

Ready for AI? Why Governance Is the Missing Piece in Your Microsoft 365 Copilot Strategy

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This is the last of a 3-part series examining redundant, obsolete, and trivial (ROT¹) information assets, the risks ROT presents to your organization, and how information governance (IG) is essential to reduce ROT and realize the benefits of AI.

In the first part of this series, "[Why Your Digital Clutter Is Costing You ROI¹ — and What to Do About It](#)," I talked about cleaning up ROT. In the second part, "[Your Information Architecture Is Failing You—Here's What to Do About It](#)," I talked about fixing the foundation and re-architecting your information landscape in order to move from ROT to ART content. However, here's the key determinant of success: AI won't succeed without governance.

As more organizations adopt Microsoft 365 Copilot, many assume the tool alone will solve productivity and knowledge management challenges. But Microsoft 365 Copilot isn't a magician — it can't organize your content, secure your data, or classify documents for you. To truly succeed with AI, you need to start where it matters most: governance.

Microsoft 365 Copilot Can't Fix What It Can't Understand

Microsoft 365 Copilot is powerful — but it's only as smart as the content it can access and the context it's given. Without proper governance, Microsoft 365 Copilot may:

- Surface outdated or inaccurate information
- Pull from non-compliant or sensitive sources
- Provide poor recommendations due to incomplete content
- Amplify security and privacy risks through incorrect permissions and access rights

In other words, without governance, you risk enabling AI-powered chaos and exposing sensitive information, at scale.

Governance: The Foundation for Secure and Compliant AI

Governance helps ensure that the right people access the right content at the right time — and with the right security and permissions in place to mitigate the risks of data losses and data breaches. It's what turns AI from a liability into a strategic advantage. A governance-first approach to Microsoft 365 Copilot means:

¹ Redundant includes duplicate, obsolete includes out-dated, and transient includes temporary and trivial content.

Defining what content is accessible to Microsoft 365 Copilot — and what shouldn't be accessible (e.g., personally identifiable information)

- Classifying and labeling sensitive data using Microsoft Purview
- Applying lifecycle policies, so Microsoft 365 Copilot accesses accurate, reliable, and trusted (ART²) content, instead of ROT
- Structuring information so prompts yield meaningful and compliant outputs
- Engaging end-users with clear guidelines and ethical AI training

Without this foundation, Microsoft 365 Copilot can't deliver meaningful outcomes and achieve the expected ROI — and may even expose your organization to unnecessary risk.

Governance-First Approach to Microsoft 365 Copilot

We keep hearing that true AI success is built on understanding the technology, trusting the content, structuring the information architecture, and developing a strategy with defined objectives and key results (OKRs) that deliver outcomes and achieve the expected ROI. This is “table stakes,” but unfortunately, many management teams streamroll ahead without governance in place. With that in mind, consider the following next steps to help you start your AI initiative to adopt Microsoft 365 Copilot confidently and responsibly ... and while mitigating risks:

- **AI readiness:** For your AI initiative, start with downloading AIIM's "[Organizational Readiness for Generative AI: Leveraging Unstructured Data for Success](#)" white paper and assessment tool kit. For more information regarding AIIM's white paper, click [here](#). Do your due diligence by consulting sources such as other industry associations, vendors, academia, standards bodies, and governmental organizational. Review their assessment tool kits and identify the one that is “fit-for-purpose.” The assessment tool kits will cover many aspects of readiness at varying degrees of detail.
- **Skills, knowledge, and experience:** Having or acquiring team members with the appropriate skills, knowledge, and experience is essential for your AI initiative. If they are not available in-house, then either hire them, or engage with a vendor with the skills, knowledge and experience. Your blended team should have both internal and external resources. The team will plan and complete a step-by-step governance audit, perform governance gap analysis, and develop an implementation roadmap, with defined OKRs. Keep in mind that the OKRs must align with your organization's strategic plans and business goals.
- **Organizational change management (OCM):** We are constantly hearing and reading about the profound changes AI will make to an organization's operations and business processes. I cannot emphasize OCM enough, because the changes to the organization will be broad-ranging, in order to realize the benefits of AI. So, consider constituting a Change Center of Excellence (CCoE) for AI adoption. The CCoE is laser-focused on all aspects of AI and is a “clearing house” of resources, training material, job aids, etc. The CCoE is active in relationship building, stakeholder management, peer-to-peer support, etc. Furthermore, a well-structured CCoE amplifies (i.e., communicates)

² Relevant can include reliable content.

success stories, sustains momentum, and responds quickly to incidents and negative gossip that can de-rail the AI initiative.

- **Organizational readiness:** To support OCM, you should remember that AI is **not** just about technology. While it is true that technology is an enabler, it is people who use the technology to consume the content, based on policies and processes. This forms a “conceptual” quadrant consisting of people, policies, processes, and content. Use the quadrant concept as a starting point to ask questions via three “readiness” lenses — strategic, tactical, and operational. Examples of questions to help assess readiness are: “Do we have the right people?” “Do we have gaps in our policies?” “Which of our processes can AI help improve?” “Do we have content that is ready and safe for AI to consume?”

Note that the next steps above will have some overlap, thereby giving you a 360-view of governance for your AI initiative and journey to implement Microsoft 365 Copilot in the context of your organization.

Where Governance Meets Innovation

AI in the workplace is here to stay—but success depends on the groundwork you lay today:

- Cleaning up ROT to reduce risk and costs due to digital clutter
- Identifying ART content to help realize the benefits of using Microsoft 365 Copilot
- Building a strong foundational IA that is usable, useful, and scalable
- Establishing an effective governance structure to sustain the AI initiative

With a governance-first approach, you can future-proof your AI initiative and realize its benefits — namely, safe, smart, AI adoption at scale.

Take the Next Step

The reality today is that the scope, speed, and scale of AI’s impact is increasing. Consequently, many organizations have already embarked on their AI journey. Whether you are starting to crawl, or taking baby steps, or are trying to walk faster, but not going anywhere, HELUX has the deep knowledge and experience to help you along your AI journey. This includes a suite of tools that can help implement an IA that is future-proof and can help improve the ROI of your investment in Microsoft 365 Copilot. Visit www.helux.ai to learn how HELUX.ai can help your organization prepare to successfully adopt and use Microsoft 365 Copilot.

Amitabh Srivastav has deep knowledge of IG / IM and is a transformation strategist with over 25 years of PM experience. He has a strong portfolio of qualifications in strategy, digital transformation, AI risk management, and content services. As the CDO & VP, Compliance & Risk Management at HELUX.ai, he advises clients on emerging technology trends, navigating the evolving technology landscape, and implementing digital transformation strategies by leveraging Microsoft solutions. Over his long career, he has managed and implemented many ECM projects with an aggregated value of approx. \$100 million. Amitabh is a highly regarded speaker and thought leader within the industry, having presented at leading conferences such as ARMA

International, ARMA Canada, PMI, and M365 SharePoint. He is a member of ARMA, PMI, AIIM, ISACA. Amitabh is also deeply involved in shaping the future of IG / IM through his work as a member of various AIIM and ARMA committees, a community member of AIIM True North, and a board member of ARMA International Education Foundation. He is also a member of the Standards Council of Canada as a delegated member on ISO/TC 171/SC 2/WG 11 committee that update ISO 10244, 12029, 18759, 18829, and 22957. Amitabh hosts webinar discussing digital transformation and AI at AIIM True North. As well, he has authored and contributed to several articles, textbooks, publications, and the CIP and IGP exams. Amitabh has advance degrees in Computer Science and Project Management, and a Bachelor of Computer Science (Honors) degree. His certifications include PMP, CIP, IGP. Amitabh is an AIIM Fellow and AIIM Ambassador. You can contact Amitabh at amitabh@heluxsystems.com or www.linkedin.com/in/amitabhsrivastav.

About HELUX

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