



POINT ALLIANCE

Unlocking AI-powered Transformation with Point Alliance and Microsoft

Speaker Introduction



Ashley Evans

AI Business Solutions
Microsoft



Jonathan Hamilton

President
Point Alliance



John Zarei

CEO
Point Alliance

What will we cover today



1

Journey to becoming a Frontier Firm

How does AI adoption look like for small businesses today

2

AI transformation with Microsoft 365 Copilot

Closer look into how AI adoption looks like with Copilot, an AI built for work

3

Introducing Copilot Agents

Understanding how AI agents works and their use cases across different functions

4

Live Copilot demo

Real-world use cases across Copilot Chat and Microsoft 365 apps

5

AI security and governance

How Copilot scales safely with agents, controls, and enterprise-grade governance

6

Copilot readiness and implementation

What organizations need to prepare for a successful Copilot rollout

7

How Point Alliance can help

How we support your AI journey from strategy to sustained business impact

Rise of a Frontier Firm

The SMB Reality.....

45%

of SMB leaders say expanding team capacity with digital labor is a top priority in the next 12-18 months.¹

79%

of SMBs plan to implement agents in the next 12-18 months, with 24% of SMBs already using them.¹

80%

Say that their employees are currently bringing their own AI tools to work (BYOAI).²

Agility is the SMB Advantage, and AI will continue to reshape the market

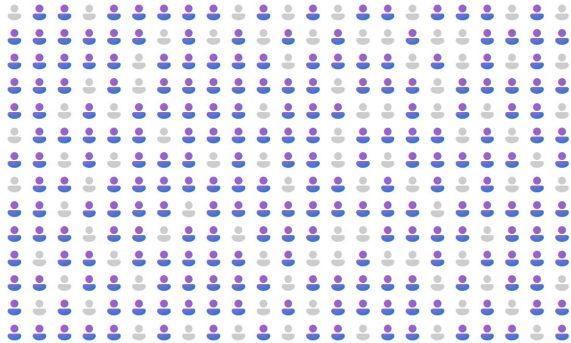
¹ Source: 2025 Work Trend Index Highlights the Rise of Frontier Firms – Here's Why SMBs May Have the Advantage | Survey Sample: 23,744 SMB Employees surveyed across 31 countries

² Source: 2025 Work Trend Index Annual Report

Major Shifts Looking Ahead

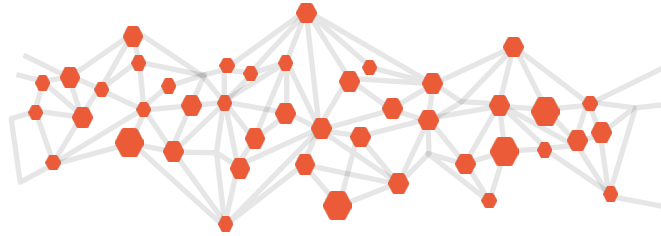
Agentic AI

A Force & Risk Multiplier



Shadow AI

Managing Safe & Secure AI across the Business



Governance

Governance as a Growth Enabler



Journey to the Frontier Firm

Every SMB's Journey is Unique
Value is measured and realized differently for employees vs organization

Phase 1

Human with assistant



Every employee has an AI assistant that helps them work better and faster

Phase 2

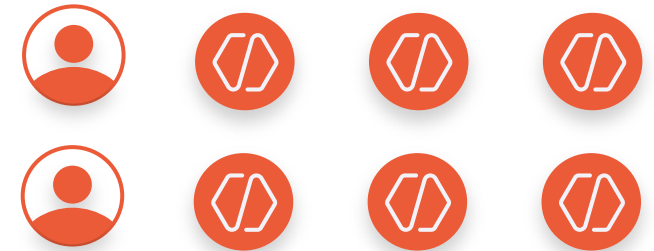
Human-led agents



Agents join teams as "digital colleagues," taking on specific tasks at human direction

Phase 3

Human-led, agent-operated



Humans set direction and agents run entire business processes and workflows, checking in as needed

Fuelling Frontier Ambitions

Business Outcomes

Frontier AI success if focused on driving tangible business outcomes

- ✓ **Enrich** employee experiences
- ✓ **Reinvent** customer engagement
- ✓ **Reshape** business process
- ✓ **Bend the curve** on innovation



Enablers to Success

Success anchors on execution discipline on key enablers

- ✓ **AI in the flow** of human ambition
- ✓ **Security & Governance** in every layer
- ✓ **Manage the human** transformation





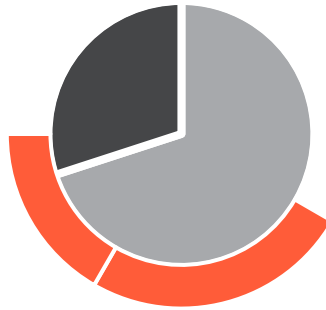
**AI Built
for Work**

AI transformation is unique to every customer

Empowering every user with the value of Copilot



Customer 1



Customer 2



Customer 3



Copilot Chat

Built for every user in mind
to improve productivity



M365 Copilot

Best for knowledge workers
needing secure AI assistance

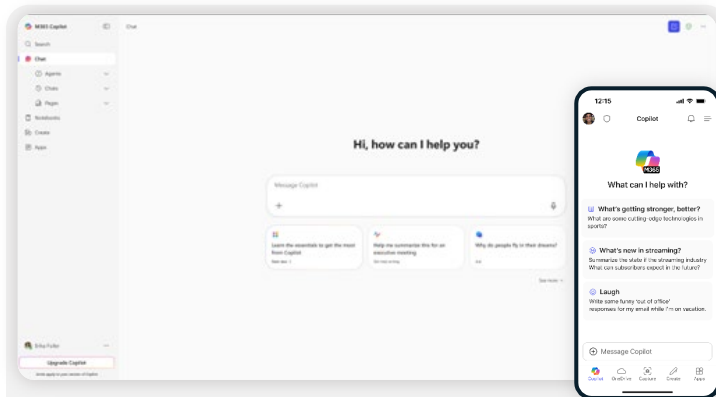


Agents

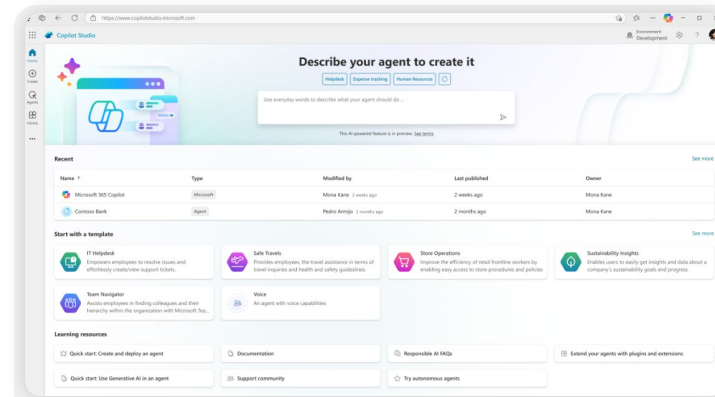
Support every Copilot user with by automating
repetitive tasks and creating digital teammates



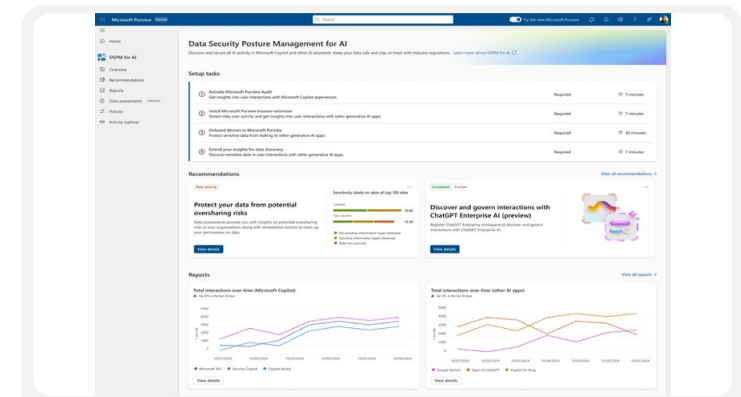
Microsoft 365 Copilot Chat



Chat



Agents



IT Controls

Secure web-grounded AI chat
on the App and web, and in
Microsoft 365 productivity apps



Integrated into the chat
experience and paid for on
a consumption basis

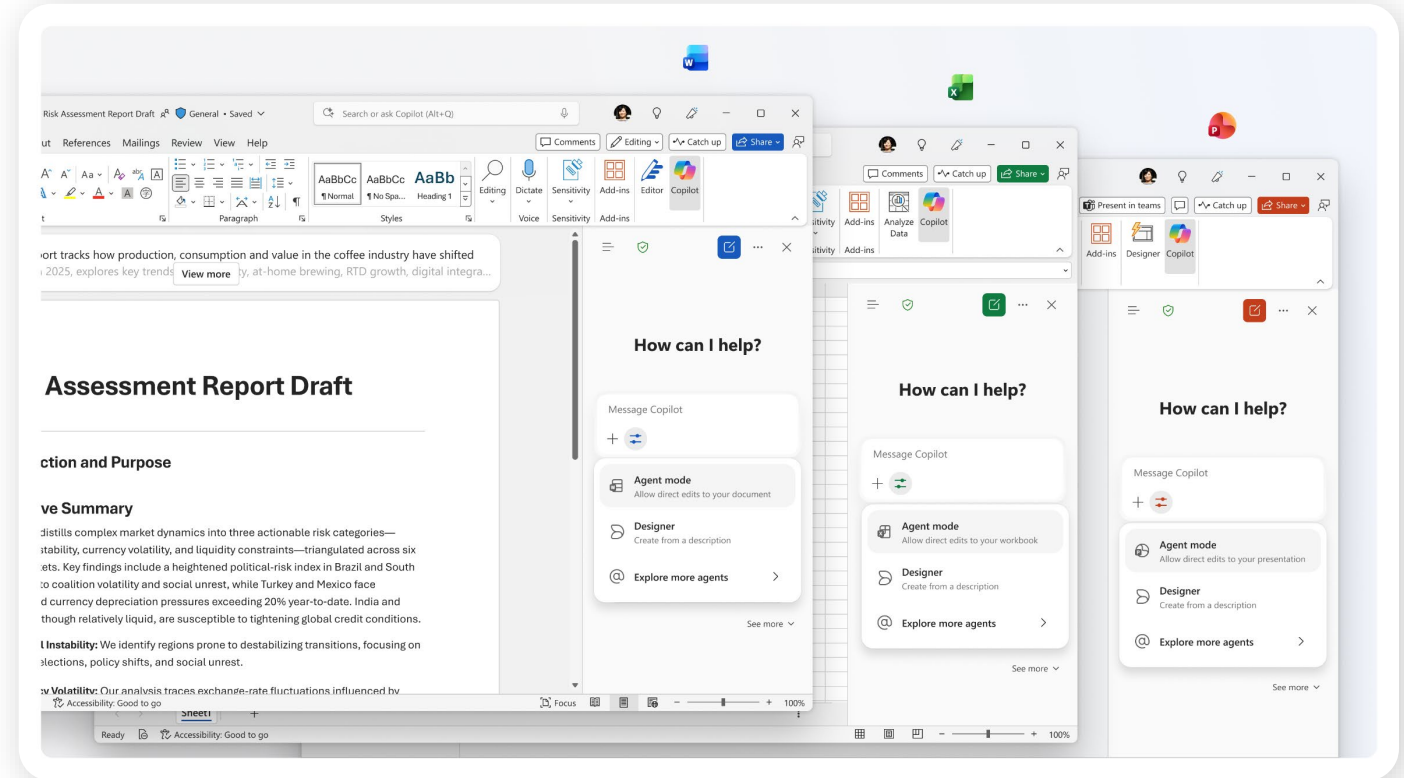


Enterprise Data Protection
and agent management

New Copilot Chat value to enhance productivity

Available for Copilot Chat users with a Microsoft 365 license

- Copilot Chat in Outlook will understand your entire inbox, calendar, and meetings, extending beyond individual emails.
- Agent Mode in Word, Excel, and PowerPoint uses web data and referenced files to help you create and refine content in Office apps.
- Word, Excel, and PowerPoint Agents allow you to create high-quality documents, spreadsheets, and presentations in Copilot Chat.



Agent Mode in Word, Excel, and PowerPoint

Rollout start in Q1 2026

Microsoft 365 Copilot Chat



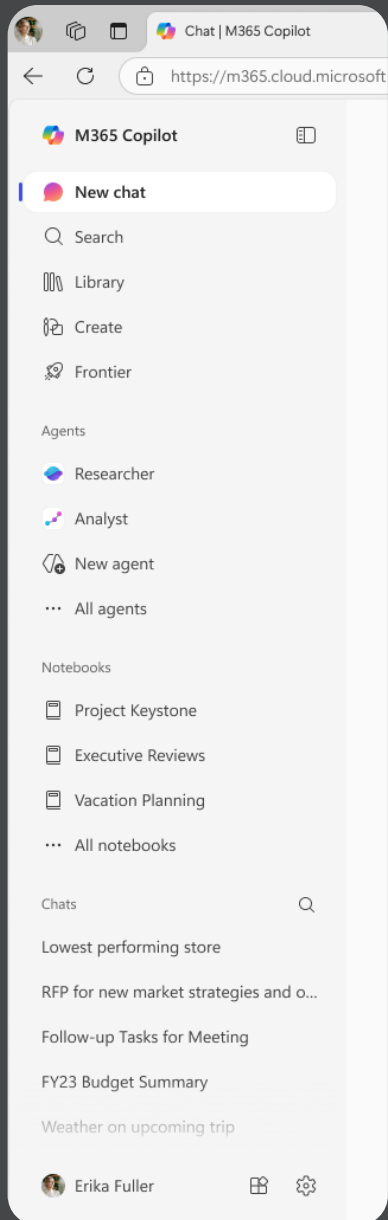
Available
wherever



BioFabric Kick-off
September 27, 1:00-1:45PM



you work



Microsoft 365 Copilot: **AI Built for work**

Chat

Secure AI chat with the latest models available and Work IQ intelligence layer.

Search

AI search enhanced by Work IQ for fast and relevant results.

Agents

A broad ecosystem of pre-built agents available in the Agent Store and build your own agents in Copilot Studio.

Create

AI-generated images, posters, banners, videos, and more that are aligned to your organization's brand identity.

Notebooks

Copilot is grounded in your project's diverse content types to provide targeted responses and engaging audio overviews.

Get proactive
overviews of your day



Copilot
Chat

Bridge your
knowledge sources



Copilot
connectors

Prepare for
a customer meeting



Researcher

Start your workday
hands-free



Voice in
Copilot mobile

Interpret multilingual
conversations in real time



Interpreter



Where Copilot wows

Never take meeting
notes again



Facilitator

Automate reminders
and tasks



Workflows

Quickly
find content



Copilot Search

Jumpstart
document drafting



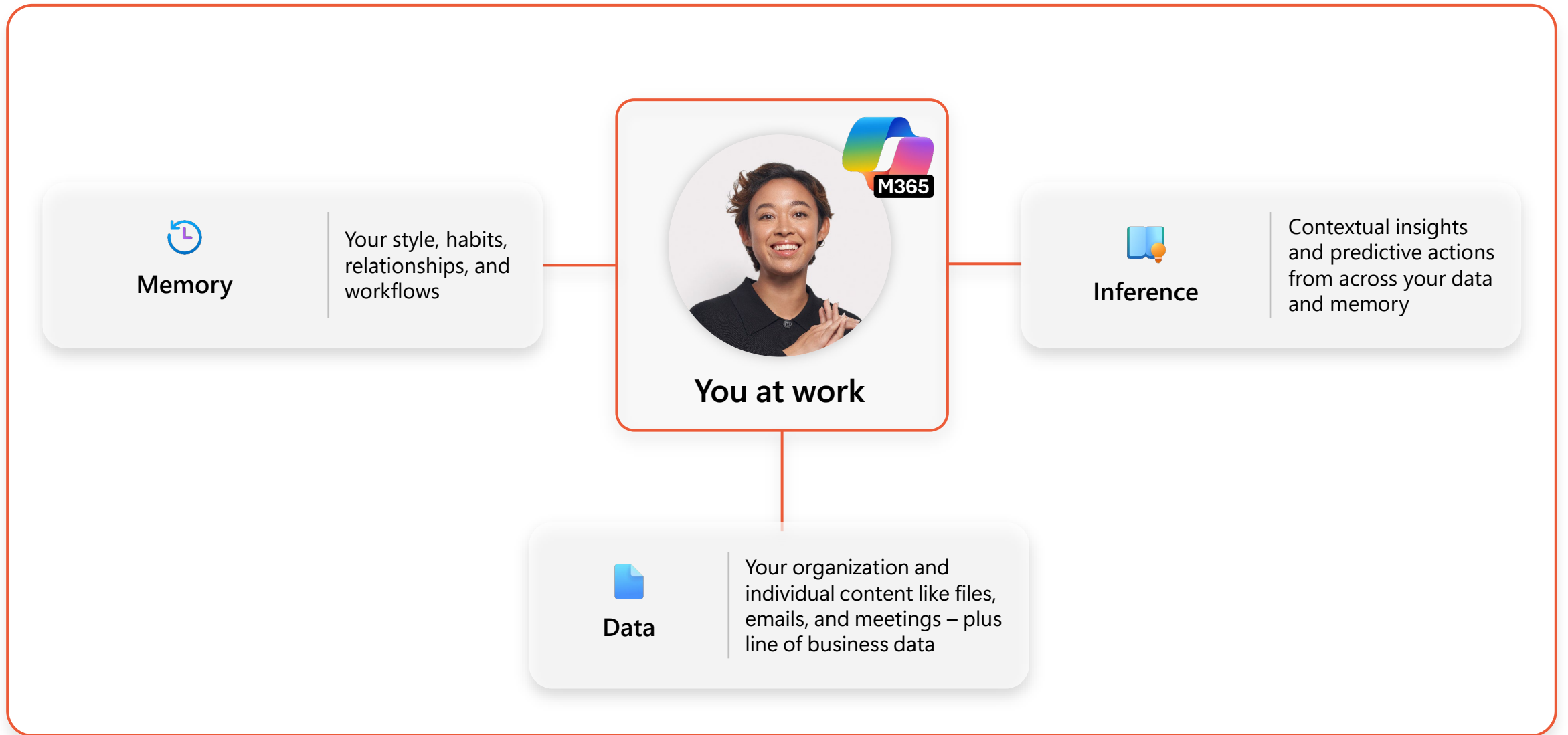
Agent Mode
in Word

Quickly onboard onto
new roles or projects



Notebooks

Work IQ



Microsoft 365 Copilot Offerings in market

Free + Metered

Microsoft 365 Copilot Chat

- Web-grounded AI chat, powered by the latest large language models
- Get Copilot Chat in select M365 apps*
- Access to agents, priced on a metered basis

>300 user orgs

Microsoft 365 Copilot

Everything in Microsoft 365 Copilot Chat, plus:

- AI-powered chat and agents grounded in business data
- Work-grounded Copilot in apps

<300 user orgs

Microsoft 365 Copilot Business

- Built for small business
- Available for up to 300 Users
- Requires M365 B-SKU as pre-require license

Customer eligibility

- Microsoft 365
- Office 365
- Teams Essentials / Teams Enterprise / Teams Rooms

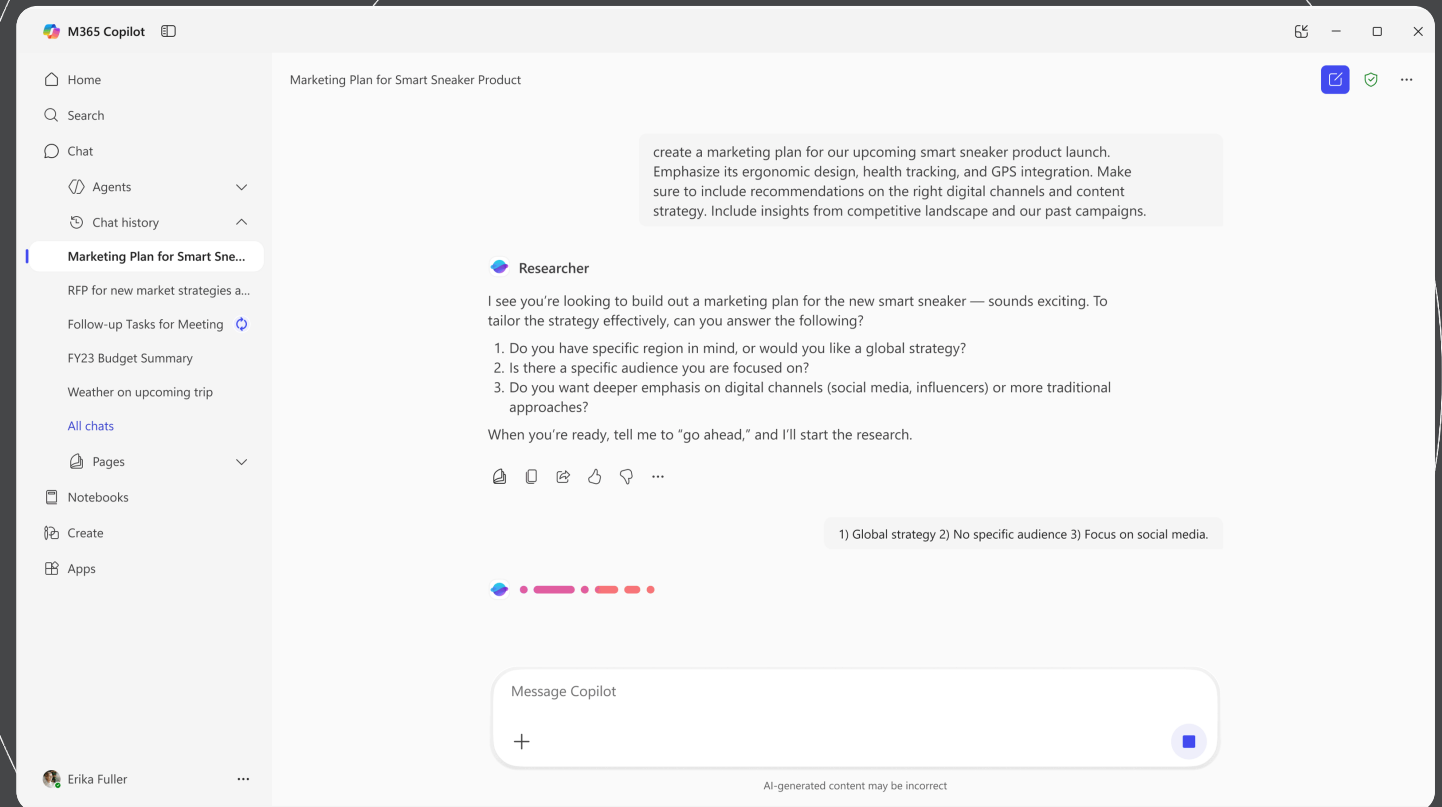
- Microsoft 365 E3/E5 or A3/A5 or F1/F3
- Office 365 E1/E3/E5

- Business Basic
- Business Standard
- Business Premium

¹ Copilot Chat is available at no additional cost to all Microsoft Entra ID users with an eligible Microsoft 365 subscription. An Azure subscription is required to use agents and is priced on a metered basis.

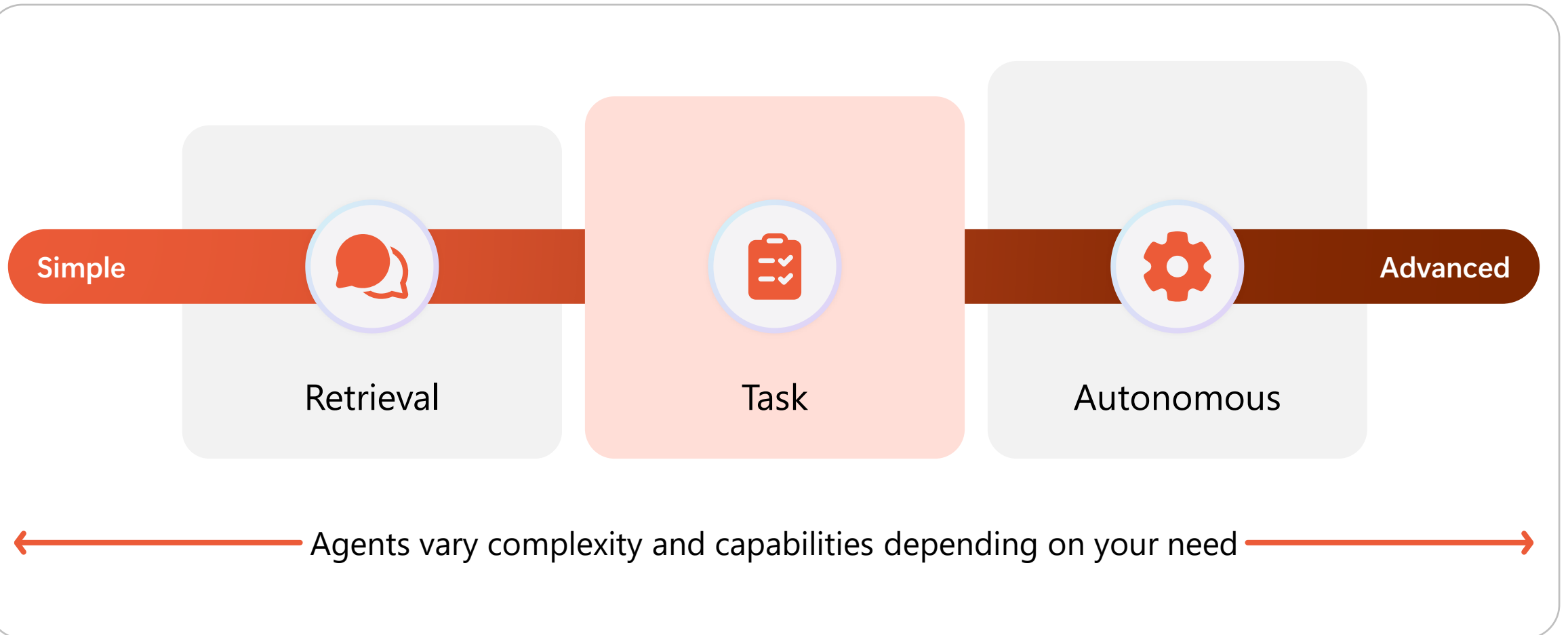
Agents

A broad ecosystem of pre-built agents available in the Agent Store, Microsoft 365 apps, and tools to build your own agents in Copilot Studio.

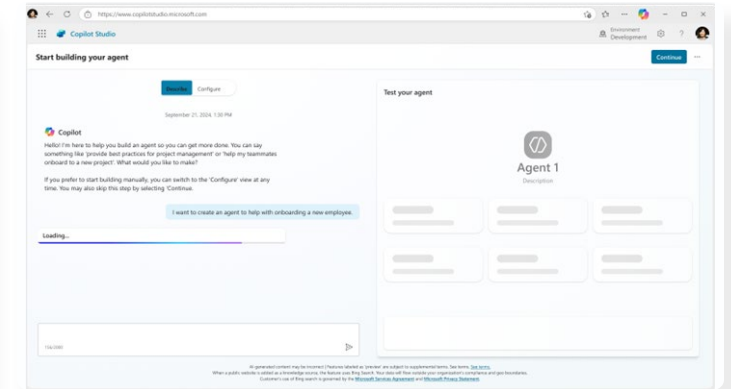
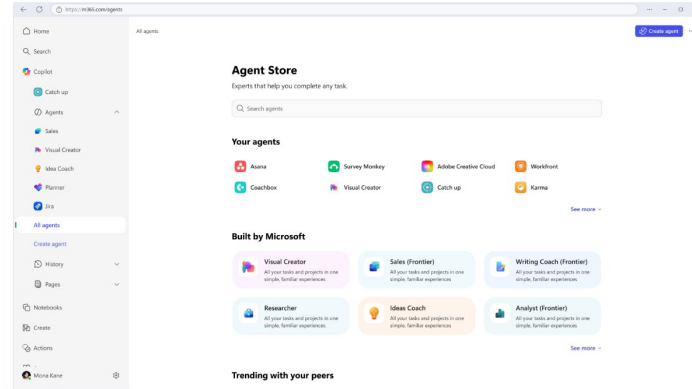
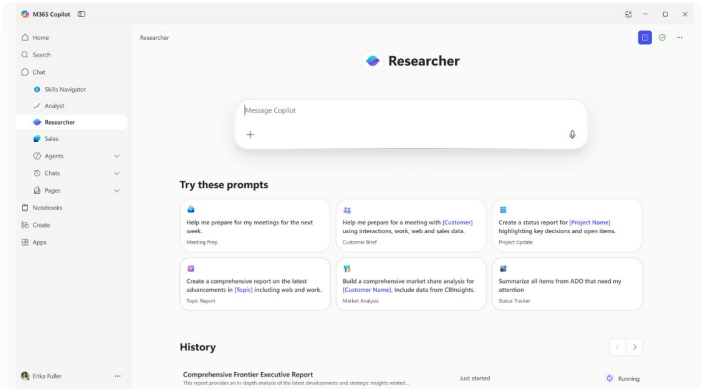


What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization



Agents



Use Microsoft agents

Leverage agents built by Microsoft that use advanced reasoning like Researcher and Analyst or specialized agents like Facilitator for meeting management.

Discover agents

From Microsoft to trusted third party agents, Agent Store is where you find agents that are ready to work for you.

Build custom agents

Build your own agents with Copilot Studio using natural language or pro code tooling with the Microsoft 365 Agent SDK.

Microsoft Agents

Automate tasks with pre-built agents by Microsoft that are designed for work



Researcher

Advanced reasoning

[Generally available](#)



Analyst

Advanced reasoning

[Generally available](#)



Surveys

End-to-end survey mgmt.

[Generally Available](#)



Interpreter

Multi-lingual translation

[Generally available](#)



Facilitator

Teams meeting moderation

[Generally available](#)



Knowledge

Content mgmt. & organization

[Public preview](#)



Channels

AI teammate

[Public preview](#)



Project Manager

Automate project mgmt.

[Public preview](#)



Communities

Community mgmt.

[Public preview](#)



Workforce Insights

Organizational insights

[Frontier Program](#)



Word

Document creation
and iteration

[Frontier Program](#)



Excel

Data visualizations
and insights

[Frontier Program](#)



PowerPoint

Build and iterate on
presentations

[Frontier Program](#)



People

Colleague connector &
collaboration planner

[Frontier Program](#)



Learning

Curated AI skill building
resources

[Frontier Program](#)

Gain agent best practices at our AI Agent Hub [AI agents – Microsoft Adoption](#)

Demo





Microsoft
commitments
and controls



**Microsoft 365
Copilot is built
on trust**



Tools
to manage
M365 Copilot

How Copilot stays secure and compliant



Microsoft 365 Copilot



Security and Governance

Data security
AI security
Compliance & privacy



Management Controls

Licensing & metering
Configuration & customization
Integrations



Measurement and Reporting

Usage & Adoption
Impact & Productivity
Business value & ROI

Tools to secure and govern your Copilot use



Address oversharing concerns

- Gain visibility into overshared content
- Remediate excessive permissions
- Prevent Copilot from processing sensitive files

Secure



Protect against data loss and insider risks

- Get alerts and reports of risky behavior and AI use
- Protect sensitive files and interactions
- Dynamically apply security policies based on risky actions

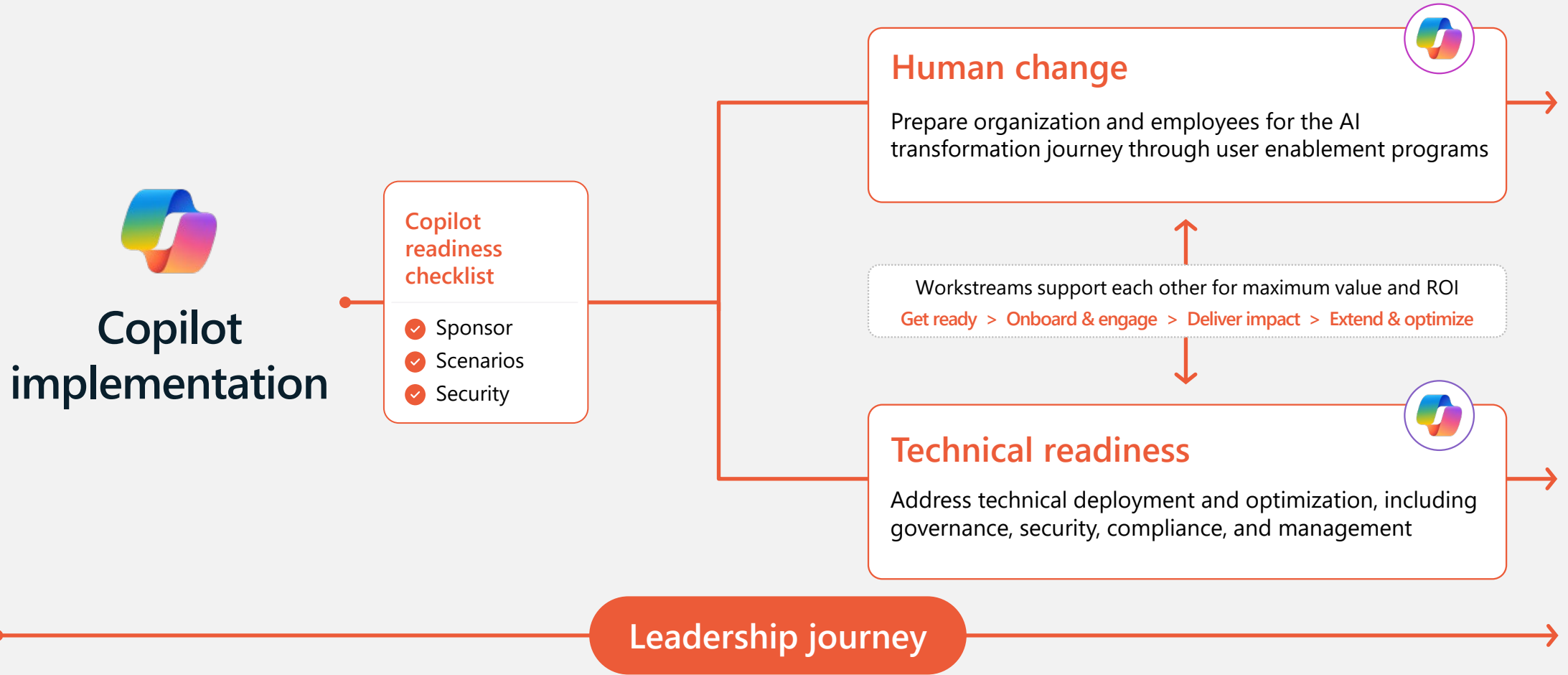


Govern AI use to meet regulations & policies

- Inspect interaction content and audit logs
- Investigate for compliance and ethical violations
- Enforce lifecycle policies and legal holds

Govern

Microsoft 365 Copilot implementation



Overview of Microsoft 365 Copilot implementation

Copilot readiness checklist

TECHNICAL READINESS

1

Get ready

Perform the Microsoft 365 Copilot

Optimization Assessment

- ✓ Address data security, governance, and data access questions
- ✓ Build shared Copilot implementation plan with User Enablement team

2

Onboard & engage

Prepare Microsoft 365 for AI deployment with the

Setup Guide

- ✓ Ensure appropriate Data Security controls are in place
- ✓ If needed, deploy additional Microsoft 365 apps

3

Deliver impact

Mature AI management skills through improved IT service delivery

- ✓ Establish service management plan
- ✓ Review Admin usage reports and the **Copilot Dashboard** to analyze user adoption and usage patterns

4

Extend & optimize

Provide insights on service health and optimization opportunities

- ✓ Design, build, and publish plugins to deliver unique experiences
- ✓ Build your own custom agents

Support continuous learning and optimization

How Point Alliance helps you succeed with AI and Copilot

1 We help organizations turn Microsoft 365 Copilot into real business impact

2 Define your AI strategy and roadmap

4 Deploy Copilot with confidence

5 Build security, compliance and governance in from day 1

6 Drive adoption through enablement and change management

7 Support you beyond go-live

Why partner with us?



20+ Years of Technology Consulting Experience



Certified Microsoft Solutions Partner



Actionable Copilot Readiness Assessment



Tailored recommendations for data governance

Take your Copilot Readiness Assessment today



Security



Modern Work



Infrastructure
Azure



Digital & pp Innovation
Azure



Data & AI
Azure

How Point Alliance helped organizations become AI-ready



Large Professional Regulator

Supported a large regulatory organization in developing an **AI Strategy Framework** and conducting a **Copilot Readiness Assessment**.
Delivered a **Microsoft 365 Copilot pilot**, followed by **training and user enablement** to prepare 500+ users for effective adoption across the organization.



Canadian Life and Health Insurance Association

Partnered with CLHIA to define an **AI Strategy Framework** and assess organizational readiness for **Microsoft 365 Copilot**.
Implemented a **Copilot pilot program** and delivered **training and enablement** to drive adoption among 70+ users.



Digital Commerce Bank

Enabled Microsoft 365 Copilot adoption at Digital Commerce Bank through **targeted training and user enablement programs**, helping 150+ users integrate Copilot into daily workflows and accelerate productivity.

Q&A





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Thank you

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