

AI Adoption Quick Reference for CI Professionals in Microsoft Environments

This document is for individuals who need a quick start guide to jump into AI use in organizations that use Microsoft products. For more detailed information on the different type of AI products offered by Microsoft, see the infographic "Which Microsoft AI Tool Should I Use?"

Please remember that:

- Microsoft is generally terrible at keeping you updated on changes to their products, so take time to research and stay informed on their applications' evolving functionality. This may be through your vendor client support staff, YouTube videos, Microsoft customer support website, etc.
- Always validate with your IT/InfoSec Department before beginning use with new tools.
- Ask if an "AI need" is actually an automated workflow instead of an agent, and whether a template for a workflow or agent already exists in Microsoft before trying to build something from scratch.

If you would like to have a virtual 1:1 or small group walk through on potential use cases and how to build them in Copilot for your specific situation, contact me at jenna@theleaneye.com or 214-603-3396.

Key Terms	Definition
AI Washing	AI Washing is the practice of labeling, marketing, or justifying something as "AI-driven" in a way that exaggerates, misrepresents, or exploits the perceived value of artificial intelligence. AI washing commonly appears in two forms: Capability AI Washing: • Claiming a tool is "powered by AI" when it relies primarily on basic automation, rules, templates, or manual processes. • Promising outcomes that the technology cannot reliably deliver. • Presenting AI as more accurate, autonomous, intelligent, or mature than it actually is. Workforce AI Washing: • Using AI as the stated reason for reducing headcount, eliminating roles, or avoiding new hiring when the actual motivation is cost reduction. • Assuming AI can fully replace human expertise without evidence, measurement, or process redesign. • Attributing productivity gains to AI that have not been demonstrated in practice.
Shadow IT	Refers to any technology, software, hardware, cloud service, AI tool, or digital process that is used within an organization without the knowledge, approval, governance, or oversight of the IT department or other authorized technology management groups.
Tokens	Tokens are the units of text consumed by an AI system for processing information. They function like the "fuel" of AI interactions, determining how much content the model can read, remember, generate, and, in many cases, how usage costs are calculated. Why Tokens Matter: AI providers often charge based on the number of tokens used. Tokens include your prompt (input tokens), uploaded content the AI reads, and the AI's response (output tokens). For example: • Your question: 100 tokens • AI response: 500 tokens • Total usage: 600 tokens Tokens and Cost: Many AI platforms charge by token volume rather than by message count. Short video to help illustrate what tokens are and how they impact business: https://www.youtube.com/watch?v=OjrGu0L5K7M



Getting Started as an Organization:

- Establish governance right NOW and assign Change Management leadership in partnership with HR and IT Departments
- Identify where AI is needed and what platforms are approved to meet cyber security requirements
- Create explicit ethical and accountability standards
- Clearly define goals that align with processes
- Determine how you will measure outputs, outcomes and overall productivity
- Create an evolving training roadmap and establish guided learning groups



Questions to help avoid potential “AI Washing” in a proposed tech solution:

- Why does this require AI instead of traditional software, automation, or search?
- What type of AI is being used?
- What data powers the solution?
- How will success be measured?
- What happens when the AI is wrong?
- What measurable improvement does it provide over the current process?
- What happens after “Gen 1” for the people who own the process?

Good AI Pilots start with a stable, repetitive process that has minimal-to-no impact to operations and/or service if wrong. Obtain clarity around the following variables:

- Is this for personal use or for a client/employer?
- What systems will you need to integrate with?
- What are short and long-term costs for setup, experimentation, and ongoing use?
- What legal, professional, and social obligations could be impacted?
- What cyber security risks exist?
- Will you need a sustainability plan, and what does that look like?
- How will others interact with the output from your AI use?
- How will you train others, communicate changes and receive feedback (if applicable)?

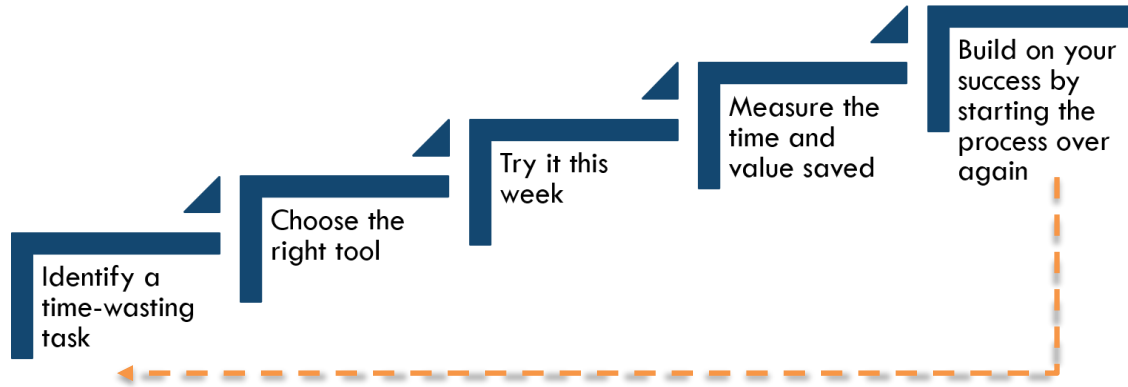
Below are the most common concerns around AI implementations, as ranked by attendees of the 2026 Worldwide CAT Dealer CI Conference. Prepare for resistance around these areas and try to develop psychologically safe environments to address them when developing a pilot AI project:

- Data security/privacy
- Output accuracy
- Lack of skills/training



- IT restrictions
- Unclear business value/roadmap
- Leadership support & clear governance
- Cost
- Workforce resistance
- Workforce reduction

Use the following steps to develop and test your AI pilot(s):



The A3 and PDCA problem-solving processes are extremely helpful for evaluating AI output. I recommend the following books to help use your AI tools critically and test agents for quality answer to your prompts:

- The Toyota Way, 2nd Edition by Jeffrey K. Liker
- The Problem-Solver's Toolkit, 2nd Edition by Tracy O'Rourke & Elisabeth Swant
- Managing to Learn by John Shook

Keep these key points in mind when working with AI tools:

