



lancia
consult

Is your data AI ready?

A bluesource and Lancia Consult guide
to building a secure, scalable foundation
for AI adoption.



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1. Executive summary

Executive summary

Artificial Intelligence is no longer a “future technology”, it’s already shaping the way businesses operate, innovate, and compete. Yet, for all the hype, one truth remains constant: AI is only as good as the data, the governance, and the processes that underpin it. Without the right foundation, AI initiatives risk being inaccurate, insecure, or unsustainable.

This report, co-authored by bluesource and Lancia Consult, explores how organisations can move from AI experimentation to strategic, responsible AI adoption. Drawing on research from IDC, Gartner, and Microsoft, we share real-world insights from our clients who are already realising measurable value from AI, while avoiding common pitfalls.

We outline:

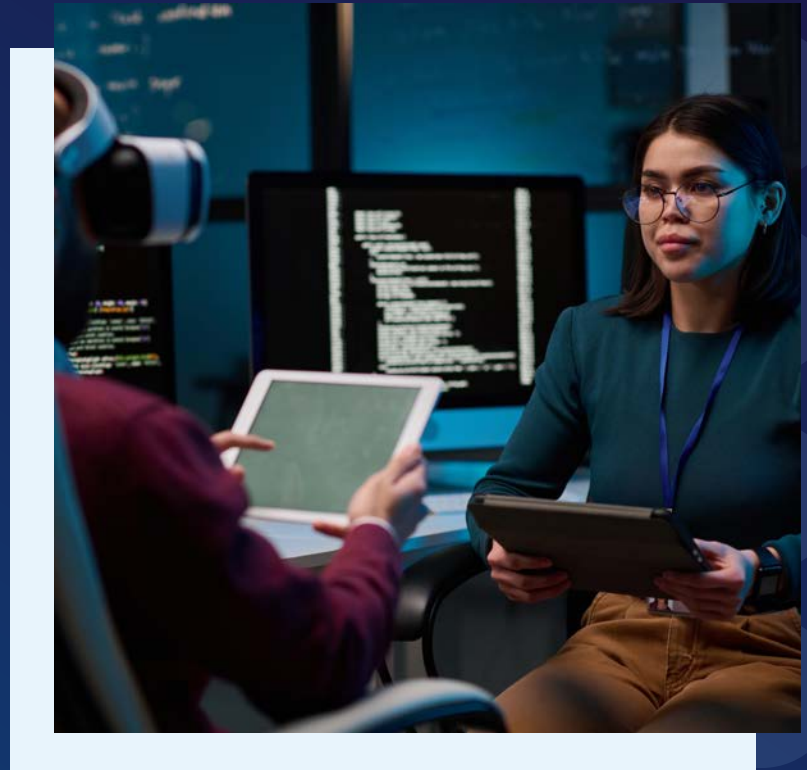
How AI adoption is evolving in the market today, and where it’s heading next.

Practical Microsoft-focused frameworks to ensure your data is AI-ready.

The role of governance, compliance, and cultural readiness in safe AI adoption.

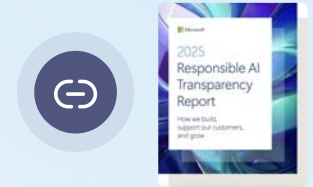
Proven use cases that deliver immediate business value.

Our joint expertise combines bluesource’s deep technical knowledge of Microsoft ecosystems with Lancia Consult’s strategic advisory experience, giving you both the technical foundation and organisational alignment needed to operationalise AI responsibly.



2. AI today vs The future of AI

AI today



Some key facts to note from 2025 Responsible AI Transparency Report are:

>77%



of organisations across the world are either **exploring potential use cases** or **investing significantly** in generative AI technologies.

91%



are currently using AI technology.

63%



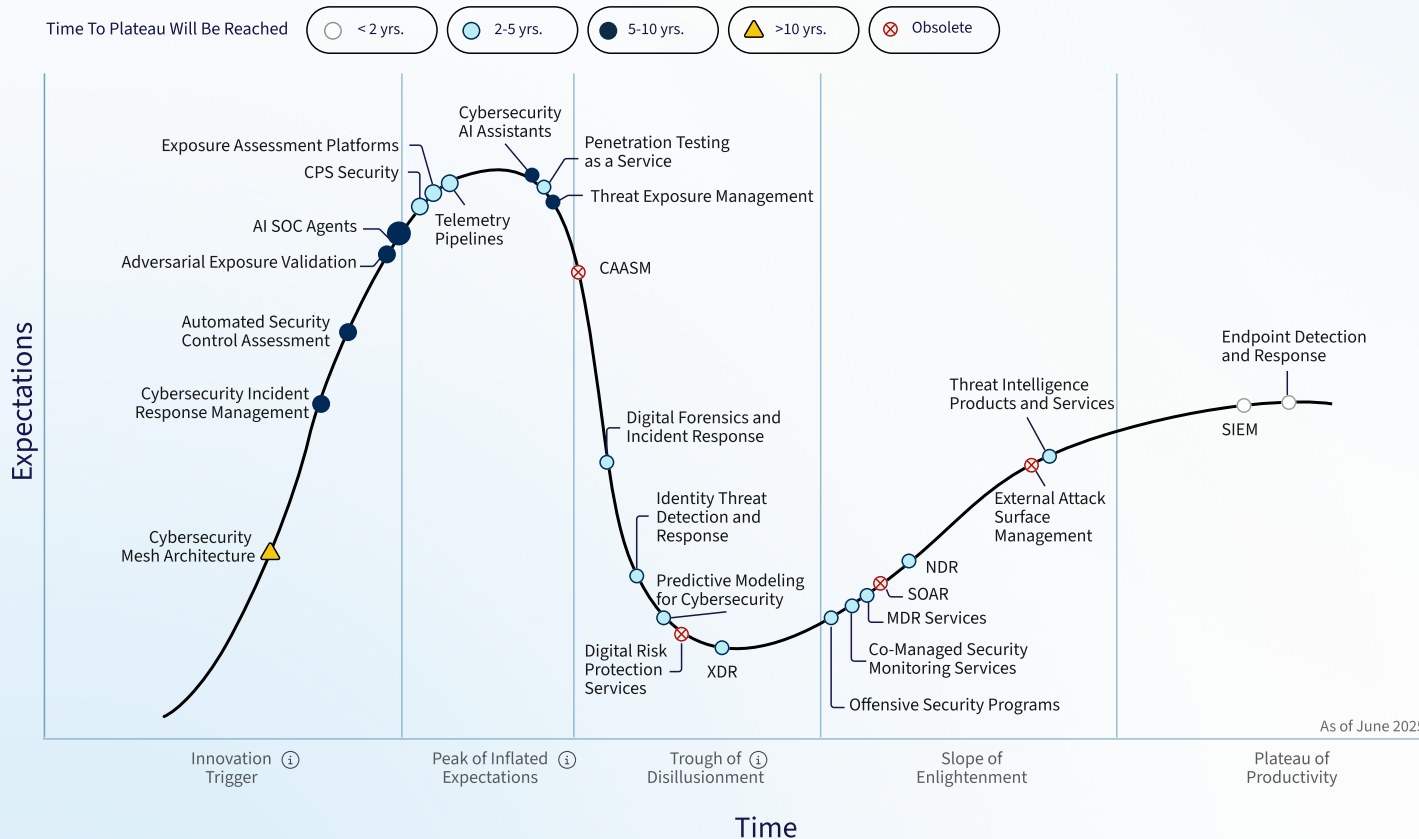
of organisations **have an AI strategy** tied to their business objectives, which includes a measurement strategy to evaluate success.

✓ Improving operational efficiency ✓ Increasing innovation ✓ Reducing cost

The top business objectives for AI initiatives

The future of AI

According to Gartner AI investment remains strong, but focus is shifting from GenAI hype to foundational innovations like AI-ready data, AI agents, AI engineering and ModelOps. This research helps leaders prioritise high-impact, emerging AI techniques while navigating regulatory complexity and operational scaling.



Viam Mercer
Chief Technology Officer

The potential of AI is extraordinary, but it's not magic. It doesn't automatically make your business smarter, faster, or safer. The reality is that AI success is a data story first, and a technology story second. If your data is inaccurate, inaccessible, or poorly governed, then AI will simply amplify those weaknesses. On the other hand, when your data estate is clean, secure, and well-managed, AI becomes a multiplier for productivity, insight, and innovation. That's why at bluesource, alongside our partners at Lancia Consult, we focus on readiness, aligning the right data, governance, and user enablement before AI is rolled out. The organisations that take this approach are the ones that avoid the costly mistakes and get to value faster. This report is a blueprint for making AI a safe, strategic, and scalable part of your business, not just a buzzword.

bluesource



3. Use cases for AI in organisations

Use cases for AI in organisations

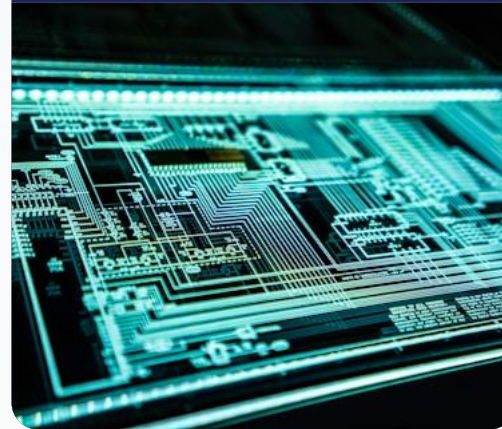
+ Software development



+ Automating IT tasks



+ Fraud detection and cybersecurity



+ Product and service innovation



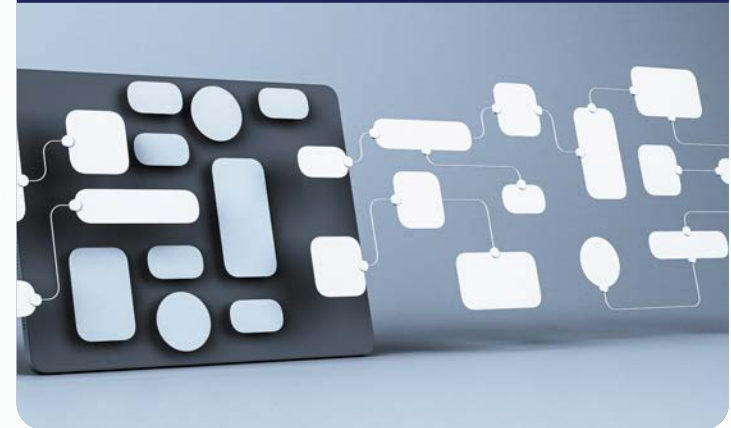
+ Automating business processes



+ Call center conversation summarisation and categorisation



+ Conversational analysis and intelligence on call center transcripts



Example of Lancia Consult use cases



Copilot usage across the business

With AI skills becoming essential across organisations, our client invested in Microsoft Copilot licenses for employees worldwide. They needed support to deploy Copilot effectively, upskill employees at different levels with varied needs, and demonstrate Copilot's business value to senior leaders.

Siraj Alimohamed | Senior Director - Data & AI @ Lancia Consult

We delivered a dual approach: broad organisational training and tailored, role-specific sessions to maximise Copilot adoption. To ensure the long-term sustainability of Copilot learning and upskilling, we have created training materials and established a global network of 'Superusers' to support ongoing learning as new features roll out.

We also built local user communities, engaged IT and HR business partners, and leadership teams to drive sponsorship. We ran personalised training sessions for the global leadership team. To track success, we monitored Copilot usage across functions, which allowed us to focus attention on knowledge gaps.

We have now delivered training and successfully onboarded 1,000 employees with Copilot. The success of our initial pilot meant the organisation looked to extend to the second phase, investing from 300 licenses to 1000 licenses. >90% of users are actively engaged and adopting the tool, which is the largest adoption rate for any organisation at that time, statistics provided by Microsoft.

Example of Lancia Consult use cases



Agentic Automations

A Singapore-based educational training institution, recently restructured from a government statutory board into a Company Limited by Guarantee (CLG) to enhance its operational agility. It also incorporated new departments and expanded its services. With 80 employees now responsible for raising purchase requisitions, the organisation faced challenges in its procurement workflow. Its existing processes were slow, tracked manually via email, and lacked a unified system, leading to inefficiencies and inaccuracies.

Melissa-Anne Boschmans | [Director - Data & AI @ Lancia Consult](#)

To address these issues, we implemented an agentic AI solution powered by Microsoft Copilot, which integrated with the client's existing NetSuite ERP system. This solution streamlines the entire procurement lifecycle. It automates key tasks, such as generating AI-powered justifications for Approval of Requirement (AOR) documents and providing suggestions for items based on historical data.

An interactive AI chatbot offers instant answers to procurement policy FAQs, while a simplified, unified flow in Copilot allows for easy requisition creation. The system also automates the generation of Approval of Purchase (AOP) justifications and purchase order (PO) creation, significantly reducing manual effort and improving the speed and accuracy of the procurement process.

Example of bluesources use cases



AI-Powered Support Transformation at Bluesource

With AI becoming integral to modern IT operations, bluesource launched **MOSES** — *the Machine Optimised Support Enhancement System* — to enhance support accuracy, reduce ticket volumes, and retain organisational knowledge. The goal was to empower analysts with intelligent assistance while ensuring data protection and long-term scalability.

Viam Mercer | Chief Technology Officer, bluesource

We delivered a people-first AI solution that combines human-in-the-loop oversight with advanced machine learning. MOSES delivers increasingly precise responses, reducing variability in support quality and ensuring contextual judgement remains central to issue resolution.

To support continuous improvement, MOSES evolves with every interaction. The system learns from real-world support scenarios, refining its ability to resolve issues and retaining expertise within the organisation, eliminating reliance on tribal knowledge and individual memory.

We targeted measurable outcomes:

- **P4/P3 Ticket Reduction**

predictable, repetitive issues are expected to decline by 40–60% over the next 6–9 months, freeing analysts to focus on complex tasks.

- **P1 Ticket Adaptation**

for high-priority tickets, MOSES supports longer learning cycles while preserving the need for human expertise in nuanced problem-solving.

All data processed by MOSES remains **securely within bluesource's Azure environment**, ensuring full control over intellectual property and sensitive information. While the solution leverages public-facing AI models for analysis, no data leaves the company's digital perimeter.

The success of MOSES has positioned bluesource to scale its AI capabilities across support functions, with a roadmap for future enhancements and governance frameworks in place to ensure ethical, secure deployment.

Example of bluesources use cases



AI-Driven Document Summarisation for a Global Consultancy Company

With the growing need to manage and extract insights from vast volumes of documents, a consultancy company invested in an AI-driven document summarisation solution built on Microsoft 365, Azure AI, and Power Platform technologies. The goal was to standardise their approach to AI services, ensure robust security and compliance, and demonstrate tangible business value through automation and intelligent processing.

Richard Li | Principal Consultant, bluesource

We delivered a phased solution design anchored in a minimum viable product (MVP) that combined Microsoft 365, SharePoint Online, Power Automate, Azure OpenAI, and Azure AI Document Intelligence. This architecture ensured secure document handling within the company's digital perimeter and enabled scalable, automated summarisation workflows. To enhance usability, Power Apps was proposed as an optional interface layer with embedded chatbot capabilities.

To support adoption and long-term sustainability, we conducted stakeholder workshops and defined a framework of service components aligned with the company's future AI initiatives. We also addressed licensing strategy, showing scalable options from targeted user groups to full organisational coverage across 1,100 employees.

Security and compliance were central to the solution. We implemented Entra for access control, reviewed internal and external data protection measures, and ensured all infrastructure met the company's governance standards. The solution was designed to evolve with the organisation's needs, supporting future AI use cases while maintaining a secure and compliant foundation.



Following successful stakeholder engagement and proof-of-value delivery, the company is now positioned to expand the solution across departments, with clear design principles and a roadmap for future enhancements.



4. Where is your business
in your AI journey?

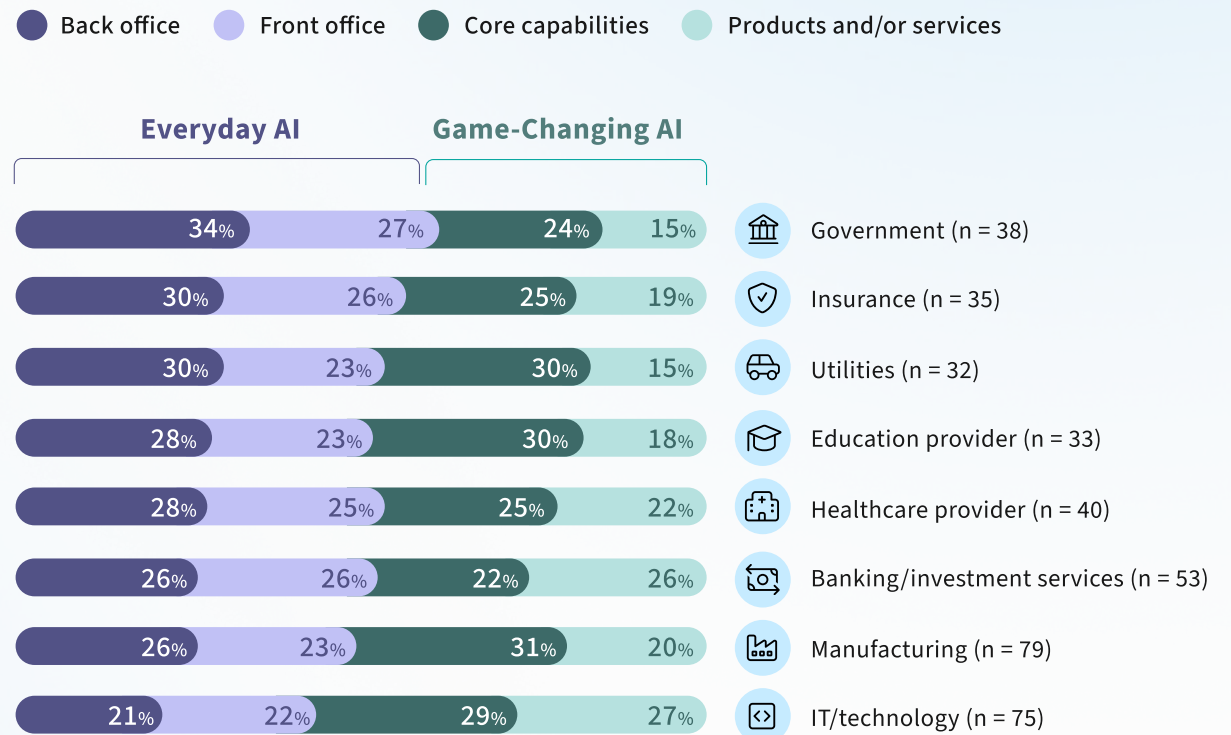
Where is your business in your AI journey?

Comparing game-changing and everyday AI initiatives across industries

Despite AI being one of the biggest buzzwords in business today, many organisations remain in the early stages of their AI journey. Most are currently focused on everyday AI, leveraging tools to automate routine processes and drive incremental improvements.

Meanwhile, others are beginning to adopt more advanced, game-changing technologies that have the potential to radically transform their operations and business models. As illustrated in the chart, no matter where an organisation sits on this spectrum, having strong data foundations is imperative. Without clean, well-governed, and accessible data, even the most ambitious AI initiatives will struggle to deliver meaningful impact.

Percentage of respondents





5. Is your data AI ready?

Is your data AI ready?

According to Gartner's 2024 Evolution of Data Management as a Dedicated Function Survey, **over 75% of organisations state that AI-ready data is one of the top three investment areas in the next two to three years.** This indicates that AI-ready data is a strategic priority for many organisations, there is a pressing need for focused efforts and investments to bridge the gaps between current capabilities and the demand to make data AI-ready.

Ensure that getting your data ready is aligned with your Use case.



Making your Data AI-ready

- 01 Run Copilot impact assessments to understand what data and apps will be surfaced.
- 02 Align Copilot with your business use cases (e.g. HR, Legal, Finance) to maximise value.
- 03 Implement information barriers and DLP policies to prevent data leaks through AI.



6. Framework for getting your data
AI ready for your Microsoft Estate?

Framework for getting your data AI ready for your Microsoft Estate?

With Microsoft Copilot, and Purview becoming central to how organisations adopt AI securely and responsibly, the groundwork lies in your data estate.

At bluesource and Lancia Consult, our role is to guide you through the practical steps needed to ensure your environment is not only ready for AI, but ready for safe, strategic, and scalable AI.

We break this down into 3 practical steps:

Identify your use case and strategy

01

Implement in a secure & compliant way

02

Validate and optimise adoption

03



1. Identify your use case and strategy - Lancia Consult

Getting your organisation ready for AI involves more than just technology; it needs a solid strategy, strong data foundations, and genuine adoption across teams. We guide you through a structured, practical process to ensure your business can unlock the full potential of AI.

1.1. Define your use case and strategy

The first step is identifying where AI can drive measurable business impact. We work with you to cut through the hype and focus on realistic, outcome-driven opportunities that align with your priorities. Using a structured AI assessment, we evaluate the core pillars of AI readiness within your organisation, identifying strengths, weaknesses, and opportunities for improvement.

How we help

Unclear or Overambitious Strategies

Disconnected, low-quality, or inaccessible data

Frustration with 'Black Box' AI

Low engagement with data tools

1.2. Conduct a discovery phase

To ensure alignment and focus, we begin with a discovery phase to define clear goals and assess current capabilities.

This involves

Stakeholder interviews to understand business priorities

Data audits to evaluate quality, accessibility, and readiness

Technology landscape reviews to highlight strengths and gaps

1.3. Measure and track success

Readiness isn't just about starting strong; it's about sustaining progress. Together, we define key success metrics tied to your business objectives.

These are

Established early
To provide direction from the outset.

Tracked throughout
To measure progress at every project phase.

Refined over time
to optimise solutions and ensure continuous improvement.

2. Implement in a secure & compliant way – bluesource

Copilot Data Security & Governance Assessment – Outline

2.1. Purpose

- Assess and strengthen Microsoft 365 and Copilot configurations to prevent data leaks and unauthorised access.
- Ensure underlying data security posture is robust before or during Copilot deployment.
- Provide actionable recommendations to align configurations with Microsoft best practices and compliance requirements.

2.2. Scope & Focus Areas

- Copilot admin & configuration review
- Data security posture review (SharePoint)**
- Purview governance & protection controls
- Emerging AI data security capabilities

2.3. Methodology

- Discovery & configuration review
- Automated Data Scan
- Analysis & Risk Assessment
- Governance Control Review
- Recommendation Development

2.5. Outcomes & Benefits

- Risk Reduction
- Governance Maturity
- Operational Confidence
- Visibility
- Future-Proofing

2.4. Deliverables

- Executive summary report
- Detailed file-level report
- Configuration gap analysis
- Governance improvement plan
- DSPM configuration guide

3. Validate and optimise adoption – Lancia Consult

Becoming AI-ready goes beyond simply implementing new technologies; it's about embedding solutions into everyday operations, ensuring your people can use them effectively, and measuring the value they create.

3.1. Embed solutions into daily operations

We work with you to make AI a natural part of your organisation's workflows.

— Comprehensive training — Continuous support — Change management

3.2. Drive adoption and engagement

For AI to deliver real value, it must be embraced by users. We focus on creating intuitive solutions, engaging with end users, and enabling them to fully integrate AI into their day-to-day activities.

3.5. Deliver tailored training sessions

- Drive AI adoption across the entire company.
- Align internal teams with AI strategy.
- Build internal support networks and collaborate with leadership to embed AI into daily workflows.

3.4. The outcome

By embedding solutions, supporting users, and measuring outcomes, we help you achieve:

- High user adoption rates
- Measurable business improvements

3.3. Monitor, measure, and optimise

To ensure impact and long-term success, we:

- Track performance
- Gather feedback
- Measure Success

Framework for getting your data AI ready for your Microsoft estate

AI Principles

1. Identify your use case and strategy

1.1. Define your use case and strategy

1.2. Conduct a discovery phase

1.3. Measure and track success

2. Implement in a secure & compliant way

2.1. Copilot data security & governance assessment – outline

2.2. Scope & focus areas

2.4. Deliverables

2.3. Methodology

2.5. Outcomes & benefits

3. Validate and optimise adoption

3.1. Embed solutions into daily operations

3.2. Drive adoption and engagement

3.3. Monitor, Measure, and Optimise

3.4. The Outcome

3.5. Deliver tailored training sessions



7. Conclusion

Conclusion

The rapid evolution of AI means that organisations can no longer afford to treat readiness as a side project. The winners in this new era will be those who combine ambition with discipline, those who invest in secure, high-quality data foundations, implement robust governance frameworks, and build a culture capable of adapting to continuous change.

Microsoft Copilot and related AI capabilities are not just productivity enhancers; they are catalysts for new ways of working, decision-making, and innovating. But, like any catalyst, they only work effectively when the underlying environment is primed. Poorly governed data, misaligned permissions, or a lack of AI literacy can quickly turn opportunity into risk.

The path forward is clear:

Align AI to strategic priorities – Focus on use cases that deliver measurable value.

Secure and prepare your data estate – Ensure accuracy, accessibility, and compliance.

Embed governance into the fabric of your operations – Make responsible AI a default, not an afterthought.

Equip your people – From leadership to front-line teams, AI adoption succeeds when humans and machines work together.

Conclusion

At bluesource and Lancia Consult, we have seen the difference this approach makes. Clients who take the time to prepare not only achieve faster AI adoption but do so with fewer setbacks, reduced risk, and greater confidence in their outcomes.

The question is no longer if you will adopt AI, it's whether you will do it in a way that is sustainable, scalable, and safe. This report has provided a blueprint; the next step is to put it into action. Your data is the foundation of your AI future. Let's make sure it's ready.

Sources

From Risk to Reward: The Business Case for Responsible AI 

Enterprises Are Implementing AI, But Not Everywhere (Yet) 

Hype Cycle for Artificial Intelligence, 2025 

Transforming our data culture with AI-ready data - Inside Track Blog 

Quick Answer: What Makes Data AI-Ready? 

