



**DIGITAL** SERVICES

# AI Foundations

## Document IQ



# AI Foundations – Document IQ

## SUMMARY

Migrate files to Microsoft 365 for secure, cloud-based storage, unlocking AI readiness, better collaboration, and enterprise-wide access to knowledge.



# AI Foundations – Document IQ

## BUILDING THE FOUNDATION FOR AI

- **AI Foundations – Document IQ** helps organizations move unstructured content — files, folders, and knowledge — from legacy file shares into secure, cloud-based environments like OneDrive and Microsoft Teams. This isn't just migration; it's the foundation for harnessing AI.
- AI can only act on the data it can access. When business-critical content remains locked in on-premises file shares, it's invisible to tools like Microsoft 365 Copilot and other intelligent platforms. Document IQ delivers the discovery, planning, and implementation roadmap for a seamless, secure move to the cloud, unlocking AI-driven productivity, collaboration, and insight.







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## KEY OFFER HIGHLIGHTS

**Current Environment Assessment:** Evaluate existing file shares, security settings, and storage architecture to establish a clear baseline.

**Migration Planning:** Define a detailed strategy with mapping, governance policies, and resource planning to ensure a smooth transition.

**Reporting and Documentation:** Capture findings, plans, and client feedback in comprehensive reports with regular review sessions.

**Organizational Change Management:** Drive user adoption through structured processes, training, communications, and post-migration support.

**Content Migration:** Build Teams architecture, configure and monitor migration jobs, and provide cutover support with additional training as needed.



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## DISCOVERY & PLANNING PHASE

**Inventory and Analysis:** Catalog existing file shares, including types, sizes, and usage patterns.

**Security and Access Discovery:** Evaluate current security settings and access controls.

**Architecture Discovery:** Analyze existing file storage architecture.

**Migration Strategy:** Define timelines, resource needs, and risk mitigation in a detailed strategy.

**Mapping and Worksheets:** Create migration maps and worksheets to guide execution.

**Governance Planning:** Establish policies and procedures to ensure compliance and data integrity.

**Assessment Report:** Detailed report outlining assessment findings, issues, and recommended solutions.

**Migration Plan Documentation:** Comprehensive document of the migration plan with step-by-step instructions and timelines.

**Client Review Sessions:** Hold regular sessions to validate findings and refine the migration plan.



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## DISCOVERY & PLANNING DELIVERABLES

- Comprehensive assessment report of the current file storage environment.
- Detailed migration strategy and plan.
- Migration mapping and worksheets.
- Organizational Change Management Plan
- Complete estimate and project plan for migrating content
- Selection of Appropriate Migration Tool

## TOTAL COST FOR DISCOVERY & PLANNING

\$25,000-35,000 depending on complexity





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## MIGRATION IMPLEMENTATION PHASE

**Destination Architecture:** Build Teams/SharePoint sites and document libraries; implement defined permission structures..

**Migration Job Configuration:** Configure and schedule migration jobs to move content from file shares to Teams..

**Migration Monitoring:** Monitoring of migration jobs, reviewing errors or throttling, restarting jobs if necessary.

**Cut-Over Support:** During the cutover process, will provide support and monitoring of delta migration jobs for completion of data migration.



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## MIGRATION ENABLEMENT READINESS

**Process Definition:** Develop UAT scenarios, feedback mechanisms, end-user communications, and training plans.

**End User Training:** Deliver customized virtual or recorded sessions before go-live and cutover from file shares to M365.

**Communications:** Draft and distribute communications on the upcoming migration, including key dates, purpose, and process of the migration.

**Additional User Training/ Office Hours:** Will provide additional user training sessions as needed post go-live.





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## MIGRATION IMPLEMENTATION DELIVERABLES

- End-User and Administrator Training
- Execution of Change Management Plan
- Migration of File Share/non-Microsoft related content to M365.
- Post-implementation support for 30 days.

## MIGRATION LICENSING & PRICING

Licensing and service pricing will be provided following a discovery call to ensure accurate scoping based on content volume, complexity, and business requirements.





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## WHAT YOU WILL GAIN

- Centralized, AI-ready content repository.
- Reduced risk and improved compliance with modern governance.
- Enhanced searchability and collaboration through Microsoft 365.
- Streamlined user adoption supported by training and change management.
- Foundational readiness for Microsoft 365 Copilot and other AI tools.





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## BUSINESS IMPACT

- **AI Foundations – Document IQ** closes the gap between legacy content and modern intelligence. By moving your organization's knowledge into the Microsoft cloud, you unlock AI's full potential to enhance productivity, accelerate decision-making, and improve efficiency across every department..



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## TAKE THE NEXT STEP

Contact us today to schedule a discovery consultation and learn how AI Foundations – Document IQ can help your organization modernize content, strengthen governance, and prepare for AI success.

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