ogi pro

# AI Readiness
## 2-Week Assessment

Microsoft
Solutions Partner

# This engagement is designed to guide businesses on effective data management in readiness for adopting AI.

## Overview

Utilising Copilot is essential for enterprise and SMB customers who want to leverage the power of AI.

However, it is critical that businesses have well managed data to fully benefit from the power of AI as Copilot products utilise an organisations internal data and permissions structure. Without being fully confident in a data infrastructure, Copilot cannot be deployed on an organisational basis.

# Key benefits

Deliver a clear path to maximising results from the implementation of AI through effective data management.
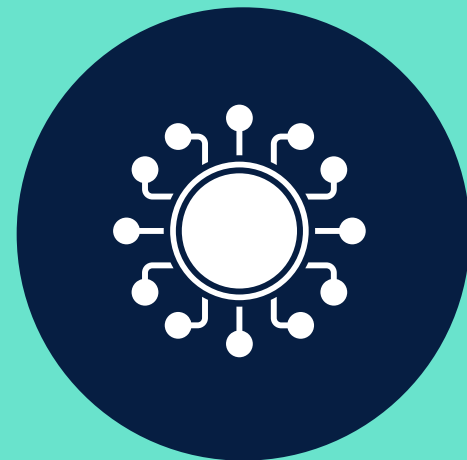
Implement a framework for data management ensuring control and consistency once AI is adopted in the organisation.

Introduce clear workable policies for data management and retention for the organisation to follow and see the benefits in their AI output.

**This engagement includes:**

Users and personas

Process documentation

Workflows

Data security, retention and labelling policies

Data stewardship and training

**Complementary add-ons for this engagement include:**

Consulting engagement tailored to customer needs to clarify RBAC requirements and user personas if this is not currently in place.

Co-pilot deployment engagement

## Scope

In this engagement, we will help customers to improve their data governance and security practices by covering the following areas:

Establishing the importance of Role-Based Access Control

Assisting with internal Data Stewardship

Understanding Redundant, Obsolete and Trivial Content and providing options related to this

Establishing policies for Data Retention, Data Loss Prevention and other Data Security policies

Enabling Data Categorisation

Providing training opportunities for each of these areas

Establishing a clear roadmap for each of these areas

# Structure

All Ogi Pro Cloud Engagements have a consistent structure designed to deliver customer-value against a set of agreed success criteria. These are measurable and unique to each customer, driven by their priorities, organisational culture, and mission. Our approach is based on Microsoft's Service Adoption Framework and consists of three main stages; Envision, Implement, and Enable.

# Envision

Envisioning consists of determining with the customer the required scope of the engagement and establishing the necessary involvement from interested parties and stakeholders. Typically conducted through a workshop session but can also be an initial call or remote session.

## This will cover

Exploring customer requirements and drivers for AI readiness

Explaining to customer processes and likely impacts – risks and benefits

Review of existing environment

Review current RBAC, Data Stewardship, data retention policies, DLP policies, data categorisation, documentation

Review of best practice recommendations and policy decisions

Agreement as to proposed timeframe and strategy for user engagement

## Key outputs

Confirmation of prerequisites in place

Current user persona requirements and requested changes to be actioned

Examples of data process documentation

Implementation plan covering:

Agreed policies/best practice changes to be made

Impacted workflows and users

Roll-out timetable

Dedicated user training requirements

## Requirement

Typically half-day Senior Cloud engineer and half-day Project Manager

# Implement

This stage takes place over one-two weeks depending on the customer involvement and availability for change windows and includes the following key activities/deliverables:

— Investigate and plan RBAC implementation following best-practices and organisational requirements

— Review and provide options for removing and categorising ROT content

— Review, create and implement DLP policies, migrating any required to Purview

— Review and create retention policies, labels and data categorisation in line with Microsoft standards and organisational needs

— Deploy audit logging

Many of these activities will take place with a data steward, data controller or assigned administrator for the organisation as part of an end-user training.

Optional extensions and further engagement pieces to include other data governance requirements can be discussed. This may include further consultancy work.

## Requirement

1-3 day Cloud Engineer depending on organisational requirements, and half-day Project Manager

# Enable

Admin/Data Controller training and materials

Confirmation of Data Stewardship team

Draft templates of Data Process documentation provided

Provide ideal roadmap for any areas not yet covered

Handover session detailing steps taken and next steps

## Requirement

Half-day Cloud Engineer - additional half-day for remote training as needed

# Timeframe agenda

(Accelerated - actual depends on customer involvement)

**Week 1**

| Day 1 | Envision session and produce outputs |
| --- | --- |
| Day 2 | Review outputs produced by organisation and review optional extensions |
| Day 3 | Produce and agree Implementation Plan |
| Days 4/5 | Review RBAC, Implement DLP policies, Retention Policies, Categorisation Methods & Security and Data Labels. Deploy logging. |

**Week 2**

| Day 1 | Provide options for ROT content and review optional engagement work |
| --- | --- |
| Day 2/3 | Provide training and documentation for training and adoption |
| Day 4 | Handover session |

# ogi pro

Let's hold a no obligation discovery call to see how we can help.

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