



# Adopting AI Securely & Confidently

## A Practical Microsoft Copilot Session

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Tuesday 7<sup>th</sup> July 2026

Your Host

# Liz Smith

Business Development Director, Lugo

Fractional CIO — 10–75 User Firms

Digital Strategy

Cyber Security

Operational Resilience

Accountancy & Professional Services — Scotland

NCSC Cyber Advisor



# Welcome



# Today's Speakers

Ingram Micro bring 25+ years of Microsoft depth — structured adoption, security, and real commercial outcomes.

DF

## David Fortnam

Microsoft Services Specialist  
Ingram Micro

25+ years Microsoft experience

12+ years at Ingram Micro / Comms-care

Focus: structured AI adoption and Copilot ROI



Ingram Micro

BV

## Ben Voce

Microsoft Presales Lead — Modern Work & Security  
Ingram Micro

Microsoft CSP specialist

Enables Copilot adoption for partners and customers

Translates technical capability into commercial outcomes



Ingram Micro



Microsoft 365  
Copilot

• Presented in partnership with Ingram Micro

# Today's Agenda

Six focused sections — from the why, to the how, to your specific next step.

**1 Introduction**  
• Lugo

**2 Microsoft Copilot in Practice**  
• Ingram Micro

**3 Adopting AI Securely**  
• Ingram Micro

**4 Getting ROI from Copilot**  
• Ingram Micro

**5 Your AI Readiness**  
• Lugo

**6 Next Steps & Q&A**  
• Lugo



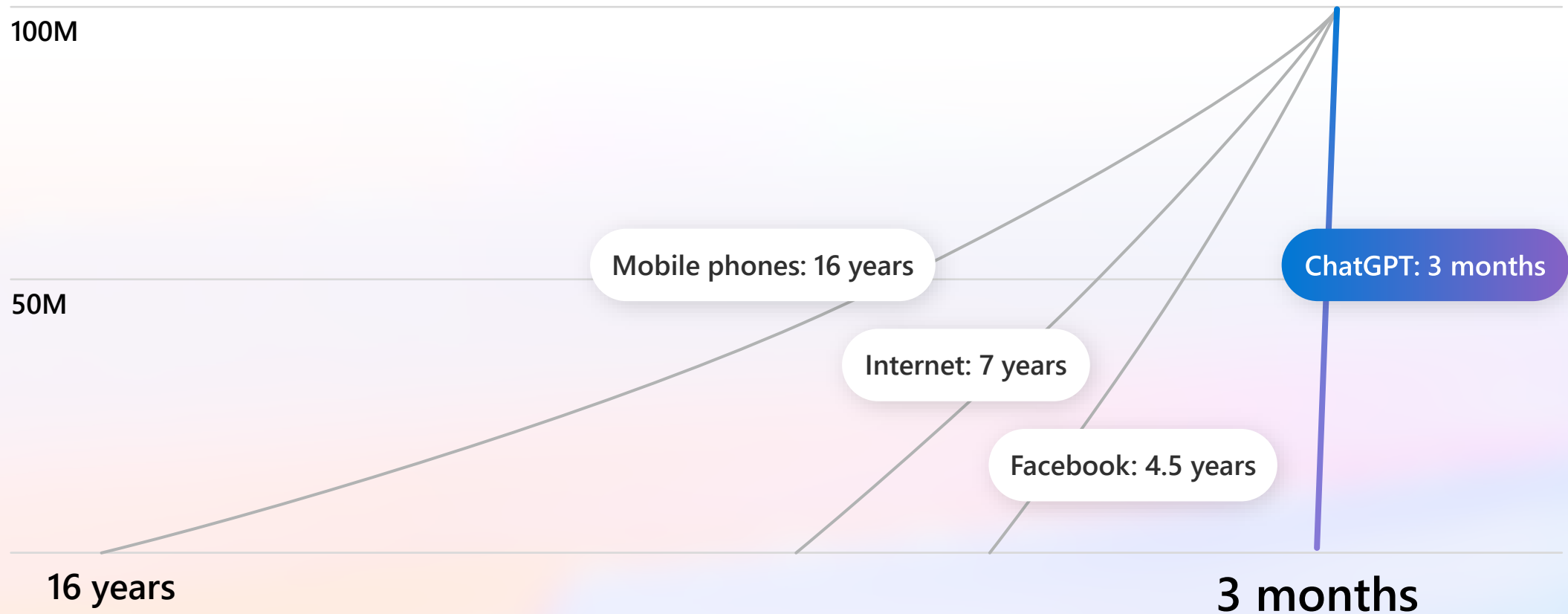
# Microsoft 365 with Copilot:

Intelligence and trust working together to power growth

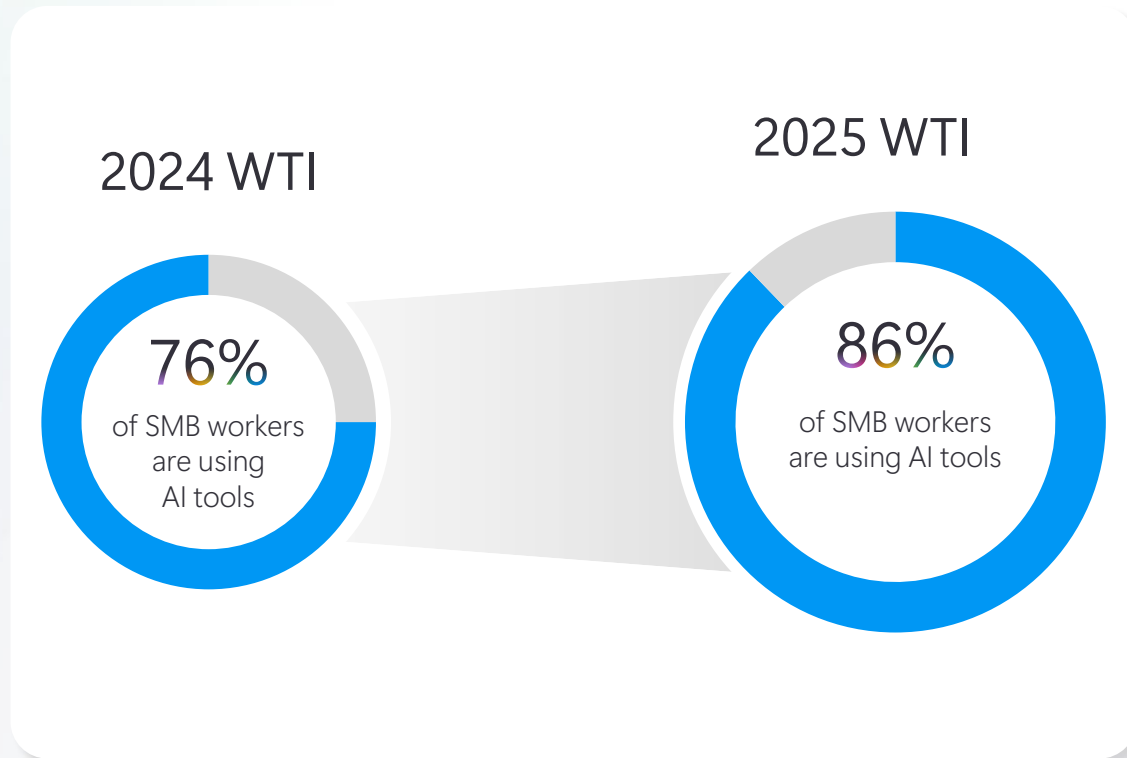


# Generative AI technology is here

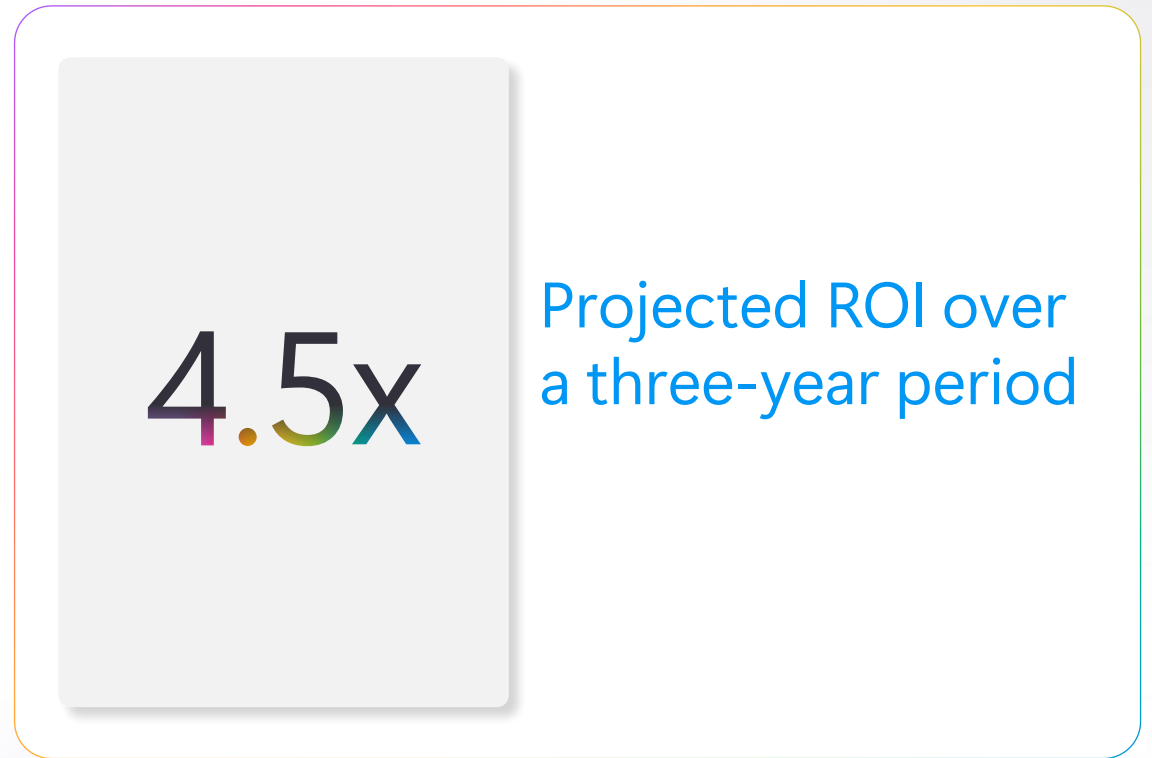
Time to reach 100M users



# More businesses are using AI to get their work done every day and are seeing transformative results



Statistics source: Microsoft, [2025 Work Trend Index Annual Report](#), April 23, 2025.



Statistics source: "New Technology: The Projected Total Economic Impact™ of Microsoft 365 Copilot for SMB," a commissioned study conducted by Forrester Consulting on behalf of Microsoft. October 2024.

# AI Users Transformation



65%

Of AI users fear falling behind if they don't use AI to adapt quickly



45%

Say it feels safer to focus on current goals than redesign work with AI



13%

Of AI users say they're not rewarded for reinvention of work with AI

# 16% of AI users are advanced AI adopters and they work differently.

Advanced AI adopters use agents for multi-step workflows, rethink workflows around what AI does well, and create shared standards for their teams.

They refuse to outsource their thinking.

80%

say they're producing work they couldn't have a year ago

*vs. 58% of all AI users*

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53%

pause before starting work to decide what should be done by AI vs. a human

*vs. 33% of non-AI adopters*

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43%

intentionally do some work without AI to keep skills sharp




*vs. 30% of non-AI adopters*

Intelligence + Trust

# Intelligence and trust - the two halves of growing your business




## Intelligence

AI understands how work happens inside your tools, your data, your habits then turns intent into action.

- 
-  Connects across your apps and data
  -  Reasons over context, not just keywords
  -  Completes work, not just answers questions

## Trust

Identity, data security, and governance designed from the start so AI moves fast without introducing unmanaged risk.

- 
-  Honors existing permissions
  -  Data stays in your tenant, doesn't train models
  -  Auditable, observable, and under your control

# Microsoft 365 with Copilot:

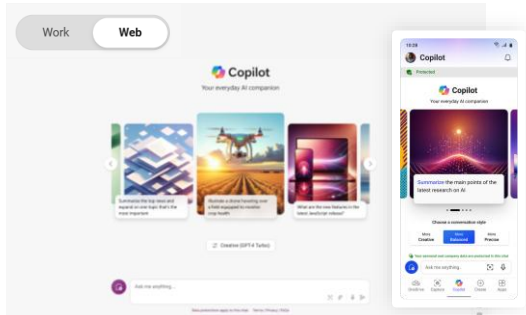
Where productivity, AI and security come  
together for you

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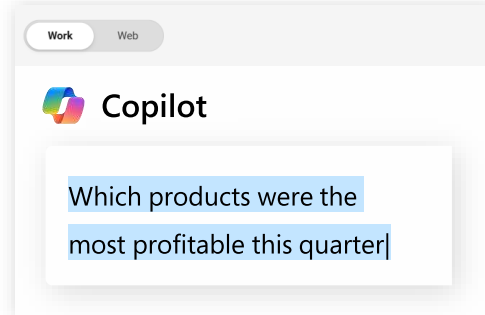
# Copilot Chat + Microsoft 365 Copilot

## Your Personal AI Assistant



**Copilot chat with web knowledge**

Available to all M365 Users



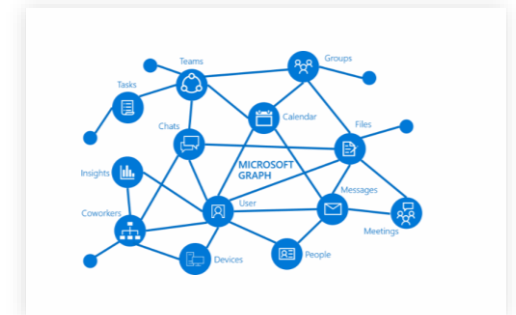
**Copilot chat with company data and web knowledge**

+



**Microsoft 365 Apps**

+



**Microsoft Graph + Work IQ**

Available to licenced M365 Copilot (Premium) users

**Enterprise grade security, privacy, and compliance**

# Copilot lives in the apps you already use

The image displays four overlapping screenshots of Microsoft Copilot integrated into different applications:

- Outlook:** The Copilot sidebar is shown over an email thread. The email content includes: "Lydia Bauer To: Kat Larsson +2 Wed 3/15/2024 12:55 PM @Kat, I uploaded all the pictures from our workshop to the team OneDrive folder. @Henry, can you add yours too? Already counting down to our next get together! Thanks, Lydia" and "Lydia Bauer Hello, Please find attached... Wed 3/15/2024 3:25 PM". Copilot suggestions include: "What are the key points in this email?", "What are some good follow up questions based on this email?", and "Draft a professional reply".
- PowerPoint:** The Copilot sidebar is shown over a presentation slide. The slide content includes: "Present in teams", "Catch up", and "Share". Copilot suggestions include: "Create a presentation about...", "Build a pitch deck for...", and "Generate an image...".
- Excel:** The Copilot sidebar is shown over a spreadsheet. The spreadsheet content includes: "Comments", "Catch up", and "Share". Copilot suggestions include: "Create a table comparing...", "Build a project timeline with tasks, owners, start/end dates, and stat...", and "Create a contact list template with columns for name, email, phone...".
- Word:** The Copilot sidebar is shown over a document. The document content includes: "Comments", "Editing", "Catch up", and "Share". Copilot suggestions include: "Summarize this document in 3 bullet points", "Make this text more concise and persuasive", and "Give me 3 alternative overviews for".

# Leverage pre-built agents across your everyday apps and tools

Create polished work in minutes - proposals, spreadsheets, decks without the agency price tag



Word Agent



Excel Agent



PowerPoint Agent

Understand your market and customers - research and analyze faster than ever



Researcher Agent



Analyst Agent

Find what you need and keep your team aligned - stop searching, start doing



SharePoint Agent



Facilitator Agent<sup>1</sup>

Take busywork off your plate - automate the repetitive stuff so you can run your business



App Builder Agent



Workflows Agent

# Top 10 prompts to try with Microsoft 365 Copilot

Legend [] = [Details you insert]



Microsoft  
365 Copilot

1

## Catch up in seconds

“Summarize the key updates and action items from my recent emails and Teams Messages. Create a to-do list with deadlines.”



Copilot in Outlook

2

## Draft a high-impact email

“Draft a response to this customer email that clearly acknowledges their request, provides a helpful and solution-oriented answer, offers two next-step options, and ends with a clear call to action while maintaining a professional and friendly tone.”



Voice in Copilot Chat

3

## Refine your pitch

“Copilot, I need to practice my sales pitch. I’ll say it out loud, then tell me how I can be more concise.”



Copilot in Word

4

## Build an onboarding guide

“**[Use our onboarding documents]** to create a step-by-step process for onboarding a new customer.

Include:

- Each step in sequence
- Who is responsible
- Tools or systems used
- Expected timeline
- Risks and how to avoid them



Copilot in Teams

5

## Prepare for a meeting

“Prepare me for my upcoming meeting with **[customer]** by reviewing relevant emails, chats, and documents, to draft talking points for the unresolved questions and potential solutions to the problems.”



AI in SharePoint

6

## Summarize team updates

“Act as my knowledge assistant and review the documents and pages in **[this SharePoint site]**, then summarize what the team is working on, highlight key updates and risks, and suggest the top three actions I should take next.”



Copilot in Word

7

## Update status reports

Update the **[document]** with the latest information from my emails and Teams chat with my manager. Keep the structure intact and add a Key outcomes / Risks / Next steps' section.



Copilot in PowerPoint

8

## Develop project updates

“**[Use my website and founding documents]** to create a six-slide sales presentation for my company that clearly explains the problem we solve, our solution, key customer benefits, proof points, pricing or engagement model, and ends with a strong call to action, using a clear and confident tone.”



Copilot in Excel

9

## Visualize business performance

**[Use existing data set]** “Analyze this spreadsheet and identify key trends over time, top performing categories, and any anomalies.

Then create:

- 1 trend chart (performance over time)
- 1 comparison chart (top vs bottom performers)
- 1 summary table of key insights



Researcher

10

## Competitive analysis

“Research the competitive landscape for [product or service] in [industry], identify the main competitors, compare their strengths and weaknesses, and summarize how a small business like mine can differentiate and compete effectively.”

Find a curated list of prompts to help with tasks like summarizing documents, crafting communications, or analyzing data in the [Microsoft 365 Copilot Prompts Gallery](#).



# A Monday morning, before and after Copilot

What changes in the first hour of the work week for a 40-person business

## BEFORE - without Copilot

**47 unread emails**

to triage before the 9am standup

**3 quote requests**

waiting on details from past invoices

**Standup in 30 minutes**

no notes from last week

**Proposal due Friday**

blank document, blank brain

## AFTER - with Copilot

**Inbox triaged in 5 minutes**

Copilot drafts replies and surfaces what truly needs you

**Quote drafted in 2 minutes**

grounded in past invoices for similar jobs

**90-second standup prep**

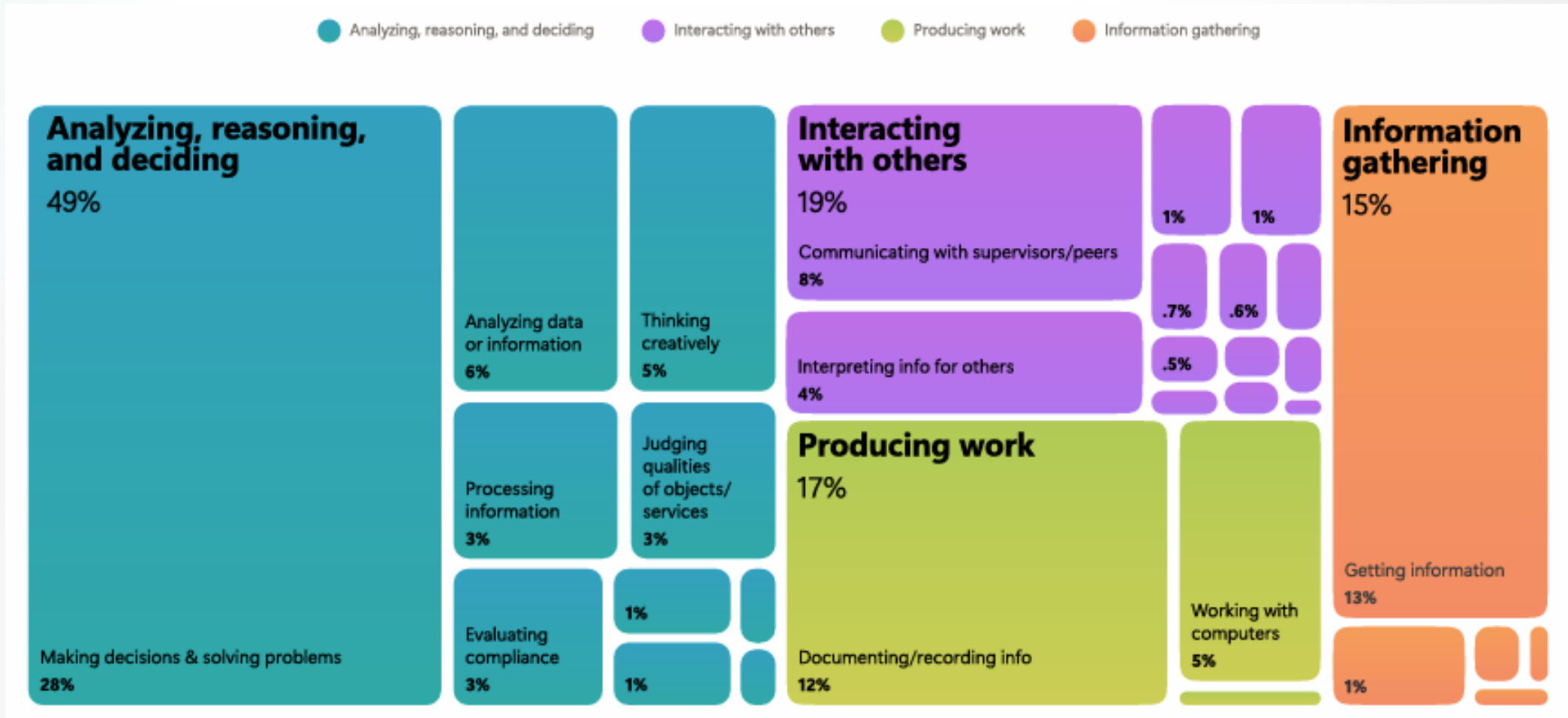
Teams summary plus open action items, in your voice

**First proposal draft in 15 minutes**

matched to your tone, ready to refine

# Copilot Chat Usage Trends

Expanding who can do high-value work



Source: Microsoft Work Trend Index 2026: [2026 Work Trend Index Annual Report](#)

# A day in the life of a Financial Analyst

Available with:  
Microsoft 365 Copilot

Scenario level:  
Buy

Benefits

~1 hour per week

Areas of investment: Learning

Handling more cases

8:00 am – Sort data

Hillary begins her day using Agent Mode in Excel looking at the latest COGS estimates for a new product. She uses it to filter the data to get the view she wants.

 Copilot in Excel

Example prompt: **Sort the data** by product feature and then filter out the Priority 2 features.

9:30 am – Recap a meeting

She later meets with her manager and IT to discuss reporting requirements updates from the sales organization. She asks Copilot in Teams to summarize the requirements.

 Copilot in Teams

Example prompt: **Summarize the meeting** and be sure to list all the reporting requirements that were mentioned.

10:00 am – Summarize a document

Hillary finally gets to her main project for the day and reviews the due diligence information on a potential acquisition target. She asks Copilot to create a summary of the content.

 Copilot Chat<sup>2</sup>

Example prompt: **Summarize the information in** [Fabrikam financial data], [Fabrikam operations analysis], [Fabrikam integration plan].

4:00 pm – Get insights

Hillary heads back into Agent Mode in Excel to update the acquisition numbers with the latest what-if scenarios and create some charts to go into the business planning presentation.

 Copilot in Excel

Example prompt: **What is the impact of** doubling the IT integration budget on the revenue per month?

2:00 pm – Summarize a chat

Hillary needs to catch up on a chat she started in the morning. She prompts Copilot to summarize the thread.

 Copilot Chat<sup>2</sup>

Example prompt: **Summarize this thread** calling out where my name was mentioned and any action items for me.

11:00 am – Create a presentation

After creating an overview of the acquisition in Word, she asks PowerPoint Agent to turn the document into a PowerPoint presentation for the business development team.

 PowerPoint Agent

Example prompt: **Create a presentation from** [Fabrikam acquisition overview.docx]  
[Get started with Word, Excel, and PowerPoint Agents](#)

Hillary  
is a Financial Analyst  
at Contoso.



<sup>1</sup>Access M365 Copilot Chat at [m365copilot.com](https://m365copilot.com) or the Microsoft 365 Copilot Chat mobile app and set toggle to "Web".

<sup>2</sup>Access M365 Copilot Chat at [m365copilot.com](https://m365copilot.com), the Microsoft 365 Copilot Chat mobile app, or the M365 Copilot Chat app in Teams, and set toggle to "Work".

<sup>3</sup>AI Agents allow Copilot to access your organization-specific apps. In the past this would have required an API call to get data from a system of record.

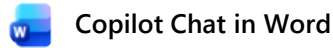
The content in this example scenario is for demonstration purposes only. You should evaluate how Copilot aligns with your organization's business processes, regulatory requirements, and responsible AI principles.



Copilot Chat can assist with many tasks in the recruiting process from creating job postings and interview questions, to performing research, and assisting with onboarding.

1. Create a job posting

Ask Copilot Chat in Word to create job postings for any role.



Prompt: Write a job description for an Accounting Director role with 5+ years of experience.

2. Create interview questions

Brainstorm interview questions specific for any role with Copilot Chat in Word. Create both behavioral and technical questions depending on your needs.



Prompt: Generate 5 interview questions for an Executive Assistant with 10+ years of experience.

3. Research salary levels

Find typical salary levels for positions based on geography.



Prompt: Provide a typical salary range for an Accounting Director role with 5+ years of experience in these five cities.

6. Make introductions

Draft an email to introduce your new employee to their team using Copilot Chat in Outlook.



Prompt: Draft an email to introduce Jane to her new team based on this information from her resume.

5. Create onboarding materials

Streamline the onboarding process by asking Copilot Chat to generate learning paths according to individual roles, learning styles, and career goals.



Prompt: Develop a 3-month plan to onboard a new hire.

4. Create an offer letter

Found the perfect candidate? Use Copilot Chat in Word to quickly draft an offer letter for you to send.



Prompt: Draft a customizable template for an offer letter.

KPIs impacted

Cost per hire

Reduce onboarding time

Value benefit

Cost savings

Employee experience

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# Demos

## Copilot Chat – Outlook, Word, Excel, PowerPoint

- <https://demos.microsoft.com/app/present/5076#/0/0>

## Teams

- [Executive Teams demo](#)

## Outlook

- [Executive Outlook demo](#)

## Word

- [Agent mode in Word](#)
- [Agent in Word](#)

## Excel

- [Create a spreadsheet from Scratch](#)

## PowerPoint

- [Agent Mode in PowerPoint](#)

Trust ensures your data is **protected**, access is **controlled**, and AI operates within the **boundaries** of your business

And trust starts with **security**

# Top security and governance concerns about generative AI

Data oversharing and  
data leaks

80%

of leaders cited leakage of  
sensitive data as their main  
concern<sup>1</sup>

Identification of risky  
AI use

41%

of security leaders cited that the  
identification of risky users based  
on queries into AI was one of the  
top AI controls they want to  
implement<sup>2</sup>

AI governance and  
risk visibility

84%

Want to feel more confident about  
managing and discovering data  
input into AI apps and tools<sup>2</sup>

1. First Annual Generative AI study: Business Rewards vs. Security Risks, Q3 2023, ISMG, N=400

2. [Microsoft data security index report](#)

# Adopt AI without losing control of your business

Easily manage security, access, and usage from one place—so you can adopt AI without added risk or complexity.



## Protect your data as you use AI

Keep sensitive business data safe with built-in protections like label inheritance and DLP policies that prevent leaks and reduce risk.



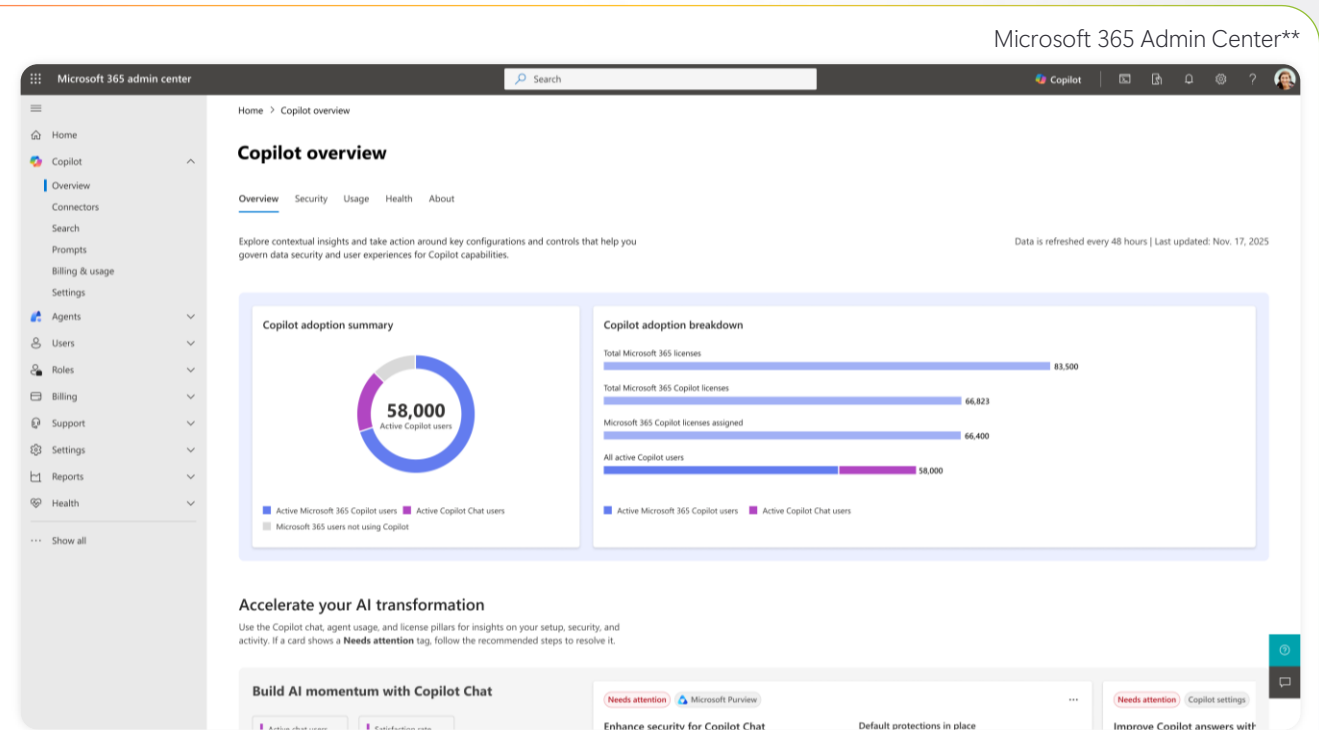
## Control access without extra effort

Make sure the right people have access to the right tools and information—without manual setup or IT overhead.



## Measurement & reporting

See how your tools and AI are being used, measure impact, and make sure your team is getting value from your investment.



Protect data and your organization



Provide access to the right tools at the right time



Place controls under central management

\*Availability and usage of Microsoft Copilot agents may be subject to metered access, licensing requirements, and service limits. Features and functionality can vary by product, region, and organizational configuration. For details, refer to your Microsoft licensing agreement and official product documentation.

\*\*Some features require a specific license. Visit our [plans and pricing page](#) for more details.

# One secure solution that grows with your business.



## Protect sensitive data automatically

Keep customer and business data from being overshared or leaked.



## Control who can access what

Secure both employees and AI agents with simple, built-in policies.



## Built-in security & observability

Stay protected from modern threats

## Microsoft 365 with Copilot

Included with  
Microsoft 365 Copilot



AI-Powered Chat



Personal Assistant



Pre-Built Agents



Advanced Management

Included with  
Microsoft 365 Business Premium/E3/E5/E7



Identity & Access Controls



Device Management



Device Security



Email & App Security



Data Security

# Proven results for businesses like yours

More than **220%**

more value from your investment

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Less than **6mo**

faster time to value

**1.5h**

more time back every week

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**\$630k+**

real financial impact (NPV)<sup>1</sup>

<sup>1</sup> ["The Total Economic Impact™ of Microsoft 365 for Business,"](#) a commissioned study conducted by Forrester Consulting on behalf of Microsoft, February 2025. Results are based on a composite organization representative of interviewed customers. The potential ROI or benefits of organizations are projections based on the survey and study. They do not constitute guarantees nor promises, and individual productivity and ROI outcomes are dependent on the organization and will vary. Forrester interviewed five decision-makers and conducted a survey of 145 respondents with experience using Microsoft 365 Business, Microsoft Teams, and Microsoft 365 Copilot at their organizations.

Learn why over  
15 million small  
businesses trust  
Microsoft 365

[Read all customer stories](#)



# Morula Health: delivering higher quality medical writing services more efficiently with Copilot



“ We’ve avoided AI solutions until now because our industry is so regulated that we can’t afford to import data into outside solutions. But Copilot keeps all the data supplied to us by customers inside our own system so they can trust what we do with it. Plus, when we use it, it’s right there in Microsoft 365.”

— Philip Burridge: Director, Operations & Strategy, Morula Health

## Customer outcomes

### Collaboration

Safeguarded writers’ time and fostered collaborative workflows between writers with Copilot embedded into Microsoft 365 apps and internal tools they are already using

### Productivity Gains

Cut review time of complex scientific data tables down to minutes from days/weeks  
Saved time on completing multiple case studies per day

### Content Creation

Empowered marketing team to produce two blog posts per week instead of one post every three weeks

# Joos: Growing its brand of mobile charging stations through worldwide collaboration with Copilot



“ Since integrating Copilot, our customers have benefitted from **faster email responses and more personalized interactions**, as Copilot enables us to better understand and anticipate our customers’ needs.”

— Jeannette Ikonga: Head of Client Success & Customer Experience, Joos

## Customer outcomes

### Data insights

Saved time and money by quickly identifying underperforming stations based on KPIs, previously a time-consuming process.

### Research prep

Saved time on researching new industries and clients, and replying to customer emails.

### Content creation

Built and refreshed pitch decks, marketing articles, press releases, and social media content.

# Three essentials for Copilot success



## Leadership

Develop leadership capabilities to leverage AI for business outcomes

- Executive sponsorship
- Align AI to business strategy
- Providing clarity and prioritization
- **Best practice:** AI Council



## Human change

Manage human transformation with robust user enablement programs

- User enablement program
- Communications and community
- Skilling and training
- **Best practice:** Measure the impact through feedback and analytics



## Tech readiness

Build and iterate technical skills to deliver on business results

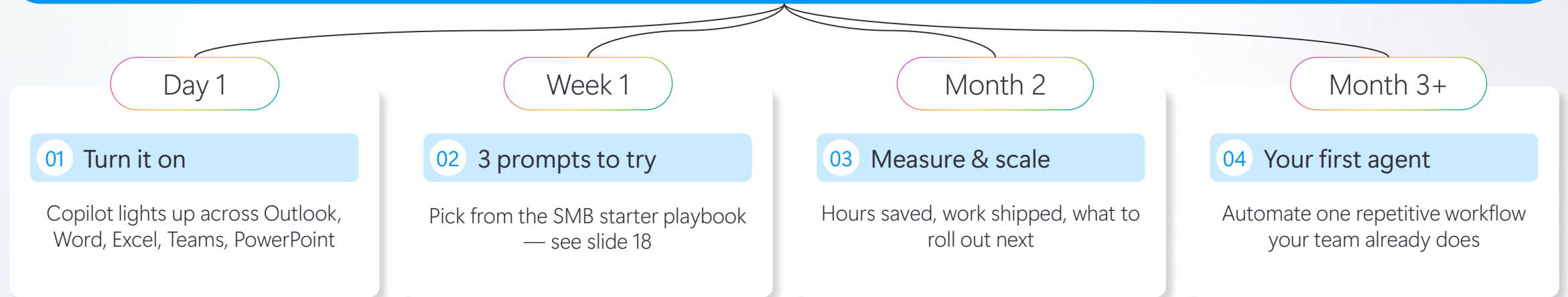
- Secure your data infrastructure
- Risk management
- Technical skilling
- **Best practice:** Center of Excellence

Responsible AI principles

# Your first 3 months with Copilot

A simple ramp from turn-on to measurable impact — no consulting engagement required

Up and running in days, enhance in months



## Everything your business needs to get started with Copilot

Core Copilot Pitch Deck & NDA Roadmap	<ul style="list-style-type: none"><li>• <a href="https://aka.ms/M365Copilotpitchdeck">https://aka.ms/M365Copilotpitchdeck</a></li><li>• <a href="#">Microsoft 365 Copilot NDA Roadmap</a></li></ul>
Customer Adoption Resources	<ul style="list-style-type: none"><li>• <a href="#">Microsoft 365 Copilot – Microsoft Adoption</a></li><li>• <a href="#">Microsoft 365 Copilot Experience Guide</a></li><li>• <a href="https://aka.ms/Copilot/Top10TryFirst">https://aka.ms/Copilot/Top10TryFirst</a></li><li>• <a href="https://aka.ms/M365Copilot/CopilotEssentials">https://aka.ms/M365Copilot/CopilotEssentials</a></li></ul>
Customer Stories	<ul style="list-style-type: none"><li>• <a href="https://aka.ms/M365Copilot/CustomerStoriesDeck">https://aka.ms/M365Copilot/CustomerStoriesDeck</a></li></ul>
Compete Pages	<ul style="list-style-type: none"><li>• <a href="#">Compare Copilot vs. ChatGPT Enterprise   Microsoft 365 Copilot</a></li><li>• <a href="#">Compare Copilot vs. Gemini Enterprise   Microsoft 365 Copilot</a></li><li>• <a href="#">Copilot vs. Claude Enterprise for Work   Microsoft 365 Copilot</a></li></ul>

# Flexible purchase and deployment options

● = Included | ▲ = Included – Metered

		Microsoft 365 Copilot Chat	Microsoft 365 Copilot
		Free + Consumption	30/user/month
Chat	Copilot Chat–Web grounded (powered by GPT 4o)	●	●
	Copilot Chat–Work grounded (shared tenant Graph data, 3 <sup>rd</sup> party data via graph connectors, personal data)		●
	Copilot Pages	●	●
	File upload <sup>1</sup>	●	
	Code Interpreter <sup>1</sup>	●	●
	Image generation <sup>1</sup>	●	●
Agents <sup>2</sup>	Create agents powered by Copilot Studio <sup>3</sup> , including SharePoint agents	●	●
	Discover and pin agents	●	●
	Use agents grounded on web data	●	●
	Use agents grounded in work data (work data in your tenant’s Microsoft Graph and 3 <sup>rd</sup> party data via graph connectors)	▲	●
	Use agents that act independently and autonomous actions	▲	▲
Personal assistant	Copilot reasons over personal work data (i.e. Outlook, OneDrive, meeting transcripts)		●
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)		●
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)		●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)		●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)		●
	Copilot in PowerPoint (Narrative Builder, presentation translation, generate company branded slides or images)		●
	Copilot Actions		In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview
Copilot Control System	Enterprise Data Protection (EDP)	●	●
	IT management controls	●	●
	Agent management	●	●
	SharePoint Advanced Management		●
	Copilot Analytics to measure usage and adoption <sup>4</sup>		●
	Pre-built reports and advanced analytics to measure ROI		●

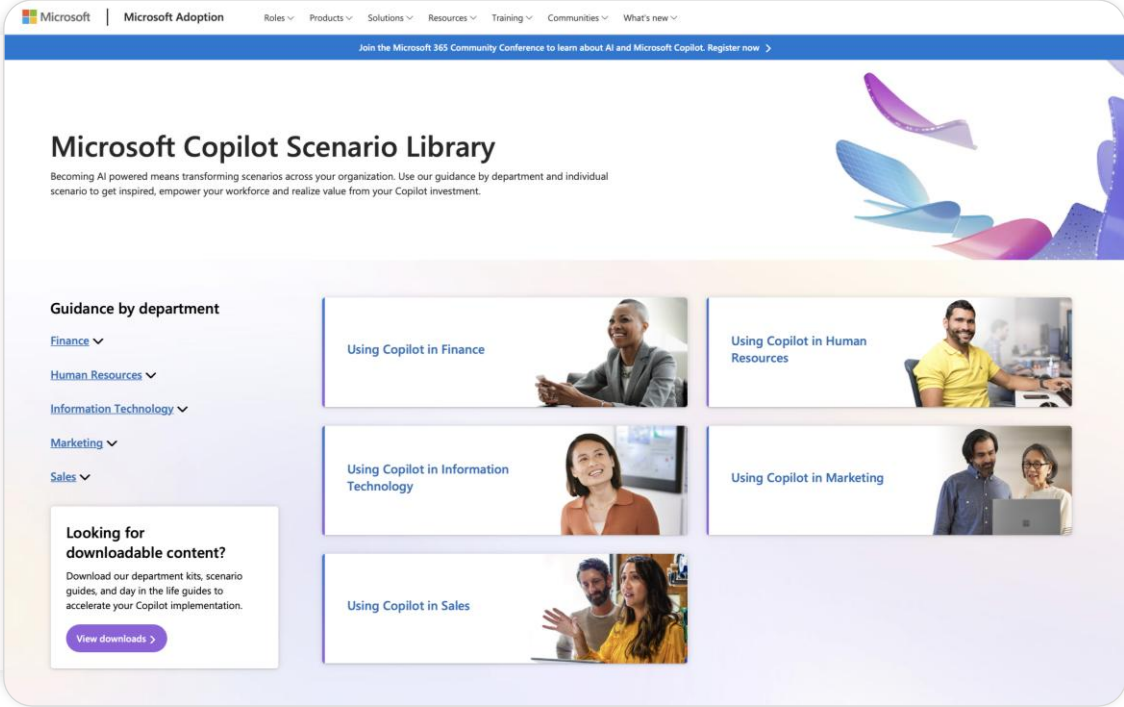
1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio [here](#). 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

# Get ideas from the Copilot Scenario Library



## Copilot brings AI value across lines of business

Use the [Scenario Library](#) to identify top use cases and key metrics you would like to improve in that functional area.



### All roles and leaders

- Improve meetings
- Content creation
- Manage daily agenda

### HR

- Cost per hire
- Employee turnover
- Compliance risk reduction

### Marketing

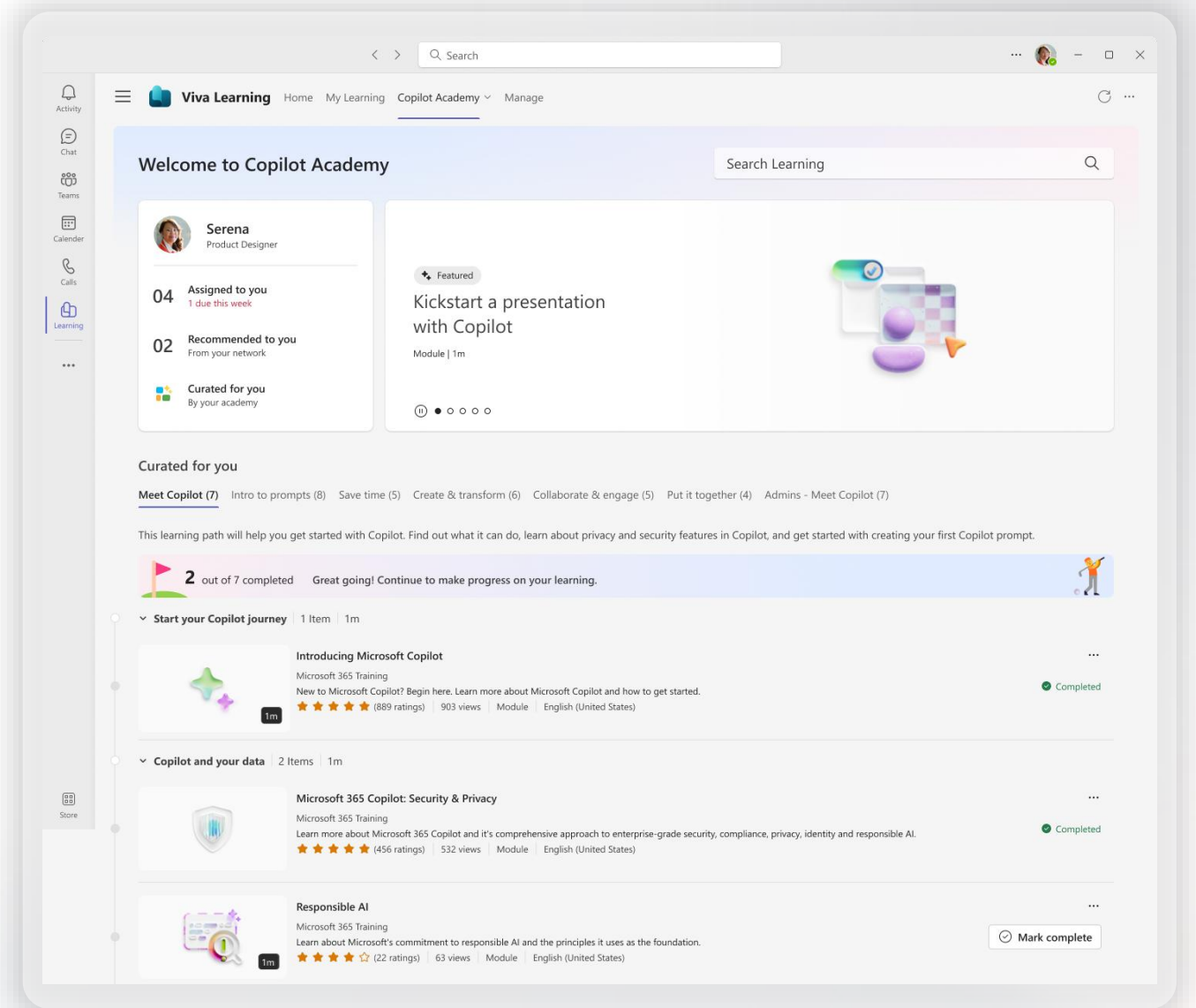
- Leads created
- Brand value
- Cost per lead

### Sales

- Number of opportunities
- Close rate
- Revenue per sale

# Develop the skills to utilise Copilot experiences effectively

- Develop the skills to utilise Copilot experiences effectively
- Curated learning paths designed by Microsoft experts to help you learn about, discover, and use Copilot for Microsoft 365
- Surface free Copilot learning courses in the tools and platforms where users already spend their time
- Out-of-the-box academy is preloaded in Viva Learning – no admin configuration required
- Support Copilot for Microsoft 365 adoption with Viva Learning
- Available to all users with access to Copilot for Microsoft 365 and a paid license for Viva Suite or Viva learning



The screenshot displays the Viva Learning Copilot Academy interface. At the top, there is a search bar and navigation links for Home, My Learning, Copilot Academy, and Manage. The main content area is titled "Welcome to Copilot Academy" and includes a search bar for "Search Learning". Below this, there is a profile card for Serena, Product Designer, and a featured module titled "Kickstart a presentation with Copilot" with a duration of 1m. A section titled "Curated for you" lists several learning paths, including "Meet Copilot (7)", "Intro to prompts (8)", "Save time (5)", "Create & transform (6)", "Collaborate & engage (5)", "Put it together (4)", and "Admins - Meet Copilot (7)". A progress bar indicates "2 out of 7 completed" with a "Great going! Continue to make progress on your learning." message. The learning path includes three modules: "Introducing Microsoft Copilot" (Completed), "Microsoft 365 Copilot: Security & Privacy" (Completed), and "Responsible AI" (Mark complete).

# Get started with AI for your business today

Choose the option that works best for your business

## Try it for free



Free Copilot Chat helps you get started with AI by letting you ask questions, generate ideas, and create content using natural language. It's an easy, hands-on way to explore how AI can boost productivity and support everyday tasks.

## Get help from an expert



Work with your Microsoft partner to set up, customize, and get the most out of your solution for your business.

## Explore on your own



Learn how the platform works, see real use cases, and find the resources you need to get started.

[Explore resources](#)

Thank you

# Key Takeaways

*Four things you'll leave knowing — and be ready to act on.*



## Structured Adoption Matters

Rushing Copilot without a readiness foundation leads to wasted spend and security gaps. A structured approach protects your investment from day one.



## Your Data Stays Yours

Copilot operates within your Microsoft 365 boundary — your data never trains the model, never leaves your tenant.



## Measure Before You Scale

You can't improve what you haven't measured. An AI Readiness Assessment shows exactly where your gaps are — giving you a clear baseline before you invest.



## Lugo Is Your Trusted Guide

Cybersecurity-first, NCSC Cyber Advisor, sector specialists serving accountancy and professional services across Scotland.

# Why You Need an AI Readiness Assessment

The gaps are typical — the difference is knowing where yours are.

## Anonymised Client Insight

"A recent assessment of a Scottish professional services firm showed a 2-star readiness rating with gaps across 6 capability areas."

★ ★ ★ ★ ★ 2 out of 5 — Initial Readiness

These gaps are entirely typical — the difference is knowing where yours are.

## AI Maturity Level

~40% — Early Stage

Not Started      Developing      Established      Advanced      Leading

⚠ 6 capability areas with identified gaps

## What your report delivers



### Readiness Score

A clear, objective baseline before you invest in Copilot



### Capability Gap Analysis

Exactly which areas need attention — no guesswork



### Top Recommendations

Prioritised, actionable next steps tailored to your organisation



### Peer Benchmarking

See how you compare to similar organisations in your sector

# Complete Your Free AI Readiness Assessment

Free. Online. Five minutes. Close the gap before you scale.

 FREE

 5 MINUTES

 CLOSING 10 JULY

Your report delivers

 Readiness Score — a clear baseline before you invest

 Capability Gap Analysis — exactly which areas need attention

 Top Recommendations — prioritised, actionable next steps

 Peer Benchmarking — see how you compare to similar organisations

[liz.smith@lugoit.co.uk](mailto:liz.smith@lugoit.co.uk) | [lugoit.co.uk](https://lugoit.co.uk)

Scan to complete



**Deadline: Friday 10 July 2026**  
5pm — don't miss your spot



## Buy Your Copilot Licence Through Lugo

Security-first, sector-specialist, NCSC-advised — the right partner makes the difference.



### Cybersecurity-First

Security designed in from day one, not bolted on after. Every deployment follows a structured, risk-aware approach.



### NCSC Cyber Advisor

Independently recognised cyber security expertise — trusted, accredited, and held to the UK's national standard.



### Sector Specialists

Deep experience with accountancy, professional services, housing associations, and charities across Scotland.



### Ongoing Support

From licence to adoption — Lugo stays with you beyond the purchase. Practical guidance every step of the way.

• **Launching Very Soon**

# Join the Lugo Copilot User Group

An exclusive community for Lugo Copilot clients to learn, share, and grow together.



## Venue

Exclusive to Lugo Copilot licence clients — in person at Lugo's Edinburgh office or via Microsoft Teams



## First Session - Promptathon

Hands-on Copilot prompting together — practical, collaborative, and immediately useful



## Member-Led Future

Future sessions driven by what you actually need — topics shaped by the community



## Register Your Interest

[liz.smith@lugoit.co.uk](mailto:liz.smith@lugoit.co.uk)



# Questions?

*No question is too basic — if you're wondering it, someone else in the room is too.*

Questions welcome on:

🗨️ Copilot features and capabilities

🛡️ Security and data governance

💡 Licensing options

☰ AI Readiness Assessment

👥 Lugo Copilot User Group

**Liz Smith**

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# Thank You

A warm thank you to **David Fortnam** and **Ben Voce** from Ingram Micro for their expertise and insight today.

1

**Complete your Free AI Readiness Assessment**

Closes Friday 10 July at 5pm — five minutes online

2

**Speak to Liz about Copilot licensing**

[liz.smith@lugoit.co.uk](mailto:liz.smith@lugoit.co.uk)

3

**Register for the Lugo Copilot User Group**

[liz.smith@lugoit.co.uk](mailto:liz.smith@lugoit.co.uk)

