

CDW AccelerateAI Services for E7 Microsoft 365 Copilot & Agents

Modern Workspace



Microsoft E7 can accelerate AI-powered productivity across Microsoft 365, but only if Copilot and agents are implemented with the right governance, data protection, adoption model and operating controls. The question is not whether AI can improve work, it is whether Copilot and agents can reduce manual effort, improve decision speed, protect sensitive information and scale without creating new security, compliance or operational risk.

CDW's Copilot & Agent Implementation for Microsoft E7 helps organizations move from AI readiness to governed execution by deploying the technical foundation, adoption model, agent lifecycle and operating controls needed to realize value safely.

WHEN YOU SHOULD PAY ATTENTION

- Microsoft E7 is being considered or purchased, but there's not yet a clear plan for how Copilot, agents, security, governance and adoption will work together
- Teams are already experimenting with AI, but usage is inconsistent, unmanaged or difficult to connect to productivity, service quality or business outcomes
- Security, privacy, legal or compliance stakeholders need confidence that sensitive data, oversharing, retention, DLP and auditability are addressed before broader rollout
- Business units want practical AI agents for knowledge retrieval, workflow support, proposal drafting, service desk summarization, reporting or frontline productivity, but governance and ownership are unclear
- You need to avoid licence waste, uncontrolled agents, data exposure and low adoption by aligning technical deployment to measurable business value
- AI spending is expanding across licences, agents, experimentation and support needs, but there's a lack of cost controls, usage visibility and value measures needed to prevent uncontrolled spend
- Your organization needs a phased implementation plan that aligns business, IT, security, compliance and enablement teams on what can move now and what must be remediated first

INDUSTRY PROBLEMS

Copilot and agent implementations look different across industries because the business risks, adoption barriers and value drivers vary. Common challenges include:

- **Healthcare:** Clinical and administrative teams need faster access to trusted information, while leaders must safeguard protected health information (PHI), reduce documentation burden and prevent AI from surfacing sensitive data across complex care workflows
- **Financial Services and Insurance:** Teams need productivity gains in client service, analysis, reporting and compliance work, but executives need confidence that data access, auditability, privacy and regulatory expectations are managed
- **Public Sector:** Leaders are under pressure to improve service delivery and employee productivity while maintaining transparency, responsible AI practices, accessibility, privacy and data residency expectations
- **Education:** Institutions want AI to support faculty, staff and students with faster knowledge access and administrative efficiency, while managing policy consistency, data privacy, AI literacy and uneven adoption
- **Retail:** Head office and frontline teams need practical ways to reduce manual work, improve knowledge access and support store operations, while protecting customer, employee and payment-related data across distributed environments.
- **Manufacturing, Energy and Utilities:** Organizations want AI to improve field operations, reporting, engineering, safety and knowledge transfer, but must account for fragmented data, OT/IT complexity, regulatory scrutiny and resilience requirements.

BUSINESS OUTCOMES

- A governed implementation path for Microsoft E7 that connects Copilot, agents, data protection, security controls, adoption and operating ownership
- Reduced rollout risk by addressing priority gaps across sensitive data, permissions, oversharing, labels, DLP, retention and agent governance before scale
- Faster business adoption through defined personas, role-based enablement, champions, office hours and practical use cases tied to real work
- Stronger agent control through intake, design standards, lifecycle management, ownership, monitoring and retirement practices
- Improved decision confidence because business, IT, security, privacy, compliance and enablement teams can see the risks, owners, priorities and next steps
- A scalable operating model that helps measure value, manage cost and expand AI capabilities without creating unmanaged technical or compliance debt

HOW WE HELP YOU START

Copilot Technical Readiness: Best when you need to validate whether the Microsoft 365 environment is ready for secure Copilot expansion. CDW reviews priority controls, identifies data and permission risks and confirms what must be addressed before broader rollout.

Governance Design & Planning: Best when risk, compliance and ownership are the blockers. CDW helps define the governance model for data protection, responsible AI use, agent lifecycle, access controls, policy decisions and operating handoff.

Copilot & Agent Implementation: Best when your organization is ready to move from planning to execution. CDW supports the deployment of Microsoft E7 capabilities, Copilot adoption, agent governance, training and the operational model needed to scale.

Permission Remediation: Best when oversharing, legacy access or unclear ownership could create Copilot risk. CDW helps identify priority permission issues, align remediation actions to business risk and prepare the environment for safer AI adoption.

Adoption and Change Management: Best when you need users to move from awareness to sustained Copilot and agent adoption. CDW helps define personas, champions, communications, training, office hours, success measures and feedback loops so AI-enabled ways of working become embedded, measurable and scalable.



WHY CDW

- We help connect Microsoft E7 investment to practical business outcomes, so Copilot and agents are tied to real users, real workflows and measurable value
- We reduce the risk of launching AI before the right data protection, access, governance, compliance and adoption controls are in place
- We bring business, IT, security, privacy, compliance and enablement stakeholders into one decision path instead of treating AI as only a productivity or technical deployment
- We pair Canadian delivery context with Microsoft 365, Purview, Entra, Defender, Power Platform, Copilot Studio, adoption and service management experience
- We leave leaders with decision-ready outputs: what can be implemented, what risk needs attention, who owns the next step and how to scale AI responsibly

RECOMMENDED NEXT STEP

Start with a 30-minute scoping call to confirm where you are today: evaluating Microsoft E7, preparing for Copilot expansion, designing AI governance or planning agent implementation. CDW will recommend the right starting point and outline the business decisions, stakeholders, dependencies and evidence needed to move forward.

CREDENTIALS

10 partner designations, nine Microsoft Azure, six Microsoft Modern Workspace and four Microsoft Security Specializations.

Microsoft Partner Azure Expert MSP



Digital and App
Innovation Azure



Infrastructure
Azure



Data & AI
Azure



Modern Work



Security



Business Applications



Microsoft Cloud

For more information, contact your CDW account team at 800.972.3922



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