COMPQSOFT™ Digital

CQD Ideation Webinars
Driving AI Balance in Your Microsoft Frontier Journey

December 11th, 2025

Your #1 AI Microsoft Frontier Transformation Partner

CompQsoft Digital is a leading next-generation AI transformation partner focused on helping enterprises reinvent customer engagement and reshape business processes. With deep expertise in **Microsoft AI technologies,** we empower organizations to unlock the full potential of AI across their operations.

We deliver measurable outcomes by embedding AI into the core of **customers, people, process, technology** driving balanced quality outcomes.

Our **solutions reduce time-to-value**, enhance customer and employee satisfaction, and drive innovation through AI-first strategies.

Your AI Agent, Copilot Go to Frontier Partner

CQD – Transformational Services

AI – Copilot, Azure AI, Autonomous Agents

- AI Readiness Assessment
- AI Roadmap & Delivery
- AI Data Security
- AI Modern Data Estate
- Autonomous Agents Workshop
- AI User Adoption COE

AI Business Solutions – D365, Power Platform

- Microsoft Dynamics 365 CRM & ERP
- Process Optimization, Journeys, Process Workshops & Assessments
- Enterprise & Solution Architecture, Functional & Technical
- Change Management, Training, Quality Assurance

Modern Data – Fabric, Databricks, Purview, PBI

- Data Migration
- Data Estate Modernization
- Advanced Analytics
- Data Quality and Governance
- Business Intelligence & Reporting

Todays Agenda

Fire Side Chat

- 4 Questions Round Robin Format
- 10 Minutes per Topic
- Ask The Experts

The WIN Room™ with Jaime Diglio | Master the New ROI: Return on Interactions
(8) Jaime Diglio 🏅 | LinkedIn
(8) Pooja Bhalla | LinkedIn
(8) Jon Rastia | LinkedIn

Why is balance important

"Organizations that prioritize their health by achieving **sharp alignment, flawless execution, and relentless renewal** - don't just survive; they **thrive in the face of complexity.** With a <u>foundation</u> of alignment, organizations introduce <u>clarity</u> at every level. **They consistently deliver exceptional value and sustain long-term success.**

McKinsey&Company

Balance: an **even distribution** of weight enabling someone or something to **remain upright and steady**

Dictionary

The balance of the equation....
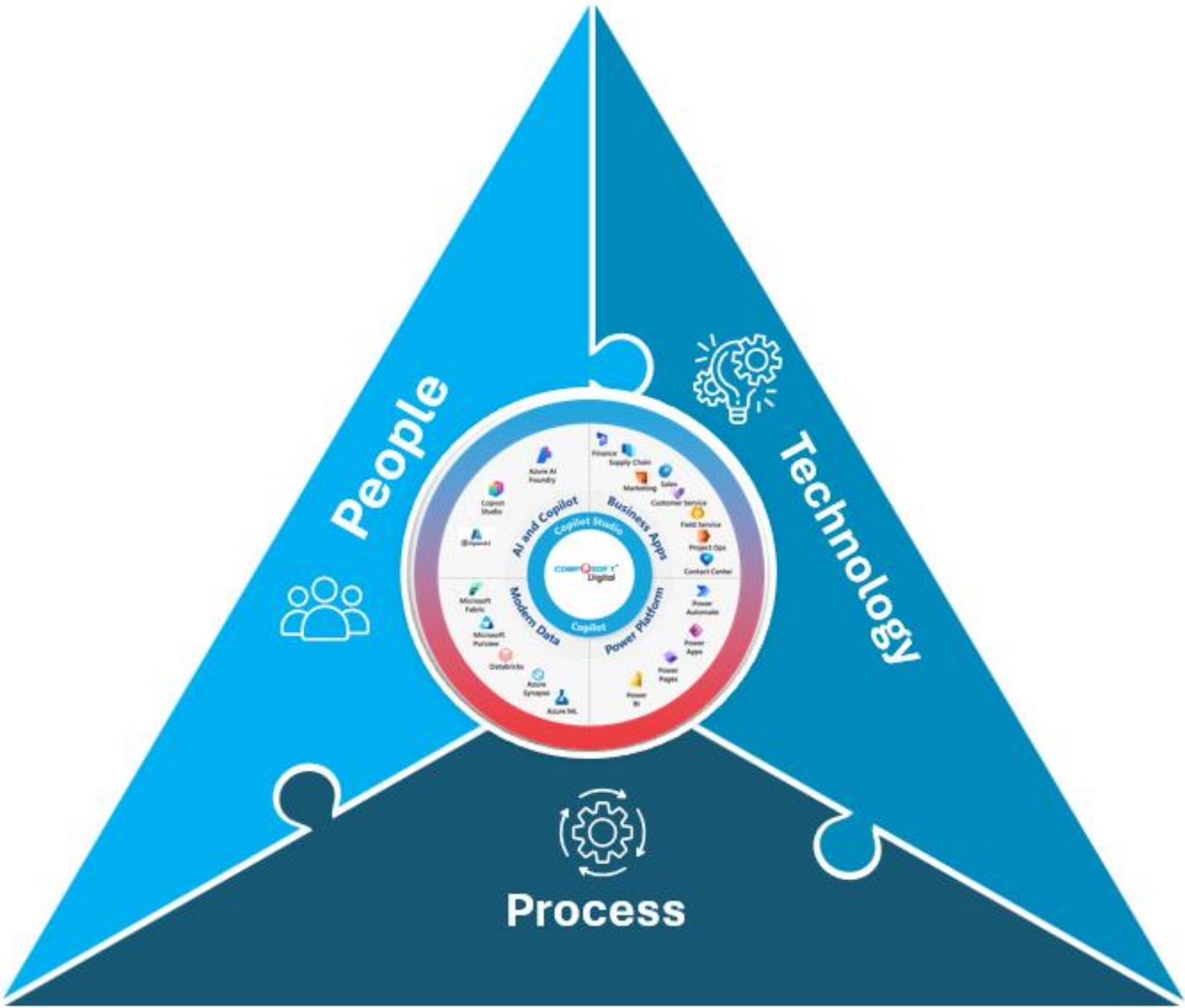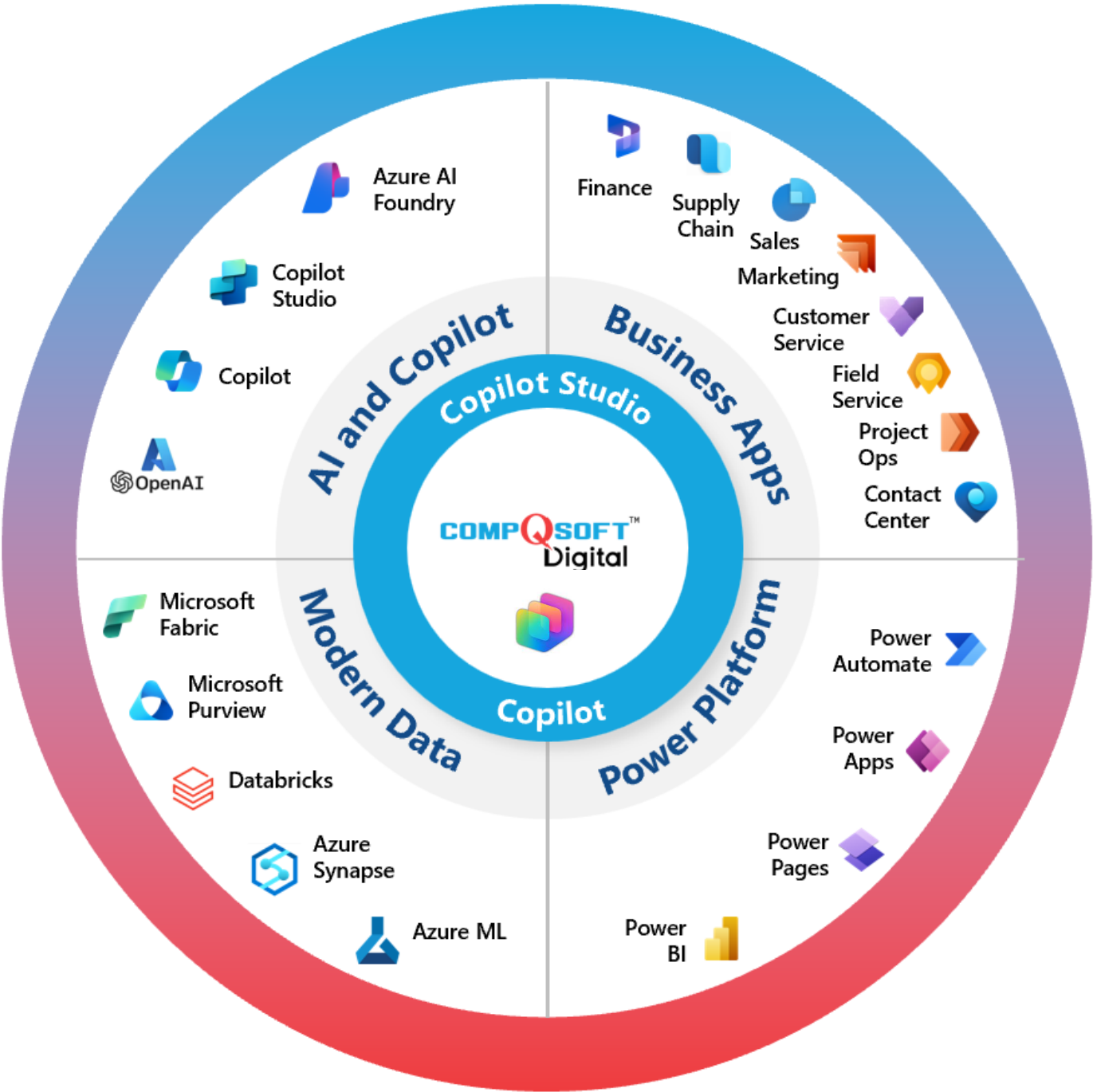
You're at the crossroads

COMPQSOFT ™
Digital

> Where do AI projects typically go off the rails - and why does it always come back to driving balance

Speaker Round Robin
- Jaime
- Pooja
- Jon

Audience Survey
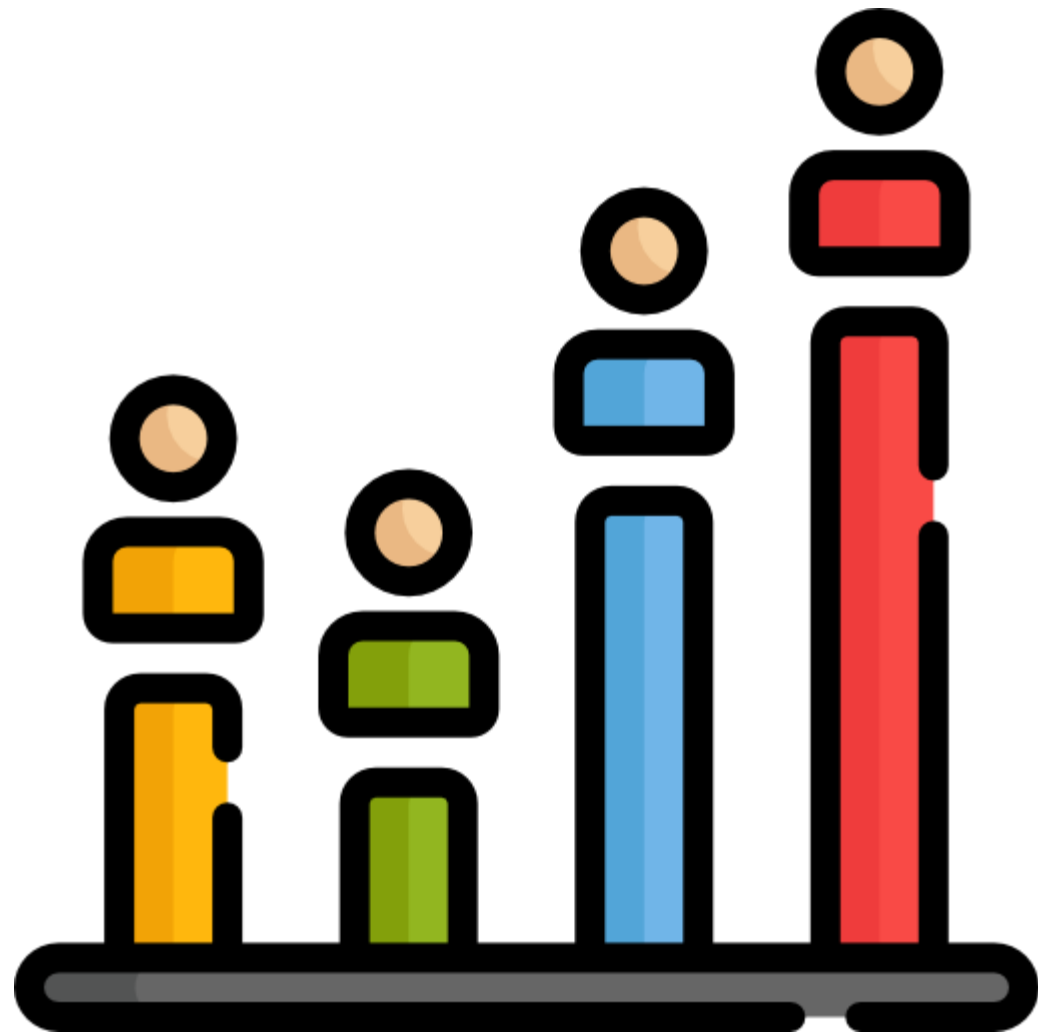
What are the top 5 reasons why AI projects fail to meet business objectives?

- **#1** Unclear or Misaligned Business Goals

- **#2** Poor Data Quality or Limited Data Availability

- **#3** Lack of Organizational Readiness

- **#4** Underestimating Complexity and Overestimating Capabilities

- **#5** Poor Change Management and Failure to Integrate with Business Processes

I want outcomes!

Bridging the islands of data, process, people

What are the AI technology dependencies / enablers required when deploying an AI strategy

Speaker Round Robin

- Pooja
- Jon
- Jamie

I want outcomes!

Bridging the islands of data, process, people

> What mindset shift do leaders need to make to successfully guide their teams through AI adoption?

Speaker Round Robin
- Jaime
- Pooja
- Jon

Audience Survey
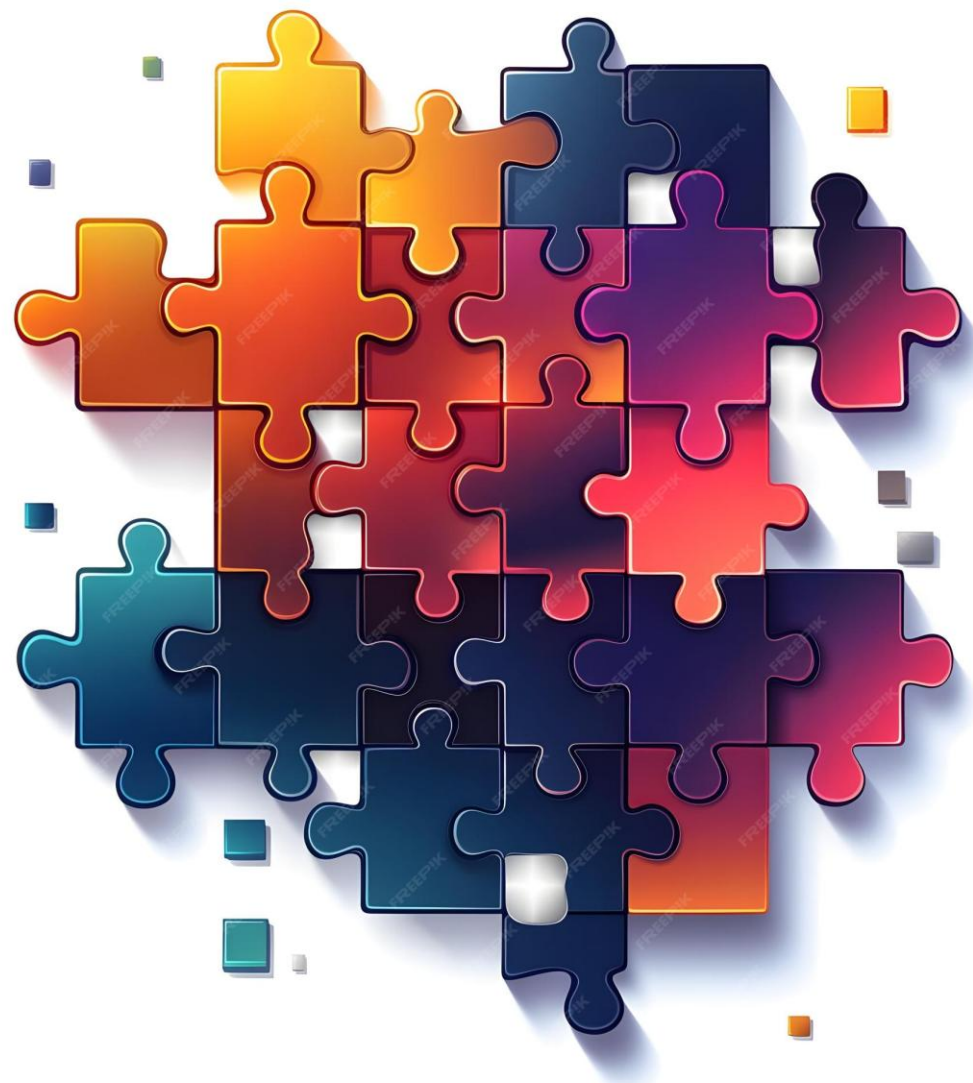
How aligned is your AI strategy across the organization and business units.

- **#1** Clear, Direct, Succinct Communication

- **#2** Somewhat Aligned, But Changes Often

- **#3** Various Business Units Aligned, But Not Corporate

- **#4** Numerous AI Visions, Strategies, Objective Not Aligned To A Common Vision

- **#5** Speedboats Going In Opposite Directions

I want outcomes!

Bridging the islands of data, process, people

> How should you approach your AI business transformation and what best practices do you recommend

Speaker Round Robin

- Jon
- Pooja
- Jamie

COMPQSOFT™ Digital

Thank You From CompQsoft Digital
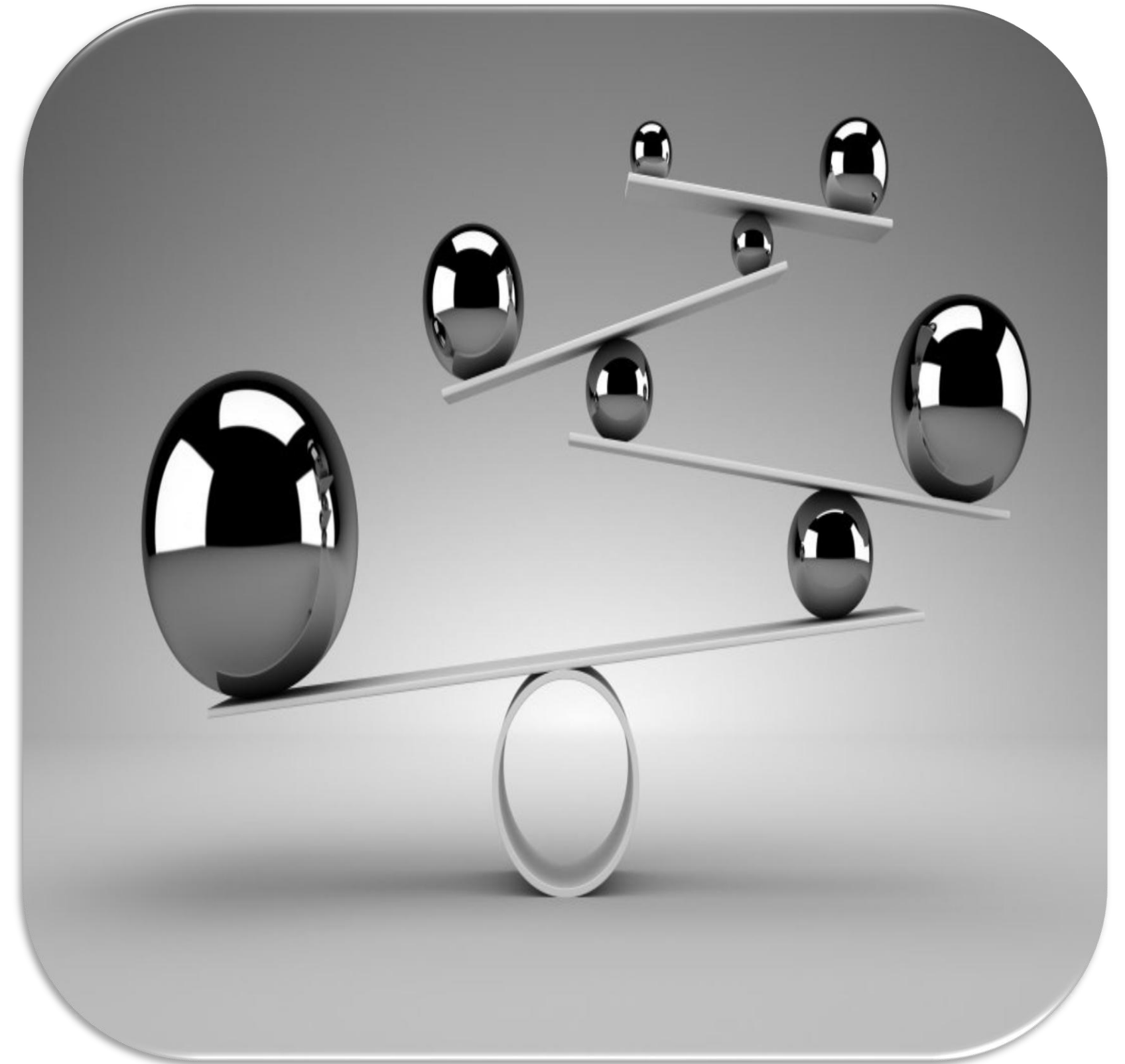
Greg Moser

CompQsoft Digital

President

281.725.1789

greg@compqsoftdigital.com

December 11th, 2025

About CQD

Reimagine the customer experience through Microsoft Services

Global **Microsoft high-performance** digital transformation partner

Deliver a proven, predictable, **scalable solutions**

Follow-the-sun delivery model for project success

Microsoft — Global Digital Partner

Why CompQsoft Digital

500 + Innovators	**25 + Years** Experience	**200+** Customers	**Commercial &** Federal	**Microsoft** Experience	**Global Delivery** Model

---

Solutions & Services

Autonomous Agents AI Copilot	D365 Business Applications CRM ERP	Modern Data Azure Fabric, Analytics, Reporting	Power Platform Application Modernization	Change Management, Training, User Experience	Solution Architecture, Development, QA, Functional

---

Industries & Horizontals

Financial Services Oil & Gas, Energy	Healthcare (Payor) Professional Services	Manufacturing Wholesale Distribution Retail	Customer Experience Contact Center Journeys	AI, Copilot, Agents Machine Learning	Modern Data Estate AI Readiness Modernization

---

Certifications

Microsoft Solutions Partner

34 Microsoft Certifications

CMMi level 3 · ISO 9001 CERTIFIED · ISO 20000-1:2005

PMP · CSM SCRUM MASTER · Prosci CERTIFIED Change Practitioner

CYBERSECURITY MATURITY MODEL CERTIFICATION · ISO 27001 Certified · ISO 20000 Certified · ISO 9001:2015 Certified

Our Follow-the-Sun Global Delivery Model

High-Performance Global Consulting

Leesburg, VA
Houston, TX
Mexico City, MX
Hyderabad, India
Bengaluru, India
Buenos Aires, Argentina

Our Global Delivery Model Benefits

Follow-the-Sun Location Benefits

- 6 Days by 18 Hour Delivery Model
- Continuous Delivery Model
- Global Talent Pool , Certifications, Expertise
- Extended Time Zones, Distributed Seasonality

Global Delivery Model Benefits

- Predictable, Repeatable, Delivery Model
- Global Azure DevOps (ADO) Consistency
- Follow-the-Sun Quality Assurance & Testing
- Training & Education, Cross-pollination, Skilling

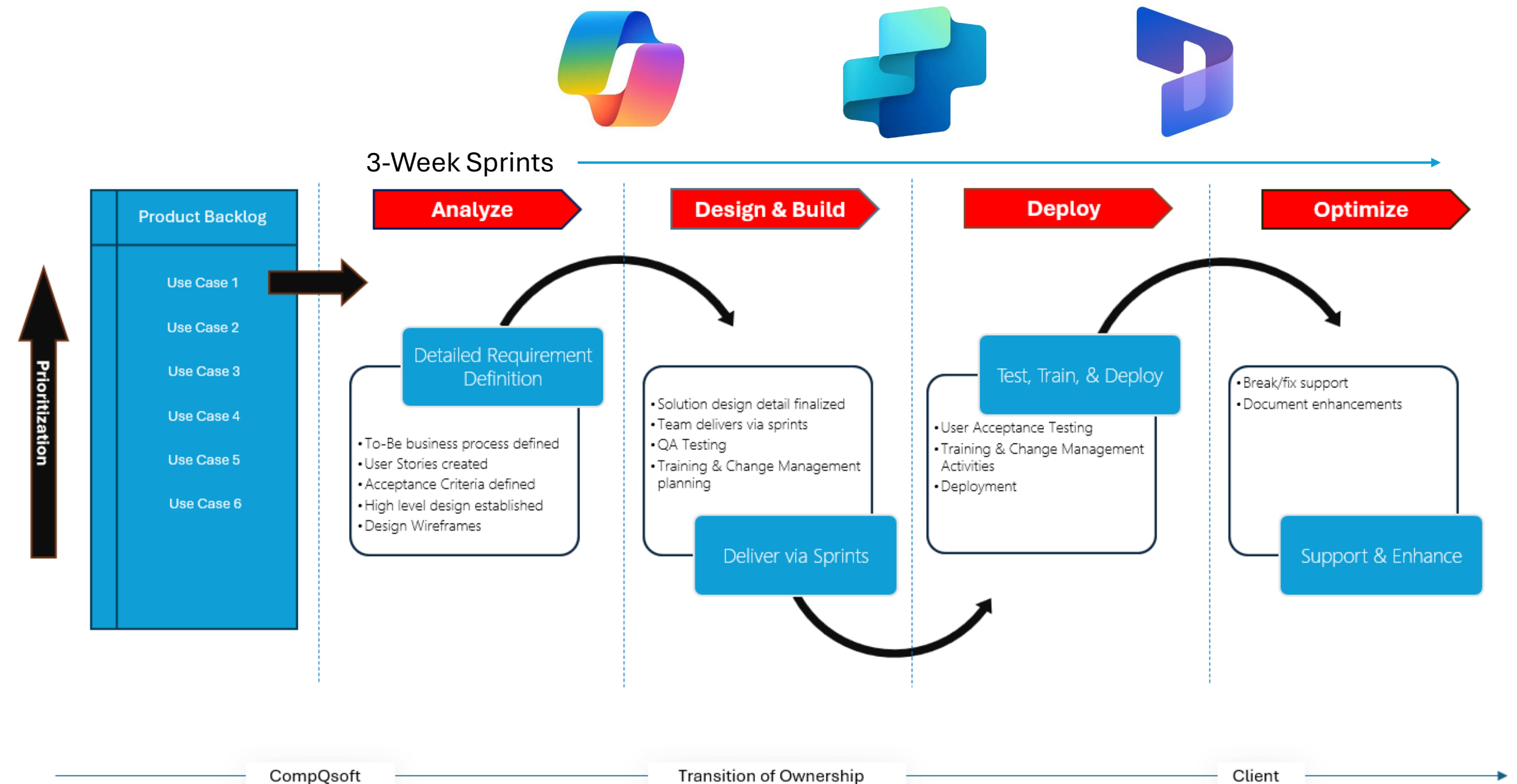# Why CompQsoft Digital

Your Trusted Partner

- **Microsoft Experience:** 78 Years Microsoft Leadership (4) Experience starting pre-release to current state

- **Microsoft Certifications:** 38 D365, Copilot & Power Platform Certifications - & Growing

- **Complex Deployments:** Our team have deployed some of the largest Microsoft & Enterprise Business Apps Deployments globally; up to 150K users

CompQsoft Digital Frontier Based Methodology

- **Leveraged for a backlog of smaller workloads**
  - Power Platform, Copilot, Autonomous Agents
  - Can be used for defined scope or ongoing work within an organization
- **Why This Methodology**
  - Copilot, AI Initiatives are NOT moving forward – quick schedule and results = better results
  - Need to show quick TCO to move these initiatives forward – accelerate business outcomes
- **Fast Track Created & Certified**
  - Microsoft Fast Track certified deployment methodology

3-Week Sprints

Prioritization

Product Backlog
- Use Case 1
- Use Case 2
- Use Case 3
- Use Case 4
- Use Case 5
- Use Case 6

Analyze

Detailed Requirement Definition

- To-Be business process defined
- User Stories created
- Acceptance Criteria defined
- High level design established
- Design Wireframes

Design & Build

- Solution design detail finalized
- Team delivers via sprints
- QA Testing
- Training & Change Management planning

Deliver via Sprints

Deploy

Test, Train, & Deploy

- User Acceptance Testing
- Training & Change Management Activities
- Deployment

Optimize

- Break/fix support
- Document enhancements

Support & Enhance

CompQsoft — Transition of Ownership — Client

AI Strategy

Continuous AI learning loop

Data
to capture digital signals across service

AI
to connect and synthesize data

Action
to drive efficient service

Assisted service
with human reps

Self-service
for customers

Operations
for leaders