ADVANCE VISION
TECHNOLOGY

From exploration to expert:

A guide to AI maturity

How Microsoft Copilot can transform your business into a Frontier Firm

Microsoft 365 Copilot

We are entering a new reality. Every leader needs a new blueprint.

In the last year, we have seen generative AI initiatives move from experimentation to execution, with 45% of small and medium-sized business (SMB) leaders reporting that expanding team capacity with digital labor is a top priority in the next 12 to 18 months.[1]

This shift in business structure has created the **"Frontier Firm,"** an AI-organization where AI capabilities and agents amplify human expertise.

Frontier Firms **accelerate decision-making and innovation** with real-time insights. As a result, these hybrid human-AI teams **unlock agility, productivity, and entirely new business models.**

In this e-book, we will take a closer look at the framework your organization can follow as you increase your digital labor resources and the steps you can take in your AI maturity journey to reach the goal of becoming a Frontier Firm.

Frontier Firms are showing what's possible

A recent survey of Frontier Firm workers showed that:

71%

believe their company is thriving.[2]

55%

can take on more work.[2]

94%

are more optimistic about future work opportunities.[2]

1. "2025 Work Trend Index Highlights the Rise of Frontier Firms—Here's why SMBs May Have the Advantage," Microsoft, 2025.
2. "2025: The Year the Frontier Firm is Born," Microsoft, 2025.

Becoming Frontier: An AI adoption framework for your business

What matters most in your AI transformation journey is that you are empowering the people in your organization to focus on the tasks that matter most and improve how they get work done. There are four pillars you should measure to evaluate if you're reaching that goal:

Enrich employee experiences

- Can you hire the best people in your industry?
- Are you delivering secure, world-class tools for your employees?

Reinvent customer engagement

- Can your teams break through with their customers to drive pipeline and revenue growth and become more efficient at customer acquisition?
- Are you providing them with the tools they need to deliver a more personalized experience and solution?

Reshape business processes

- Do your employees have the tools they need to streamline operations and be more efficient?
- Can they be part of the transformation process by identifying new opportunities to innovate?

Bend the curve on innovation

- Are your employees able to use their technology solutions to generate new ideas that have a lasting impression on customers?
- Can they accelerate their creative processes and iterate faster than before?

Once you establish a strong adoption framework that can be used as your business grows, you can start on your AI transformation journey to reach the Frontier Firm state. Let's dive into what that journey can look like for your organization.

The journey to becoming a Frontier Firm

The process of becoming a Frontier Firm doesn’t happen overnight. There are several steps to take along the way to help you scale your AI maturity successfully.

Introduce → **Plan** → **Transform**

can walk you through each stage of this journey and offer the guidance and Microsoft Copilot solutions needed to become a Frontier Firm. Here’s how we do it.

Introducing generative AI solutions

As you consider the areas where AI can drive the most impact for your business, a free tool allows you to build your employees' AI awareness and skills while testing capabilities and realizing early wins in productivity and creativity.

Microsoft Copilot Chat is a free, secure chat powered with the GPT-5 model that enables your employees to:

- Generate chat results from the latest web information and your business data
- Create, discover, and pin web-grounded agents
- Collaborate on content in real-time with AI and their teammates through **Copilot Pages**
- Upload files and access Code Interpreter and image generation*
- Experiment with AI tools securely with enterprise data protection, IT management controls, and agent management
- Access Copilot Chat in Microsoft 365 apps to help you right where you're working to reduce app switching

**Limits apply.*

There are several ways your business can start testing Copilot Chat:

Jumpstart the creative process
- Create a marketing campaign
- Generate high-quality images
- Propose new product names

Create strong first drafts
- Write a strategy document
- Prepare a meeting agenda
- Draft a customer email

Query uploaded work documents
- Summarize key points in Microsoft Word
- Analyze data from Microsoft Excel
- Get Microsoft PowerPoint suggestions

Expedite research
- Surface current market trends
- Find the latest industry stats
- Summarize expert reports

Embedding AI workflows across your organization

In some instances, your organization may have already started experimenting with AI, and you are ready to introduce more advanced AI workflows for your employees. The expanded capabilities of Microsoft 365 Copilot increases the productivity and value your business can realize with AI.*

- Get AI-powered search across all your work data, including line-of-business applications and services using 100+ connectors.
- Create AI-generated images, posters, banners, and videos that align with your organization's brand identity.
- Centralize project-related content of various types for targeted AI assistance in Microsoft Copilot Notebooks.
- Get comprehensive access to prebuilt, specialized, and custom agents grounded in your work data to boost efficiency.
- Take advantage of SharePoint Advanced Management and Copilot Analytics to measure usage, adoption, and ROI as AI becomes further embedded into your workflows.

**A separate license for a qualifying Microsoft 365 plan is required to purchase Microsoft 365 Copilot.*

> "We've saved ourselves probably USD500,000 in programming services that we don't need because we can use Copilot instead."
>
> **—Sally Mizell,**
> *Principal and Cofounder, ICG*

Planning and scaling your generative and agentic AI use

As you assess your AI strategy, you can continue nurturing your employees' AI expertise and confidence by giving them access to use **prebuilt agents** available in Microsoft 365 Copilot.

Researcher agent helps you tackle complex, multi-step research and delivers greater quality and more accurate insights than before

Analyst agent uses chain-of-thought reasoning to progress through problems step-by-step to refine reasoning and provide a high-quality answer that mirrors human analytic thinking

Facilitator agent enables you to stay on track and focused in Microsoft Teams meetings by taking real-time notes, tracking proposed solutions and questions, and generating meeting summaries.

As your business grows, you can also build custom agents using Microsoft Copilot Studio and **access a wide ecosystem of third-party agents** to support your employees as they continue to increase their reliance on Copilot to enhance their daily workflows.

Learn more about how agents can change the way you work.

> "Copilot's meeting recaps are extremely helpful. [...] Copilot has been great in providing key action points automatically. That has saved us a lot of time and helped us improve processes and documentation."
>
> **—Dan Qarkaj**
> *E-commerce Trading Manager, The Rider Firm*

Transforming your self to be on the forefront of digital labor innovation

When you've evolved in your AI maturity journey, your business will operate as an AI-first organization with hybrid human and agent teams.

For these teams to work successfully, every employee will need to be an agent boss: someone who builds, delegates to, and manages agents to amplify their impact.[1]

3. Internal Microsoft study in partnership with PSB Insights. Based on a sample size of 351 SMB employees, including 176 information workers and 175 decision makers.

And we're seeing that many companies like yours already depend on Copilot to reach this state:

66%

of SMBs are using Copilot to **manage projects and streamline task management.**[3]

52%

of SMBs are using Copilot to generate creative ideas to assist with the **content creation process.**[3]

55%

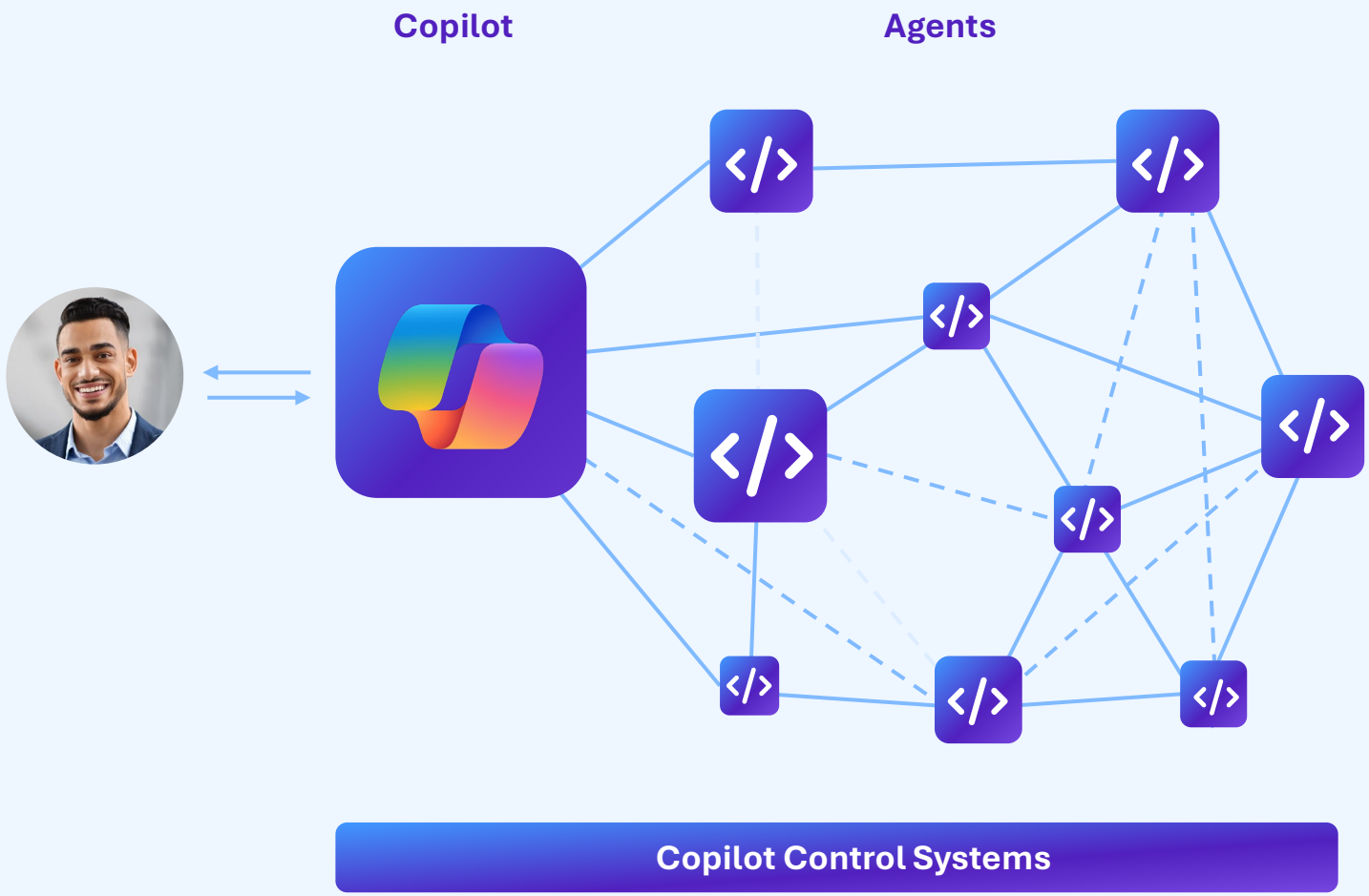
of SMBs are using Copilot agents to **automate tasks.**[3]

Microsoft 365 Copilot:

Your UI for AI

As we've seen throughout this e-book, no matter what stage you're at in the AI journey, Microsoft 365 Copilot is your system to unlock more value to grow and run your business. Copilot offers intelligent assistance and improved collaboration for you and your employees with access directly in the tools you already use every day. Go beyond productivity with Copilot to deliver secure, scalable impact for your business, by:

- Driving impact with human and AI collaboration
- Automating processes to enhance business efficiency
- Protecting your data with secure, enterprise-ready AI



Microsoft 365 Copilot is built on trust

Microsoft 365 is built on existing commitments to data security and privacy, enabling you to always stay in control.

- With Copilot, it's your data and you control all your data.
- Your data is not used to train foundation large language models, including those used by Microsoft 365 Copilot.
- Copilot honors your existing **Microsoft 365 permissions** and policies for data access.
- You can control your data's location.
- You're protected against AI security and copyright risks with the **Microsoft Customer Copyright Commitment**.

On top of these data security and privacy commitments, the Microsoft Copilot Control System makes it easy for IT to manage deployment, agent lifecycle, and usage analytics to support secure, scalable adoption.

"We've avoided AI solutions until now because our industry is so regulated that we can't afford to import data into outside solutions. But Copilot keeps all the data supplied to us by customers inside our own system so they can trust what we do with it. Plus, when we use it, it's right there in Microsoft 365."

—Philip Burridge
Company Director, Morula Health

The future is human-led, agent-operated

Microsoft 365 Copilot is more than a productivity tool for growing businesses like yours. It is a system that enables human and AI collaboration that transforms how work gets done. As you progress in your path to becoming a Frontier Firm, Copilot offers the capabilities, flexibility, and scalability to test use cases, implement generative and agentic AI capabilities, and empower every employee to grow into a new role of being an agent boss.

Whether you're just getting started or scaling your AI transformation, can help your organization get ready, develop your adoption strategy, prepare your environment, train your employees to help support a secure Copilot deployment, and maximize impact.

Let's start your AI journey. Contact us today to take the next step with Microsoft 365 Copilot and agents.

Talk to our expert today