Copilot AI Readiness Assessment

FREE ONE HOUR SESSION

Is Your Organization Ready for AI?

Many organizations are excited about Microsoft Copilot—but without the right data, governance, and processes, AI can create more risk than value.

This free 1-hour assessment helps identify where you stand.

What we review

Data & CRM Readiness	Data quality, duplicates, and structure CRM data used by Copilot
Security & Governance	Access controls and permissions Sensitive data exposure risks
Processes & Use Cases	High-value Copilot use cases (Sales, Service, Field Service) Automation opportunities

What you will gain

- Identify readiness gaps across data, security, and processes
- Evaluate your current Microsoft Dynamics 365 environment
- Highlight quick-win opportunities for Copilot
- Understand data and governance risks
- Receive clear next steps

What you will walk away with

- AI Readiness snapshot
- Top risks and gaps
- Quick wins
- Recommended next steps

AI success depends on clean data, strong governance, and clear use cases—not just turning Copilot on.

Get Started – It's Free

60-minute session | No obligation | Immediate insights

Ken Farmer

PRESIDENT

Ken@dyn365pros.com

(760) 585-4250

2604-B El Camino Real #251
Carlsbad, CA 92008