

Webinar:

How to build a Microsoft Copilot Adoption Strategy

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Today's team



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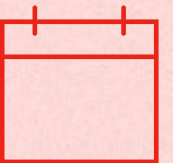


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Today's agenda

- Who is AlfaPeople?
- Copilot initiatives stall
- Innovation with control
- Beyond personal productivity
- Path to scale
- What matters the most



Who we are

Leaders in **Microsoft Business Solutions** implementation



19 Countries

Brazil, Canada, Chile, China, Colombia, Costa Rica, Denmark, Ecuador, Germany, Guatemala, Mexico, Paraguay, Peru, Saudi Arabia, Spain, Switzerland, United Arab Emirates, United States, Uruguay



+650 Employees

66% Business Solutions delivery and support
12% Sales and Marketing
22% Management and Administration



+450

Skilled **Microsoft certified** professionals



+95%

of our services are **delivered online**, using the solutions that we sell and implement



+500

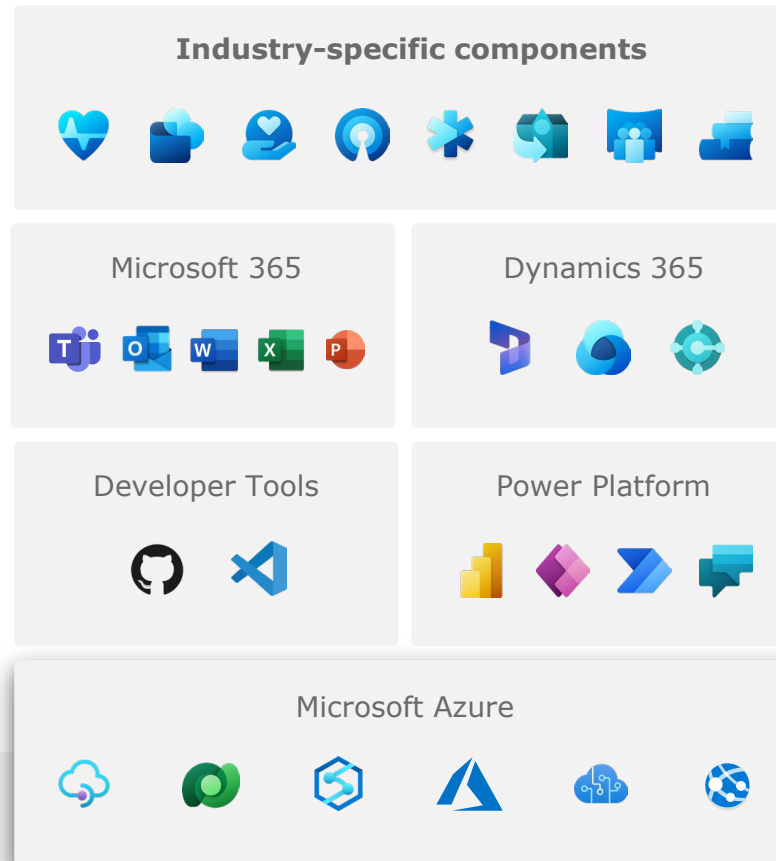
Active Customers around the world



16x Inner Circle

Top 1% of Microsoft Worldwide Partners. Part of Inner Circle for the last 16 years and received several awards in the same period.

Microsoft Cloud



- **Security** baked in across all solutions
- One common **data foundation** and **AI capabilities**

- **Best of suite** vs. best of breed
- A composable ecosystem to fuel organization-wide **digital transformation**

Identity, security, management, and compliance

Copilot initiatives stall

Why many projects stop after early experiments





85%

of GenAI solutions still fail at the production phase (full-stack)

95%

of GenAI pilot projects in enterprise fail to deliver meaningful ROI (MIT)

IANSA 's 46 Copilots



46 proposed AI use cases
Copilot for Finance

Robotic Process Automation (RPA)

A sequence of predefined rules and scripts

Extracting values from an invoice

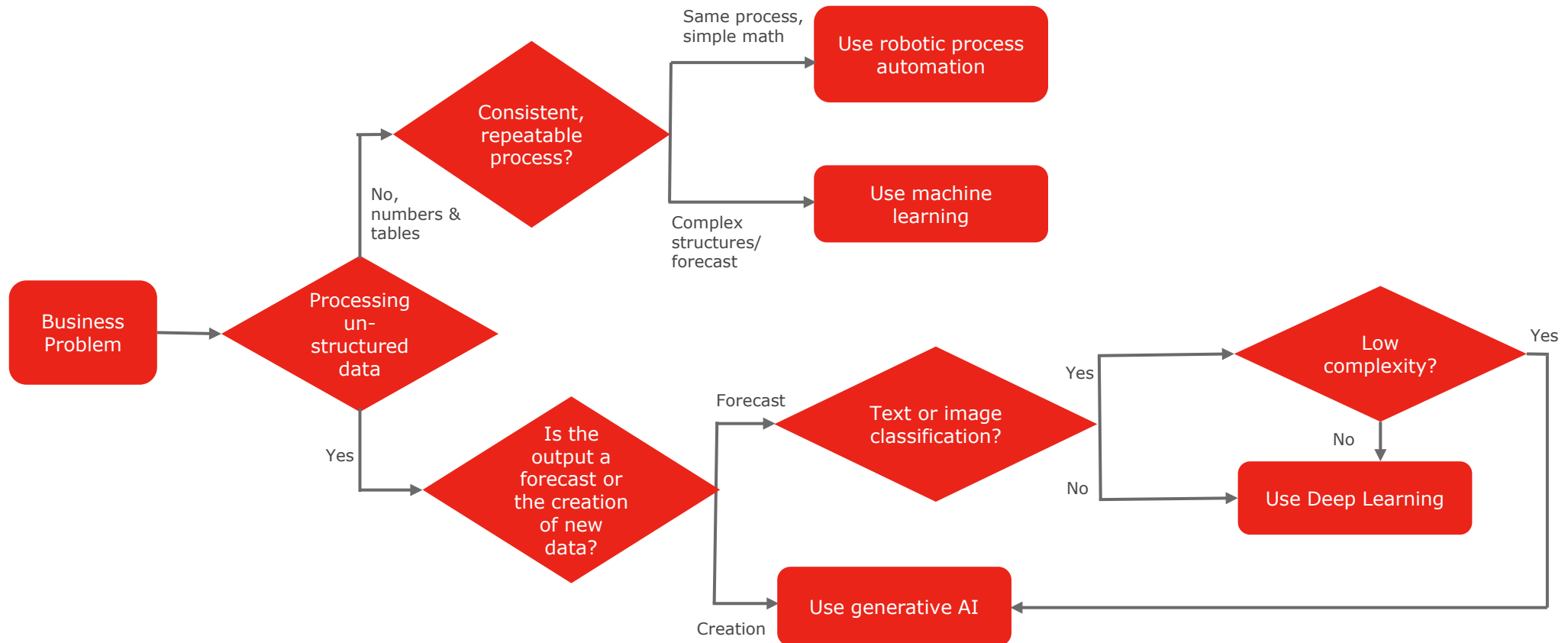
Copying data into Excel

Sending alerts

Generating reconciliations

What do I use when?

We need to stop treating AI as a single tool and start treating it as a portfolio of capabilities – some generative, some analytical, and some agentic.



Main failures in AI projects



**Training & Reality
are too different**



**Breakdowns due to
System Integration errors**



**Not working
Escalation Pathways**



**User is trapped
in AI cycle**

Risks for AI projects

- Training data is different to reality
- Missing real data messiness
- Wrong API design
- Missing performance tests of API's
- Missing design and testing of escalation pathways
- Real world testing – integration of real testers in real situations
- Missing feedback loops during ramp-up phase

Fully autonomous vs Conversational AI agents

Aspect	Fully autonomous AI Agents	Conversational AI Agents
Autonomy level	High: operate independently. They can plan, execute, and optimize without human prompts.	Moderate: reactive. They require interaction and predefined dialogue flows.
Complexity handling	They usually manage complex, multi-step tasks like content placement and inventory management by coordinating sub-agents.	Handle structured, routine interactions like FAQs and basic support with limited adaptive logic.
Integration	Deep integration with enterprise systems including lakes, APIs, and DaaS platforms to support autonomous workflows.	Primarily integrates with communication interfaces and selected backend systems such as CRM and e-commerce platforms.

Innovation with control

How leaders balance innovation, governance and speed



Managing the AI Journey

How to Start the AI Journey in the Right Way?

Start with Low-Dependency, High-Value Interventions
Focus on small tasks, knowledge support & repetitive questions.

Prioritize Coordination-Heavy Workflows
Streamline handoffs, stuck processes & pattern detection

Build a Minimal Internal AI Capability
Have an AI Expert from Day One.

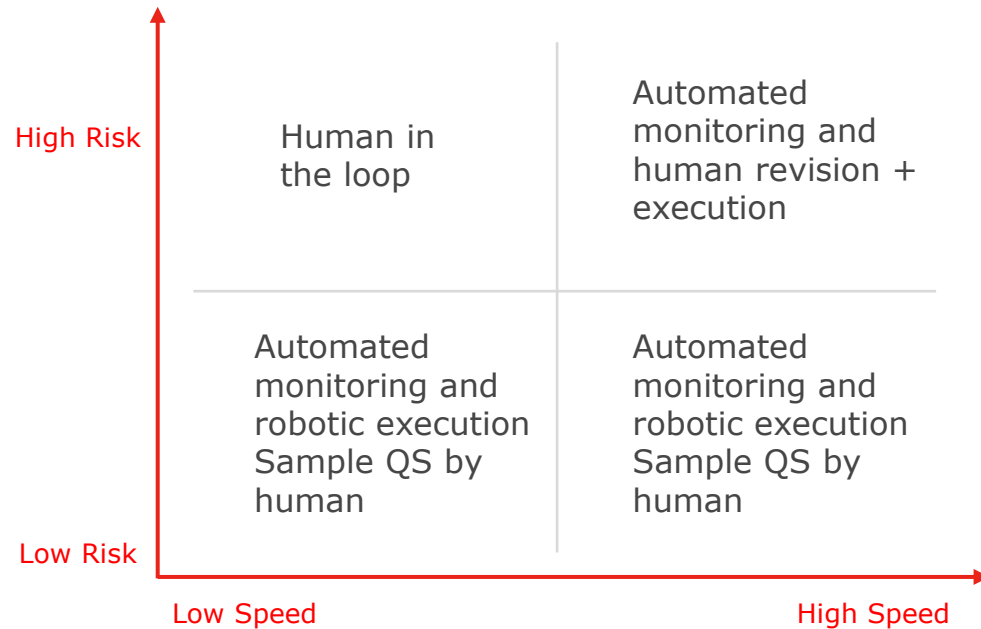
Establish Early Governance & Transparency
Ensure Safety, Security & 100% Human Review.

Start Smart, Build Trust, Succeed with AI

Starting save

- Start with low hanging fruits and a small success project
- Identify your heavy load processes where AI can help you well
 - Pattern recognition – exception detection
 - 24/7 chatbot answering repetitive questions
 - Accelerating summaries, analysis tasks within minutes and not hours or days
- Ensure your internal AI capability – you need someone who knows where to touch your system and can explain what happens
- Ramp up security in parallel
 - Limited access for agents
 - Proper classification of all of your documents
 - Monitoring
 - Clear exit points for human in the loop

The Risk & Speed Matrix



Know risk and speed of your processes

- Where would you classify the following processes?
 - Checking a customer's creditworthiness
 - Preparing meeting minutes
 - AI-generated product recommendations for fashion items
 - AI-generated product recommendations for medicine
 - Monitoring stock market transactions



Beyond personal productivity

Where Copilot creates measurable business value



Value through Agentic Automation

Key benefits



Accuracy

Comparing different documentation and flagging inconsistencies.



Efficiency

Doing things faster and saving time – doing complex web research about competitors.



Client attention

Support that, e.g., answers the most common questions about products.

From answering... to acting

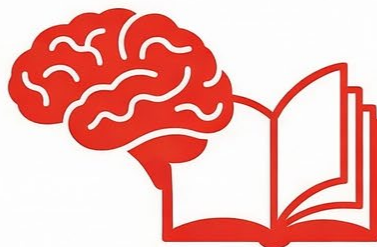
The true value of AI

LLM:
Reasons and
Responds
(Brain)



Generates text,
reasons.

RAG: Responds with
live knowledge
(Brain + Books)



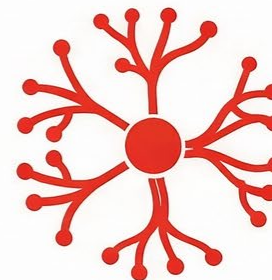
External knowledge.

Agents:
Perform tasks
(Brain + Hands)



Real-world actions,
tool usage.

MCP: Connects and
governs all
(Nervous System)



Communication
and fluid governance.

Copilot Studio: Create agents with low code no code

The screenshot shows the Copilot Studio interface for an agent named 'CajaChica Cinepolis'. A modal window titled 'Agregar herramienta' (Add tool) is open, allowing the user to search for and add external tools to the agent. The search term 'mcp' is entered in the search bar. The results are categorized into several groups:

- Microsoft Dataverse:** Includes four tools such as 'Servidor MCP de Microsoft ...', 'Servidor MCP de Microsoft ...', 'Servidor MCP de Dataverse (...)', and 'MCP del orquestador de con...'. A 'Ver todo' link is provided for this category.
- Dynamics 365 Business Central:** Includes one tool: 'MCP de Dynamics 365 Busin...'. A 'Ver todo' link is provided.
- MCP de Docs de Microsoft Learn:** Includes one tool: 'Servidor MCP de Docs de Mi...'. A 'Ver todo' link is provided.
- Box MCP Server:** Includes one tool: 'Box MCP Server'. A 'Ver todo' link is provided.

At the bottom of the dialog, there is a feedback question: '¿Cómo es su experiencia con la adición de herramientas?' and a 'Cancelar' button. A footer note states: 'Esta característica con tecnología de IA se encuentra actualmente en versión preliminar. Ver los términos'.

Path to scale

The decisions needed to expand Copilot adoption



Agentic AI: From tools to organizational infrastructure

What works first ?

- **Coordination intelligence > full autonomy**
- Agents create value by **consolidating context across systems**
- **Next-best-action suggestions**, not independent execution
- **Humans retain control** of relationships and outcomes

Where to draw the line ?

Trust-based triage

- Automate **low-trust / low-impact** work
- Assist **high-trust / ambiguous** decisions
- Keep **high-consequence commitments** human-led

AI augments judgment — accountability stays human

How to build (Year 1)

Hybrid, asymmetric model

- **In-house:** process ownership, decision rights, domain logic, governance
 - **Partners:** architecture, frameworks, security, integrations
- Goal:** capability transfer — **not dependency**

Governance is the real risk !

- Biggest failure mode: **decision diffusion** (*no traceability, no override, unclear ownership*)

Fix with

- Explicit **agent boundaries**
- **Audit trails**
- Clear separation:
observe → **recommend** → **act**

How should leaders measure value ?

Not "*Did it save time?*" but:

- Earlier issue detection
- Fewer late escalations
- Better coordination and consistency

Highest ROI lives between silos
(*handoffs, escalations, exceptions*)

Long-term view

Agentic AI becomes **organizational infrastructure**

- Coordination layer
- Institutional memory
- Decision hygiene mechanism

Open, governed systems outperform closed copilots over time

AmalIA Core: The front door to hyperautomation

Transforms AI from “chat” into real adoption

Most clients struggle to operationalize AI. Amalia creates a real, human-like interface that accelerates adoption and trust.

Enterprise-grade by design

Built with Azure AI Foundry + MCP + Entra ID, ensuring security, identity control, and scalable deployment.



AmalIA Core DEMO



What matters most

Key insights for scaling Copilot successfully





Key take-aways

Choose the appropriate AI and test strategy based on the business processes (realistic data!).

Start with low-hanging fruit for quick wins.

Choose business solution providers for the complex implementations.

GIVEAWAY: AI & Copilot Assessment Workshop



This workshop provides an AI integration roadmap fostering innovation, efficiency, strategic growth, operational readiness, and ethical practices, transforming challenges into competitive opportunities.

2 x 4-hour workshop, Online.

The workshop is designed for managers, IT decision-makers, process owners, and data analysts.

Giveaway: The workshop must be scheduled for a date no later than June 30th, 2026.

Sessions in the Workshop:

- **Introduction to Microsoft technologies:**
Exploring Microsoft AI, Copilots, and Azure services to enhance efficiency and address business challenges.
- **Use Case Exploration:**
We will explore use cases and identify challenges and priorities for strategic impact in your organization.
- **Design Thinking:**
Design Thinking session focuses on AI solutions, quick wins, ROI, consensus, and prioritizing value creation.
- **Organizational Readiness:**
Discussing AI integration, emphasizing data quality, change management, training, governance, and ethical AI practices.
- **Roadmap and Next Steps:**
Outlining a roadmap for AI adoption to accelerate your organization's journey.

Thank you!

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