



Service Definition Document

AI Readiness and
Adoption

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Solution Overview

Adopting AI can bring many benefits to an organisation, including enhanced productivity, faster workflows, reduced errors, improved collaboration, and consistency. However, it is important to carefully consider data protection, security, and privacy when adopting AI technologies like Copilot.

Before starting on the path to AI, it's important for every organisation to pause and think through five important questions:

- What are your goals for using AI?
- What are the pain points within your organisation that can be addressed with AI?
- What are your current AI capabilities?
- Does your organisation have a data strategy in place?
- Do you have the necessary infrastructure and resources to support AI initiatives?

Four core principles should guide the work around AI:

- Fairness
- Reliability & safety
- Privacy & security
- Inclusiveness

These core principles are underpinned by two foundational principles:

- Transparency
- Accountability

Microsoft Copilot employs advanced encryption and stringent access control mechanisms to ensure that data, both at rest and in transit, remains secure. This secure environment mitigates potential risks and affirms Microsoft's commitment to user data protection.

It is important to note that Copilot immediately inherits your existing data and security permissions. If these are not set correctly, then sensitive data may be exposed to unauthorised users. Therefore, it is recommended to have an assessment before deploying Copilot to ensure that your governance policies are accurate and up to date in line with current Microsoft and industry guidelines.

In summary, while Copilot can bring many benefits to an organisation, it is important to carefully consider data protection, security, and privacy when adopting this technology. By following best practices and ensuring that your governance policies are up to date, you can safely adopt Copilot and unlock its full potential.

Key Features

- Comprehensive AI readiness assessment for organisational preparedness
- Interactive consultative workshops to align strategy and objectives
- Detailed data quality, governance, and security review
- Identification of high-value AI and Copilot use cases
- Actionable remediation recommendations with adoption roadmap
- Support aligning AI initiatives to governance frameworks
- Guidance for Copilot adoption, configuration, and user training
- Agentic AI use case development for automation opportunities
- Persona mapping to optimise user experience and workflows
- Technical enablement for data connectors and system integrations

Key Benefits

- Accelerates safe and effective AI adoption across the organisation
- Reduces operational and security risks from unmanaged AI use
- Optimises AI investment and avoids unnecessary spend
- Provides a clear, actionable AI strategy and roadmap
- Improves decision-making through accurate, data-driven insights
- Builds a scalable foundation for future AI capabilities
- Enhances employee productivity through targeted AI enablement
- Strengthens governance and promotes responsible AI practices
- Increases organisational confidence in AI tools and processes
- Improves change readiness for successful AI adoption

Aims and Objectives

Aims

Our aim is to ensure the safe and productive adoption of Microsoft Copilot within your organisation. We will undertake a technical review of your Microsoft landscape to assess your readiness to use Copilot, as defined by the vendor's best-practice guidelines. We will also provide recommendations to help safeguard the security of your data.

Objectives

- **Quantify your readiness and posture** – Completing Microsoft's Copilot scorecard and a technical assessment.
- **Assess results of scorecard & review current environment, then recommend remediation** – set against your IT operations and policies and recommend actions to increase readiness or remove blockers – Identify the gaps – e.g., no device control.
- **Validate the use case** – Validating similar Microsoft's known persona's and use cases, engage stakeholders with a demonstration of Microsoft 365 Copilot's potential and benefits. Identify and define key user profiles to determine Copilot's role in various workflow types.

Scope and Duration

Scope

The scope of this service will encompass the following tasks:

- **Organisational profile:** Identify some of the business cases that can be supported by Copilot for Microsoft 365 and recommend use case scenarios based on our experience.
- **Productivity and collaboration tools:** Identify what tools and services are already being used and by whom that can help to leverage the features of Copilot for Microsoft 365 right away.
- **Data security and governance:** While uncovering the potential data and security risks Microsoft 365 Copilot could introduce into your organisation, identify sources, discover the implemented controls and necessary safeguards to satisfy any organisational, country, or regulatory based requirements as it pertains to the use of Copilot for Microsoft 365. For instance, we can configure Purview to apply sensitivity labels and retention policies to different types of content within your environment. Plus, we can set up access controls, multi-factor authentication, and other policies for every Microsoft 365 user.
- **Copilot Eligible Users:** An initial snapshot of the number of users that could immediately take advantage of Copilot for Microsoft 365.
- **Identity & Access Management:** Use strong authentication and real-time, risk-based adaptive access policies without compromising user experience.
- **Endpoint Management:** Ensure that only secure, up to date and compliant Windows physical or virtual devices and mobile devices have access to your organisation's resources.

- **App Management:** Control how data is accessed and shared by apps on mobile devices, protecting your organization's data at the app level on both company devices and users' personal devices.

Anything not specifically described as being in-scope can be deemed to be out-of-scope.

Duration

Duration is typically 3 days, but this may vary based on specific requirements.

Deliverables

The key deliverables of this engagement are:

- Readiness scorecard. Completed scorecard.
- A Report with recommendations to address gaps.
- A plan for Copilot adoption

Structure and Activities

Governance

Iomart will work with named individuals at your organisation to ensure we have the correct information and the required delegated admin privileges to facilitate a successful completion of the proposed work.

The essential security and governance details will be agreed in the initial workshops.

Resources

The following table describes the resources that will be required during this engagement.

Phase	Resource Type	Description	Qty	Provider
All	Staff	Technical Architect	1	Iomart
	Permissions	Access to M365 admin portal and Azure Active Directory	N/A	Customer

Data Protection & GDPR

Atech, part of the Iomart Group, is committed to conducting its business in accordance with all applicable Data Protection laws and regulations and in line with the highest standards of ethical conduct. Our Data Protection policy sets forth the expected behaviours of Iomart Employees and Third Parties in relation to the collection, use, retention, transfer, disclosure and destruction of any Personal Data belonging to an Iomart Contact (i.e. the Data Subject). Iomart, as a Data Controller, is responsible for ensuring compliance with the Data Protection requirements outlined in our Data Protection policy (available on request).

Iomart's leadership is fully committed to ensuring continued and effective implementation of this policy and expects all Iomart Employees and Third Parties to share in this commitment.

Iomart uses the Personal Data of its Contacts for the following broad purposes:

- The general running and business administration of Iomart Entities.
- To provide services to Iomart customers.
- The ongoing administration and management of customer services.
- The use of a contact's information should always be considered from their perspective and whether the use will be within their expectations or if they are likely to object.

Each Iomart Entity will Process Personal Data in accordance with all applicable laws and applicable contractual obligations. More specifically, Iomart will not Process Personal Data unless at least one of the following requirements are met:

- The Data Subject has given Consent to the Processing of their Personal Data for one or more specific purposes.
- Processing is necessary for the performance of a contract to which the Data Subject is party or to take steps at the request of the Data Subject prior to entering a contract.
- Processing is necessary for compliance with a legal obligation to which the Data Controller is subject.
- Processing is necessary to protect the vital interests of the Data Subject or of another natural person.
- Processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the Data Controller.
- Processing is necessary for the purposes of the legitimate interests pursued by the Data Controller or by a Third Party.

Why Partner with Atech?

Credentials and Capability

Atech is the one of the UK's most accredited providers of secure hybrid cloud managed services, delivering deep expertise across Microsoft technologies, data protection, and cybersecurity. We hold Microsoft designations for **Modern Work, Security, Infrastructure (Azure)** and are recognised as an **Azure Expert MSP** – a status achieved by only 60 partners globally and 15 in the UK.

As part of the Microsoft AI Cloud Partner Program, we have validated technical capabilities across the full cloud lifecycle. Our inclusion in the **Azure Expert MSP Program** reflects proven excellence in people, processes, and tools, ensuring sustainable, repeatable, and scalable managed services. This means you can rely on a partner that consistently delivers best practice and operational efficiency.

Partnering with us gives you access to over **200 Microsoft cloud specialists**, including **two Microsoft MVPs**, ensuring unparalleled technical depth and experience.

Microsoft Endorsements and Specialisations

We hold multiple Microsoft Solutions Partner designations, including:

- Digital & App Innovation (Azure)
- Data & AI (Azure)
- Business Applications



Figure 1: Microsoft Accreditations

In addition, we have achieved advanced specialisations in areas such as:

- Cloud Security
- Identity and Access Management
- Threat Protection
- Infra & Database Migration
- Azure Virtual Desktop
- Enterprise Application Migration to Azure



Figure 2: Microsoft Designations

These credentials validate our ability to deliver complex, secure, and innovative solutions aligned to Microsoft best practices.

Security and Compliance

Security is at the heart of our services. Atech is **ISO 27001 certified**, **Cyber Essentials Plus accredited**, and a member of the **Microsoft Intelligent Security Association (MISA)** – an invitation-only program granting access to Microsoft’s top security experts. We also hold **CREST accreditation** and participate in the **Microsoft MSSP Program**, one of only 12 partners in the UK, giving our customers direct benefits such as access to product teams and funded workshops.

Further reinforcing our security leadership:

- **Microsoft Gold Partner Status** alongside **Azure Expert MSP**
- **Microsoft MSSP Program** (1 of only 12 UK partners)
- **Microsoft Fastrack Ready Partner** (1 of only 300 globally)
- **Microsoft XDR status**

These credentials provide you with assurance that security is embedded throughout design, migration, and ongoing management. Combined with our advanced specialisations and industry recognition, they demonstrate our ability to deliver secure, compliant, and future-ready solutions.

ATECH IOMART

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