

Using AI for Business Transformation

Optimization: Doing More with Less



ADVISICON

Accelerate · Adapt · Achieve



ADVISICON
NONPROFIT SUPPORT

Serving Those Who Serve





We help organizations move
faster by leveraging process and
technology, together.



ABOUT THE FACILITATORS **TIM RUNCIE & JEFF POSTE**



- SENIOR PRODUCTIVITY CONSULTANT AND TRAINER

- 17 YEARS IN PROJECT TO PORTFOLIO MANAGEMENT TECHNOLOGIES

- SENIOR AI ARCHITECT / CONSULTANT

- 21-YEAR MS PROJECT MVP, PROJECT ADVISORY COUNCIL

- PMO EXPERT & BUSINESS TRANSFORMATION COACH

- ADVISICON FOUNDER AND AUTHOR OF 39 BOOKS ON PM TECH & METHODOLOGY BEST PRACTICES



AGENDA



- Understanding AI to Drive Change and Productivity
- Understanding MS Strategy with AI
- How to Get Started or Scale with AI
- AI Demonstration
- Summary and Open Audience Q&A



Common Opportunities to Optimize Productivity with AI



KEY AI – VISION & VALUES

Pioneering the future with innovative AI-powered, human-led solutions.

TRANSFORMING DATA INTO
ACTIONABLE INSIGHTS

01

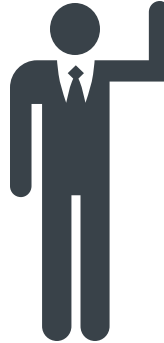


02

LEVERAGE AI TO AUGMENT HUMAN
CAPABILITIES, NOT REPLACE THEM

SOLVING COMPLEX BUSINESS
CHALLENGES

03



04

ENSURE AI SOLUTIONS ARE
TRANSPARENT, EXPLAINABLE, AND FAIR

SUPERIOR OUTCOMES THROUGH
INCREASED CREATIVITY &
INNOVATION

05

06

A FUTURE WHERE AI HANDLES THE
ROUTINE, AND HUMANS THRIVE
ON PURPOSE



AI VISION – TO AI VALUE

AI VISION

1. *Content Creation with Generative AI*
2. *Evaluation of potential future states with Predictive AI*
3. *Performing Tasks with Automation AI*



AI VISION – TO AI VALUE

HOW TO GET THE AI VALUE

Use AI strategically to transform a problem into valid insights.

1. Map out the value chain activities end to end
2. Map the value strategic drivers (growth, efficiency, financial).
3. Decouple activities in the value chain for AI potential
4. Identify activities that:
 - Create more value.
 - How do you create value, and for whom?
 - Capture more value.
 - How do you capture value faster, cheaper, with less effort, and for whom?
 - Erode value.
 - Fix or eliminate.



9

GENERATIVE AI CAPABILITIES

Extracting
insights

Creative
ideation

Subject
research

Dialog
agents

Essay
outlines

Comments
from code

Summarizing
text

Limitless generation with
a few lines of input

Semantic
search

Virtual
assistants

Image
generation

Classifying text

Code generation

Answering
questions

Language
translation

Poem
creation

Code
refactoring

Writing
assistance



10 PREDICTIVE – AI CAPABILITIES

Employee
Turnover
Prediction

Customer
Churn
Prediction

Financial
Forecasting

Sales
Forecasting

Healthcare
Diagnostics

Empowering data-driven
decisions, enhancing efficiency,
accuracy, and proactive problem-
solving.

Demand
Forecasting

Personalized
Marketing

Fraud
Detection

Risk
Assessment

Predictive
Maintenance



11 AUTOMATION – AI CAPABILITIES

Inventory
Management

Financial
Transactions

Robotic
Process
Automation

Natural
Language
Processing

Streamlines processes, reduces costs, and enhances productivity by automating repetitive and complex tasks

Document
Processing

Image
Recognition

Email
Automation

Predictive
Analytics

Workflow
Automation

Chatbots / AI
Agents



Understand Microsoft's Direction with AI Toolsets

Copilot for Microsoft 365 is transforming work

60%

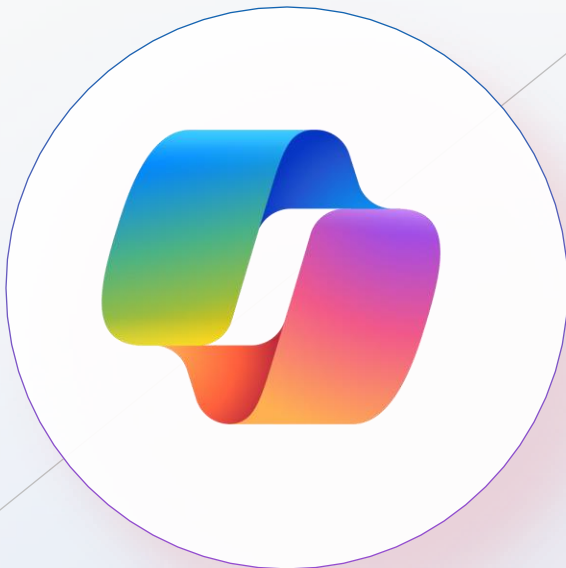
of leaders say a lack of innovation or breakthrough ideas is a concern

64%

of people have struggled with finding time and energy to get their work done

70%

of people indicated they would delegate as much as possible to AI to lessen their workloads



68%

said Copilot improved the quality of their work

70%

said Copilot made them more productive

77%

said they didn't want to give Copilot up

14 AI IN THE MS UNIVERSE ~ *Which Tool is Needed?*



Copilot AI's *(11 of these products)*

- Enhanced Productivity and Streamline Work
- M365 Product Enhancements
- Low Code / No Code ~ AI Agents
- Security & Compliance



Azure AI's *(14 of these products)*

- Helping Tech's & Dev's Build Intelligent Applications
- Integration between Services (Products)
- Machine Learning & Large Data Analytics



Key Approaches to Maximizing AI Productivity



KEY AI – PRODUCTIVITY APPROACHES

1. Establish an AI Strategy / Roadmap
2. Align Vision, Values to Needs / Opportunities
3. Enable AI Toolsets & Capabilities in M365
4. Create Processes to Standardize and Curate Data
 - Avoid GIGO
5. Establish Governance and Security
 - Who, What and How
 - Right People See and the Wrong People Don't
6. Structure and Access Data in Teams, SharePoint, Azure, etc.



AI Demonstrations



Open Audience AI Q&A



What are Your AI Next Steps



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ADVISICON AI OFFERINGS

18 AI Offerings from Strategy, Development, Environment Enablement to End User Training



AI Vision and Value Workshops

A **three-hour training** designed to familiarize, envision, and understand how to leverage Copilot in your organization for maximum results.



AI Onramp to Cruising Lane Programs

We **discover, analyze, and recommend** how to best deploy AI in your unique situation.

In this service, you come away with a **detailed implementation plan**.



AI Governance, Automation and Guided Security Audits

Our IT experts examine every aspect of your system, from settings to policies, ensuring that your environment meets Copilot's stringent security requirements.

We aim to get your environment **ready to deploy**.

[Claim your Free 1:1 Consult](#)

BUSINESS TRANSFORMATION

Strategy, AI, Automation and organizational,
and talent transformation

Leadership and cultural development

Change management

Efficiency and process transformation

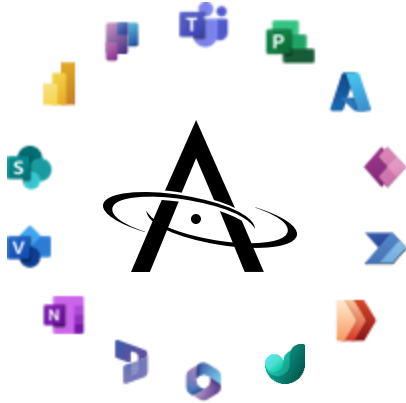
WORK MANAGEMENT

Deploying, configuring, and updating technology

Adoption, training, and quality improvement

Building custom solutions

Data integration and analysis



Ongoing Free Training
Advisicon.Thinkific.com
YouTube.com/Advisicon



THANK YOU FOR YOUR TIME

Productivity with Tech & Processes ~ Together!

Contact us:

📞 866.362.3847
✉️ Contact@Advisicon.com

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Reach out or follow us



Tim Runcie



@ProjectMVP



Tim.Runcie@Advisicon.com

Jeff.Poste@Advisicon.com