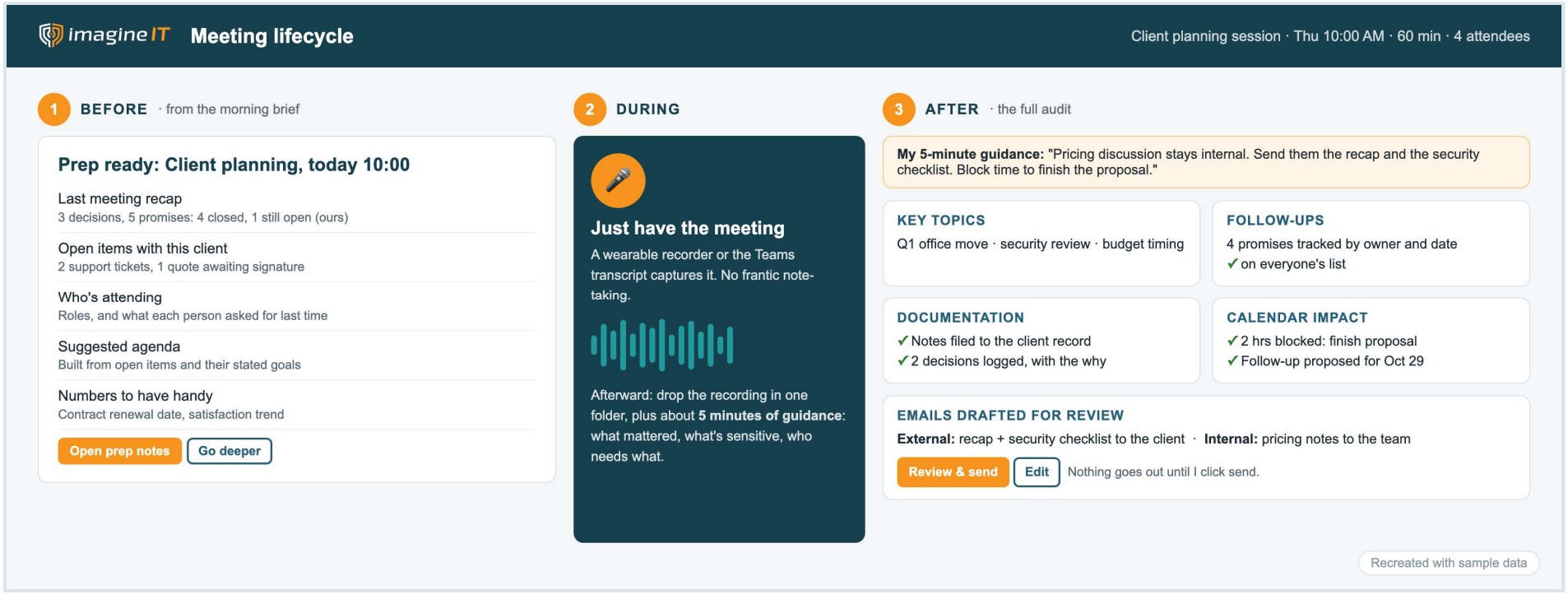
of my guidance after a meeting yields the full follow-through package

114

promises tracked by owner and date; 60 already closed

Local government: the same engine drafts meeting minutes for sign-off, where the record is a legal requirement.

01 Before, during, after: the whole meeting, not just the transcript



VALUE | **Labor efficiency** | **Risk reduced** | ~40 min saved per meeting × 17 meetings last month ≈ 11 hours/month returned (est.)

02

DATA

Seven systems. One calendar anyone can read.

BEFORE

Client reviews lived in one system, domain and certificate expirations in another, time off and holidays in a mailbox, go-lives in project software. Nobody had the whole picture, and our own review list was missing more than half of the upcoming reviews.

WHY IT WAS HARD

Seven sources, none of which talk to each other: ticketing/CRM, a shared calendar mailbox, a client-review platform, a documentation system, live domain-registry lookups, live certificate checks and a client registry. AI only reads; permissions stay in each system.

WHAT WE BUILT

One company calendar with 10+ layers you can switch on and off, filtered by region, team or person. Every entry links back to the record it came from. It rebuilds itself every night, with a "refresh now" button.

WHAT CHANGED

39 → 80

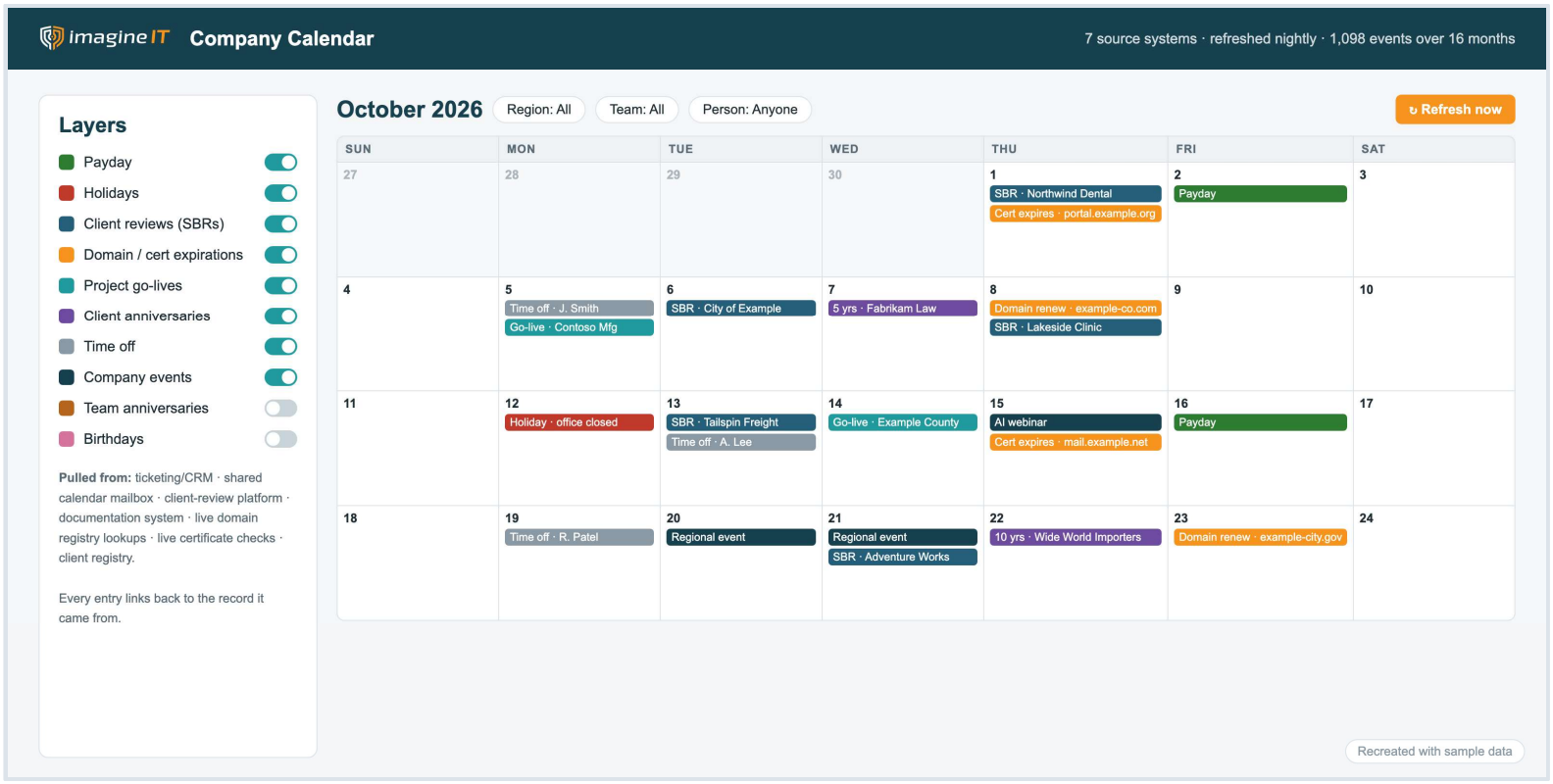
upcoming client reviews visible once we stopped trusting the old list

1,098

events over 16 months; 689 expirations, checked live

Peter's reaction when he first saw it: connecting systems like this will be "half of our requests going forward."

02 Every date that matters, from every system, in one place



VALUE | **Capability unlocked** | **Risk reduced**

Wouldn’t exist without AI · 41 more client reviews in view · 689 renewals checked nightly

03

PROCESS

Six to ten half-connected processes became one process we all own.

BEFORE

We felt the symptoms: deals that seemed to stall between the client's "yes" and our invoice, billing that ran on a weekly manual spreadsheet, forecasts built on a hand-entered percent-complete guess. What we didn't have was clarity. Everyone was looking at their own piece.

WHY IT WAS HARD

Quote-to-cash was really six to ten partially connected processes: quoting, CRM, service boards, projects, purchase orders, invoices and the general ledger, about 11 hand-offs in all. To teach the AI the process, we fed it our flowcharts, checklists and notes, then connected it to every system that touches a deal.

WHAT WE BUILT

A live, end-to-end map of every deal from idea to invoice, refreshed nightly. It shows where deals pile up and sit, and produces a monthly revenue forecast Finance can check against the books. Sales, solution design, projects and finance now review the same picture in the same meeting.

WHAT CHANGED

1 shared map

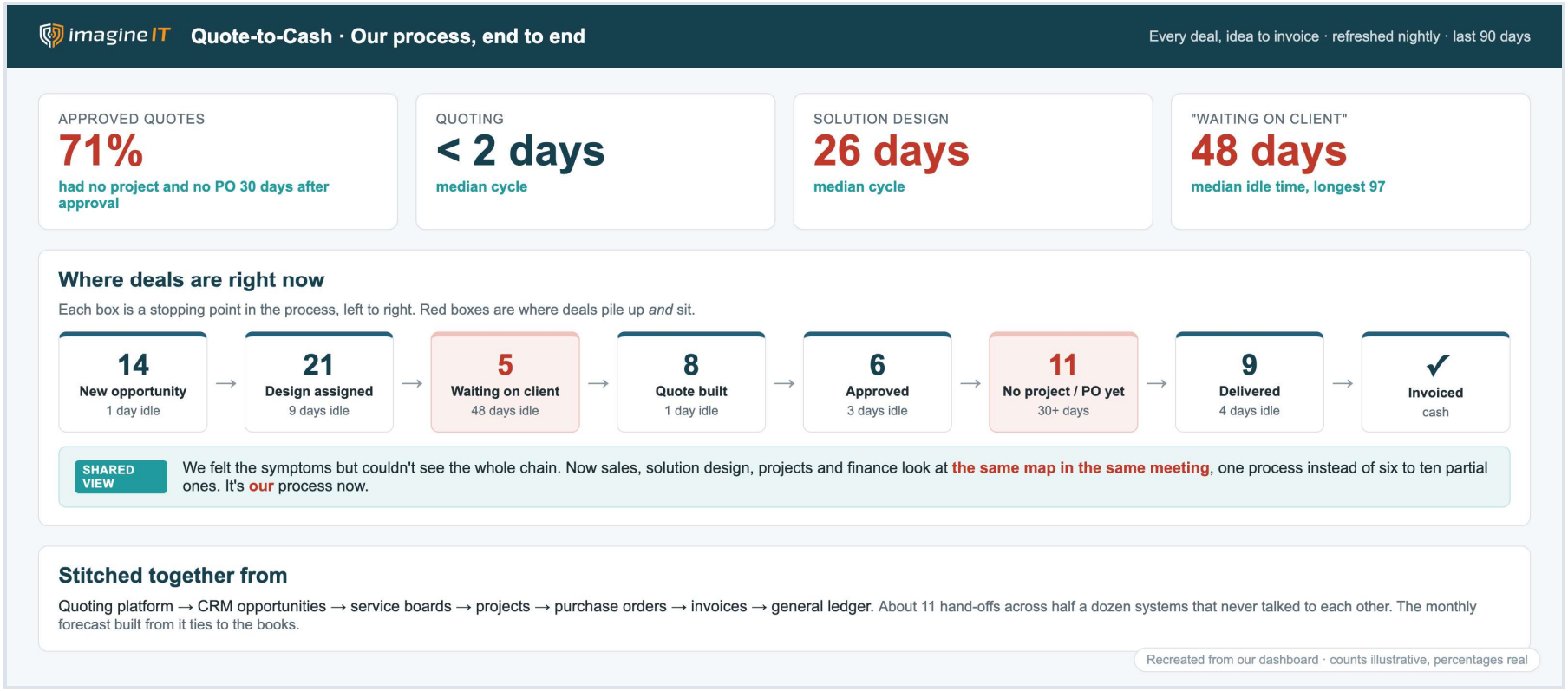
instead of 6-10 partial processes pieced together from memory

71%

of approved quotes had no project and no PO 30 days after approval: visible for the first time

It's now OUR process. And our first-ever monthly hardware sales forecast tied out to the books to the penny.

03 One shared picture of the process, from idea to invoice



VALUE | **Capability unlocked** | **Revenue enabled**

Wouldn't exist without AI · 1 shared view replaces 6–10 partial ones · stalled approved work visible

04

GROWTH

Proposals in hours, not days, and that changes what you say yes to.

BEFORE

A formal proposal took 4-5 people, often including our CRO and lead sales reps, collaborating over about 10 business days: 30+ hours of our most senior time per bid. So many public-sector bids weren't worth chasing, and we only found the ones someone happened to see.

WHY IT WAS HARD

Four separate steps, each AI-assisted: find bids across public bid boards, notice sites and E-rate filings; vet them against who we serve and who's already a client; draft from our best past proposals and approved templates; then track and present to the decision board.

WHAT WE BUILT

Every Sunday morning, the engine finds public-sector RFPs, scores the fit, and drafts a response about 90% done. A person owns the last 10%: the go/no-go, the pricing, and the voice. Anything due within 10 days sends an urgent Teams alert.

WHAT CHANGED

30+ hrs → a few

of senior time per proposal: CRO and lead sales reps (est.)

Days → hours

from ~10 business days of collaboration to a draft ready for review

"It reduced RFPs from days to hours. It changes our whole perspective on whether to pursue one."
— Mat Nguyen, Imagine IT

04

Find, vet, draft: the last 10% stays human

imagine IT **Public-Sector RFP Scan**

Runs every Sunday at 9:08 AM · bid boards, public notices, E-rate filings

41	7	6	2
RFPs found bid boards + public notices	match who we serve	not already a client	approved by a person → drafted

This week's shortlist

AGENCY	SCOPE	DUE	FIT	STATUS
City of Example	Managed IT services	Oct 30	**92**	DRAFT 90% READY
Example School District	Network refresh (E-rate)	Nov 4	**88**	DRAFT 90% READY
Lakeside County	Cybersecurity assessment	Nov 12	**81**	AWAITING GO / NO-GO
Riverside Township	Phone system replacement	Nov 18	**74**	AWAITING GO / NO-GO
Metro Transit Authority	Help desk staffing	Oct 24	58	PASS: OUTSIDE OUR FIT

Anything due within 10 days triggers an urgent Teams message.

The four steps, each AI-assisted

1. Find bids and buying signals → **2. Vet** against who we serve → **3. Draft** from our best past proposals → **4. Track & present** to the decision board

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Response to RFP: Managed IT Services

Prepared for City of Example · draft v0.9

90% drafted by AI · last 10% is ours

- ✓ **Executive summary** — Drawn from our 16 strongest past proposals
- ✓ **Understanding of your requirements** — Mapped line-by-line to the RFP
- ✓ **Scope of services & approach** — From approved statement-of-work templates
- ✓ **Qualifications & references** — Similar public-sector clients
- ✓ **Compliance checklist** — Required forms flagged
- ✎ **Pricing** — A person sets it
- ✎ **Final voice & judgment** — A person signs off

Recreated with sample data

VALUE | **Labor efficiency** | **Revenue enabled**

30+ senior hours per proposal → a few hours of review ≈ 25+ hours back per proposal (est.)

05

LEADERSHIP

My chief of staff starts work before I do.

BEFORE

Thirty-plus minutes every morning bouncing between email, calendar, Teams, the ticket queue and my to-do list, just to figure out what actually needed me today.

WHY IT WAS HARD

It pulls from email, calendar, Teams, ticketing, company files, our goals tracker and the promise log from story 1. Gathering was easy. The hard part was teaching it what to leave out. An earlier version had about 30 sections; nobody reads 30 sections.

WHAT WE BUILT

One page at 6:30 AM: what only I can decide, what I promised, what's worth a nudge, and what got handled overnight. Plus a "handle this" email folder: drag anything in and it gets done, not summarized. Anything outbound waits for me.

WHAT CHANGED

30+ min → 2 min

to know what needs me today

~30 → 1 page

sections cut to only what is mine to decide, own or drive

It keeps running when I'm on vacation. That's the point.

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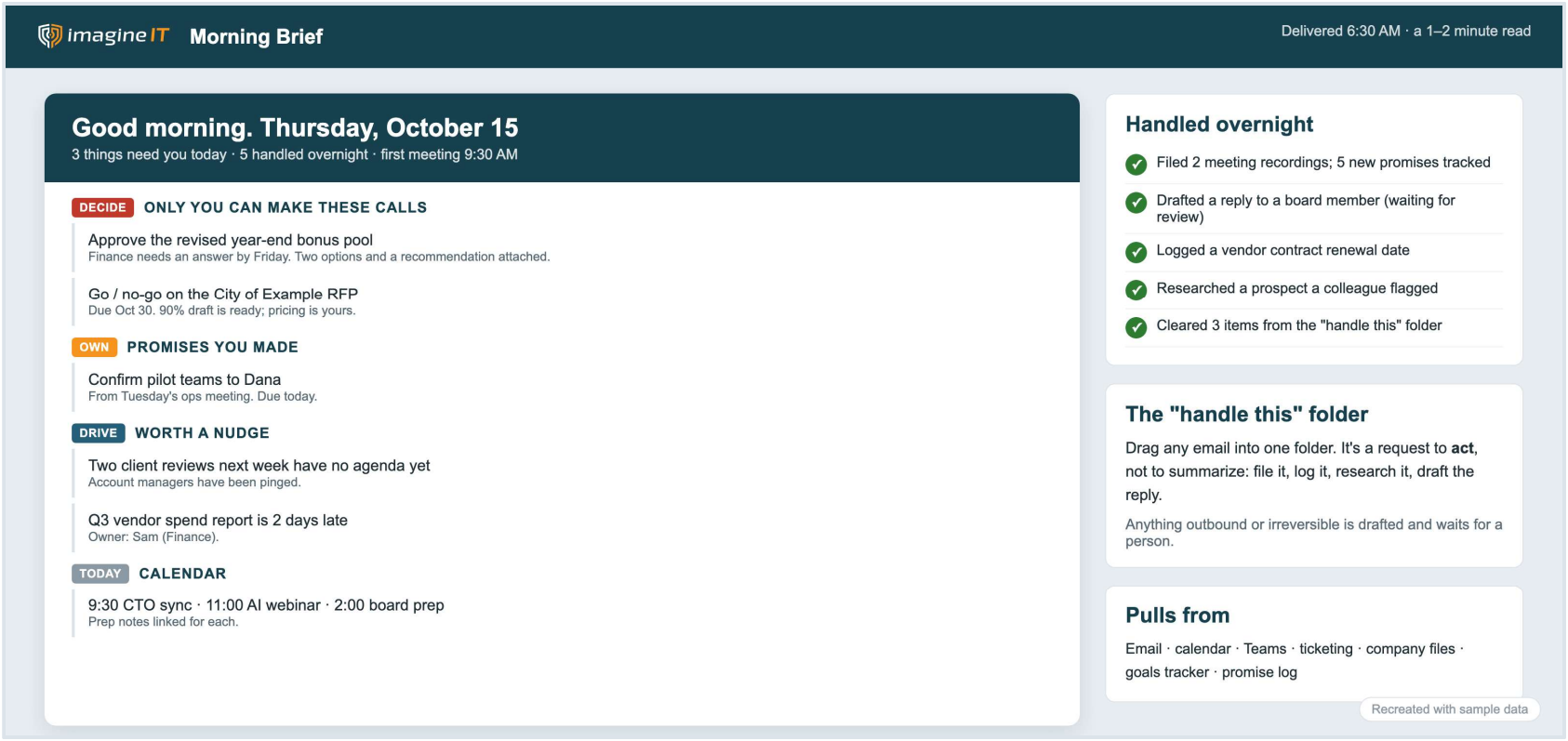
05

Decide, own, drive: only what needs me



VALUE **Labor efficiency** ~28 min/day × ~21 workdays ≈ 10 hours/month returned (est.)

06

AT HOME

And at home: my travel plans file themselves.

BEFORE

Forwarding confirmations, retyping flight times into the calendar, doing time-zone math in my head, and getting duplicate entries every time an airline re-sent a confirmation.

WHY IT WAS HARD

It reads airline, hotel and rental-car confirmations from my inbox, maps each airport to its time zone, and applies sensible defaults: hotel check-in at 4 PM, car pickup at landing, drop-off two hours before departure. Then it checks the calendar for duplicates before writing anything.

WHAT WE BUILT

Every confirmation becomes a trip file and calendar events automatically, and the morning brief shows the trip the week it happens. It is read-only on travel email: it never replies, never books, never touches a vendor's website.

WHAT CHANGED

0

confirmations retyped or forwarded

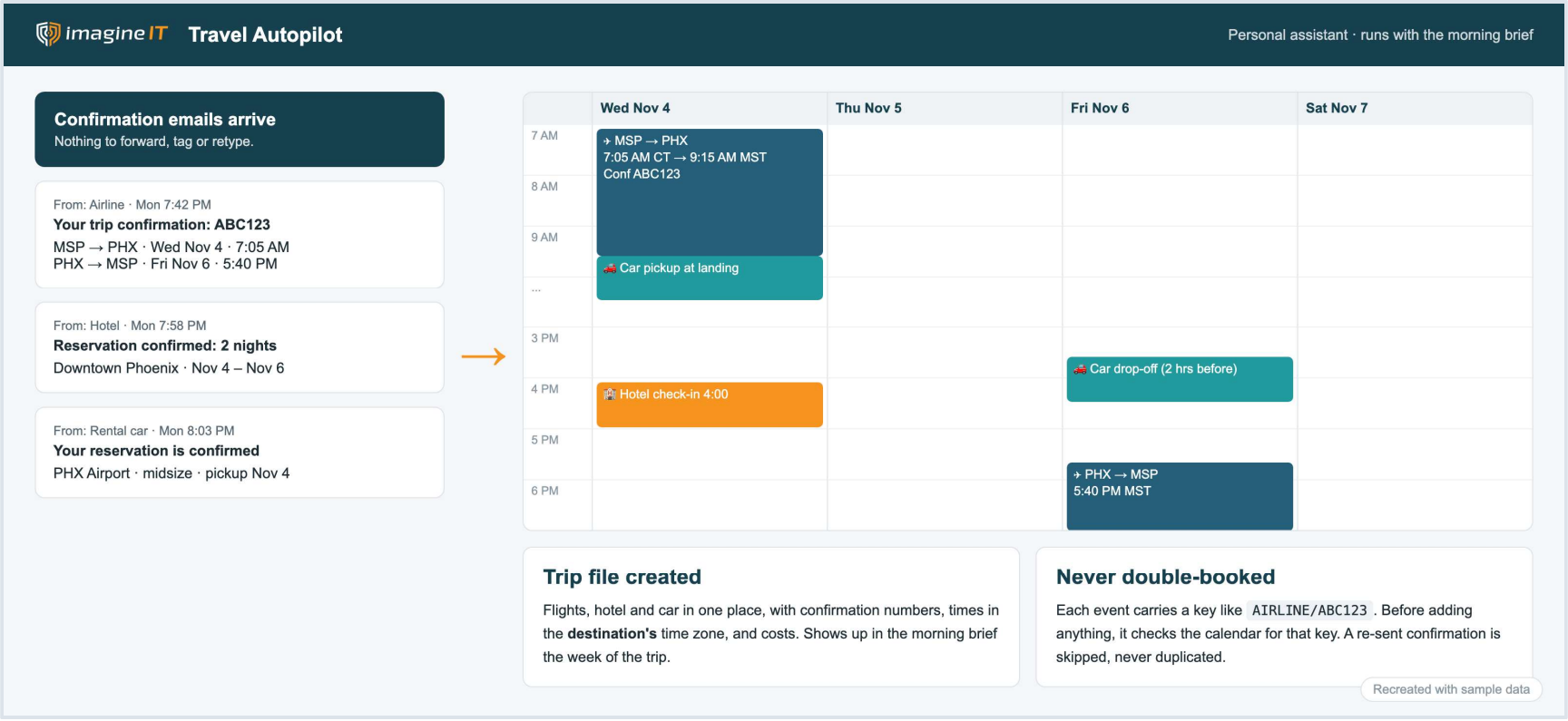
1 key

per booking, checked on the calendar before writing: no duplicates

Same pattern as work: read, connect, draft, and a person stays in charge of anything irreversible.

06

Three confirmation emails in, a complete trip out



VALUE | **Labor efficiency** | **Risk reduced** | ~30 min saved per trip (est.) · duplicate calendar entries blocked by design

WHAT KIND OF VALUE

Six stories, five kinds of value, and none of it is headcount cuts

Story	Capability unlocked	Labor efficiency	Revenue enabled	Risk reduced	Cost eliminated	Capacity returned
01 Meetings: prepared before, done after	○	●		●		~11 hrs/month (est.)
02 One calendar from seven systems	●	○		●		Wouldn't exist without AI
03 One process we all own	●		●	○		Wouldn't exist without AI
04 Proposals in hours, not days	○	●	●			25+ senior hrs/proposal (est.)
05 An AI chief of staff		●		○		~10 hrs/month (est.)
06 At home: travel on autopilot		●		●		~30 min per trip (est.)

● primary ○ secondary

Estimates are conservative, from before-and-after time. "Cost eliminated" is empty on purpose: this is capacity, not cuts.

SIDENOTE

How this section was made: about an hour of my time

THE PROMPT (EXCERPT)

"Find the draft deck Peter shared with me several weeks ago...

Then brainstorm 3-5 ways I've used AI to streamline my work.

I want content business leaders can relate to: the previous challenge, the complexity, a brief overview of what was done, then a screenshot or two of the end result.

It's complete when the agreed stories are fully documented in the deck with speaker notes."

Plus my picks and a few rounds of feedback. That's it.

1. **Found it** Located Peter's deck from a Teams message and read all 57 slides
2. **Researched** Swept our own records for candidate stories, with the numbers behind each
3. **I chose** I picked five work stories and one personal one
4. **Built v1** Checked every figure against its source, recreated screenshots with sample data, wrote slides and speaker notes
5. **I pushed back** "More on meeting prep." "We didn't know, we felt symptoms." "Add this slide."
6. **Built v2** Revised, re-checked, and re-rendered in minutes

Orange = my part. Blue = the AI's part.

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MEASURED, NOT ESTIMATED

2.4

full-time roles of capacity added

385 hours of work in 28 days, about 96 hours a week, against a 40-hour role.

5.5×

hours of work for every hour I spend directing it

93.7%

of 286 scheduled jobs delivered on time

48 hrs

ran completely unattended, overnight and on weekends

17

meetings captured, with decisions and promises tracked

Measured from assistant activity logs, 16 Aug – 13 Sep 2026, for one executive and his assistants.

WHAT TO TAKE BACK TO YOUR TEAM

1

Start with a pain, not a tool.

Every story began as a complaint someone had every week: late recaps, missed renewals, slow proposals. Ask your team what their biggest backlog is.

2

Connection is the unlock.

Most of the value came from joining systems that never talked to each other. Permissions stay in each system, which is why the security groundwork comes first.

3

AI drafts. People decide.

Every story has a human gate: send, price, approve, book. Draw that line on purpose, and write it into your AI Acceptable Use Policy.

None of this is safe without the groundwork. That's next.

BONUS STORY · IF TIME ALLOWS

We turned a numbers game into a research game.

BEFORE

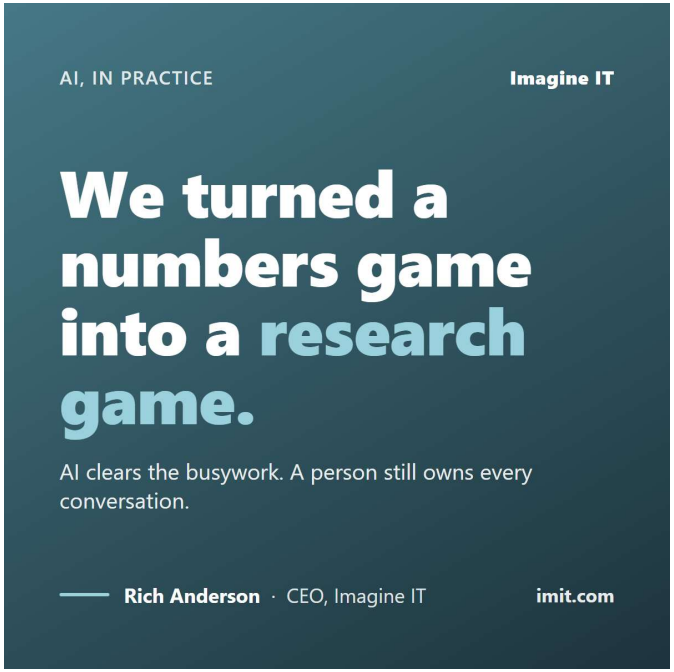
Prospecting was "spray and pray": big lists, cold emails, and an afternoon of digging before a single good conversation. An alert-based approach we tried produced almost nothing usable.

WHAT WE BUILT

A weekly scan for companies showing a buying signal (for example, posting an IT help-desk job). AI researches and scores each one, removes anyone who's already a client, and hands the strong ones to the right sales rep with a short dossier and three draft opening emails.

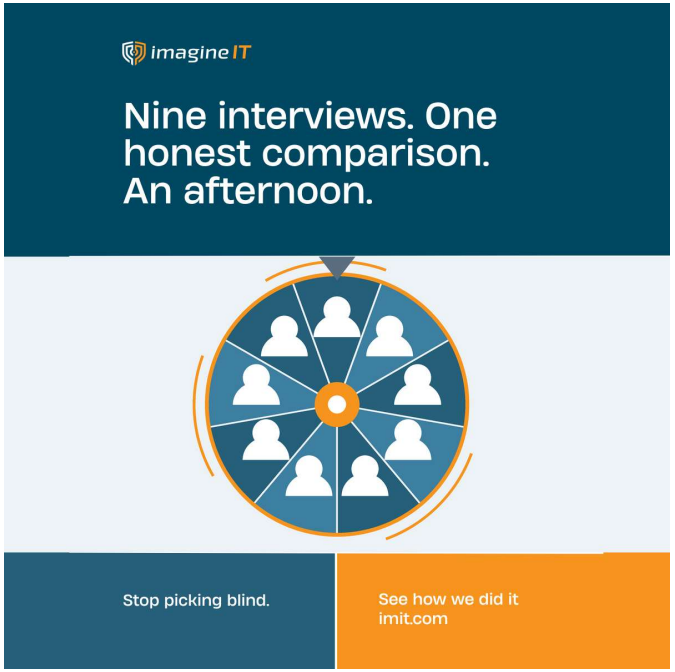
WHAT CHANGED

Each weekly scan costs about 46 cents. Our first two wins from the channel closed in August. A person still owns every conversation and every send.



BONUS STORY · IF TIME ALLOWS

Nine interviews. One honest comparison. An afternoon.



BEFORE

A hiring manager ran nine candidate interviews. The notes were in different formats, and the comparison lived in one person's memory and gut feel.

WHAT WE BUILT

AI aggregated all nine interviews into a side-by-side comparison against the same criteria, suggested follow-up questions for the finalists, and drafted candidate communications.

WHAT CHANGED

An honest comparison in an afternoon. AI did not make the hiring decision; it made sure the person making it saw every candidate the same way.

MICROSOFT COPILOT

AI BUSINESS-GRADE CHAT TOOL COMPARISONS

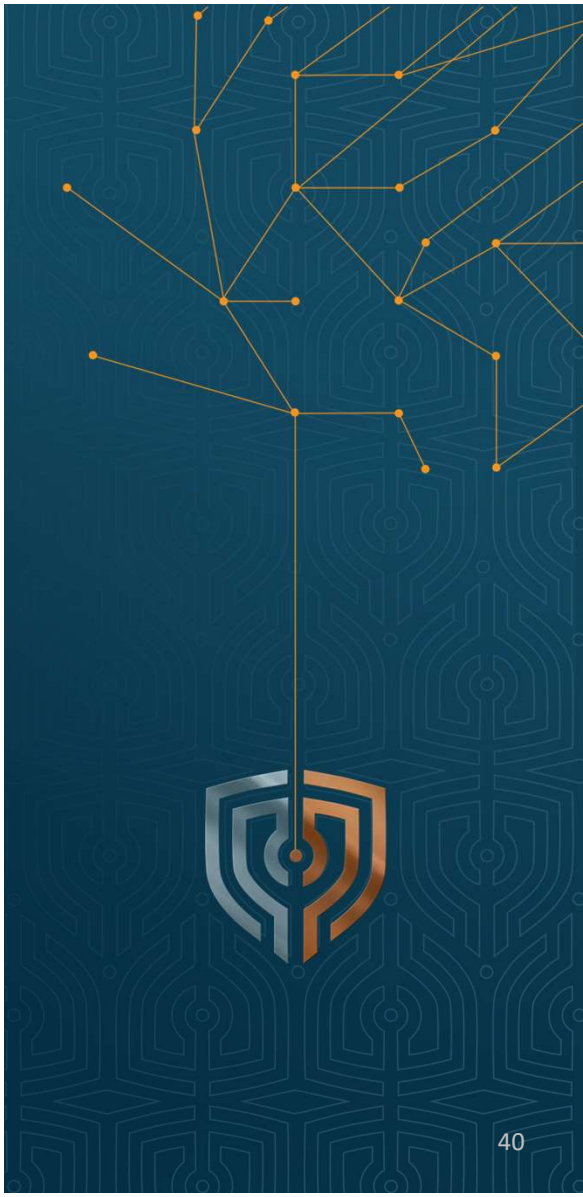
Dimension	Copilot (Free Work Version)	Copilot for Business	ChatGPT Business	Claude Team
What it is / best for	Microsoft Copilot Chat: free AI chat for eligible M365 users signed in with a work (Entra) account. Casual Q&A, drafting, quick research.	Microsoft 365 Copilot Business (up to 300 users): Copilot embedded in Word, Excel, PowerPoint, Outlook, and Teams, grounded in your work data.	OpenAI's team workspace: ChatGPT, ChatGPT Work, and Codex in every seat, plus connectors and shared admin.	Anthropic's team workspace (2–150 seats): chat, Claude Code, Cowork, connectors, and enterprise search.
Price (per user/mo)	$0 – included with eligible M365 plans	$21 annual ($25.20 monthly). $18 promo on annual plans for existing M365 customers through 12/31/26. Bundled: $23.50 (Biz Standard), $32 (Biz Premium). Enterprise add-on: $30.	Standard $20 annual ($25 monthly). Premium $100 annual ($125 monthly, 5x usage). 2-seat minimum. Heavy Codex/Work use is billed in credits.	Standard $20 annual ($25 monthly). Premium $100 annual ($125 monthly, 5x usage). Both include Claude Code and a monthly API credit.
Base requirement	Any Entra ID account + eligible M365 subscription; no separate purchase	Add-on – requires a qualifying M365 base plan first	Standalone – no M365 dependency	Standalone – no M365 dependency
Underlying models	OpenAI GPT-class models (standard access, capacity-limited)	User-selectable: Auto, GPT-6 Sol, GPT-6.1 Sol, Claude Sonnet 5.5, or Claude Opus 5.5	OpenAI only: GPT-6 family (Sol, Pro) rolling out to Business workspaces; GPT-5.6 still available	Anthropic only: Claude Opus 5.5, Sonnet 5.5, and Haiku 5.5
Data grounding (what it can see)	Web + manually uploaded files only	Full Microsoft Graph via Work IQ (email, chat, calendar, files), permission-aware, plus Copilot connectors	Web + uploads + admin-configured connectors (M365, Google Drive, Slack, GitHub)	Web + uploads + connectors (M365, Google, Slack, GitHub) + enterprise search
Does data leave the M365 tenant?	**No** – stays inside Microsoft's DPA boundary	**No** – inherits labels & retention. Claude and OpenAI models run as Microsoft sub-processors (Anthropic is outside the EU Data Boundary)	**Yes** – sent to OpenAI to generate a response	**Yes** – sent to Anthropic to generate a response
Compliance / BAA	GDPR, EU Data Boundary, ISO 27018; in scope for Microsoft's HIPAA BAA (web search queries excluded)	Same as Chat, plus labels, retention, and audit; Microsoft BAA included via the DPA by default (web search excluded)	SOC 2, DPA; HIPAA BAA typically Enterprise-only	SOC 2, ISO 27001, DPA; no HIPAA BAA at Team tier (Enterprise is HIPAA-ready)
Admin controls	Basic – inherits M365/Entra policies	Full – M365 admin center, DLP, sensitivity labels, retention, audit logs; scope Claude to specific Entra groups	SAML SSO, MFA, centralized billing, role management, usage analytics, spend controls	SSO + domain capture, JIT provisioning, role-based permissions, spend controls, central billing
Ideal for	Low-risk way to try AI before committing budget	M365-standardized orgs wanting AI in Office with the tightest data-boundary story	Broad model/connector ecosystem + coding (Codex), lower headline cost	Long-document writing/analysis quality + coding via Claude Code

Paid Work Copilot License Main Benefits

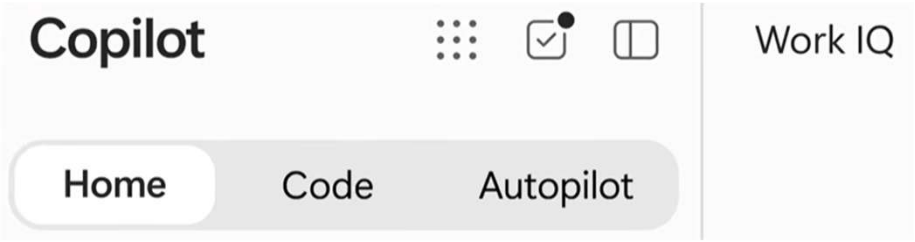
Microsoft 365 Copilot Business ~$21/mo
Microsoft 365 Copilot Enterprise ~$30/mo

Includes all features of the Free Work Account version, plus…

- Adds direct functionality directly into Office apps.
- Accesses your org's M365 data in AI chats. This can come in handy when searching for documents or data, and for business and financial insights.
- Adds Claude and other GPT model options.
- Removes the daily limit for graphics generation.
- Most Copilot AI Agents are only available with the paid license.
- Adds "Cowork" (must be manually enabled due to consumption costs).



COPILOT NEW INTEGRATED LAYOUT



[Introducing the new Copilot with Home, Code and Autopilot]

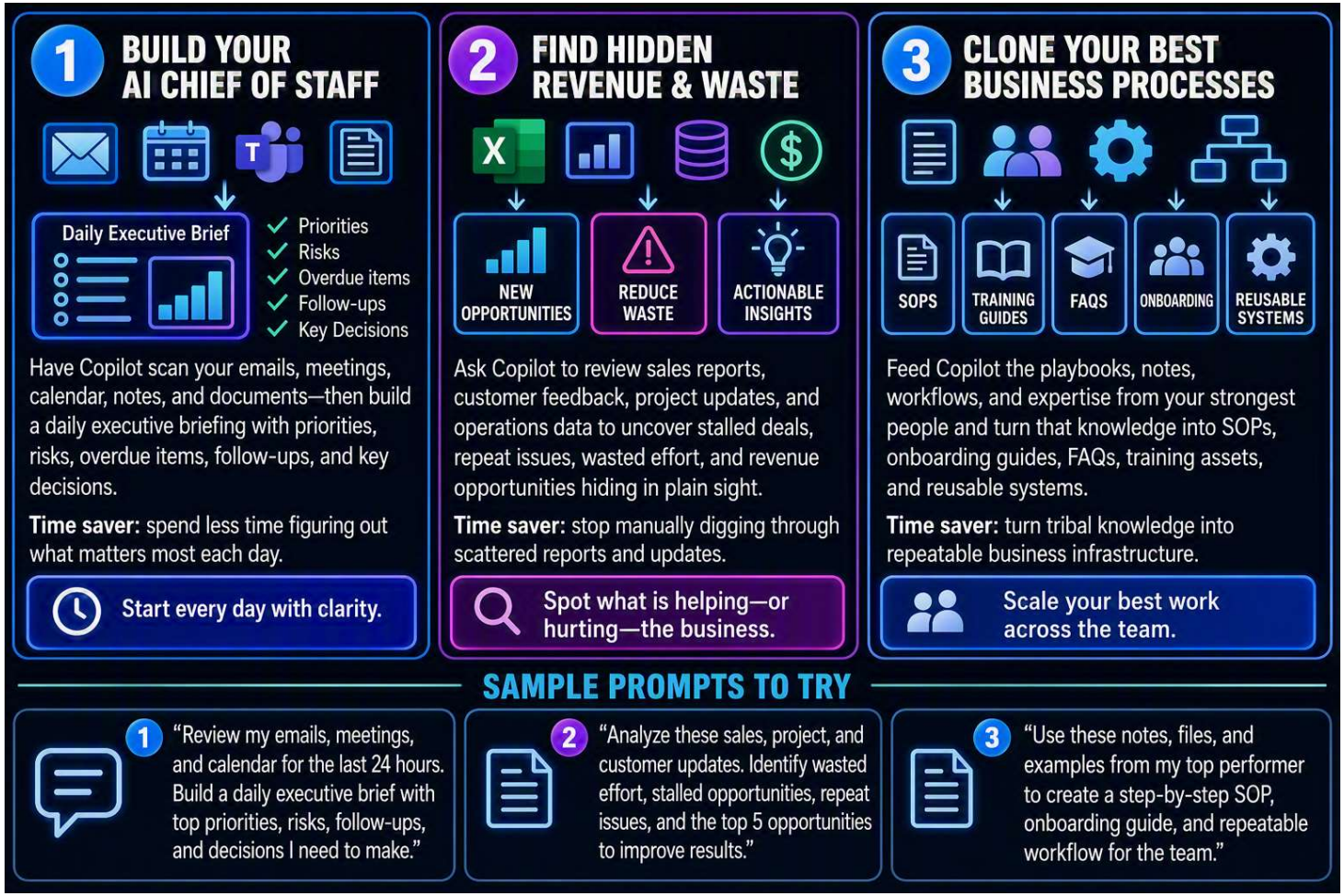
[YouTube - New Copilot: where AI work comes together]



COPILOT SIMPLE BUSINESS USE CASES

Most people use Copilot for simple prompts.

The real advantage is turning AI into a business operating partner that helps leaders prioritize work, uncover hidden opportunities, and scale what already works.



Credit to https://www.linkedin.com/in/paul-hylenski/ (consider following him)

SAME WORK, IN MICROSOFT 365

Already on Microsoft 365? You can start with Copilot today.



Three everyday jobs, done with Copilot. Find the license you have today.

1

Copilot Chat

Included with Microsoft 365

Basic Worker path

2

Microsoft 365 Copilot

Copilot inside Word, Excel, Outlook

Information Worker path

3

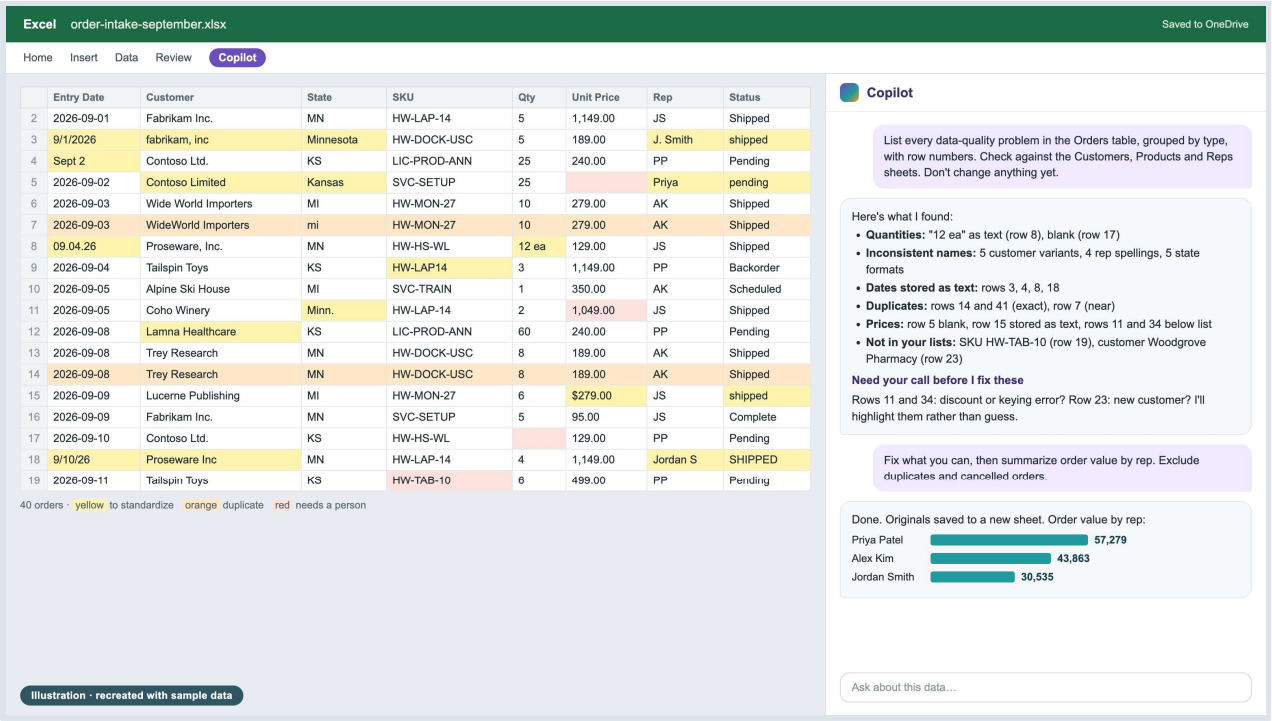
Copilot Studio + Power Automate

Work that runs without prompting

Agentic Builder path

COPILOT IN EXCEL

A month of hand-keyed orders, cleaned in minutes



1 Ask it to find the mess first

Name variants, text dates, missing prices, duplicates, all by row number. Nothing changed yet.

2 It fixes what it can

Standardized names, states, reps and dates. The originals are kept on a separate sheet.

3 It asks instead of guessing

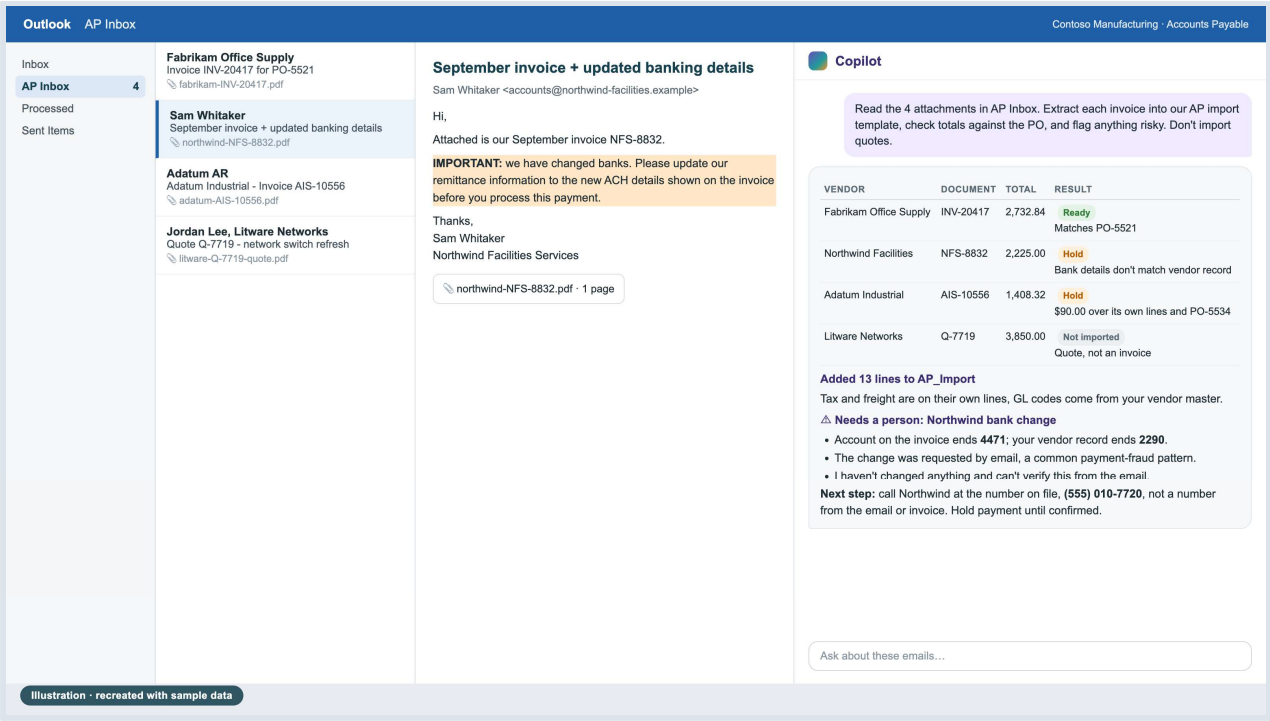
Unknown customer, unknown SKU, below-list prices: highlighted for a person.

VALUE **Data quality** **Time returned** License: Microsoft 365 Copilot (Copilot in Excel)

ILLUSTRATIONS USE SAMPLE DATA

OUTLOOK + COPILOT

From vendor emails to an import file, red flags caught



1 Reads every attachment

Invoices and a quote from the AP inbox, as PDFs.

2 Fills the import template

Header and line items, tax and freight on their own lines, GL codes, PO match.

3 Catches what people miss

A quote isn't imported. A $90 overcharge is held. New bank details don't match the vendor record, so it escalates to a person.

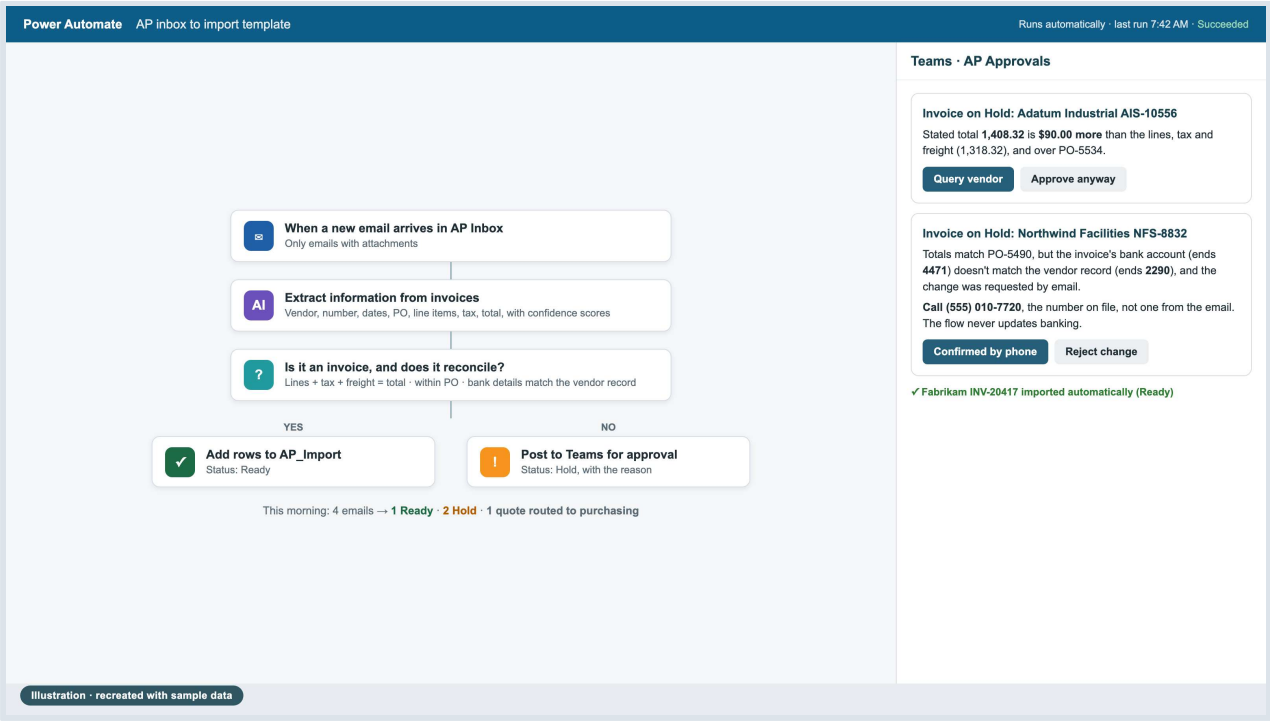
VALUE Time returned | Risk reduced

License: Microsoft 365 Copilot (Outlook + Copilot Chat)

ILLUSTRATIONS USE SAMPLE DATA

POWER AUTOMATE + AI BUILDER

Then make it run by itself, with a person on the exceptions



1 Runs as email arrives

No prompt. Every attachment is extracted with a confidence score.

2 Clean invoices go straight in

Anything that reconciles lands in the import file as Ready.

3 Exceptions go to a person

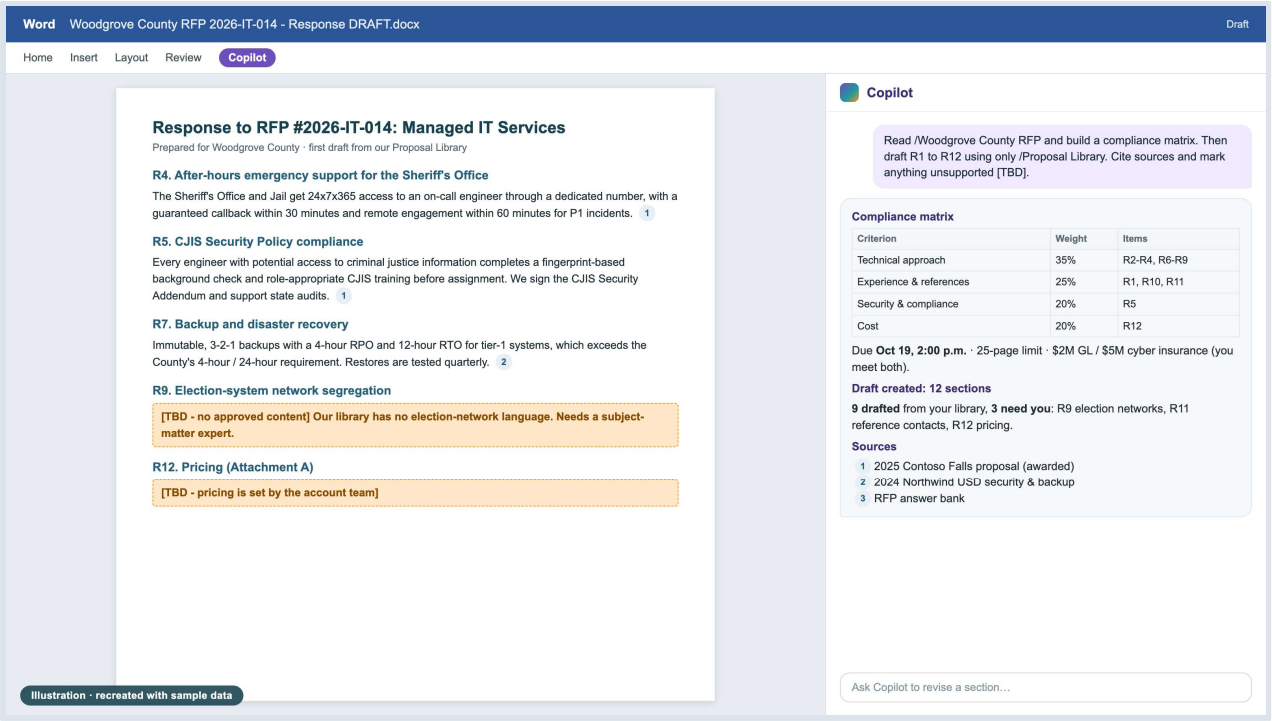
A Teams card with the reason. A bank change is verified by phone on the number on file, never from the email.

VALUE **Time returned** **Risk reduced** **Scale** License: Power Automate Premium + AI Builder or Copilot Credits

ILLUSTRATIONS USE SAMPLE DATA

COPILOT IN WORD

Same RFP job, inside Word



1 Reads the RFP

A compliance matrix in seconds: required items, weights, deadline, page limit, insurance.

2 Drafts from past proposals

Grounded on past proposals in SharePoint, with a citation on every answer.

3 Says what it doesn't know

Election networks, references, pricing: marked [TBD], not invented.

VALUE Time returned · Win rate

License: M365 Copilot (Word + Researcher); Copilot Studio for the team

ILLUSTRATIONS USE SAMPLE DATA

WHERE TO START

Pick your starting line

You have	You can do today	Next step
Copilot Chat (included with M365)	Upload a file: RFP compliance matrix, list of data problems, invoice fields extracted	Basic Worker path + Copilot Academy
Microsoft 365 Copilot	Copilot inside Word, Excel and Outlook, grounded on your own files and mail	Information Worker path
Copilot Studio / Power Automate (or another agent platform)	Workflows that run without prompting, a human approves the exceptions	Agentic Builder path, then the AI Discovery Track

Not sure which one you have, or which one you need? That's the first 30 minutes of the conversation with your account manager.

ILLUSTRATIONS USE SAMPLE DATA

RUNG 4 · SOLUTIONS

What AI can do for your business

Sales and growth · Meetings and people · Operations and process · Reporting and data · Security and IT

Proposals: days to hours	Prospect lists and outreach	Buying-signal lead scans	Public bid finder	Expiring-quote alerts	Social campaign designer	Customer watchlists
Account review prep	Meeting notes to follow-ups	Daily morning brief	"Handle this" inbox folder	Hiring interview summaries	1:1 prep notes	Employee recognition pulse
Performance review drafts	Travel autopilot	Connect a core process	One calendar, all systems	New-customer onboarding	Teach AI your process	AP inbox triage in Outlook
Invoice analysis in Excel	Power Automate + AI Builder	Standards scoring	Customer risk views	Team snapshots	Goals tracker, live	Customer feedback analysis
Who uses which tools	Board updates and decks	Customer review handouts	Unapproved app finder	Aging computer alerts	Is everything backed up?	IT documentation gaps

Every tile is something Imagine IT runs on itself today, or that you saw in this webinar.

AI RISKS

FICTIONAL STORY OF SMB COLLAPSE

🚨 **FAKE AI NEWS NETWORK (FAINN)** 🚨
"Tomorrow's Disasters, Reported Today"

"JUST WING IT SERVICES" LIVES UP TO ITS NAME — AI ROLLOUT GOES OFF THE RAILS, CLIENT DATA HITS THE OPEN INTERNET

FAINN EXCLUSIVE | Somewhere in the Heartland, USA — In what industry insiders are already calling "a masterclass in how *not* to do AI," small business **Just Wing It Services** confirmed late yesterday that their breezy approach to artificial intelligence has resulted in sensitive client data being splashed across the public internet, a surprise visit from a federal auditor, and a growing pile of lawsuits that may soon morph into a full-blown class action.

The company's motto — reportedly scribbled on a sticky note in the break room — was simply: *"We'll figure it out as we go."*

They did not, in fact, figure it out.

FICTIONAL STORY OF LOCAL GOV COLLAPSE

🚨 **THE FAKE AI NEWS NETWORK** 🚨

Breaking AI Headlines from the World That Isn't

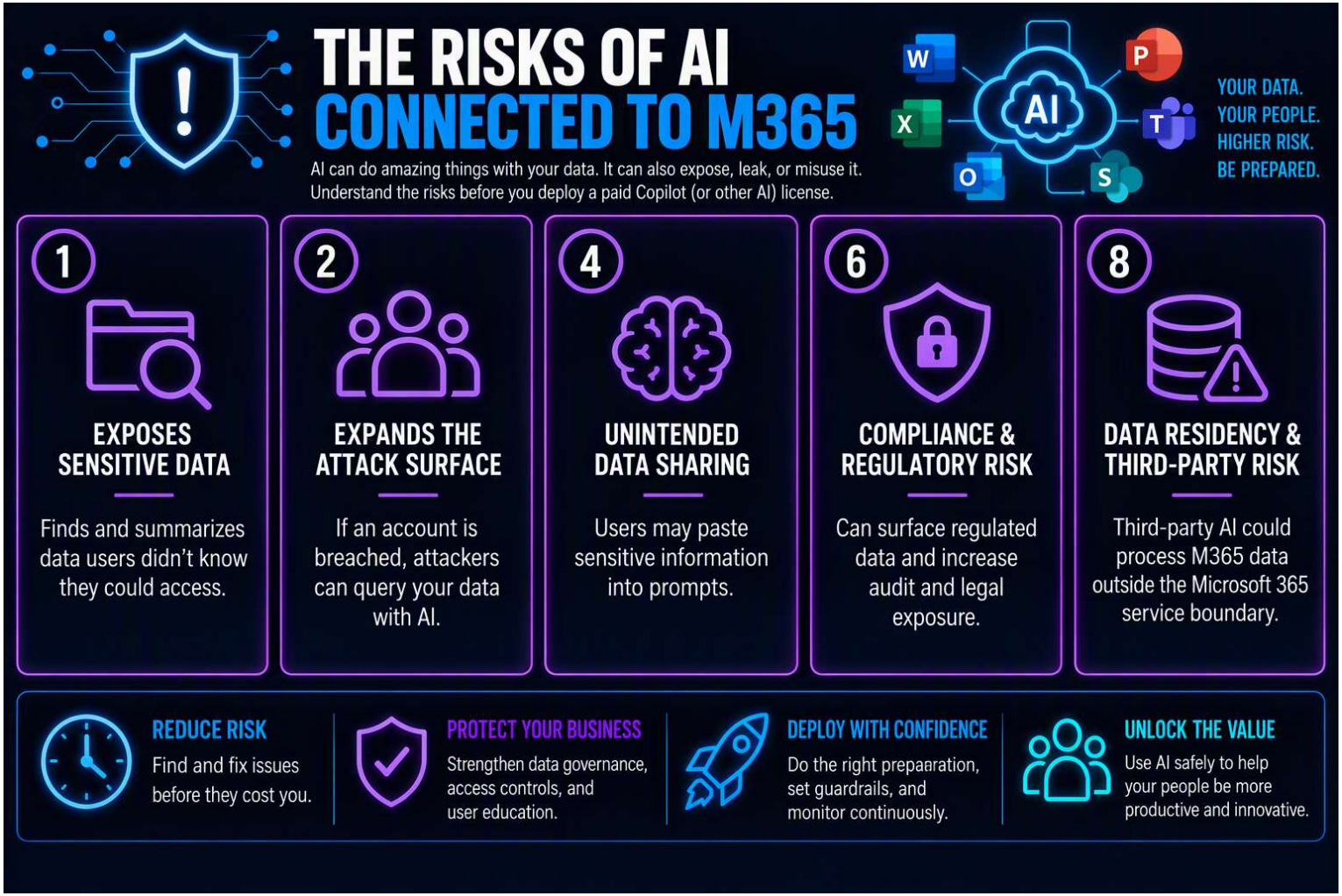
"OLD SCHOOL COUNTY" COLLAPSES UNDER WEIGHT OF ITS OWN STUBBORNNESS

FAINN Business Desk | Filed: June 20, 2029 | Old School County, USA *By Dale Winters, Senior Correspondent*

In what political analysts are now calling "the most predictable collapse in modern county government history," Old School County officially hit rock bottom this week after years of stubbornly refusing to embrace artificial intelligence and modern automation tools.

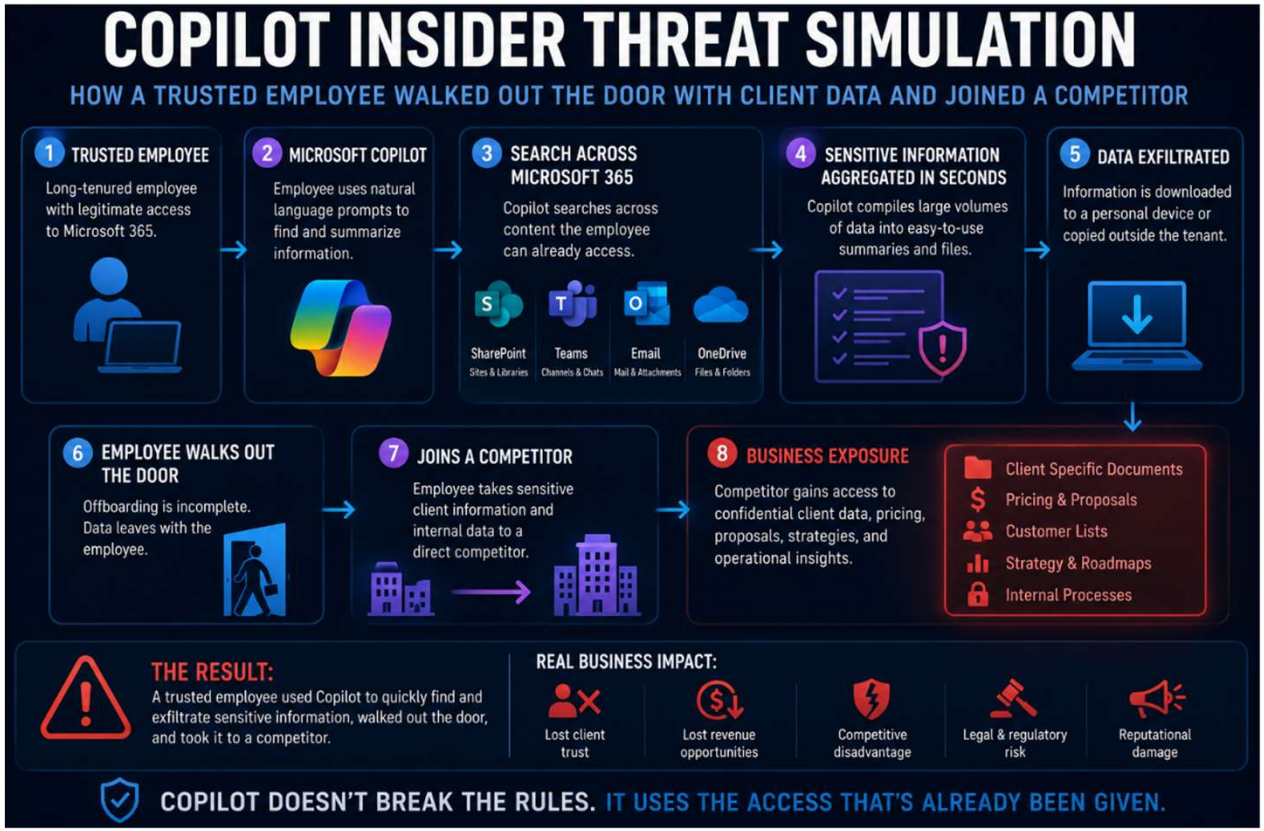
Frustrated constituents, fed up with potholes older than their teenagers and permit applications that move slower than continental drift, delivered a stinging message at the ballot box Tuesday night — voting nearly every incumbent out of office.

BEWARE – BEFORE CONNECTING AI TO M365…



https://tminus365.com/we-simulated-a-copilot-insider-threat-heres-what-we-learned/ (5-minute read)

Also consider a scenario where an account gets hacked, and the attacker performs the same steps

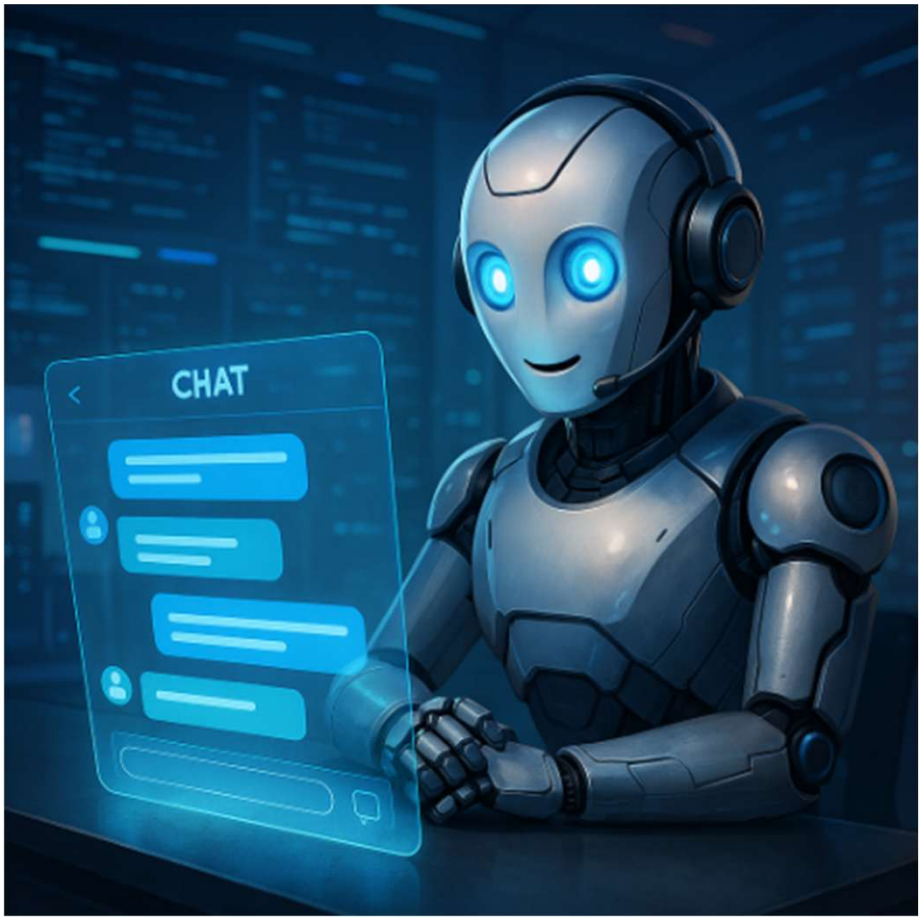


SECURELY USING AI CHAT – THE BASICS

Most AI tools have major downsides:

1. Your data leaves your M365 tenant.
2. Uses your conversations to train the AI model.
3. That information can then be presented to other people in responses.

- **DO NOT use free or paid "consumer-grade" AI tools for work** since they violate your **“AI Acceptable Use Policy”** and regulated industry frameworks.
- Use the Copilot that's included free with your M365 account. Ask your manager for approval.
- For free personal AI use, Copilot and Claude have an "opt out" setting so your chats aren't used to train the AI.



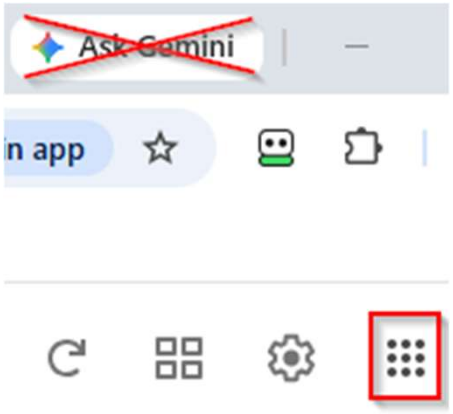
SECURELY USING AI CHAT – THE BASICS

Most AI tools have major downsides:

1. Your data leaves your Google Workspace tenant.
2. Uses your conversations to train the AI model.
3. That information can then be presented to other people in responses.

- **DO NOT use free or paid "consumer-grade" AI tools for work** since they violate your **“AI Acceptable Use Policy”** and regulated industry frameworks.
- Use the business-grade Gemini that's included free with your Google Workspace account (under the Hamburger; do not “Ask Gemini”).
- Free personal AI use: Copilot, Claude and Grok have an "opt out" setting so your chats aren't used to train the AI.





⚠ AI SAFETY GUIDE

THE 8 THINGS YOU SHOULD NEVER UPLOAD TO AI (UNLESS APPROVED BY POLICY)

⚠ DON'T RISK YOUR PRIVACY FOR THE SAKE OF CONVENIENCE

SENSITIVE DATA INCREASES RISK

Anything you share with an AI tool can travel further than you expect.

01 PASSWORDS & VERIFICATION CODES

Passwords, 2FA codes, and security question answers.

02 CREDIT CARD & BANKING INFO

Card numbers, CVV, IBAN, and bank statements.

03 ID & OFFICIAL DOCUMENTS

National ID numbers, passports, driver's licenses, dates of birth.

04 COMPANY SECRETS & CONFIDENTIAL DOCS

Trade secrets, contracts, and files marked “Confidential.”

05 CUSTOMER OR EMPLOYEE DATA

Names, contact details, and HR/personnel files subject to laws like GDPR.

06 PRIVATE HEALTH RECORDS & RESULTS

Medical reports, prescriptions, and diagnostic information.

07 CHILDREN'S IDENTITY, SCHOOL & LOCATION

School names, home/school addresses, and daily routine details.

08 API KEYS & CRYPTO WALLET INFO

API keys, seed phrases, and private keys should never go into a chat.

PRO TIPS

01 ANONYMIZE

Remove names, account numbers, and personal details before sharing.

02 STRIP UNNECESSARY DATA

Include only what's needed to solve the problem — cut the rest.

03 CHECK PRIVACY SETTINGS

Use temporary/incognito chat and review data retention settings.

WHY IT MATTERS

Most AI tools may retain your conversations for model development or training unless you change the settings. **The data you share can stick around longer than you'd expect.**

Consumer-Grade vs Business-Grade AI

Why users must run the business-grade tier of every AI platform

✗ Consumer = client-data risk
✓ Business = required for compliance

Platform	CONSUMER-GRADE *Do NOT use for work*	BUSINESS-GRADE *Required tier for work*	Why the business tier matters
Microsoft Copilot	**Copilot (free) & M365 Personal / Family / Premium** Personal Microsoft account. Copilot Pro was retired Aug 1, 2026. No tenant data access; no enterprise data protection.	**Microsoft Copilot & Copilot Chat (work account)** Formerly "Microsoft 365 Copilot." Entra sign-in; runs inside your M365 service boundary.	Covered by Microsoft's DPA; no training on your data. Respects permissions, sensitivity labels, retention & audit; GDPR & EU Data Boundary.
ChatGPT (OpenAI)	**Free, Go, Plus, Pro** Prompts may be used to train models unless each user opts out. No DPA, no admin visibility, no shared controls.	**ChatGPT Business (formerly Team) & Enterprise** Business: 2–200 users, Standard or Premium seats. Enterprise: custom contract.	No training on business data by default; DPA. SAML SSO, MFA & central admin. Enterprise adds SCIM, RBAC, custom retention & data residency.
Google Gemini	**Gemini app (free), Google AI Pro & Ultra** Personal Google account. Chats can be human-reviewed & used to improve Google; reviewed chats kept up to 3 yrs, even after deletion.	**Gemini in Google Workspace (work account)** Included in paid Workspace plans; Business Standard+ adds Gemini in Docs, Sheets & Meet.	Not used to train models outside your domain; no human review; Workspace DPA. HIPAA BAA covers specific Gemini features (admin accepts).
Claude (Anthropic)	**Free, Pro, Max** Trains on chats unless opted out; training data kept up to 5 years. No DPA, so not defensible for work data.	**Claude Team & Enterprise ("Claude for Work")** Run under Commercial Terms; your organization is the data "Controller."	No training on your content; DPA included. Enterprise adds SCIM, audit logs, custom retention & a HIPAA BAA.

WHY USERS MUST USE BUSINESS-GRADE

- "No training on your data" is contractual; consumer tiers can pull work data into model training.
- A Data Processing Agreement (DPA) is included, the contractual baseline for privacy laws & contracts.
- Central admin, SSO & instant offboarding kill "shadow AI" and control who has access.
- Audit logs & retention controls give you proof to hand an auditor or regulator.
- HIPAA requires a BAA, not just a DPA: available for Microsoft Copilot, Gemini in Workspace & Claude Enterprise.
- Paying for a consumer plan does NOT make it business-grade; the work account and contract do.

Note: BAA scope varies by feature. ChatGPT Business and Enterprise do not include a BAA (use the OpenAI API or ChatGPT for Healthcare). Plans and terms change often; verify at each vendor's site.

AI TOOL HIPAA BUSINESS ASSOCIATE AGREEMENTS (BAA)

All Major AI products besides Microsoft MUST be “Enterprise or Healthcare” versions...

Copilot for Business / Enterprise (Copilot is covered by Microsoft's default BAA).
https://learn.microsoft.com/en-us/compliance/regulatory/offering-hipaa-hitech

Anthropic Claude Enterprise (not Pro or Max or Team or Cowork)
https://support.claude.com/en/articles/15455031-covered-models-under-a-business-associate-agreement-baa

OpenAI ChatGPT for Healthcare (not Plus or Team or Enterprise)
https://help.openai.com/en/articles/8660679-how-can-i-get-a-business-associate-agreement-baa-with-openai-for-the-api-services

Google Cloud (data must reside in a HIPAA-eligible GCP)
https://cloud.google.com/security/compliance/hipaa

AI TOOL FERPA CONSIDERATIONS

The core rule

FERPA (20 U.S.C. § 1232g; 34 CFR Part 99) prohibits an institution that receives federal funds from disclosing PII from education records without **written consent from parents or students**, unless a specific exception applies. Sending an education record to AI *is* a disclosure in FERPA terms, and the regulated party is the **educational institution, not the AI company and not the individual faculty/staff member**.

- **Rights have already transferred to the parents/students.** At the postsecondary level, FERPA rights belong to the "eligible student," not the parent, so consent has to come from the students themselves.
- **AI creates new records.** If the tool generates a risk score, summary, or feedback tied to an identifiable student, that output can itself become part of the education record, which parents/students then have a right to inspect.

The only two lawful paths

There are exactly two ways to put student PII into an AI tool legally:

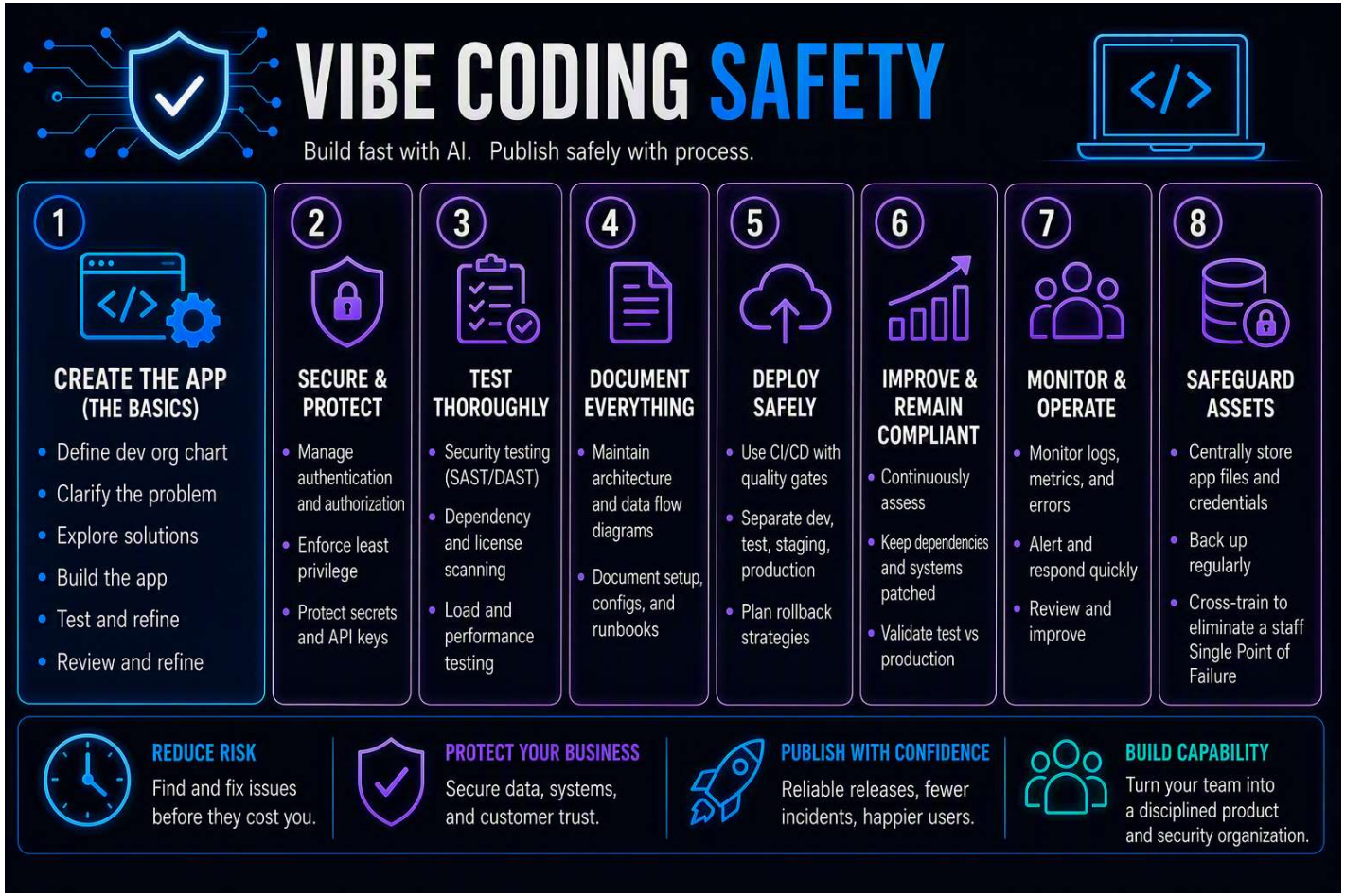
- **Prior written consent** from each eligible parent/student, specifying the records, the purpose, and the party receiving them. Broad "technology use" language collected at enrollment does **not** count.
- **The "school official" exception** under 34 CFR § 99.31(a)(1), which is the path virtually every institution actually uses for vendors.

Which Tools

- Business-Grade only.

VIBE CODING RISKS

Taking software dev “in house” brings these applications “in scope” of cyber insurance & regulated industry compliance.



AI PROPERTY CONTINUITY CONCERNS



1. What happens when the AI Builder(s) leave the org?
2. Is there an AI step in the staff termination process for delegation of the AI?
3. Are all AI tools Business-Grade that are centrally managed?
4. How will the org continually assess and address AI security risks?
5. Are Markdown files (or similar) accessible for others, and are they backed up?
6. Is there an AI Map of connected datasets, agents, and workflows that is kept up-to-date?
7. Are all AI Agents inventoried and measured at least quarterly?
8. Are AI setup processes and maintenance thoroughly documented and kept up-to-date?
9. Does the org align AI with their regulatory requirements and cyber insurance?
10. Who has “AI Management” in their Job Description with clear expectations?

AI USER ADOPTION & TRAINING



GETTING USER ADOPTION

Why get adoption?

Orgs and information workers that embrace AI will be more efficient, effective, and competitive.

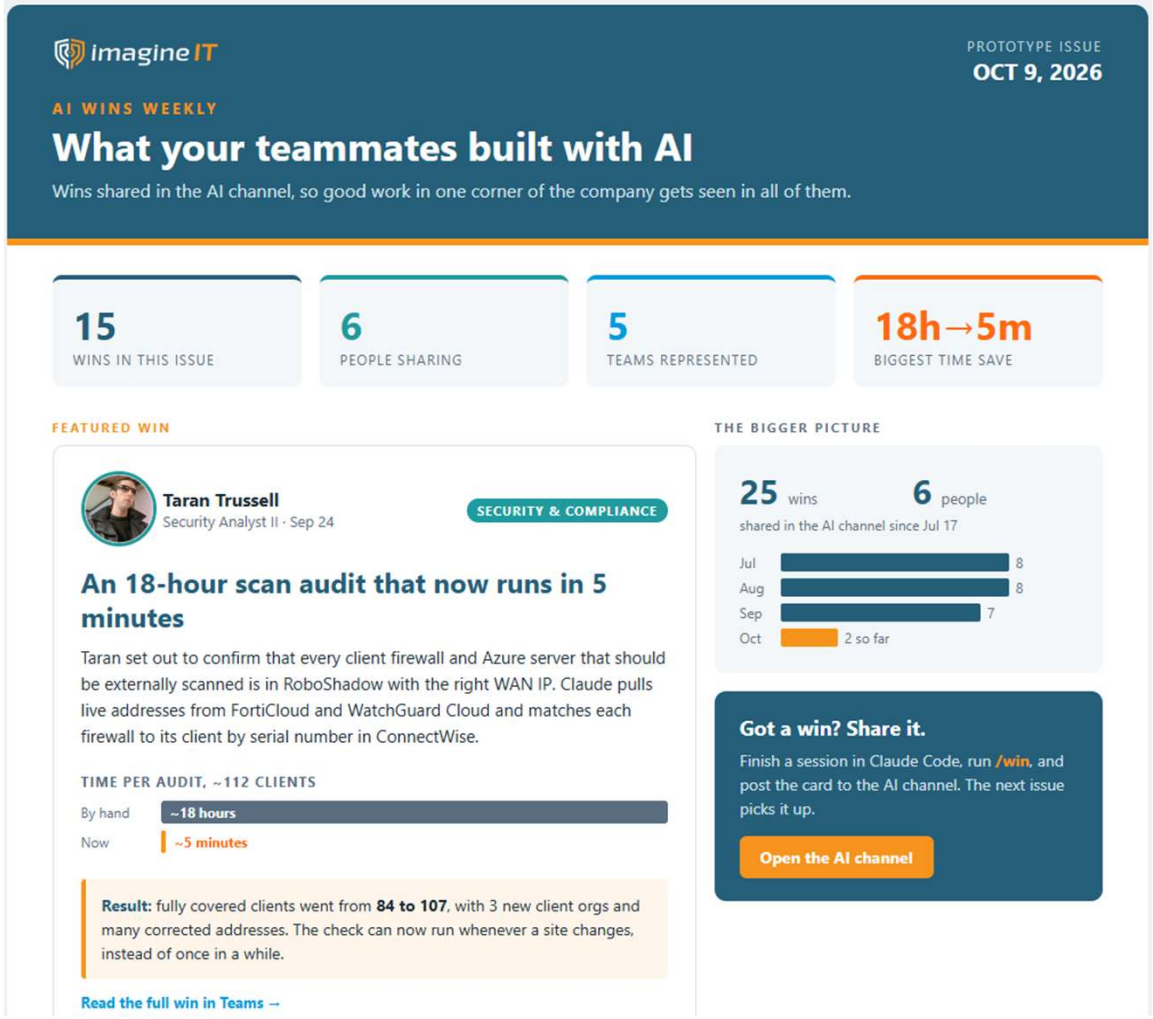
How to get adoption…

- **Training** > enroll users in:
  - Microsoft Copilot Academy
  - Learning Paths You Create
  - IMIT ClipTraining LMS

- In company meetings, mention AI often. Make it part of the culture.

- Ask users (and leadership) to frequently share and critique AI successes in a dedicated Teams channel.

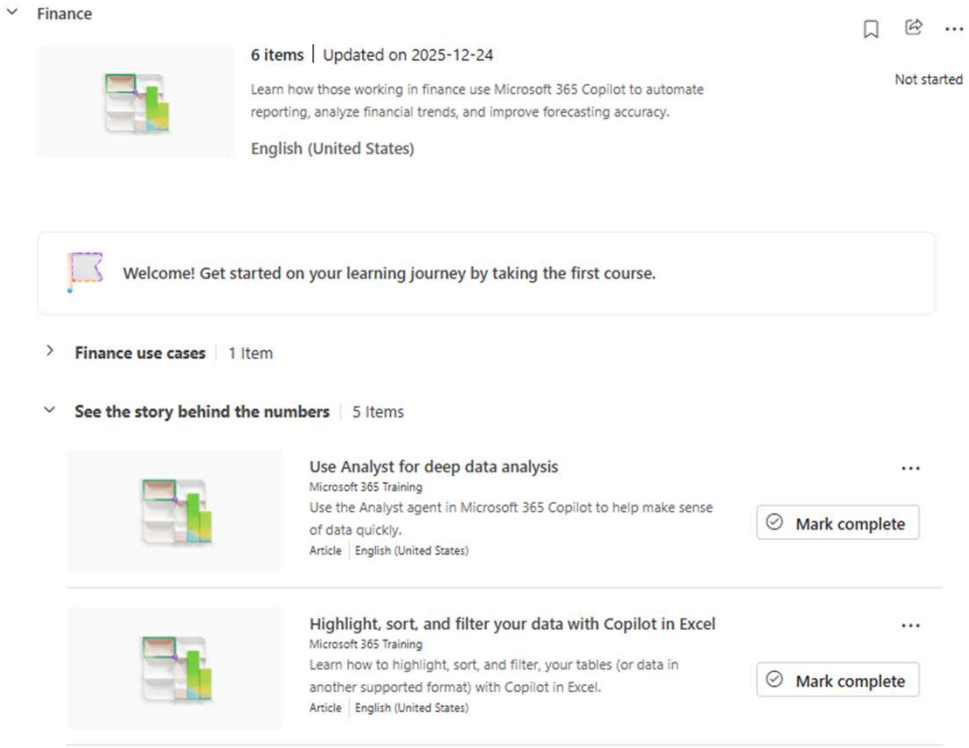
EXAMPLE OF TEAM AI SUCCESS SHARING

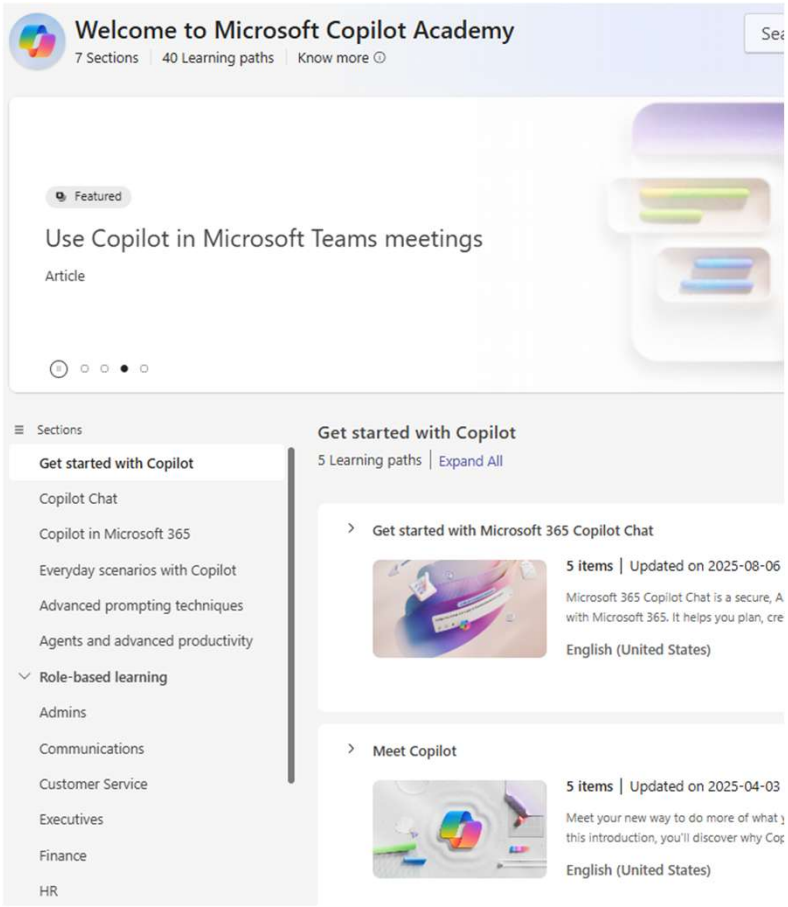


MICROSOFT'S FREE COPILOT TRAINING

Microsoft provides training to kick-start your Copilot skills development… https://aka.ms/copilot-academy

- Requires Microsoft 365 login





AI BEST PRACTICE ROLLOUT

DOING IT RIGHT > THE AI SUCCESS TIMELINE

"Lead with Humanity; Scale with Intelligence (and Crush Backlog)"



"Personal Assistant AI"



"AI Agent Part of Org Chart"

Unstructured or Unapproved Use
Random Experiments

Workflow & Security Assessments
Security Remediations
AI & Security Licensing

Advanced Learning Path…
"Using Paid Copilot Features"

Agentic Builder Learning Path
Agentic AI Deployments & Maintenance/Support

Start of Month 1 — In Progress

Start of Month 2

End of Month 2 — Start of Month 3

End of Month 3 — Next Quarter & Beyond

Discovery & Visualization
AI Acceptable Use Policy

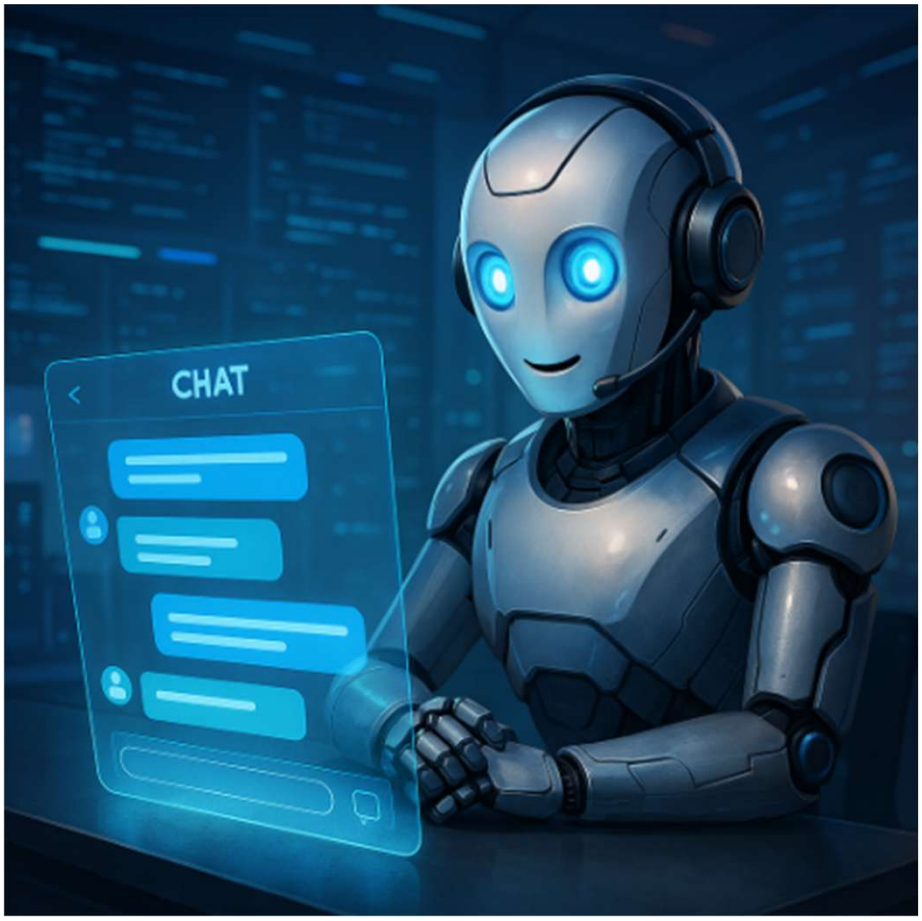
Basic Learning Path…
"Effectively Engaging with AI"

Agentic AI Automation
Discovery & Assessments

AI ACCEPTABLE USE POLICY BASICS

Some Recommended Policy Sections…

- Purpose: Lead with Humanity; Scale with Intelligence
- List of AI tools allowed and banned
- What AI can be used for
- The types of information allowed and banned from chats
- What requires human review
- User AI Training
- Policy Enforcement



M365 SECURITY ASSESSMENT & REMEDIATIONS

1 FIND OVERSHARED SITES

- Identify SharePoint sites with broad access.
- Prioritize sites containing business-critical information.

2 IDENTIFY SENSITIVE DATA

- Find financial, HR, customer, and confidential data.
- Understand where sensitive information actually lives.

3 REVIEW PERMISSIONS

Owner
Member
Guest
External

- Remove unnecessary users and excessive access.
- Pay close attention to external and guest access.

4 APPLY SENSITIVITY LABELS

Highly Confidential
Confidential
Internal
Public

- Classify information according to business sensitivity.
- Use labels to enforce appropriate protection controls.

5 CONFIGURE DLP

Financial Data
PII / HR Data
Confidential Info

- Protect sensitive information from accidental exposure.
- Align policies with actual business risk.

6 REMOVE STALE CONTENT

- Delete or archive information nobody needs.
- Reduce forgotten data sitting across the tenant.

7 TEST WITH PILOT USERS

Copilot

- Start with users across different business functions.
- Validate what Copilot can actually discover.

WHY IT MATTERS

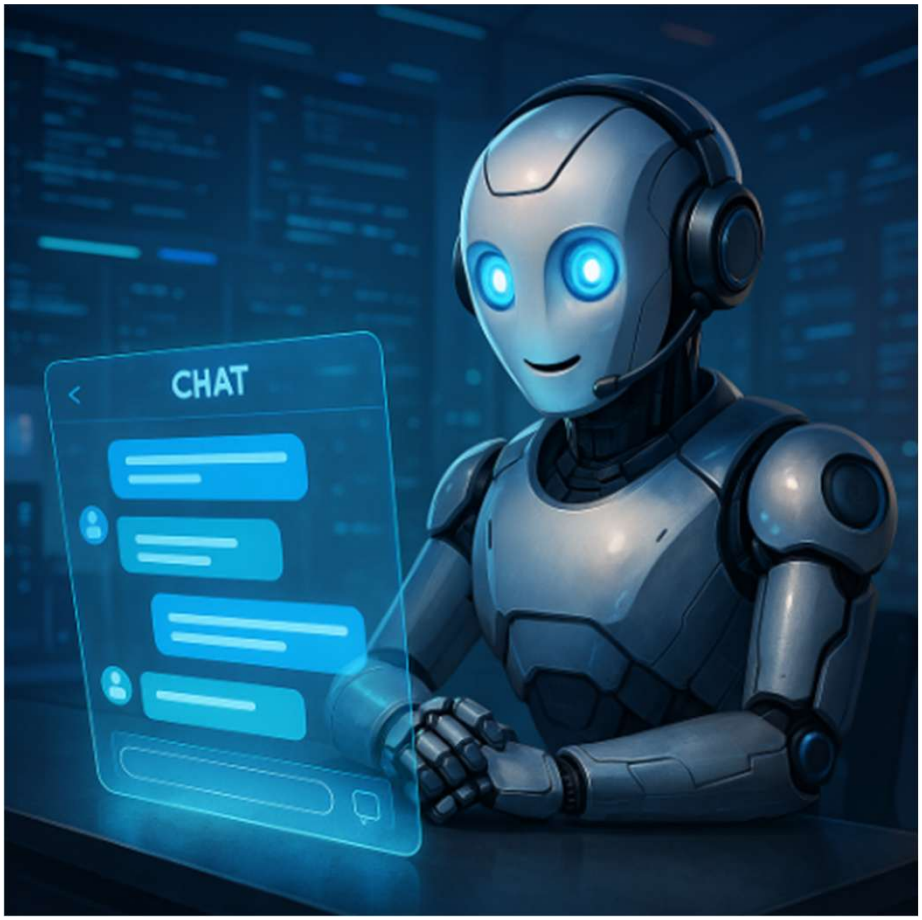
Microsoft 365 environments rarely fail because one permission is obviously wrong.

The bigger problem is accumulation:

- Old SharePoint sites
- Inherited permissions
- Guest accounts
- Unclassified documents

Copilot can surface that accumulated exposure much faster than a human searching manually.

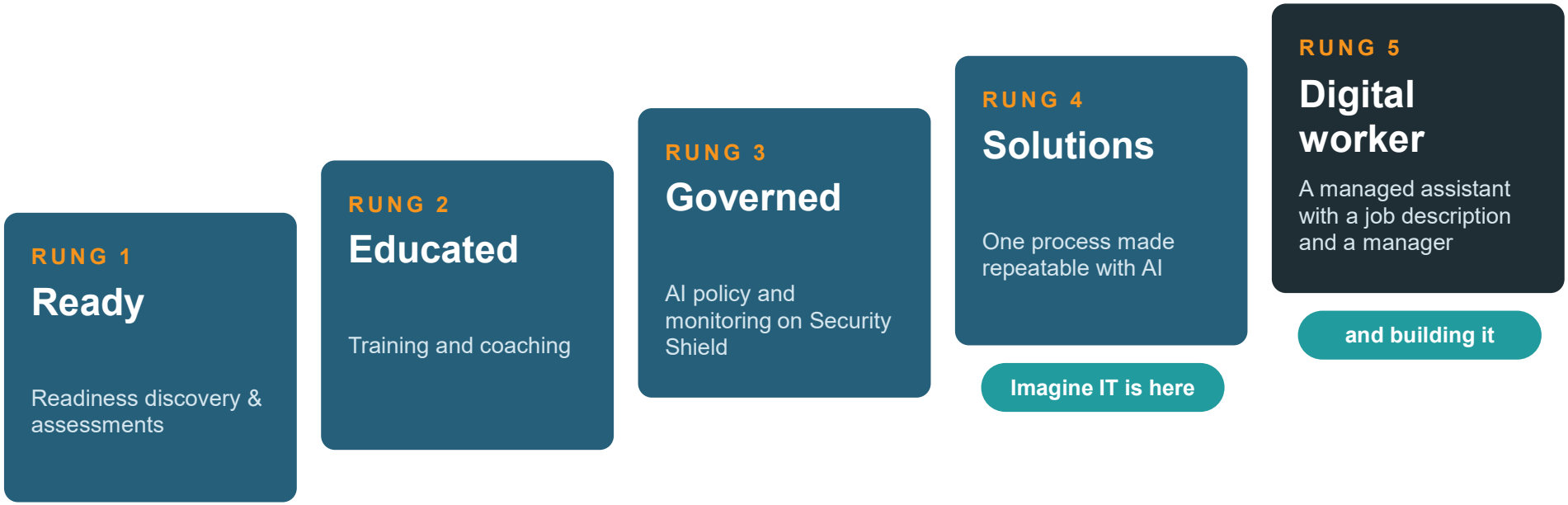
Better Security	Lower Risk	AI-Ready	Greater Efficiency	Stronger Business Impact
Reduce unnecessary access and exposure.	Protect sensitive data and maintain compliance.	Ensure Copilot works with the right data.	Less clutter. Clearer data. Better outcomes.	Unlock AI value with trusted information.



NEXT STEPS

THE AI LADDER

Five Rungs, climbed in order



No Rungs should be skipped. Every conversation starts at Rung 1.

WHERE TO START

Four short assessments, one per Rung

STAGE 1

Curious and prepared

Opens Rung 1: Ready

10 questions

Not there yet? The next step is

A one-hour AI Visualization Workshop

STAGE 2

Learns and improves

Opens Rung 2: Educated

9 questions

Not there yet? The next step is

Training as a service

STAGE 3

Governed

Opens Rung 3: Governed

14 questions

Not there yet? The next step is

Governance on Security Shield

STAGE 4

Opportunities

Opens Rung 4: Solutions

11 questions

Not there yet? The next step is

A use-case Workshop

Start with Stage 1 and your IMIT Account Manager. Pass or pause, you leave with a next step.

imagineIT

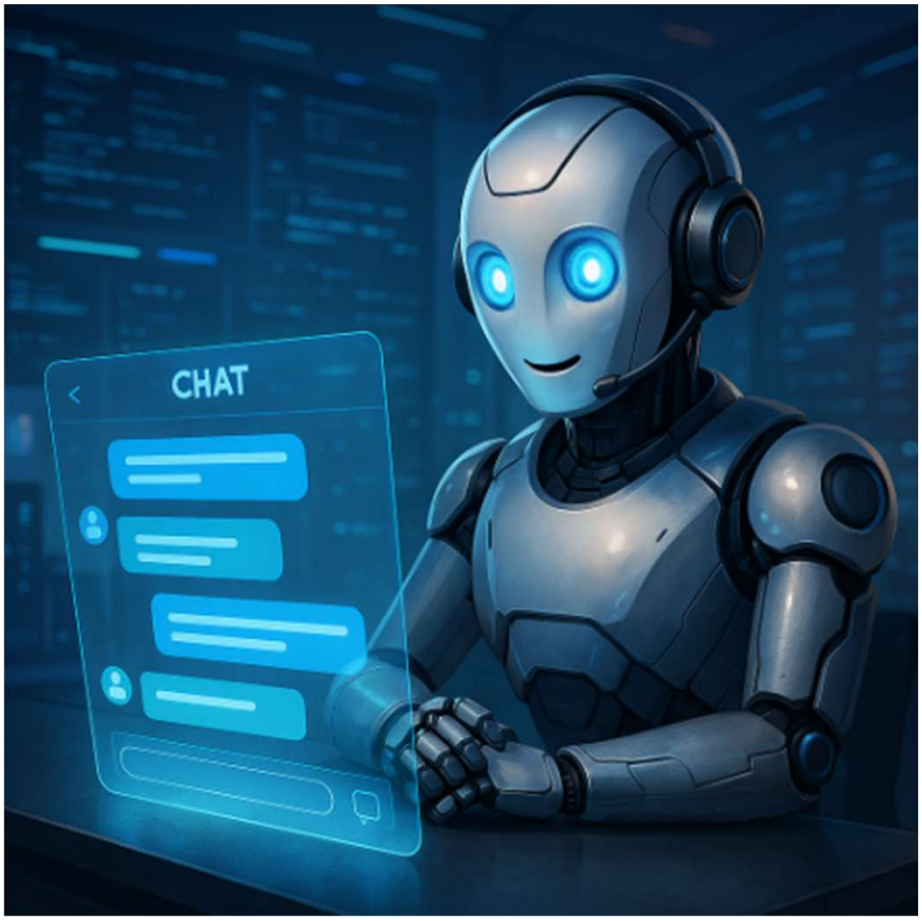
RUNG 1 > A FEW “AI VISUALIZATION WORKSHOP” QUESTIONS

If you could build an AI tool that fixed your single biggest daily headache, what would it be?

What's eating up the most time across your team right now?

Are there shared drives, SharePoint sites, Teams, or mailboxes that likely contain over-permissioned or over-shared sensitive data?

If your competitors adopt AI faster than you and gain major cost reductions, how might that impact your business?





Imagine IT
AI Learning Center
(for Leadership)

https://imit.com/ai-learning-center/

Security & Your Data

- What are the Security Concerns for a Business?
- Explain the Difference Between Free and Paid Copilot
- What Data Does Paid Copilot Access?
- How Does Copilot Expose Sensitive Data?
- Should We Fix SharePoint Permissions Before Turning on Copilot?
- How Do We Audit SharePoint Shares?
- How Do We Expire Old Shares?
- How Do We Identify Inactive Guests?
- How does Copilot protect our data?
- What is Microsoft Purview?
- What are Sensitivity Labels?
- Explain Data Loss Prevention (DLP) rules

Rolling Out AI

- Rolling Out AI the RIGHT WAY
- What are Common AI Adoption Mistakes?
- What is the best practice timeline for an AI rollout?
- How Does Our Org Measure AI Success and ROI?
- How Do We Measure Business Impact?

Training & Prompting

- What Does an AI Readiness Assessment Look Like?
- Developing an AI Acceptable Use Policy
- How Do We Shut Down Unsanctioned “Shadow AI”?
- What is Copilot “Cowork”?
- User Training and Getting Adoption
- Best Practices for Effective Prompting
- Best Practices for Using Copilot for Business/Enterprise

Agentic AI

- Best Practices for Rolling Out Agentic AI
- How to Setup Agentic AI Guardrails
- How to Pilot Agentic AI Effectively
- What Are AI Tokens?

Industry Use Cases

- Browse all 17 industries

HOMEWORK

1. **Take the** AI Risks & Opportunities Webinar Survey

2. **Reach out to your IMIT Account Manager to kickoff the Stage 1 discussion**.

3. **Thoroughly review the IMIT AI Learning Center**: https://imit.com/ai-learning-center/. *This content will answer a lot of your questions.*

4. **List 3 datasets you would love to tie together.**

5. **List 2-3 repetitive tasks you would love to automate.**

   This reflection of items 4 and 5 often surfaces a quick win or two you can act on.





THANK YOU

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