



ENDPOINT SOLUTIONS

AI Readiness — Delivery Report



Client: Beacon Strategy Partners

Date: 2026-06-22

Prepared by: Michael-Paul Hart, Endpoint Solutions

Confidential — prepared for Beacon Strategy Partners leadership. Not for distribution.

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OVERALL MATURITY

53

Developing

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Management consulting

Primary sponsor: Alicia Reyes, Managing Partner

Executive summary

Beacon has strong AI momentum on the consultant side — people are already using AI daily for research and first drafts — but the foundation underneath is thin. Knowledge is scattered across tools, there is no acceptable-use policy, and no one owns the AI agenda. The upside is real: this is a knowledge business where AI can compound. The near-term work is governance and a data foundation so the firm can scale usage safely rather than accidentally.

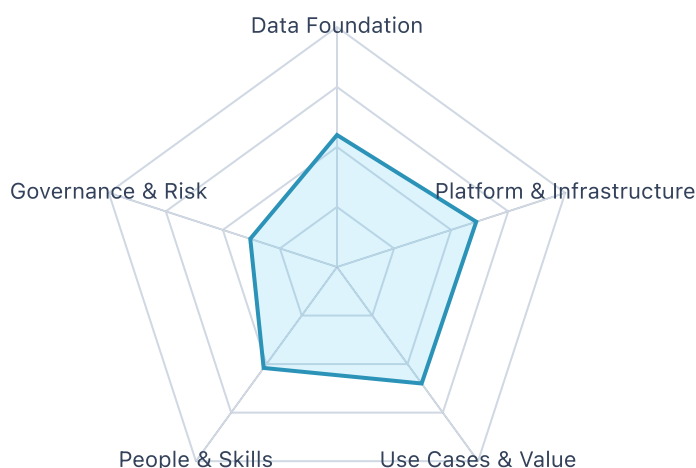
Current-state overview

AI adoption is bottom-up and enthusiastic. Consultants use ChatGPT and Copilot for research synthesis, proposal drafting, and meeting notes, but do so through personal accounts with no policy, no client-data guardrails, and no shared prompt library. Firm knowledge — past deliverables, research, methodologies — lives across SharePoint, email, and individual drives, so the AI never sees the firm's best work. Leadership sees the opportunity but has not assigned ownership or a budget.

Maturity scorecard

STAGE	SCORE	INTERPRETATION
01 Data Foundation	55%	Developing
02 Platform & Infrastructure	61%	Advancing
03 Use Cases & Value	60%	Advancing
04 People & Skills	52%	Developing
05 Governance & Risk	38%	Emerging

Maturity profile



Top findings & business implications

1. **Widespread “shadow AI” with no policy or client-data guardrails** — Consultants are pasting client material into personal AI accounts — a confidentiality and reputational risk in a business built on trust.
2. **The firm’s best knowledge is invisible to AI** — Deliverables, research, and methodology are scattered, so AI answers from the open web instead of Beacon’s own expertise — the biggest untapped advantage.
3. **No owner and no measured value** — Usage is real but unmanaged; without an owner and a couple of tracked metrics, AI stays a personal productivity hack instead of a firm capability.

Domain observations

01 · DATA FOUNDATION — 55%

Client and firm knowledge is spread across SharePoint, email, and personal drives with informal governance. Consultants can find things eventually, but AI tools have no access to the firm's curated best work, so outputs are generic.

02 · PLATFORM & INFRASTRUCTURE — 61%

Cloud-first on M365 with Copilot available but lightly adopted; no retrieval layer connecting AI to firm knowledge, and integrations between tools are manual.

03 · USE CASES & VALUE — 60%

A clear shortlist has emerged organically — research synthesis, proposal/first-draft generation, and meeting summarization — and a couple are already in daily use. Value is felt but not measured, and ownership sits informally with a few power users.

04 · PEOPLE & SKILLS — 52%

Literacy is above average for an SMB thanks to a curious, analytical staff, but skills are individual rather than institutional; there is no training program and change is managed informally.

05 · GOVERNANCE & RISK — 38%

The dominant gap. An acceptable-use policy is being drafted but not in force, shadow AI is widespread, security review of AI tools is minimal, and accountability for AI risk is unclear.

Risk register

RISK	AREA	SEVERITY	OWNER
Confidential client data entering personal / unvetted AI accounts	Governance & Risk	Critical	Managing Partner
No acceptable-use policy or approved-tool list	Governance & Risk	High	Operations
Key-person dependency — AI skill concentrated in a few consultants	People & Skills	Medium	Practice Leads
Inconsistent, unreviewed AI output reaching client deliverables	Use Cases & Value	Medium	Quality / Delivery

Recommended priorities

05 · GOVERNANCE & RISK

Publish an AI acceptable-use policy + approved tools

Move the draft policy into force, stand up firm-licensed AI accounts, and give consultants a safe, sanctioned way to work so shadow AI stops.

01 · DATA FOUNDATION

Make the firm's knowledge retrievable

Consolidate deliverables and research into one governed source and connect AI to it, so outputs draw on Beacon's own expertise.

AI readiness roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Publish AI acceptable-use policy and approved-tool list; move staff onto firm-licensed AI accounts Outcome: Shadow AI stops; client data protected · Vendor: Endpoint · Depends on: Leadership sign-off	Managing Partner	High	Low
Assign an AI owner and pick 2–3 value metrics (hours saved on research/proposals) Outcome: Usage becomes measurable	Operations	High	Low

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Consolidate deliverables & research into one governed knowledge source Outcome: AI can draw on the firm's best work · Vendor: Endpoint · Depends on: SharePoint cleanup	Practice Leads	High	Medium
Roll out a shared prompt library and a 2-hour applied-AI training for all consultants Outcome: Skill moves from individuals to the firm	Operations	Medium	Low

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Pilot a retrieval assistant grounded in firm knowledge for research & proposals Outcome: Faster, on-brand first drafts · Vendor: Endpoint · Depends on: Knowledge source in place	AI Owner	High	Medium

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
Formalize AI review step in delivery QA; expand to the highest-value practice area Outcome: Consistent, trustworthy output at scale · Depends on: Pilot results	Quality / Delivery	Medium	Medium

AI tools & vendor ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
Microsoft 365 / Copilot	Productivity + AI assistant	Annual — 03/2027
OpenAI (personal accounts)	Ad-hoc research / drafting — unsanctioned	Month-to-month
SharePoint Online	Document / knowledge store	With M365

Documentation reviewed: Data inventory / catalog — what data exists and where it lives · AI use-case list or backlog / ideas under consideration · AI & ML tools or platforms in use or piloted · Team & skills overview — who could build and own AI · KPIs / metrics the business wants AI to improve

Evidence notes: No acceptable-use or data-handling policy was available — itself a priority finding. No consolidated data catalog beyond SharePoint site structure.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Annual — 03/2027	Microsoft 365 / Copilot	Productivity + AI assistant
Month-to-month	OpenAI (personal accounts)	Ad-hoc research / drafting — unsanctioned
With M365	SharePoint Online	Document / knowledge store

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 • Data Foundation

How centralized is your business data?	Some consolidation
Confidence in data quality / consistency	Good
Data governance in place?	Informal
How easily can teams access the data they need?	Some friction
Data types you want AI to use	Documents, Email/Chat, Structured/DB

02 • Platform & Infrastructure

Primary environment for workloads	Cloud-first
AI / automation tooling in use	Copilot/M365
Path from pilot to production	Ad-hoc
How integrated are core systems?	Some

03 • Use Cases & Value

Have you identified AI use cases?	A shortlist
Are success metrics defined?	Vaguely
AI pilots underway?	Piloting
Who drives AI use cases?	Business only

04 • People & Skills

General AI literacy across the org	Solid
In-house AI / ML skills	Limited
AI training / enablement offered?	Planned
Change management for AI adoption	Informal

05 • Governance & Risk

AI acceptable-use policy?	Drafting
Ungoverned (shadow) AI usage	Widespread
Data security / privacy controls for AI	Basic

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: AI-Ready 80+ · Advancing 60+ · Developing 40+ · Emerging 20+ · Unprepared 0+.

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