

roadmap



AI, Automation and Orchestration Intelligence Roadmap

The path to successful SME and mid-
market operating intelligence

Commercial Transformation



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AI readiness looks different for every SME and mid-market organisation. For NSG, the question is not whether a business should “do AI”. The sharper question is whether its commercial operating model is ready to use AI, automation and orchestration intelligence to remove friction, improve control and create measurable value. This roadmap reframes AI adoption around Commercial Transformation: the practical redesign of workflows, data, governance, revenue movement and management visibility so Microsoft technology can support real operating improvement rather than becoming another disconnected tool.



Executive summary

AI is reshaping how work gets done, but most SME and mid-market businesses do not need an abstract AI transformation programme. They need a more controlled commercial operating model: clearer workflows, better data, stronger handoffs, faster decisions and practical automation inside the tools they already use. For many UK firms, that means using the Microsoft estate more deliberately across Microsoft 365, Copilot, Power Platform, Azure AI, Fabric and the surrounding governance model.

The key to successful Commercial Transformation is operational readiness: the organisation's ability to integrate AI, automation and orchestration intelligence into business operations without creating risk, confusion or expensive theatre. This readiness is shaped by five essential drivers: commercial strategy, Microsoft technology and data strategy, AI and orchestration experience, operating model and culture, and AI governance.

Together, these drivers form a practical framework for assessing where a business stands today and what it needs to do next. When developed in parallel, they help leadership move faster, reduce manual drag, improve management visibility, protect the business and realise value from Microsoft-aligned intelligent solutions.

We work from

real-world

commercial transformation patterns across SME and mid-market firms where growth, process, reporting and technology have become too fragmented to scale cleanly.



Five drivers of AI, automation and orchestration readiness



Commercial strategy

How AI, automation and orchestration support growth, control and operating outcomes.



Microsoft technology and data strategy

The data, permissions, systems and Microsoft architecture needed to run intelligent solutions safely.



AI, automation and orchestration strategy

The use-case discipline, process logic and repeatable delivery model needed to create sustainable value.



Operating model and culture

The ownership, skills, behaviours and management cadence that determine adoption.



AI governance

The controls, accountability and review structures that protect data, decisions, customers and teams.

To understand these drivers in an NSG context, the starting point is simple: most SME and mid-market firms are not short of software. They are short of orchestration. Systems exist, but they do not always work together. Teams are busy, but too much effort leaks through manual handoffs, duplicated data entry, document chasing, weak reporting and unclear ownership. Leadership wants AI, but the organisation often lacks the process, data and governance foundations required to use it properly.



Driver 1:

Commercial strategy

Ensure your AI projects serve strategic business objectives

Successful Commercial Transformation is not pursued through random pilots, prompt workshops or tool-led experimentation. It should be tightly aligned with the commercial objectives of the business: better pipeline quality, stronger revenue control, faster service delivery, reduced manual effort, cleaner reporting, improved customer experience and more confident leadership decisions.

For SME and mid-market organisations, this alignment requires more than excitement about Copilot or automation. It demands leadership buy-in, a clear view of the operating problem and a shared definition of success. AI and automation should not be positioned as technology for its own sake. They should be positioned as a way to improve the commercial operating model: how the business creates demand, qualifies opportunities, moves work across teams, manages risk, serves customers and makes decisions

Key takeaways

Get support from leaders and executives

How AI, automation and orchestration support growth, control and operating outcomes.

Clearly define the problem and the solution

The data, permissions, systems and Microsoft architecture needed to run intelligent solutions safely.

Align everyone on one vision for success

The use-case discipline, process logic and repeatable delivery model needed to create sustainable value.





Ensure your AI projects serve strategic business objectives

One of the most critical enablers of AI and automation readiness is leadership buy-in. In an SME or mid-market firm, this means more than verbal support from the owner or MD. It involves active sponsorship, visible prioritisation and a willingness to make operating decisions that technology alone cannot solve. When leadership positions AI and automation as part of commercial control, rather than as an isolated technology initiative, the rest of the organisation understands that the work matters.

Leaders in growing firms also play a practical role in securing budget, assigning internal owners, managing risk tolerance and aligning cross-functional teams. Without this sponsorship, Microsoft tools often become shelfware, Copilot usage remains shallow, Power Automate flows become tactical fixes, and data foundations stay fragmented. In contrast, when executives and functional owners are engaged, AI and automation become part of business planning, KPI management, workflow design and operating cadence.

“I’ll tell the leadership team, ‘It costs this much, it needs to do this and I know we have the funds.’ What’s the reason you would push back on purchasing this product? They don’t see the actual value. That’s the more important thing.”

Commercial Director, SME Technology Services

“The more you can make something visible and show that it’s valued, the better. I wanted to have a holistic program that involved leadership This gives the perception that leadership values it. There’s social pressure to adopt these tools. Alignment and messaging at multiple levels accelerates adoption because it’s clear that everyone values it.”

Commercial Director, SME Technology Services



“I think [we] need to have that buy-in from the CEO and the investors to really accelerate what we’re doing in AI.”



Identify the specific commercial problem you plan to solve with AI

A critical step in building readiness is understanding the problem you are solving. For SME and mid-market firms, the problem is rarely “we need AI”. The problem is usually slower and more practical: too much manual administration, inconsistent sales qualification, document-heavy workflows, weak management information, overloaded service teams, poor handoffs between sales and delivery, or leadership decisions being made from spreadsheets that no one fully trusts.

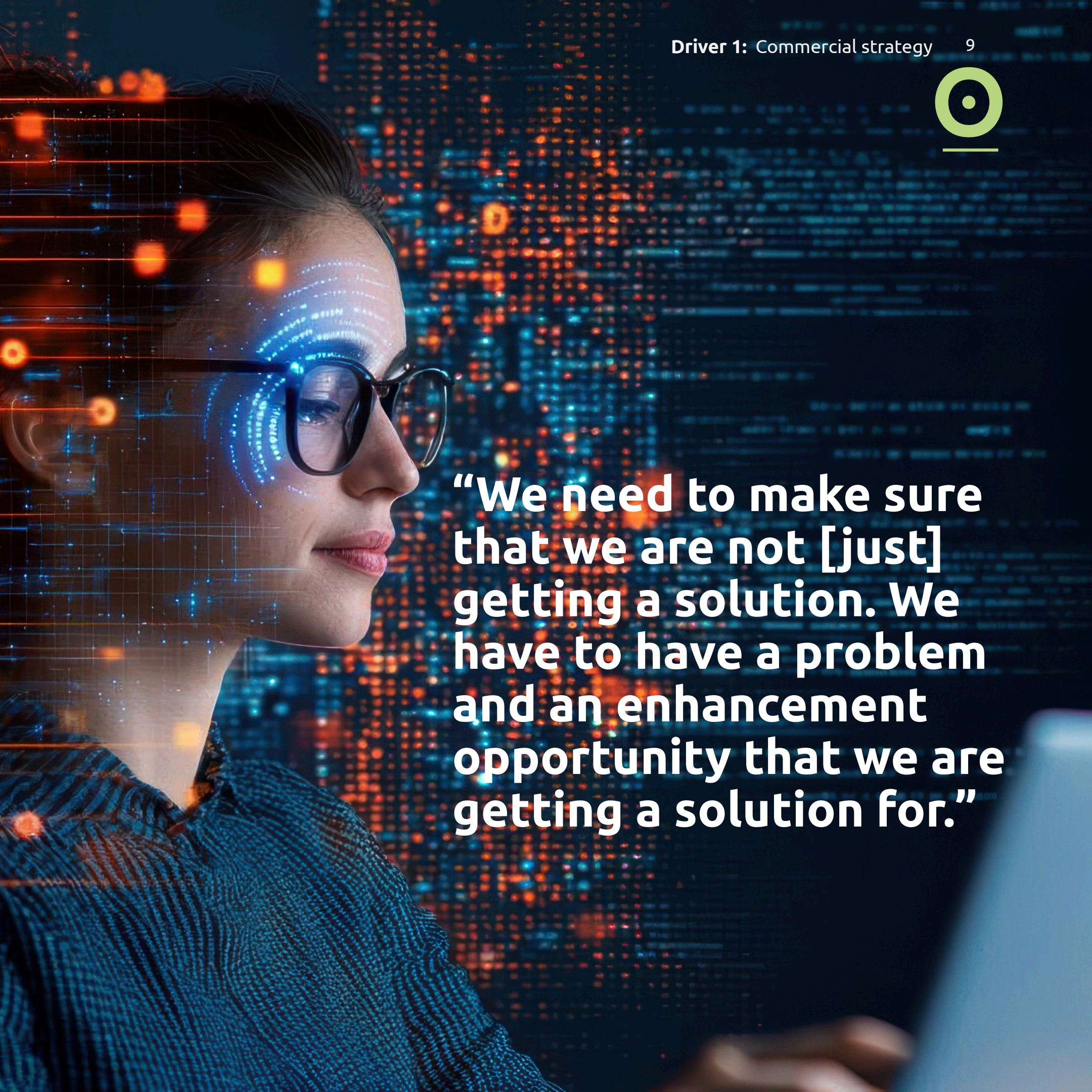
The strongest AI and automation projects start by defining the use case, the operating problem, the current cost of friction and what success would look like. Whether the goal is to automate proposal assembly, improve case triage, summarise documents, accelerate onboarding, reduce rekeying, improve reporting or support sales teams with better knowledge retrieval, the work must be grounded in measurable value.

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“You have to have something real. You have to have something that you can show ... and explain in very detailed ways. It can’t be just a fluffy kind of idea – it needs to be a very certain thing [It needs to have] some hint of an ROI. Like, we’re solving this problem faster. We’re improving our users’ lives by doing x, y and z. We are accomplishing this task much faster. Something like that needs to be stated.”

**Commercial Director,
SME Technology Services**



“We need to make sure that we are not [just] getting a solution. We have to have a problem and an enhancement opportunity that we are getting a solution for.”



Establish a shared vision of what success looks like

Commercial Transformation starts with a clear, shared vision for success that aligns leadership, teams and technology initiatives around common outcomes. For an SME or mid-market business, this may mean improving forecast confidence, reducing administrative effort, speeding up onboarding, increasing proposal throughput, reducing processing errors, improving customer response times or creating cleaner reporting for weekly management decisions.

Without this alignment, AI and automation efforts can fragment across departments. Sales may use AI for content. Operations may automate isolated tasks. Finance may build reporting workarounds. IT may focus on licence control. None of those activities are wrong, but without a shared commercial vision they rarely become a coherent operating capability.

A shared vision gives the business a benchmark for measuring progress. It also gives NSG a clear advisory position: define the business outcome first, then decide whether the right answer is Copilot, Power Automate, Power Apps, Azure AI Document Intelligence, Azure AI Search, Fabric, process redesign, data cleanup or no AI at all.

Success looks different from one organisation to the next and what it looks like may change over time depending on your unique business challenges and objectives.



Driver 2:

Microsoft technology and data strategy

Establish the foundation needed to deploy AI, automation and orchestration at scale

Turning AI ambition into practical business value is only possible with the right technology foundation and trusted data. While commercial strategy sets the direction, Microsoft technology and data strategy determines whether an organisation can move from experimentation to controlled impact. For many SME and mid-market firms, the opportunity is already inside the Microsoft estate they pay for: Microsoft 365, Teams, SharePoint, OneDrive, Power Platform, Dynamics, Azure, Fabric and Copilot.

But technology value depends on readiness. Permissions, data quality, document structure, workflow ownership, reporting logic and governance all matter. By treating data as a strategic operating asset and Microsoft as a connected business platform rather than a set of separate applications, the organisation becomes better positioned to innovate responsibly, automate safely and realise measurable value from Commercial Transformation.

Key takeaways

Effective AI solutions need high-quality business data

Ensure your data is consistent, governed and accessible so Microsoft AI and automation can produce reliable outcomes.

Preparing data for AI is an ongoing process

Continuously refine documents, permissions, metadata, reporting logic and data ownership.

Know when to configure, automate, buy or build

Consider whether the business needs Copilot enablement, Power Platform automation, a specialist Microsoft partner, or a custom Azure AI solution.



“We need to make sure that we have the technical capabilities. Do we have the data? Because in some cases, yes, we have the data, but the data is not right [In] terms of the data format [or] structure ... we need to have a full audit ... because garbage in, garbage out.”

**IT Director,
SME Financial Services Firm**

“[My best] advice would be to prioritise your data. Make sure that you have consistent data quality [and] your data infrastructure represents the AI stack.”

**Head of Digital Operations,
Automotive Services Group**

Focus on the quality and consistency of your business data

SME and mid-market leaders often underestimate how much AI value depends on information quality. Microsoft Copilot, Azure AI Search, Fabric, Power BI and automation workflows all depend on content, permissions, metadata and source-of-truth discipline. If the business has duplicated files, overshared folders, unclear data ownership, inconsistent CRM fields or reporting logic built on manual spreadsheet manipulation, AI will amplify the mess rather than fix it.

Prioritising data means treating it as part of the commercial operating model. That includes identifying the most valuable sources, reducing silos across sales, service, finance and operations, and improving how information is captured, labelled, retrieved and trusted. It also involves creating data dictionaries, decision definitions and common reporting logic so management conversations are grounded in the same version of reality.

Poor-quality data leads to unreliable answers, biased conclusions, weak automations and failed deployments. Clean, consistent data enables Microsoft AI and automation to work from trustworthy inputs, improving reliability and helping the business scale without relying on heroic manual work.



Key techniques for structuring and managing business data include:

Technique 1

Labelling and annotating data

Label and annotate documents, records and knowledge assets so AI retrieval, document intelligence and reporting can produce more reliable outputs.

Technique 2

Breaking down data silos

Connect data sources across Microsoft 365, CRM, finance, service and operational systems to improve retrieval, reporting and workflow automation.

Technique 3

Incorporating real-time data

where appropriate, use live operational and commercial data so dashboards, triggers and decision support reflect what is happening now.

Technique 4

Transforming data for AI

Convert raw documents, emails, forms, PDFs, spreadsheets and images into structured formats that can be used by Power Platform, Azure AI and reporting layers.



“We are cataloguing and putting in definitions for EVERYTHING. That effort is not an overnight effort. It’s a data governance initiative that runs for years.”

**Head of Data and Operations,
eCommerce Business**

“So many things can go wrong. So you have to come into it like, ‘Let’s start basic. Let’s not try to throw in a dozen pieces of data all at once. Let’s be iterative about this.’”

**VP of Digital Analytics Services
Engineering, Banking, FinServ and Capital
Markets**

Preparing business data for AI takes time

Getting data ready for AI is not a one-time project. It is a continuous operating discipline. As a business grows, the information that supports sales, service, finance, compliance and operations becomes more fragmented. Folder structures multiply. CRM definitions drift. Teams create local spreadsheets. Reporting packs become dependent on individual knowledge. These conditions make AI and automation harder to trust.

A Microsoft-aligned data strategy should therefore evolve with the organisation. It should include regular permission reviews, content cleanup, metadata design, governance of SharePoint and Teams, CRM data discipline, reporting definitions and feedback loops from AI outputs. When a Copilot answer is poor, a workflow fails or a dashboard is questioned, the business should treat that as evidence about the underlying operating model.

Teams that treat data readiness as a continuous discipline develop more resilient systems and gain the agility needed to support AI and automation over time. The aim is not perfect data before action. The aim is controlled improvement, with the highest-value use cases prioritised first.



“Data literacy is extremely important, and we lack that today. A data literacy mission is also something that we’ve started in parallel so that we can train more people to be more data-aware and help us improve the quality of data, whatever they’re managing with.”





Know when to configure, automate, buy or build

Deciding whether to configure, automate, buy or build is one of the most important decisions in SME and mid-market AI adoption. Many businesses move too quickly to custom build or too quickly to licence more tools. Both mistakes are expensive. The better question is: what is the operating problem, and what is the simplest Microsoft-aligned capability that solves it safely?

Configuring existing Microsoft tools can unlock immediate value. Copilot can improve personal productivity and knowledge work when permissions and data are ready. Power Automate can remove repetitive task movement. Power Apps can replace spreadsheet-driven processes. Azure AI Document Intelligence can structure document-heavy workflows. Azure AI Search can support retrieval across governed knowledge sources. Fabric and Power BI can improve management intelligence.

“So many different suppliers are offering solutions in this space, but [my] company is doing a pretty good job in evaluating and trialling several of these tools, utilising several ... suppliers to figure out what works best.”

Head of Product Strategy,
Communications Provider

Buying prebuilt solutions may make sense when a supplier already solves the problem well. Building custom AI or orchestration capability may be necessary where the process is differentiating, data is specific or integration requirements are complex. The right choice depends on goals, budget, risk, talent and operating readiness. Whether the business chooses configuration, automation, purchase or build, the decision should be anchored in commercial value and governance, not novelty.

Gain a clearer view of the Microsoft AI and automation options that create business value

[read our ebook](#)

“You can buy now and stick with it, or you can take some time to build it once you understand the nuances.”

Product Director,
eCommerce Business



“It’s still so early. A lot of GenAI is still experimental, right? It’s evolving so rapidly. It’s hard to know that the tool I bought today is actually going to be there tomorrow or actually meet my needs as the market and everything keeps changing.”



Decision makers in SME and mid-market organisations should ask these questions when choosing whether to configure, automate, buy or build:

“Do we have the internal capability to design this properly?”

If the business lacks internal architecture, process and data capability, consider a Microsoft-aligned advisory route before committing to build. If internal teams understand the process and have delivery capacity, they may be able to configure or build safely.

“Are we under any time constraints?”

If the business needs value quickly, consider configuring existing Microsoft tools or buying a proven solution. If there is time to design around unique process requirements, a more tailored build may be justified.

“Is this solution part of an existing workflow?”

If the issue sits inside Teams, SharePoint, Outlook, Excel, Dynamics or Power Platform, start with the Microsoft estate. If the process sits across specialist operational systems, integration and architecture decisions matter more.

“Can our technology stack support governed AI and automation?”

If systems are compatible, properly permissioned and supported by clear ownership, automation can scale faster. If systems are fragmented, custom or poorly governed, the first move may be data and process remediation.

Factor	Configure / Buy	Automate / Build
Speed	Faster to deploy where the use case is standard	Longer design and delivery cycle
Cost	Lower upfront cost if existing licences and suppliers fit	Higher investment in process design, integration and governance
Customisation	Limited flexibility but often enough for common use cases	Tailored to unique workflows and commercial requirements
Expertise Required	Requires clear business ownership and supplier selection	Requires stronger architecture, data, security and delivery capability
Compliance Needs	Limited to supplier and platform controls	Can be designed around specific security, audit and governance needs

Determining factors in the choice to configure, automate, buy or build



Driver 3:

AI, automation and orchestration strategy

Gain the expertise needed to support operating intelligence at scale

Without the tools, processes and knowledge needed to turn ideas into operating capability, businesses can fail to realise meaningful value from AI. A clear vision is important, but SME and mid-market firms also need technical-commercial judgement, repeatable delivery methods and the discipline to separate useful automation from expensive theatre.

noodleSPARK positions AI, automation and orchestration strategy as a practical capability inside Commercial Transformation. The aim is not to build the most advanced solution first. The aim is to identify the right workflow, use the right Microsoft capability, create a controlled pilot, measure value and then scale what works.

Key takeaways

Start small and learn as you go

Launch focused, low-risk pilots that are easy to implement, easy to measure and linked to real operating pain.

Prioritise use cases by commercial value

Focus implementation on projects that reduce manual effort, improve throughput, strengthen control or improve decision quality.

Use metrics to guide iteration and scaling

Track adoption, cycle time, error rates, user satisfaction, reporting confidence and ROI signals from the start.



“Trying to build a generic solution would have been super hard. For the proof of concept ... try and first identify actual questions that business users have asked for Solve for them and then expand from there.”



Across SME and mid-market firms, the most useful metrics often include:

-  Quality of output
-  Return on investment
-  User satisfaction
-  User engagement
-  Width of impact
-  Time to completion
-  Number of users

Make data-driven improvements to your AI and automation projects

Establishing measurable indicators of success early is essential, even if the first metric is simple. Usage, cycle time, error reduction, document processing time, number of manual steps removed, approval delay, first-response time or reporting turnaround can all provide useful early signals. Waiting for perfect ROI modelling often delays practical progress.

Measuring KPIs from the outset creates accountability and focus. It gives leadership, functional owners and implementation teams a shared understanding of what success looks like. For example, usage data can reveal whether Copilot is being adopted beyond early enthusiasts. Workflow data can show whether automation has reduced rekeying or simply moved the bottleneck. Reporting confidence can show whether management information is becoming more trusted.

In early pilots, learning is part of the value. Simple metrics provide the feedback loop needed to strengthen the design, refine governance and decide whether to scale, stop or redesign the solution.

“ROI? That’s really tough to measure. I have tried. Really, I think the best proxy that we could use is adoption and engagement – just usage of the tool.”

Head of Product and Marketing,
Marketing Services Agency



“You measure return on investment based on what you are spending before and with the AI in place. The expectation is that [you] will be spending less, but it’s yet to be determined because we have just deployed these systems. They just went into production. This is all very new.”



Driver 4: Operating model and culture

Encourage teams to create value with AI, automation and orchestration

The success of AI and automation depends on more than technology. Without the right operating model and culture, even strong Microsoft tools can stall or fail. SME and mid-market firms need to align leadership, functional owners and frontline teams around how intelligent tools will actually be used inside workflows.

For noodleSPARK, this is where Commercial Transformation matters most. The business must decide who owns the process, who owns the data, who approves changes, who manages exceptions, who reviews outputs and how performance will be measured. Adoption is not a communications exercise. It is an operating-model question.

Key takeaways

There is no one-size-fits-all approach to AI

Shape adoption around the organisation's culture, maturity, risk profile and Microsoft readiness.

Approach AI and automation collaboratively

Build cross-functional working groups so solutions are relevant, practical and scalable.

Foster a culture of continuous learning

Invest in training and guided experimentation so teams use tools confidently and responsibly.

Progressive rollouts are a key part of adoption

Scale gradually to refine workflows, train users, manage risk and avoid disruption.



Shape your adoption strategy around your workplace culture

If the business lacks internal architecture, process and data capability, consider a Microsoft-aligned advisory route before committing to build. If internal teams understand the process and have delivery capacity, they may be able to configure or build safely.

Uncover the key considerations for training teams to use Microsoft AI and automation responsibly

read our ebook

“The bottleneck always is on the adoption side – on the end user side.”

Software Engineering,
Healthcare Services
Provider

In SME and mid-market firms, culture is often shaped by founder habits, departmental workarounds and long-serving team knowledge. When people distrust AI or feel that automation is being imposed on them, adoption slows. When people understand that the goal is to reduce friction, improve quality and give them better tools, adoption becomes easier.

While most companies contain a mix of resistance and enthusiasm, the rollout strategy should be tailored to the organisation’s reality. Microsoft tools can support change, but leadership must explain the operating purpose clearly.

	Change-resistant culture	Innovation-driven culture
Employees’ views on AI	Don’t replace me. AI sparks concerns over job security, slowing down adoption.	Don’t hold me back. AI creates interest when positioned as a way to remove low-value work.
Employees’ views on work	Don’t make me change. Long-established workflows and habits are difficult to transform.	Help me grow. AI and automation are seen as ways to improve performance and capability.
Employee tendencies	If it doesn’t work, give up. AI solutions are quickly dismissed if they do not solve problems immediately.	If it doesn’t work, try again. Users refine prompts, workflows and inputs to improve outcomes.
Past tech deployments	Yet another box to check. New technology is seen as a burden or management fad.	Ready to embrace new opportunities. Technology is adopted when the business case is clear.

Key characteristics of change-resistant and innovation-driven cultures



Encourage collaboration throughout the development process

Successful AI and automation initiatives require input from across the business, not just IT. In an SME or mid-market organisation, the most valuable knowledge often sits with the people who live inside the process every day: sales administrators, account managers, service coordinators, finance assistants, operations managers, compliance leads and department heads.

Rather than allowing technical teams or suppliers to design solutions in isolation, businesses should build cross-functional working groups. These groups help ensure that Microsoft-based solutions are relevant, practical and aligned with real workflow conditions. They also help identify risks, exceptions and edge cases that would otherwise be missed.

Including users in testing is essential because the same AI prompt, automation rule or document extraction workflow can behave differently depending on context, data quality and user behaviour. Human review remains critical, especially in regulated, customer-facing or commercially sensitive processes.

“Have a business sponsor ... that you're working with. Don't be doing development in a vacuum. This is not Field of Dreams [where] if you build it, [users are] going to come.”

CAIDO,
Retail Business

“For every business unit, we've selected key people with a good knowledge of the business, good connections in their area of the business, good communicators ... to feed opportunities up to my AI team, but also for my AI team to feed down to them what some of the capabilities are and get people thinking about where they can use them.”

CEO,
Retail Business



“Have humans go and check it out. There are companies coming to the market right now to do automated testing, but so far I haven’t seen one single one that does good testing in the output that’s not predictable. Until then humans must come in and do a little bit more rigorous testing.”



Continuously provide workers with training opportunities

Preparing people for AI, automation and orchestration intelligence is just as important as preparing systems. Teams need the confidence and judgement to use Microsoft tools safely and effectively. That includes knowing when to use Copilot, when to check outputs, how to handle sensitive information, how to work with automated workflows and how to report issues.

Training should not be limited to generic AI awareness. It should be tied to real workflows: proposal creation, meeting follow-up, document review, customer service, case triage, finance processing, sales handoffs and management reporting. By offering practical learning paths and guided experimentation, the business helps teams understand how intelligent tools support their work.

This is especially important for SME and mid-market firms where roles are often broad and informal knowledge is valuable. Training turns AI from something abstract into a practical operating capability.

Discover the practices that help teams build confidence with Microsoft AI and automation

[read our ebook](#)

“Many employees are excited about AI [and machine learning]. When we offer training courses, we have oversubscription because people understand it’s good for their [curriculum vitae], makes them more competitive and more resilient in terms of headcount.”

**Strategy and Transformation Director,
Manufacturing Business**

“Invest in the people. Invest in the talent. Invest in the training and hire ... skilled professionals in an incremental way. Not just a big bang hiring without understanding the use cases – without understanding what level of investment you can do.”

**CTO,
Professional Services Firm**



Business and technology leaders suggest:

1

Starting with a group of power users

Find employees who are willing to test AI and automation, document what works and share feedback. A random group of users may not engage deeply enough.

2

Collaborating and sharing knowledge

Encourage teams to share prompts, workflow ideas, automation examples and lessons learned so adoption becomes collective rather than isolated.

3

Collecting user feedback regularly

Set up structured reviews or written feedback so initial users are accountable for what they learn. An open-ended “just try it” approach rarely produces useful evidence.

4

Defining a timeframe for deployment

Create urgency with a defined sprint, pilot period or review date. This helps teams provide feedback sooner and supports faster iteration.

A progressive rollout is the key to successful adoption

Breaking AI and automation adoption into manageable phases gives teams time to understand, test and adjust. This reduces disruption, builds confidence and creates space for feedback. A progressive rollout also helps the business identify cultural friction, process gaps, permission issues and governance concerns before they become expensive problems.

For Microsoft-based adoption, this might mean starting with a small Copilot cohort, a single Power Automate workflow, one document intelligence use case or one reporting improvement. Once the business understands the value, risk and adoption requirements, it can scale with greater confidence.



Driver 5: AI governance

Deploy AI and automation while maintaining security, privacy, compliance and commercial control.

AI governance is the framework that ensures intelligent solutions are developed and used responsibly. For SME and mid-market firms, governance must be practical. It should protect the business without creating so much process that nothing moves. As Microsoft AI, automation and orchestration capabilities become more embedded in daily work, governance provides the guardrails for data access, permissions, human review, compliance, auditability and decision ownership.

Effective governance is not just about control. It is about confidence. It brings together leadership, IT, compliance, finance, operations and commercial owners to define how AI should be used, monitored and improved across the business.

Key takeaways

Gaining trust in AI technology takes time

Understand that early outputs may be inconsistent until data, prompts, workflows and review habits improve

Create guardrails and adapt them over time

Establish practical rules that help teams use Microsoft AI and automation safely, ethically and effectively.

Collaborate with security, compliance and operational owners

Make sure people responsible for risk, customer data, finance, service quality and process control are involved from the start.



Gaining trust that your AI solutions will work effectively is an ongoing process. Most companies continually validate the accuracy of their AI outputs.

Explore ways to build trust in Microsoft AI and automation

[read our ebook](#)

Building trust in your AI solutions takes time

AI systems improve through better data, clearer prompts, stronger workflows, human feedback and more disciplined use. Early outputs may be inconsistent or incomplete, especially where documents are poorly structured, permissions are too broad or business definitions are unclear. These imperfections are part of the adoption process, not a reason to stop.

Trusting technology does not mean ignoring limitations. It means putting the right controls in place. Teams need review rules, escalation points, output checks, data ownership, access controls and a clear view of where AI can and cannot be used. This is especially important for customer-facing, regulated or commercially sensitive processes.

SME and mid-market organisations that accept and manage the learning curve are more likely to build internal confidence and realise value sooner. Progress comes from engaging with the system, improving the foundations and shaping responsible use over time.



Partner with security, compliance and operational owners during development

AI governance is most effective when it builds on existing responsibilities. Security, compliance, finance and operational leaders understand the policies, obligations and control points that already matter. Their early involvement ensures AI and automation fit into the business rather than creating uncontrolled shadow processes.

For Microsoft-based adoption, this includes reviewing permissions across SharePoint and Teams, understanding sensitivity labels, managing external sharing, defining data sources, setting workflow ownership and deciding where human review is required. It also means aligning AI and automation with existing audit, privacy, cyber and customer service expectations

Working with these teams accelerates responsible adoption. It prevents duplication, reduces risk and gives leadership confidence that AI and automation are being introduced as part of a controlled operating model. As capability scales across departments, central coordination helps policies and practices evolve with the business.

“The compliance team, with the data governance policies, want to make sure that we’re handling customer data appropriately. Just because we have customer data and it’s being used internally, doesn’t mean that everyone is entitled to see it or use it... That’s why all of these teams from compliance to legal to privacy to cybersecurity all have a role.”

**Data and Compliance Director,
SaaS Technology Firm**

“We have an AI team, a data team and also the ethics governance team to manage the AI developments.”

**Digital Transformation Lead,
Marketing Services Business**



Establish a clear set of guidelines for using AI

AI governance is most effective when it reflects the specific needs, risks and culture of the business. Rather than copying enterprise policies that are too heavy for an SME or mid-market organisation, leaders should establish practical guardrails: approved use cases, data access rules, human review requirements, customer-data restrictions, permission standards, prompt and output guidance, audit expectations and escalation paths.

As adoption grows, governance must evolve. Guardrails should be embedded into daily workflows, templates, training, automation design and review cycles. Over time, usage data and lessons from pilots should inform updates to policy, technology and operating cadence.

When done well, governance protects the business without slowing useful innovation. It gives teams permission to move quickly inside clear boundaries. That is the NSG position: no AI without controls, and no agentic orchestration without governed foundations.

Common risks associated with AI usage are centred around:

Leakage of confidential information

within AI models, prompts, documents, overshared files or poorly governed knowledge sources.

Compliance

with regulatory standards, customer obligations, sector rules and internal policies.



Inaccurate outputs

and potential biases that affect decisions, customer communication or management reporting.

Alienating employees

by failing to position AI and automation as tools for better work, not simply as cost reduction.



Consulsion

This roadmap reframes AI readiness for the NSG Commercial Transformation strategy. The central argument is simple: SME and mid-market firms do not need AI theatre. They need practical operating improvement. They need to remove manual drag, improve data quality, automate the right workflows, strengthen governance, increase reporting confidence and create better management visibility.

Microsoft products can play a major role in that journey, but only when positioned properly. Copilot, Power Platform, Azure AI, Fabric, SharePoint, Teams and the wider Microsoft ecosystem should not be sold as disconnected tools. They should be orchestrated around the commercial operating model: how the business creates demand, converts revenue, serves customers, moves information, manages risk and makes decisions.

Take the next steps on your Commercial Transformation journey

01

MAP

where manual effort, document friction, weak reporting, poor handoffs and unclear ownership are limiting commercial performance.

02

PRIORITISE

the Microsoft AI, automation and orchestration use cases that can create measurable value in the next 90 days.

03

ENGAGE

with noodleSPARK Group to enable your AI, automation and Orchestration Intelligence Transformation.



**STRONGER
TOGETHER**



Fix the friction between workflow drag, document friction, reporting delays, automation logic, AI prioritisation and governance.

Growing businesses rarely fail because effort is absent.

They fail because the operating logic behind growth is weak, inconsistent or too dependent on individual judgement.

NSG AI, Automation and Intelligence Advisory is designed to fix that. It helps UK B2B, B2B2C and Education organisations improve the specific operating conditions that are limiting performance in this part of the commercial system.

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