

# A practical guide to AI automation for business



## Step one: Productivity

### Making AI real in day-to-day operations

**Successful AI journeys begin with empowering people. Microsoft 365 Copilot integrates AI directly into everyday tools employees know and use, such as Teams, Outlook, Excel, and Word.**

By providing meeting summaries that yield actionable insights, email and document generation become faster, and deep research enables targeted, focused sales and marketing approaches.

The top-down approach to identifying use cases ensures strategic alignment, and the bottom-up approach brings operational relevance from those doing the work day in, day out and from overlooked pain points. The people on the ground know where inefficiencies hide, where repetitive tasks accumulate, or where internal processes could benefit from automation.

Organisational leaders often underestimate the cultural lift that comes from these early wins, when employees see AI helping them immediately, digital adoption across the business accelerates.



**Low effort, high value wins give organisations the breathing room and justification needed to plan deeper AI strategies. They also help to get resistant areas of the business on board making company-wide adoption quicker and easier.**

## Step two: Automation

### What can AI really do?

With employees now benefiting from AI in their day-to-day routines, the focus shifts to operational workflows. Copilot Studio helps organisations build automation into structured business processes; employee onboarding journeys, customer interactions, and multi-step operational tasks can all be orchestrated through natural conversation.

The low-code nature of Copilot Studio empowers business employees to participate in the creation of AI-based processes. This democratisation of capability is essential where IT demand outweighs supply. The real advantage comes when these agents are deployed across multiple channels, from Teams for internal use to websites or mobile platforms, meeting the desired end users wherever they are.



Alongside this democratisation, there is a balance between Security and Governance from the IT teams. IT remains responsible for establishing guardrails and ensuring that AI-generated actions are logged and auditable, and that only authorised users can access the data. Striking a balance between empowering users and providing governance is embedded from the start. It should not be seen as a battle between innovation and control, but rather as a partnership in which both responsibilities strengthen each other.



## Step three: Scale

### Engineering AI for the Enterprise

**As use cases become more advanced, the technical and scalability requirements move beyond the scope of Copilot Studio. Enter Azure AI Foundry: Microsoft's developer-first, code-first platform for building, managing, and governing AI systems.**

Azure AI Foundry uses advanced tools such as model orchestration, grounding, deployment observability, compliance tooling, and the flexibility to choose from Microsoft OpenAI models, open-source models, or custom fine-tuned models. Here, organisations can transition their AI initiatives from experimentation and basic automation to mission-critical capabilities aligned with security, governance, and operational resilience.

The flexibility of Azure AI Foundry means AI agents can be integrated into webpages and customer applications, as well as into the rest of the Microsoft AI stack we've mentioned so far.



Together, Copilot Studio and Foundry will become a single "Copilot", providing the intuitive conversational experiences that users adopt quickly. At the same time, Foundry ensures the intelligence behind the scenes remains secure, validated, and aligned with the business. Copilot is user-friendly on the front end and enterprise-controlled at the core, enabling organisations to trust AI at scale.

## Secure AI adoption with Logicalis

**LogicalisAs Azure Expert MSPs, Logicalis can act as your strategic partners in designing and executing an AI roadmap that delivers tangible outcomes.**

Through Microsoft Partner programs, we can access funding to support your initiatives and help reduce the cost of getting started. These investments allow customers to quickly validate AI capabilities on Microsoft technology through assessments, deployment assistance, business adoption workshops, and proof of value.

As a Microsoft Security partner, we ensure every AI solution aligns with your security posture, compliance requirements, and operational standards, enabling confident adoption across the business.

An automated business is just one click away!

**Automate my organisation!**