



2026 —

Technology Modernization Playbook

Powered by AI



We focus on your technology,
so you can focus on your business.

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LastPass...

The Four Pillars of AI Readiness

A sequence, not a menu. Each pillar makes the next one safe.

1

Secure It

Lock down identities, permissions, and data before AI can touch them.

2

Manage It

Keep devices, cloud, and infrastructure healthy enough to run AI at scale.

3

Monitor It

Prove compliance stays intact as threats and regulations evolve.

4

Use It

Turn a secured, governed environment into a productivity force multiplier.

Sell Programs, Not Parts

Lead with an outcome-based package per pillar. Offer the individual assessments inside as add-ons.

AI Foundation

P1 · SECURE

Access, identity, data classification & collaboration review → Readiness Scorecard, Risk Report & Roadmap.

AI Security & Mgmt

P2 · MANAGE

Pen test, MDR, Windows 10/11 readiness, Exchange migration, cloud posture & managed network.

AI Compliance

P3 · MONITOR

Continuous compliance monitoring, framework alignment & 24x7 alerting.

AI Adoption

P4 · USE

Copilot readiness & deployment, workflow automation, Dynamics 365 + the 10 AI use cases.

Every individual assessment is also available stand-alone as an add-on.



PILLAR ONE

Secure It

AI is only as trustworthy as the data it can access. Before enabling AI across your organization, ensure identities, permissions, collaboration, and sensitive information are properly secured.



SECURITY & COMPLIANCE

Compliance & Security Copilot

Answer compliance questions, generate documentation, and surface control gaps — grounded in your own policies.

THE CHALLENGE

Teams lose days pulling evidence every audit cycle, answering the same control questions over and over.

INVESTMENT

45+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Answers audit questions in seconds, not days
- ✓ Drafts policies and control documentation on demand
- ✓ Maps evidence to HIPAA, SOC 2, and CMMC
- ✓ Caches answers by control so repeat audits don't repeat work

"Your auditors ask the same questions every year — answer once, cache it, and reuse it."

OBJECTION

"Our compliance docs are already in SharePoint."

→ Exactly — this makes them answerable: tag by control and the Copilot cites the right policy instead of your team hunting for it.

BEST FIT

Regulated Industries

CMMC / HIPAA / SOC 2

Upcoming Audit

Policy-Heavy Orgs



LEGAL & COMPLIANCE

AI Legal & Contract Automation

Review contracts in minutes, not days — with risk flagging and obligation tracking built in.

THE CHALLENGE

How many contracts auto-renewed last year because no one was tracking them? Manual review is slow and misses risk.

INVESTMENT

50+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Cuts contract review time 70–80% per document
- ✓ Flags risky terms before execution, not during a dispute
- ✓ Eliminates unwanted auto-renewals
- ✓ Creates a full audit trail for M&A diligence

"BigLaw charges \$500–800/hour for review; this does the first pass in minutes for a fraction of the cost."

OBJECTION

"We still need lawyers to review contracts."

→ Yes — for high-stakes agreements. But a \$600/hr attorney on a routine NDA? This handles routine; counsel handles strategic.

BEST FIT

In-House Legal

Procurement

High Contract Volume

M&A Activity



PILLAR TWO

Manage It

Modern AI environments require continuous operational management. Devices, identities, cloud infrastructure, and business applications must remain healthy, secure, and current to support AI at scale.



FINANCE & OPERATIONS

AI Finance & AP Automation

Automate invoice intake, approvals, and spend analysis — and cut manual AP work.

THE CHALLENGE

If someone is keying invoices into a system, that's automatable — and it costs more in labor than the solution does.

INVESTMENT

60+ hours to build

Built on Copilot Studio, Power Automate & AI Builder
— grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Processes hundreds of documents per hour
- ✓ Reduces document-processing errors by 85–95%
- ✓ Accelerates AP cycles and clarifies spend visibility
- ✓ ROI typically realized within 3–6 months

“This is the highest-volume, lowest-glamour work in your business — perfect AI territory.”

OBJECTION

“We already use RPA for this.”

→ RPA breaks when formats change; AI understands intent and adapts — it's RPA that doesn't need babysitting.

BEST FIT

Finance & Accounting

High Invoice Volume

Multi-Vendor Ops

Month-End Spikes

AI Email Triage & Intelligent Routing

Automatically classify inbound email and route it to the right person — instantly, 24/7.

THE CHALLENGE

Misrouted email is the silent tax on response time — urgent requests sit in the wrong inbox for hours.

INVESTMENT

60+ hours to build

Built on Copilot Studio, Power Automate & AI Builder
— grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Auto-routes the majority of inbound email
- ✓ Cuts response time from hours to minutes
- ✓ Frees staff from manual inbox triage
- ✓ Rules-first design cuts AI usage 60–80%

“Every low-confidence email still goes to a human with the AI’s best guess attached — not a black box.”

OBJECTION

“Rules can already do this.”

→ Rules break on ambiguity; we run rules first for speed and cost, then let AI handle edge cases with a human fallback.

BEST FIT

100–1,000 Employees

High Email Volume

Remote / Hybrid

30–60 Day Deploy



KNOWLEDGE & SEARCH

AI Document Management & Knowledge

Search, summarize, and compare knowledge across every document your team owns.

THE CHALLENGE

Your knowledge already exists — it's just buried across sites and drives where no one can find it.

INVESTMENT

35+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Finds the right document in seconds, not minutes
- ✓ Summarizes long contracts and reports on demand
- ✓ Compares versions and files to surface differences
- ✓ Turns institutional knowledge into an answerable resource

"This turns your SharePoint into something you can just ask."

OBJECTION

"We already have SharePoint search."

→ Keyword search finds files; this understands them — summarizing and answering, grounded only in what the user may see.

BEST FIT

Document-Heavy Teams

Distributed Knowledge

Professional Services

Legal & Compliance



PILLAR THREE

Monitor It

Security is not a one-time project. Continuous monitoring ensures AI environments stay compliant, resilient, and protected as threats and regulations evolve.

AI Executive Reporting Automation

Automated financial summaries, KPI dashboards, and executive-ready reports — every month.

THE CHALLENGE

'Why did revenue dip last month?' is a three-day data pull today. Leaders wait on analysts to answer basic questions.

INVESTMENT

25+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Eliminates the analytics bottleneck — minutes, not days
- ✓ Lets non-technical leaders self-serve insights
- ✓ Surfaces revenue trends, anomalies & risks automatically
- ✓ Reduces dependence on BI contractors

"CEOs and CFOs can ask questions directly — no analyst required. That changes how fast you decide."

OBJECTION

"We have Power BI / Tableau already."

→ Those visualize data; this lets you talk to it. They're complementary — we integrate with what you have.

BEST FIT

Data-Rich Businesses

Executive Teams

Operations Leaders

Finance & Revenue



PILLAR FOUR

Use It

Once your environment is secure and governed, AI becomes a force multiplier — improving productivity, automating workflows, and accelerating business outcomes.

AI Sales Pipeline Acceleration

An AI co-pilot that handles the admin and surfaces the opportunities.

THE CHALLENGE

Reps spend only 34% of their time actually selling. This attacks the other 66% — the admin, the CRM updates, the missed follow-ups.

INVESTMENT

40+ hours to build

Built on Copilot Studio, Power Automate & AI Builder
— grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Saves reps 5–7 hours/week on CRM admin
- ✓ Increases pipeline visibility & forecast accuracy 30–40%
- ✓ Flags at-risk deals before they slip
- ✓ Speeds new-rep ramp by surfacing winning patterns

"If AI helps one rep close one more deal a quarter, it pays for itself many times over."

OBJECTION

"Our reps won't use new tools."

→ Adoption is driven by value — when AI writes their follow-ups and updates the CRM for them, they protect it, not resist it.

BEST FIT

B2B Sales Teams

Dynamics 365

10+ Reps

Complex Cycles

AI HR & Employee Onboarding

A white-glove employee experience at scale — without scaling your HR team.

THE CHALLENGE

HR spends half its day answering 'how many vacation days do I have?' while onboarding quality quietly decides who stays.

INVESTMENT

30+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Cuts routine HR inquiries 60–70%
- ✓ Cuts time-to-productivity for new hires by 40%
- ✓ Consistent, compliant policy answers for everyone
- ✓ Scales HR capacity without adding headcount

"The first 90 days decide whether a hire stays — consistent onboarding directly drives retention."

OBJECTION

"HR is too sensitive to automate."

→ We automate lookups and logistics, not empathy — complex, sensitive conversations stay with HR.

BEST FIT

100+ Employees

High Hiring Volume

Multi-Location

HR Teams of 2–8

AI Project Management & Delivery

Automate planning, status reporting, and risk tracking — from kickoff to delivery.

THE CHALLENGE

Teams spend 30% of the week in meetings — but how much of it results in documented, tracked action?

INVESTMENT

30+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Auto-generates task lists and owners at kickoff
- ✓ Makes 'what was decided?' instantly searchable
- ✓ Keeps Planner / Project Online current automatically
- ✓ Surfaces top risks from missed deadlines

"How much of your PMs' week goes to status updates? This drafts them from live project data."

OBJECTION

"We already use Planner / Project."

→ This sits on top of it — reading the data you already keep and turning it into task lists, status emails, and risk flags.

BEST FIT

Professional Services

Project-Based Teams

PMOs

Fast-Growing Teams



CUSTOMER EXPERIENCE

AI Customer Support & Experience

Deflect support volume, accelerate resolutions, and scale CX without scaling headcount.

THE CHALLENGE

Customers don't want to wait on hold — they want answers in 30 seconds, on every channel, at any hour.

INVESTMENT

55+ hours to build

Built on Copilot Studio, Power Automate & AI Builder — grounded in your data.

WHAT IT DOES FOR THEM

- ✓ Deflects 50–70% of tickets without human help
- ✓ Delivers instant 24/7 responses — no hold times
- ✓ Cuts handle time 35% on escalations (full context)
- ✓ CSAT improves 15–25 points within 90 days

“Modern AI chatbots have nothing in common with the bots people hate — conversational, contextual, brand-consistent.”

OBJECTION

“Our customers hate bots.”

→ They hate bad bots. This understands context, escalates gracefully, and actually resolves issues.

BEST FIT

Retail & E-Commerce

SaaS & Tech

Financial Services

High-Volume Support

Every Capability We Deliver

The 10 use cases in this booklet run on a full stack of assessments, managed services, and partner tools spanning all four pillars.

01 · SECURE IT

Access Control · Identity Protection · Data Classification · Secure Collaboration · Copilot AI Readiness · Managed Copilot Deployment

02 · MANAGE IT

Pen Test & Vuln Scan · Windows 10/11 Upgrade · ReadyHelp Helpdesk · Exchange Migration · GCC / GCC-High · Cloud Posture · Endpoint MDR

03 · MONITOR IT

Monitoring & Alerting · Continuous Compliance · Framework Alignment (CMMC, NIST, SOC 2, HIPAA)

04 · USE IT

Workflow Automation · Microsoft Dynamics 365 · + the 10 AI use cases featured in this booklet

OPERATIONAL TECHNOLOGIES

ReadyQuote SOW & Quoting · M365 Licensing Strategy · Security Awareness Training · Free Network & Server Assessments · Password Management · Re-Certified Hardware · HaloITSM · Security Assessment



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to keep your systems secure, reliable and performing.



Monitoring
& Support



Security
Management



System
Management



Backup &
Disaster Recovery



Reporting &
Performance

HARDWARE / SOFTWARE LICENSING

Access the right
technology with
trusted vendors,
competitive pricing
and expert guidance.



Hardware Solutions



Software Licensing



Cloud Subscriptions



Volume Licensing
& Renewals



Vendor Management