



# WELCOME TO MICROSOFT IN 2026.

Microsoft's platform is evolving fast—Copilot, AI agents, and new expectations for ROI. We help organizations translate Microsoft's direction into measurable business outcomes, not just new tools.



## **BUSINESS CHALLENGES DIDN'T DISAPPEAR— MICROSOFT JUST CHANGED HOW YOU SOLVE THEM**

AI and Copilot don't eliminate complexity. They raise the bar for data readiness, adoption, governance, and measurable value.

### **TOOL SPRAWL AND UNCLEAR OWNERSHIP**

Dynamics, Power Platform, Copilot, and Azure are powerful—but without a clear operating model, adoption and value stall.

### **DATA WITHOUT INSIGHT**

Reporting and forecasting stall when data is fragmented or definitions aren't consistent.

### **AI PRESSURE WITHOUT A PLAN**

Copilot promises value, but organizations need governance, readiness, and real use cases to see results.

# SERVICES BUILT FOR MICROSOFT'S AI-FIRST DIRECTION

We combine strategic advisory, Microsoft delivery, and AI-led solutions to help organizations move from platform investment to real business impact.



## AI, COPILOT & SECURITY-FIRST DELIVERY

Practical AI enablement with the guardrails you need: permissions, policies, and measurable use cases.

- Copilot readiness: licensing, info architecture, and security posture
- Custom agents + automation scenarios aligned to business outcomes
- Governance, data access, and adoption to drive real usage



## MODERN WORK, ADOPTION & COLLABORATION

Make Microsoft 365 work the way your teams actually work—governance, structure, and adoption.

- Teams + SharePoint architecture, governance, and information design
- Change management, adoption programs, and training
- Workflow improvements that reduce friction and shadow IT



## BUSINESS APPS & CUSTOMER EXPERIENCE

Dynamics 365 and Power Platform delivery that ties directly to pipeline, service operations, and customer experience.

- Dynamics 365 implementation, migration, and optimization (Sales/Service/Marketing)
- Power Platform automation (Power Apps, Power Automate, Power Pages)
- Customer Insights and connected data for segmentation + reporting



## DATA, ANALYTICS & FORECASTING

Turn reporting into decisions—clean definitions, connected sources, and dashboards people trust.

- Power BI models, semantic layers, and executive dashboards
- Data quality + definitions (so teams stop debating “the number”)
- Forecasting and operational reporting tied to real workflows

# START WITH CLARITY —NOT ANOTHER TOOL

Our fixed-scope workshops help you align Microsoft capabilities, AI opportunities, and business priorities before you invest further.

## CURRENT-STATE REVIEW

> We'll map what you're using today across business apps, modern work, data, AI, and security—plus where things are stuck.

## QUICK WINS + RISKS

> Practical improvements you can act on quickly, plus risks to address before scaling (especially around AI and governance).



## PRIORITIZED ROADMAP

> A sequenced plan tied to business outcomes—what to do now, next, and later, with success metrics you can track.

# WHY TRELLISPOINT

At TrellisPoint, we believe great results come from collaboration and trust. Our clients work directly with experienced consultants who communicate openly, respond quickly, and stay focused on shared success. We operate as an extension of your team—committed to delivering results, not surprises.



**CHRIS FINNECY**  
*Founding Partner, TrellisPoint*



## **MICROSOFT-FIRST, AI-READY**

Deep expertise across Copilot, Dynamics 365, Power Platform, and Azure.



## **OUTCOME-DRIVEN, NOT TOOL-DRIVEN**

We focus on business results, not just implementations.



## **GOVERNANCE BUILT IN**

Security, data integrity, and compliance are part of every engagement.



## **DEDICATED DELIVERY TEAM**

You'll work directly with a consistent team with regular check-ins.



# LET'S ALIGN YOUR MICROSOFT STRATEGY FOR 2026

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