



iCatalyst

**SCARED YOU'RE
MISSING THE AI TRAIN?
THINK AGAIN!**

**Build an AI roadmap with the Microsoft
tools you already own**





AI EXPECTATIONS ARE RISING, AND BUSINESSES MAY BE MORE READY THAN THEY THINK

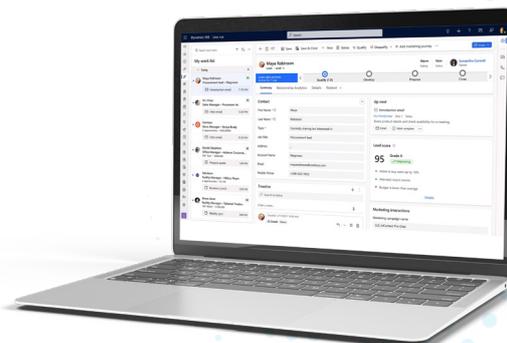
Artificial intelligence (AI) is a board-level conversation, and leaders want to know what the organisation is doing about AI, where it is in the AI journey, and whether it has a strategy. Mid-sized organisations often find themselves caught between curiosity and chaos. Teams start experimenting without alignment, resulting in ad hoc tool use, siloed decisions, and confusion about what AI is for and how it can help.

Some business units push ahead with isolated pilots, while others hesitate, unsure of the risks, the value, or even where to begin. Structured and unstructured data sit across different systems, and it's not always obvious how to make that information useful. Meanwhile, IT managers, digital leaders, and finance teams are being asked to plan for AI, define costs, and show value, often before they've had a chance to assess their current position.

Does this sound familiar?

The truth is that many organisations may already be on the AI journey without realising it. If your organisation uses Microsoft 365 (M365) or Microsoft Dynamics 365 (D365), your existing licence could include Copilot, and your business tools may already offer intelligent features. This means you're not starting from zero, and you're not behind, either.

If you're a Microsoft-based business, this whitepaper doesn't aim to scare you or suggest you're lagging in your AI journey. It helps you understand where your organisation stands, what you can activate and what we can extend or build for you, and how to govern it using the tools you already pay for, including Microsoft Copilot.



HOW TO MAKE REAL PROGRESS WITH MICROSOFT COPILOT

Understanding where you are is the first step toward making Copilot work for your business. These four steps will help you activate the tools you already have, start building useful agents, and plan your path forward.

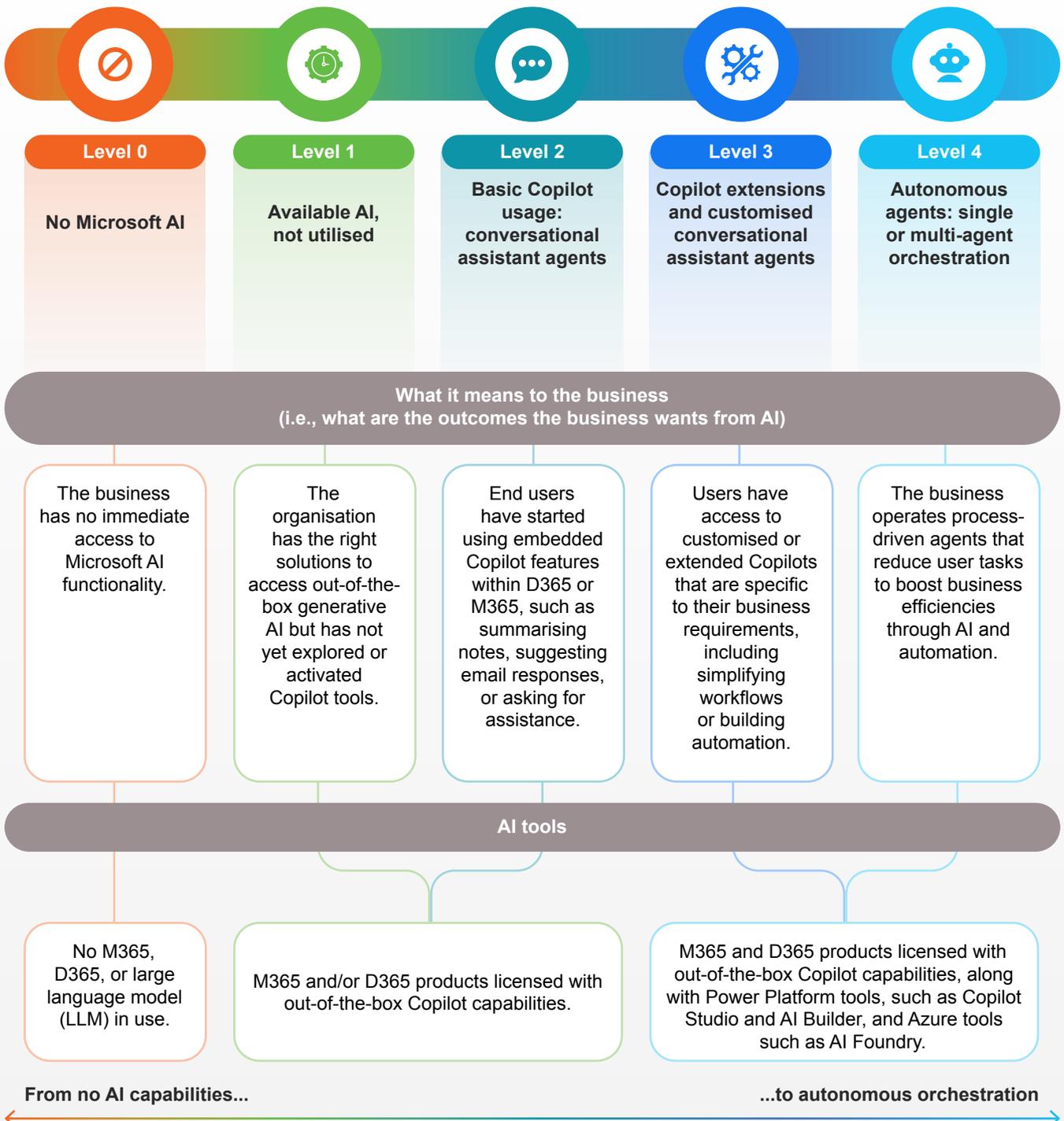
Step 1: Understand your AI maturity

Most Microsoft users underestimate their readiness, with many assuming they are starting from zero. The truth is, you have already made progress if your business uses M365 or D365 as part of daily operations.

The iCatalyst AI maturity model helps organisations assess where they are and decide what to do next.

There's no value in pitching a Level 4 solution to a Level 1 organisation, so it's important to start where you are, not where others say you should be.

AI maturity can be interpreted in various ways, depending on a business's goals, experience, and adoption stage. iCatalyst offers the following model as one possible view:



Step 2: Turn on what you already have

Many businesses already have access to Copilot tools, yet they're either not aware of them or haven't activated them.

These features often appear as panes or suggestions inside the Microsoft applications people use every day.

This step is about activating those tools with existing licences and helping people understand how to use them in context.

Review your M365 and D365 licences to identify which versions include Copilot features and check if those features are switched on. Introduce your staff to the tools and keep training simple. Show users where Copilot appears, explain how it fits into their workflow, and encourage feedback by sharing examples of what it can do.



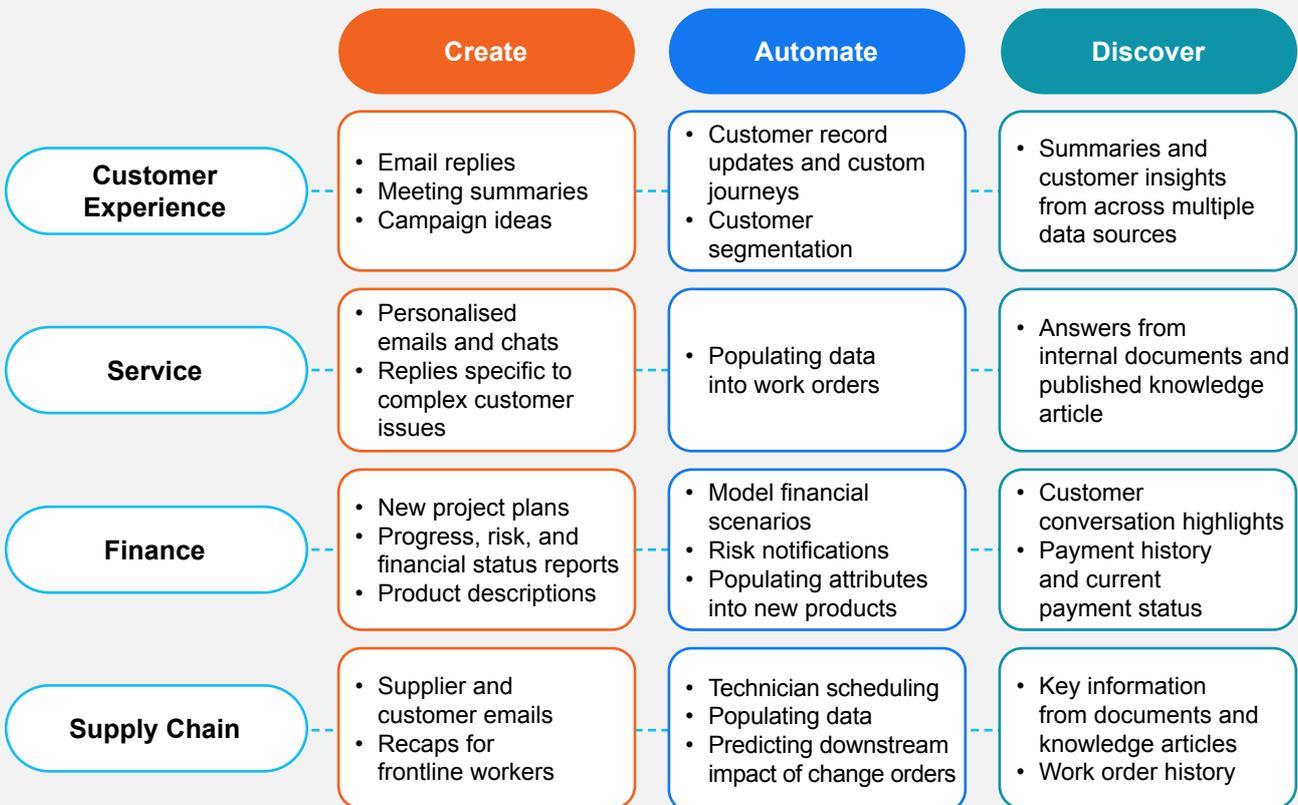
If you're using Microsoft, you're already in the game. Let's activate what's available and train the team.

Sometimes, the best way to uncover value is to ask the right questions. If you're unsure where to begin, try asking yourself and your team:

- Are our salespeople using Sales Copilot to summarise customer relationship management (CRM) records or prepare for meetings more effectively?
- Is anyone using M365 Copilot to suggest document edits or summarise Teams conversations?
- Could D365 Business Central Copilot help streamline purchase orders or improve forecasting accuracy?
- Are our marketers or analysts using D365 Customer Insights Copilot to generate content or prompts?

These questions help reveal what's already possible and open the door to further assistance. Often, small use cases create momentum for broader adoption.

Copilot improves work for every department



Even small changes can improve daily operations, like making it easier to recap meeting notes or create draft content. This will build momentum for more ambitious projects later when early improvements are operationalised into business processes over ad-hoc individual contributions.

Step 3: Identify gaps and customisation opportunities

Activating Copilot is a strong starting point; however, off-the-shelf features rarely cover everything a business needs.

Most organisations uncover the real gaps after they begin using the tools. Tasks still require manual effort, prompts don't always deliver what's needed, and some workflows stop short of being truly useful.

iCatalyst works with your team to assess how the tools perform in real scenarios and uncover what's missing rather than guessing where Copilot might fall short. This collaborative approach lets businesses make targeted improvements using the Microsoft stack.



Ask your teams:

- What tasks still require manual effort or workarounds?
 - Where does Copilot struggle to access the right data or deliver the right outcome?
 - Are your processes consistent enough to automate reliably?
 - Are users working around Copilot's limitations instead of with it?
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Understanding these shortfalls creates a clear path forward. In many cases, teams need to extend Copilot's built-in capabilities to better align with their data, workflows, and use cases. This might include integrating with third-party systems, automating across multiple platforms, or enabling more complex prompts and logic.

Tools like Power Platform make it possible to build and extend AI solutions without writing full code. This opens the door for business users to contribute, especially when supported by experienced partners. Organisations that involve both technical and non-technical teams in building AI capability tend to see faster adoption and better results.

This is the point where most organisations benefit from outside support. A partner with deep knowledge of the Microsoft ecosystem can help pinpoint where built-in Copilot tools fall short, and when it may be beneficial to extend or build using tools like Copilot Studio, AI Foundry, Azure OpenAI, or custom workflows.

iCatalyst understands the entire Microsoft Business Applications ecosystem. We help customers make targeted improvements with long-term value in mind, not short-term patchwork.

Step 4: Build and extend with AI agents and multi-flow workflows

Start building agents that solve specific business problems after identifying where Copilot falls short. You can create these task-specific assistants using Copilot Studio or Power Platform.

They work best when designed to perform a single, well-defined task, such as onboarding clients, triaging service requests, or processing approvals.

Microsoft promotes Agent Builder and Copilot Studio as tools for business users. However, many teams find the learning curve too steep or the setup too technical. iCatalyst supports organisations by designing, building, and refining agents that are practical, effective, and ready for real-world use.

iCatalyst recommends that organisations begin with a focused use case. Build an agent that performs one task well, test it with a small group of users, and then refine it based on actual feedback. These agents should support your people and improve their workflows rather than replace them.

Start expanding into multi-agent workflows once you have established the basics. You can create agents that coordinate actions, automate tasks across systems, and manage long-running processes.

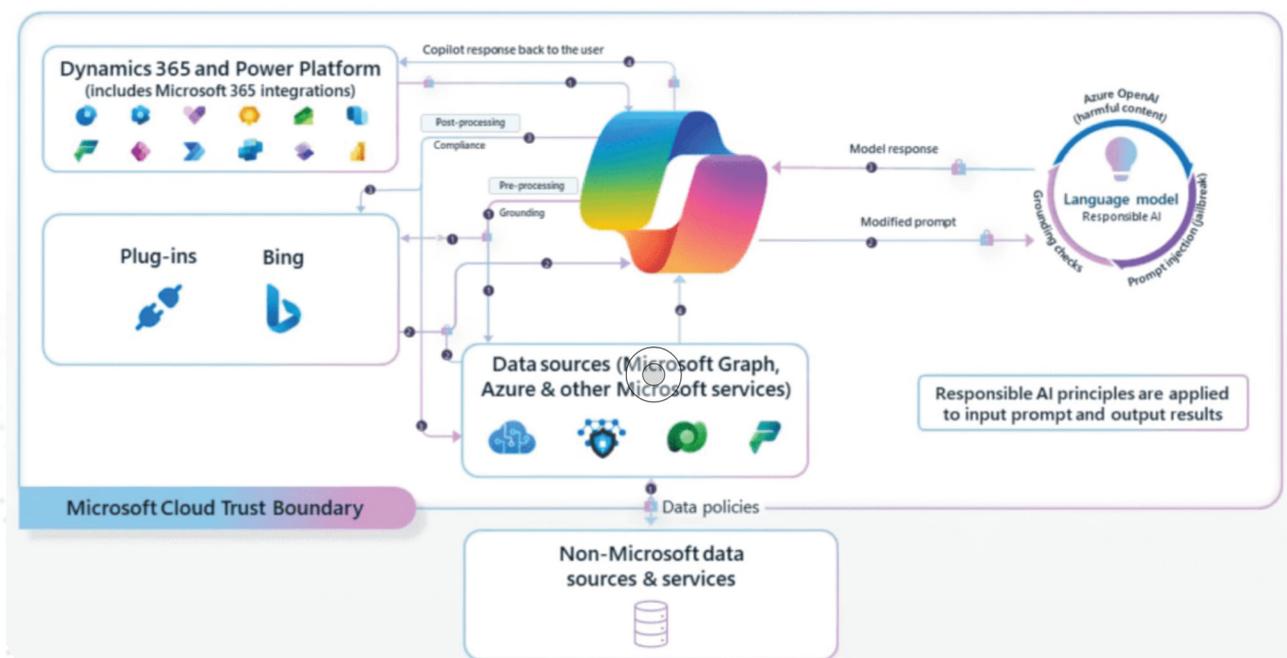
These agents can store working memory, apply logic, and adjust their behaviour based on context. This level of orchestration creates meaningful value, yet also increases complexity. You need to plan carefully, define ownership, and monitor performance over time.

At this stage, ask the following questions:

- Does the agent need to serve both internal users and external clients?
- Should it access or update data in systems outside Microsoft?
- Can the experience improve by integrating automation or external data services?
- Who owns the agent once it is live, and how will you track its performance?

iCatalyst helps you work through these questions and deliver solutions that grow with your business. We design agent-based systems that connect M365, D365, Azure, and other platforms in ways that fit with how your people already work.

Microsoft Copilot for Dynamics 365 and Power Platform



GOVERNANCE: THINK BEFORE YOU SCALE

AI tools come with cost implications, whether through per-user licensing or consumption of tokens and application programming interface (API) calls.

You need to track and manage costs carefully as more people use Copilot or deploy agents, especially in consumption-based models where charges depend on the volume of queries, interactions, or compute power used. Governance is about oversight. You need to understand which tools are being used, how they're being used, and whether they're helping or hindering.

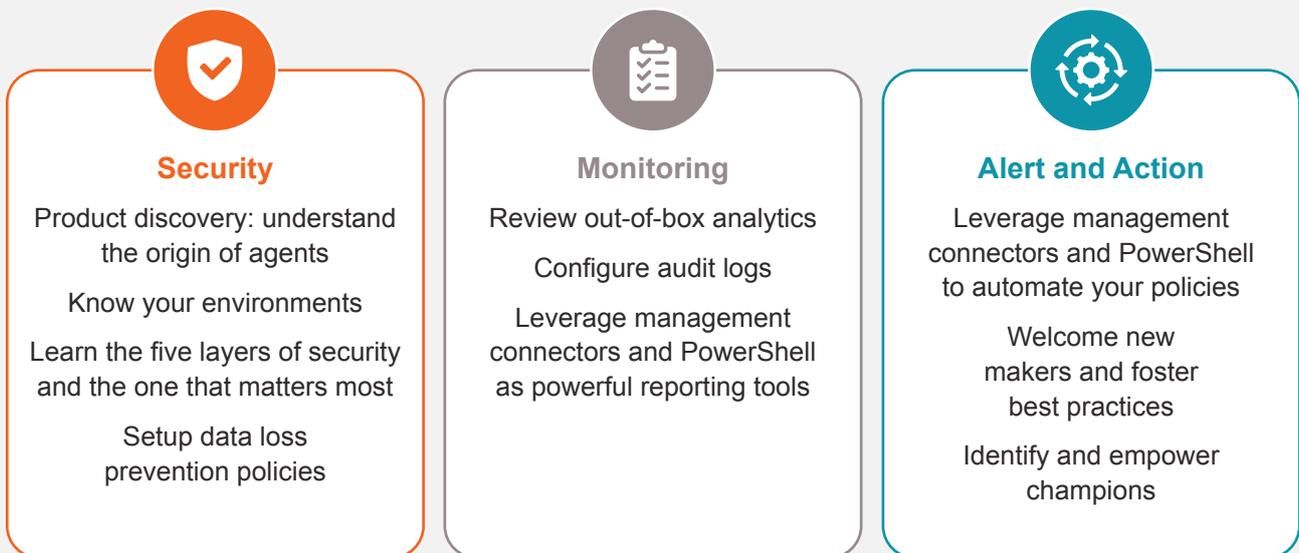
However, that's not the whole picture. You also need to assess and consider the impact and sensitivity of the data that AI accesses and uses. Organisations need to put the right permissions and access controls in place. Otherwise, people may be able to use agents to access data they shouldn't if the security model isn't correct.

Key questions to ask:

- Which agents are running, who built them, and who maintains them?
- What data is being processed and are privacy or compliance risks involved?
- Are users following prompt guidelines or behaving riskily?
- Are results monitored and improved over time?

Costs rise and trust falls without governance. You need a consistent way to log, review, and refine how AI is used in your business.

Optimal governance is a multi-step approach



[The 10 guardrails](#) | [Voluntary AI Safety Standard](#) | [Department of Industry Science and Resources](#)

iCatalyst helps customers put simple, scalable governance models in place. These models focus on control without blocking progress.

THE ICATALYST DIFFERENCE

If you're a Microsoft Business Applications user, you're already on the AI train. Now, let's work out where you're going.

iCatalyst is a leading Microsoft Solutions Partner that helps businesses navigate the evolving landscape of Microsoft Business Applications. Our team of senior Microsoft Dynamics professionals brings deep expertise in delivering Microsoft Dynamics 365 enterprise resource planning (ERP), CRM, and Microsoft Power Platform solutions across a range of industry sectors.

iCatalyst offers strategy workshops to help organisations assess their AI readiness and map out how to get the most from D365 Copilots.

Our approach is built on extensive knowledge of business applications and transactional data, helping companies move from initial awareness to effective implementation.

Our team can help you take the next step with confidence and control, whether you're still exploring what Copilot can do or already building a multi-agent workflow.

Join an iCatalyst strategy workshop to explore what's possible with Copilot and walk away with your AI readiness roadmap.

Our team provides structured guidance to help organisations realise the full potential of their Microsoft Business Applications, whether assessing Microsoft Copilot's capabilities or developing multi-agent workflows.

iCatalyst partners with businesses to leverage their existing Microsoft investment. We help customers move from awareness to action, pilots to platforms, and confusion to clarity. Our team brings a cautious, considered approach grounded in a deep understanding of your business applications and transactional data.



Contact our team today.

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