

From AI curiosity to business value

Becoming a Microsoft Frontier Firm



Today 's team



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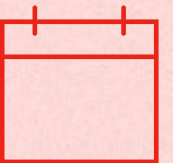
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Agenda

- Welcome
- What is Frontier Firm
- Why most companies are stuck
- AI Center of Excellence
- From strategy to execution
- How to get started
- Thank you!



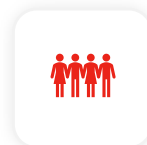
Who we are

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



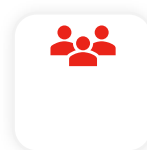
+450

Skilled **Microsoft certified** professionals



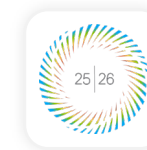
+95%

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



+500

Active Customers around the world



16x Inner Circle

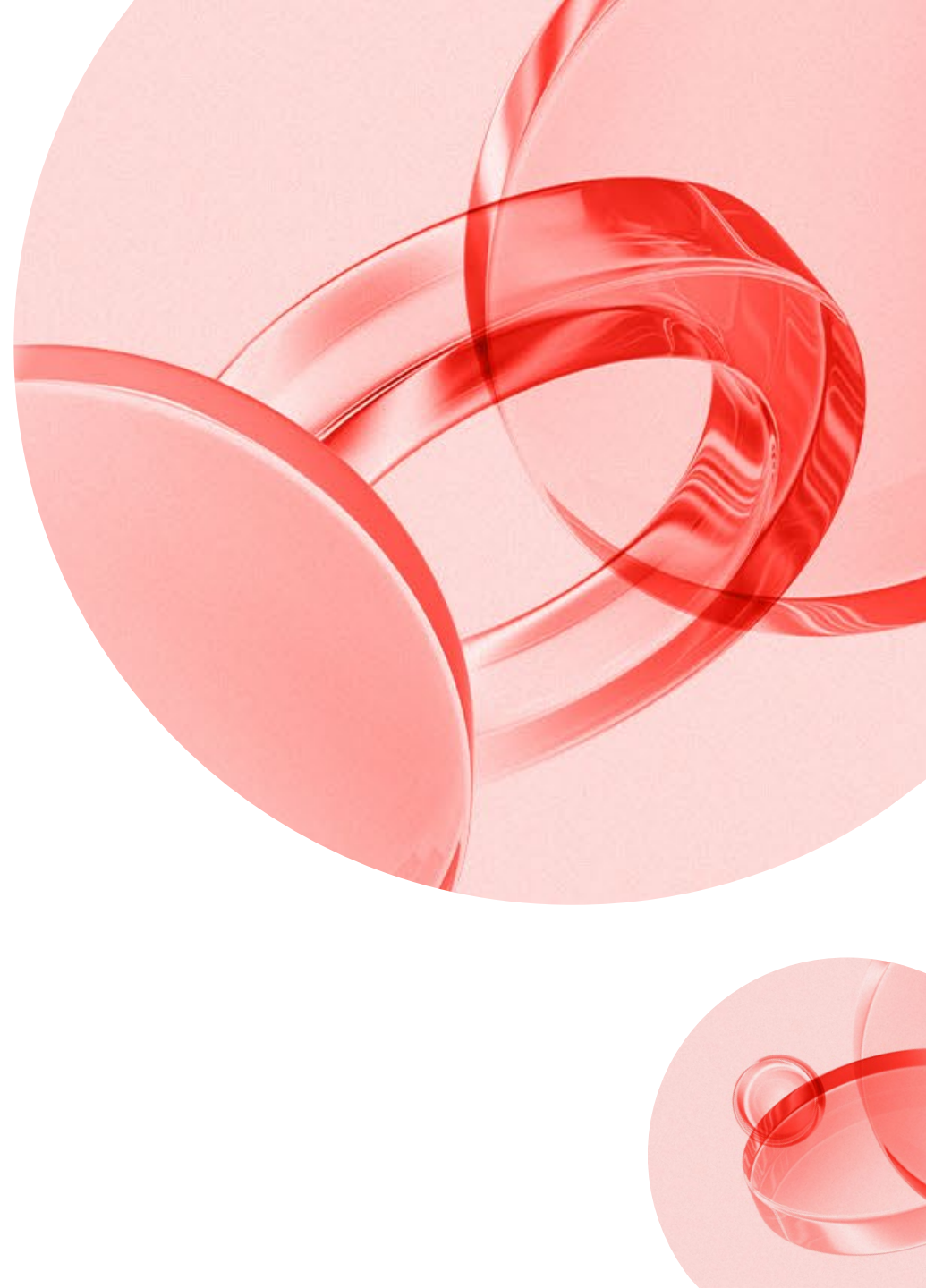
Top 1% of Microsoft Worldwide Partners. Part of Inner Circle for the last 16 years and received several awards in the same period.



FastTrack Partner

Microsoft FastTrack Portfolio Partner helping customers reduce implementation risk through direct collaboration with Microsoft architects and product teams.

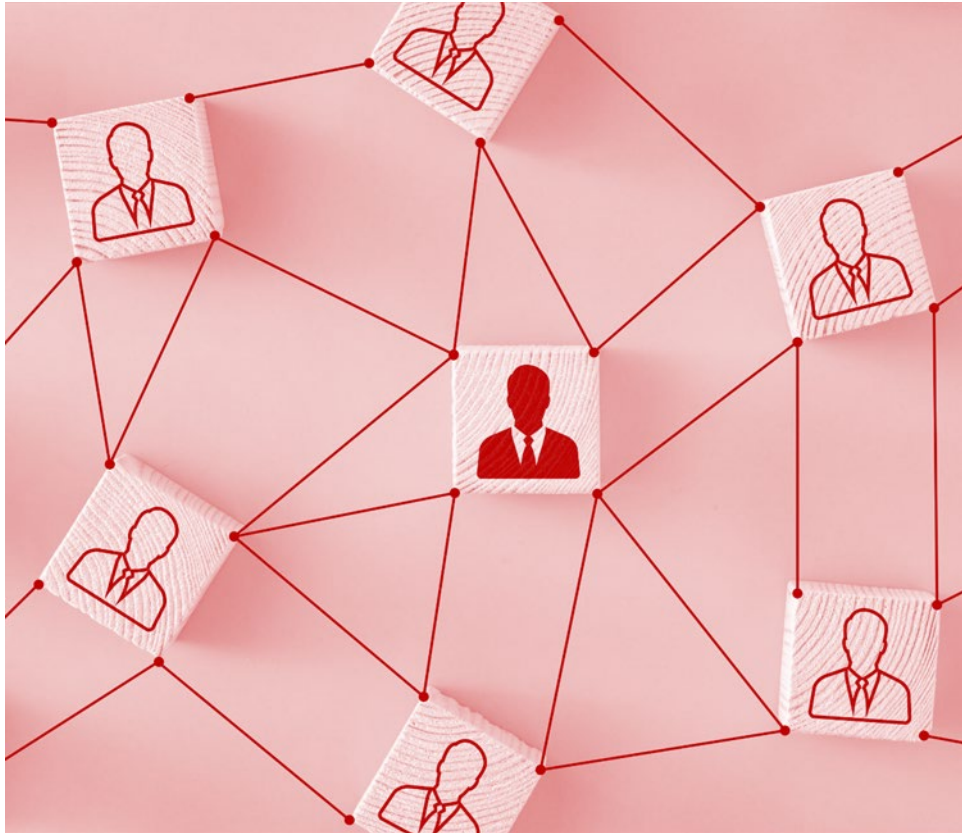
What is a Microsoft Frontier Firm?





A Microsoft Frontier Firm is an organization that has moved beyond experimenting with artificial intelligence and has made AI a practical, trusted, and integrated part of everyday work.

From hype to real business value



AI as Strategic Capability

Frontier Firms integrate AI deeply into workflows and decision-making, moving beyond experimentation to practical value.

Outcome Focused Transformation

These firms prioritize productivity, quality, speed, and improved experiences through AI-driven execution.

People and Process Alignment

Success comes from aligning leadership, employee enablement, governance, and technology with clear priorities.

From AI hype to adoption

Phase of Experimentation

Organizations engage in pilots and testing, driven by curiosity and desire to explore AI potential.

Challenges of Fragmentation

Independent AI adoption leads to fragmented usage lacking security, compliance, and governance.

Need for Structured Adoption

Structured adoption with leadership alignment and prioritization is key to achieving meaningful outcomes.



From adoption to real use



Transition to Real AI Use

Organizations move beyond adoption to deeply integrate AI in daily work, making it essential and routine.

Alignment and Governance

Successful AI use requires alignment of people, processes, data, and security with clear governance and ownership.

Focus on Impactful Use Cases

Prioritizing AI use cases that reduce cycle time, improve decisions, and enhance employee satisfaction drives success.

Cultural Acceptance and Continuous Improvement

Real use builds muscle memory and culture, making AI normal and continuously refined through feedback.

What sets Frontier Firms apart

Leadership and Responsible AI

Leadership actively sponsors AI, sets priorities, and models responsible AI usage to drive management capability.

Empowered Employees and Innovation

Employees use AI within clear guardrails, fostering innovation while ensuring compliance and security.

Data as Strategic Asset

Data quality, accessibility, and ethics are prioritized to treat data as a key strategic asset.

Continuous Learning and Governance

Continuous learning and governance frameworks balance speed with responsibility to enable AI progress.



A journey to become a Frontier Firm

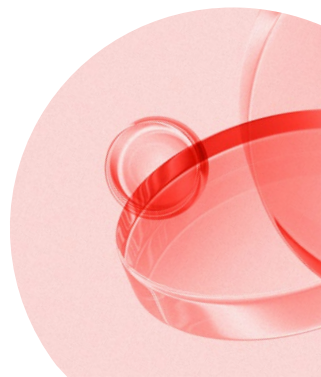
All companies are on a journey





The Challenge(s)

Why Most Companies Are Stuck



Why most companies are stuck



Lack of Organizational Alignment

AI initiatives often lack integration with daily operations, causing a gap between promise and business results.

Speed vs Structure Imbalance

Technology adoption outpaces organizational readiness, leading to confusion and resistance among employees.

Need for Cultural Shift

Organizations must rethink workflows, value measurement, and trust to fully leverage AI capabilities.

Adoption without readiness and unclear business impact

Premature AI Adoption

Organizations often deploy AI tools too rapidly due to market pressure without clear value or accountability.

Comprehensive Readiness

Effective AI adoption requires skills, leadership, process clarity, and change management beyond technology.

Importance of Alignment

True readiness aligns people, processes, and incentives for sustainable AI usage and governance.

Difficulty Measuring AI Impact

Many companies struggle to define success and track productivity or quality gains from AI initiatives.

Transition from Expense to Investment

Visible and measurable AI impact shifts perception from cost to strategic value generation for businesses.



Data posture is the hidden blocker

Data Fragmentation Challenges

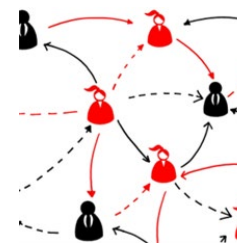
Data scattered across systems and inconsistent governance limits AI effectiveness and trust in outcomes.

Security and Access Constraints

Concerns about data leakage and strict policies slow AI adoption and restrict user access.

Evolving Data Enablement

Leading organizations treat data as evolving assets focusing on governance, literacy, and balanced security



Adoption without transformation



Adoption vs Transformation

Rolling out AI tools does not guarantee transformation without changing core business processes.

AI Beyond Technology

AI readiness includes skills, mindset, and leadership, not just technical capability.

Workflow Redefinition Needed

True AI impact requires redesigning workflows, roles, and ownership to unlock real value.

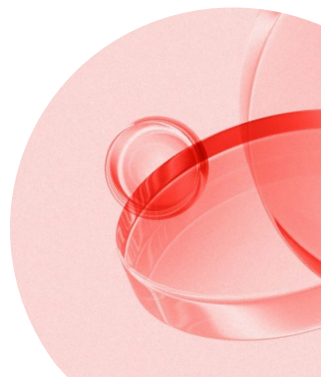
Frontier Firms' Approach

Leading firms treat AI as a business transformation anchored in objectives and new ways of working.



The Enabler

AI Center of Excellence (CoE)



The AI agent revolution is here

...and most organizations are not ready

62%

Already experimenting with AI agents

Yet most lack the governance, security, and operational frameworks to scale them safely beyond pilot stage.

Source: McKinsey, 2025

40%

Of agentic AI projects will be canceled

Due to inadequate governance, unclear ROI, and unresolved security concerns by end of 2027.

Source: Gartner, 2025

8x

Acceleration in agent adoption

40% of enterprise applications will embed task-specific AI agents by 2026, up from less than 5% in 2025.

Source: Gartner, 2025

80%

Cite data leakage as top concern

Business leaders want greater confidence in managing sensitive data flowing into AI tools and agents.

Source: Microsoft Work Trend Index, 2025

Challenge: Balancing Governance and Innovation

Agent Creator/Maker



How can I **build a conversational agent** that will answer on my behalf?



How can I build agents that can **drive efficiency and save efforts and costs** for our enterprise?

CISO



How can I understand all my **data security risks**?



How can I **discover** all agents and **protect my data** from external threats?



How can I ensure agents have the right access to data and **prevent data exfiltration**?



How can I **stay compliant with regulations**?

CIO / CTO



How can I ensure that solutions people are building **follow guidelines**?



How can I gain **visibility** to what is getting used?



How can I get **experts to review agents** before they get shared broadly?



How can I drive **cost efficiency and ROI**?

Copilot Center of Excellence (CoE) is the enabler

A Copilot Center of Excellence (CoE) is a centralized cross-functional team that sets AI governance, security policies, and adoption frameworks

Phase 1: CoE Foundation

- Current-state assessment and agent inventory
- Identify maturity baseline across core dimensions
- Governance framework (roles, RACI, policies)
- Security baseline (DLP, MIP, environment routing)
- Environment strategy and initial configuration
- Executive readiness & Phase 2 roadmap

Phase 2: Operations & Evolution

- Continuous governance monitoring & enforcement
- Agent lifecycle and ALM pipeline support
- Security posture reviews & incident response
- Maker training & community building
- Cost optimization and consumption management
- Quarterly business reviews with executives

Outcomes: Controlled innovation · Strong security posture · Measurable ROI · Maturity progression

Benefits of a structured CoE

reduce risk, accelerate adoption, and maximize ROI



For the CIO

- ✓ Visibility and control over the entire agent ecosystem from a single governance framework
- ✓ Accelerated time-to-value with a proven maturity model instead of trial-and-error
- ✓ Predictable cost management through billing policies, consumption limits, and chargeback models



For the CISO

- ✓ Security-first approach with DLP, MIP, Purview DSPM, and Sentinel from day one
- ✓ Reduced data leakage risk through zoned security controls and sharing limits
- ✓ Compliance readiness for GDPR, HIPAA, and industry-specific regulations



For the Business

- ✓ Empowered makers who innovate within guardrails, not roadblocks
- ✓ Measurable ROI through agent usage tracking, productivity metrics, and business impact analysis
- ✓ Scalable foundation that grows from personal agents to enterprise-grade automation



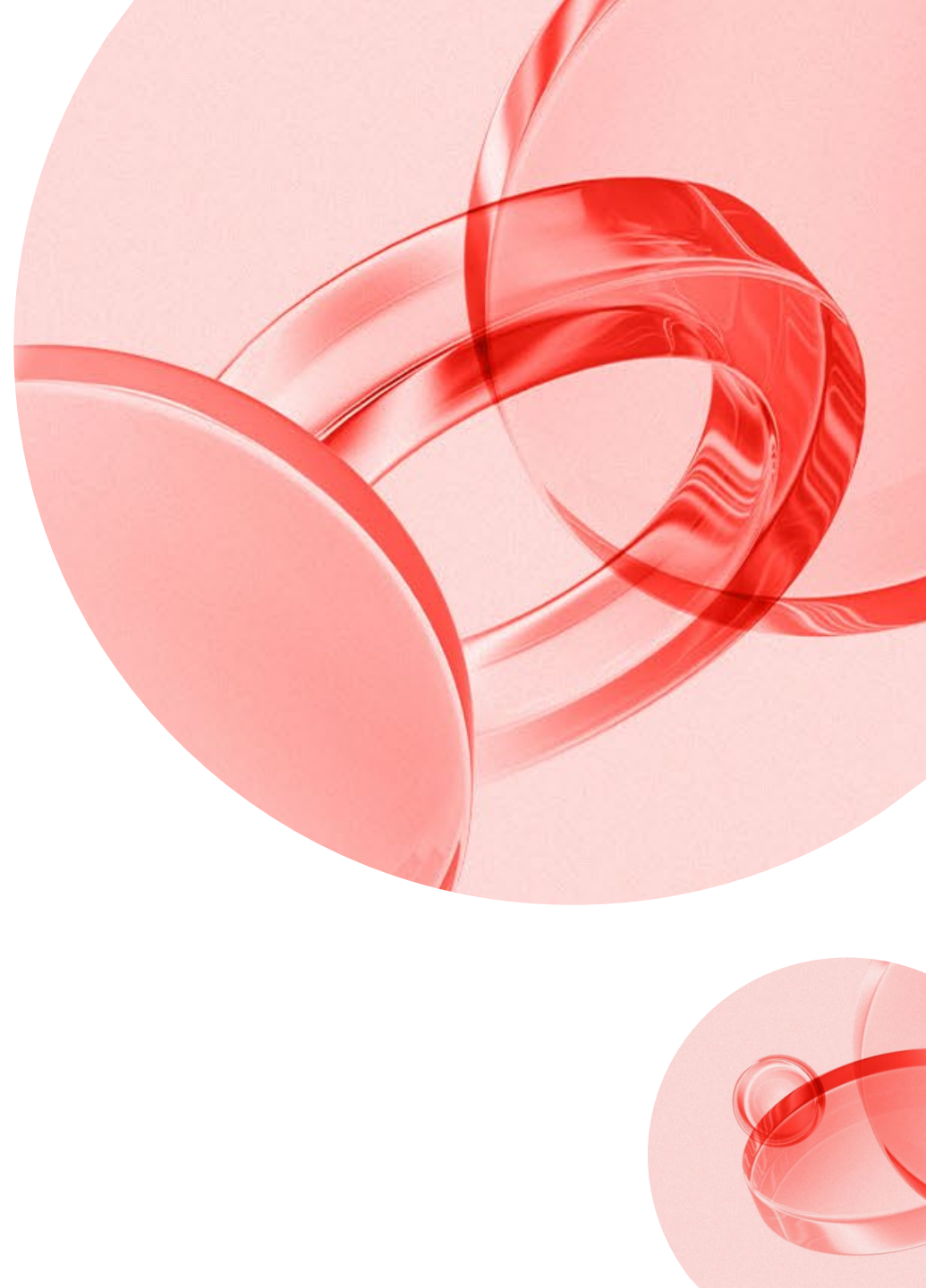
For IT Operations

- ✓ Standardized ALM pipelines reducing deployment errors and manual effort
- ✓ Centralized monitoring and alerting through Sentinel and Purview integration
- ✓ Clear roles and responsibilities eliminating governance ambiguity



From Strategy to Execution

The AlfaPeople approach



AI Success starts with AlfaPeople

Culture and Adoption

Technology alone does not drive AI transformation

Adoption does



Change & Skills



Usability



Regulations &
Risk, Security



Legal &
Compliance



Culture

AI transformation is NOT a technology project

What it takes to turn AI into business results

Five conditions separate pilots from real operational impact. If one is missing, AI will not scale.

01

Condition

Business Strategy

Prioritize use cases that improve revenue, margin, speed, or service quality.

02

Condition

Technology & Data Strategy

Ensure the data and systems behind ERP, CRM, and operations are usable and connected.

03

Condition

AI Strategy & Experience

Use proven methods to move from idea to adoption without endless pilots.

04

Condition

Organization & Culture

Prepare teams, ownership, and decision-making so adoption actually happens.

05

Condition

AI Governance

Protect security, compliance, and trust while scaling automation.

AI Readiness - The organization's ability to effectively integrate AI within business operations — shaped by all five drivers, not one.

How can AlfaPeople help you with AI and Innovation?

IPO
Intelligent Process Optimization

**AlfaPeople
3-Layer Approach**



3. Business Impact
We focus on amplifying results through Intelligent Process Optimization (IPO)



2. Augmented Intelligence
We add a layer of intelligence by building and adapting



1. Existing Assets
We start from what you already have

How can AlfaPeople help you with AI and Innovation?

3. Business Impact

We focus on amplifying results through Intelligent Process Optimization (IPO)

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We add a layer of intelligence by building and adapting

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We start from what you already have

What does it mean?

We don't start from scratch. We leverage your existing assets and build on top of them.

Practical Examples

CRM/ERP platforms
(Dynamics 365, SAP, legacy systems)

Operational processes
(sales, service, finance, supply chain)

Existing teams and business expertise

Structured and unstructured data

Existing Reports

Knowledge bases, documents, and internal content

Channels
(Intranet/Portals, Teams, emails, IVRs, SMS, WhatsApp, etc)
(desktops vs. mobile)

Company Needs

How can AlfaPeople help you with AI and Innovation?

3. Business Impact

We focus on amplifying results through Intelligent Process Optimization (IPO)

2. Augmented Intelligence

We add a layer of intelligence by building and adapting

1. Existing Assets

We start from what you already have

What does it mean?

We combine AI with Intelligent Process Optimization (IPO) and other enabling technologies to create a simplified intelligence layer and enhance your existing assets, leveraging Microsoft technologies

Practical Examples

Data management and governance frameworks

AI agents and copilots embedded in business apps

Workflow automation (Power Automate)

RPA and IoT for legacy systems (robotic process automation)

Integration across multiple platforms

AI-driven classification, prediction, and recommendations

Code development

Omnichannel

New systems and solutions

Architecture Enhancement

AI components may represent only a **small** part of the solution and, in some cases, **may not** even be needed.

How can AlfaPeople help you with AI and Innovation?

3. Business Impact

We focus on amplifying results through Intelligent Process Optimization (IPO)

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What does it mean?

By simplifying, optimizing, and orchestrating business processes—ranging from stand-alone tasks to end-to-end workflows—we help your organization achieve better outcomes with lower complexity, cost, and effort.

Practical Examples

HR Request Processing

→ Faster response times, reduced HR workload, improved employee satisfaction

Employee Onboarding & Offboarding Tasks

→ Saved time, lower administrative costs, improved compliance and employee experience

Customer Service Request Handling

→ Reduced resolution time, higher customer satisfaction, increased service efficiency

Maintenance Equipment Knowledge Base Access

→ Faster issue resolution, reduced downtime, improved maintenance productivity

Manufacturing Floor Operations & Maintenance

→ Fewer production pauses, higher equipment availability, improved operational efficiency

Invoice Processing & Financial Validation

→ Lower processing costs, fewer errors, faster financial close

Sales Opportunity Qualification & Follow-Up

→ Higher win rates, better sales productivity, increased revenue focus

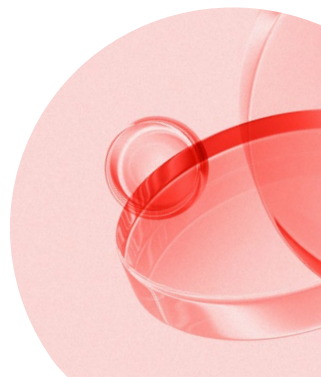
Management Reporting & Decision Support

→ Faster insights, better decisions, improved profitability and performance



How to Get Started

– A Practical Roadmap



How to get started

A Practical Roadmap

The objective is to convert inspiration into actions

- Assess current maturity
- Identify high-value use cases anchored on business outcomes – not technology
- Establish phase 1 of the CoE
- Establish minimum foundation (don't over-engineer)
- Identify and build Pilot Agents
- Measure the impact and tell the story
- Scale across organization and functions
- Move the CoE to phase 2
- ...continue the journey

Starting point: 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.

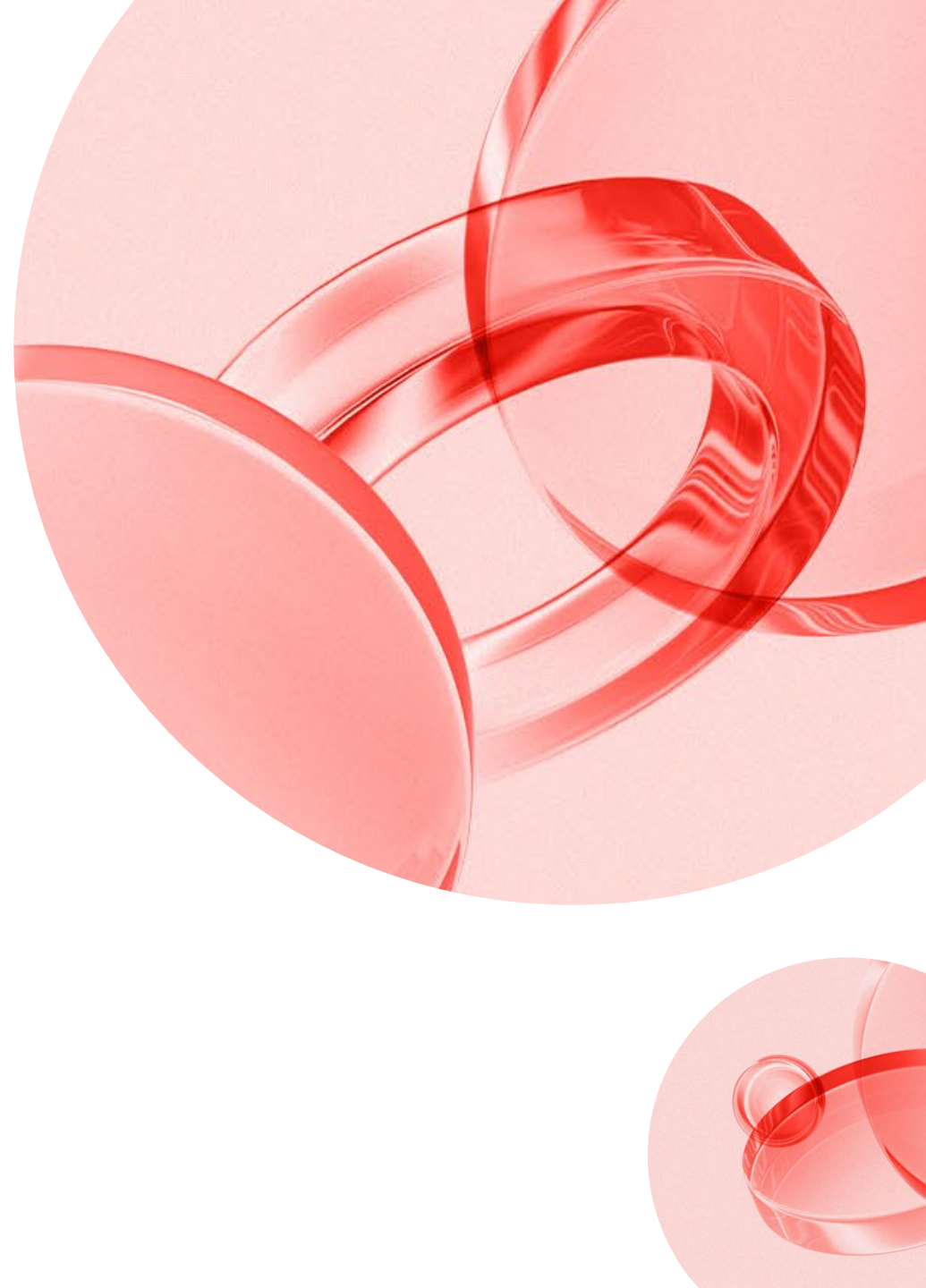
1-day workshop, On-site or Online.

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

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.

Key take-aways



Key take-aways

Being a **Frontier Firm** means aligning leadership, culture, governance, data strategy, and workflows

A **Copilot Center of Excellence (CoE)** is the Governance Engine for Scaling AI Safely

AlfaPeople's approach builds on what you already have and positions AI as the **next step in a business transformation journey**

Survey

Complete the survey and participate in our giveaway!





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