Microsoft 365 Copilot Readiness Assessment Report

Client	**Ogeid Professional Services Ltd**
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Assessment Outcome	~~Emerging~~/Developing/~~Established~~

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1. Executive Summary

Ogeid Professional Services Ltd has a clear business rationale for exploring Microsoft 365 Copilot. Leadership sees AI as a potential enabler of growth, productivity improvement and operational efficiency, particularly following the acquisition of a major new contract and ambitions to expand into London and additional markets.

The organisation demonstrates strong management interest, active involvement from senior leaders and existing experience with AI-assisted forecasting within the finance function. The workforce appears generally positive towards AI, although some concerns remain around job security, capability and confidence.

The assessment suggests that Ogeid's readiness is best categorised as Developing. The organisation has identified potential value and sponsorship but lacks mature governance arrangements, defined ownership structures, adoption planning and documented AI policies.

The recommended approach is to establish a governance and adoption foundation before undertaking broader Copilot capability development and rollout.

2. Organisational Strengths

Strong leadership interest and sponsorship

The Managing Director, Operations Manager, HR Manager and Finance Manager are actively driving the initiative and recognise the strategic importance of AI.

Positive organisational culture

The organisation has strong staff morale, invests in employee development and achieves good attendance levels for hybrid working arrangements.

Clear growth ambitions

Leadership views technology and AI as important enablers for organisational growth and expansion into new markets.

Existing exposure to AI

The finance team already uses AI-driven forecasting through a third-party provider, providing some familiarity with AI-assisted working.

Engaged technology partner

The organisation has an established managed service provider, Intelli-IT, responsible for Microsoft 365 administration and available to support Copilot license deployment and monitoring activities.

3. Risks & Gaps

Governance structures do not yet exist

The organisation has acknowledged that governance arrangements, ownership structures and AI-specific policies would need to be created. Staff use of shadow AI is a known risk.

Human review processes are undefined

No formal guidance currently exists regarding when AI-generated outputs should be reviewed, validated or approved before use.

Adoption planning is immature

There is currently no defined approach for measuring adoption, monitoring business impact or sharing lessons learned. The organisation specifically identified the need for support in this area.

Capability and confidence gaps

Whilst some employees are considered technically confident, AI literacy across the broader workforce is relatively low and there remains uncertainty regarding practical application.

Expectations regarding agents

There is considerable interest in AI agents despite limited understanding of current capabilities, creating a risk of misaligned expectations.

4. Opportunity Areas

Operational productivity

Operations teams are under significant workload pressure and have identified a strong requirement for workflow efficiency and administrative time savings. Copilot is a way of releasing productive capacity.

Document creation and communications

The organisation produces large volumes of documentation, communications and survey-related outputs that could potentially benefit from Copilot-assisted drafting and summarisation.

Finance analysis

Finance staff already utilise AI in forecasting activities. The wider workforce may benefit from additional support around analysis, spreadsheet work and reporting activities.

Knowledge sharing and capability development

The presence of technically capable and enthusiastic employees provides an opportunity to create champions and peer-support networks.

Competitive differentiation

Leadership believes successful adoption could help the organisation differentiate itself in a competitive professional-services market.

5. Priority Use Cases

#	Area	Detail
1	**Document drafting and refinement**	Creation, editing and improvement of client-facing documents, reports and internal communications.
2	**Email and meeting productivity**	Drafting correspondence, summarising discussions, generating actions and supporting routine administrative activity.
3	**Operational workflow support**	Reducing manual effort associated with repetitive administrative and operational tasks.
4	**Excel analysis and reporting**	Supporting data analysis, reporting and spreadsheet activities across the workforce.
5	**Future exploration of agents**	Exploration of AI agents as part of longer-term customer service and business process improvement initiative.

6. Recommended Next Steps

6.1 Governance

1	Establish ownership and accountability arrangements for Copilot adoption.
2	Create practical AI usage guidance covering data handling, confidentiality and acceptable use.
3	Define human-review requirements for internal and customer-facing outputs
4	Implement incident reporting and escalation processes relating to AI use.

6.2 Capability

1	Develop AI literacy across leadership, managers and end users.
2	Identify and support Copilot champions within the organisation.
3	Deliver role-specific capability development focused on operations, HR and marketing functions
4	Build confidence in evaluating AI-generated outputs and recognising limitations.

6.3 Adoption

1	Create a structured adoption and communications plan.
2	Define measures of success linked to business outcomes and productivity.
3	Start with a focused pilot group before wider deployment.
4	Conduct regular reviews of usage, benefits and lessons learned.

6.4 Technology

1	Confirm technical readiness with Intelli-IT.
2	Validate licensing, permissions and deployment requirements.
3	Identify any data access, security or integration issues prior to rollout.
4	Align technical planning with longer-term ambitions around agents and advanced AI capabilities.

This sequence would address the organisation's immediate governance and capability gaps while supporting its broader goals of productivity improvement, workforce development and business growth.

Sources used:

1. **Copilot Scoping Call Questions** (Janice Cooklin, HR Manager)
2. **Client Copilot Readiness Diagnostic Questionnaire** (completed by Janice Cooklin, HR Manager)
3. **Online Discovery Workshop** (Toby Woolcock, Managing Director; Janice Cooklin, HR Manager; Jonny Monsanto, Operations Manager)