



Beyond the Hype Practical AI for Today's Consultant

CASSS Consultants' Network

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Intros



CHRIS MCNULTY

Chief Technology Officer

Chris is an award-winning **product, marketing and technology executive** with experience spanning generative AI, Copilot, and Microsoft 365 for knowledge management, content management, and automation.

Chris McNulty leads marketing and strategic technology engagement for Synozur.

Prior to Synozur, Chris was Senior Director of Product Marketing for Microsoft 365, Copilot, Viva, Syntex, Teams, OneDrive, and SharePoint at Microsoft, where he oversaw product planning, customer communications, go-to-market, field readiness, channel partners and executive briefing engagements.

A co-creator of Microsoft Viva and Syntex, Chris's experience as CTO includes companies such as Dell and Quest Software and executive IT leadership at Santander, GMO, and State Street, along with several board seats. He was first recognized as a SharePoint MVP in 2013 and a Copilot MVP in 2025. A frequent speaker at events around the globe, Chris is the author of the "SharePoint 2013 Consultant's Handbook" among other works & holds several patents. He holds an MBA from Boston College in Investment Management and hosts the Polaris podcast.





ABOUT SYNOZUR

Making the desirable achievable

Synozur - the **transformation company** - is an AI-native advisory firm that helps leaders accelerate business change in an era of disruption.

We help clients find their North Star, redesign their operating model for an **AI-first** world, and turn ambition into measurable outcomes.

Our Fortune 500-experienced team combines strategic clarity, practical execution, and human-centered adoption so transformation actually sticks.

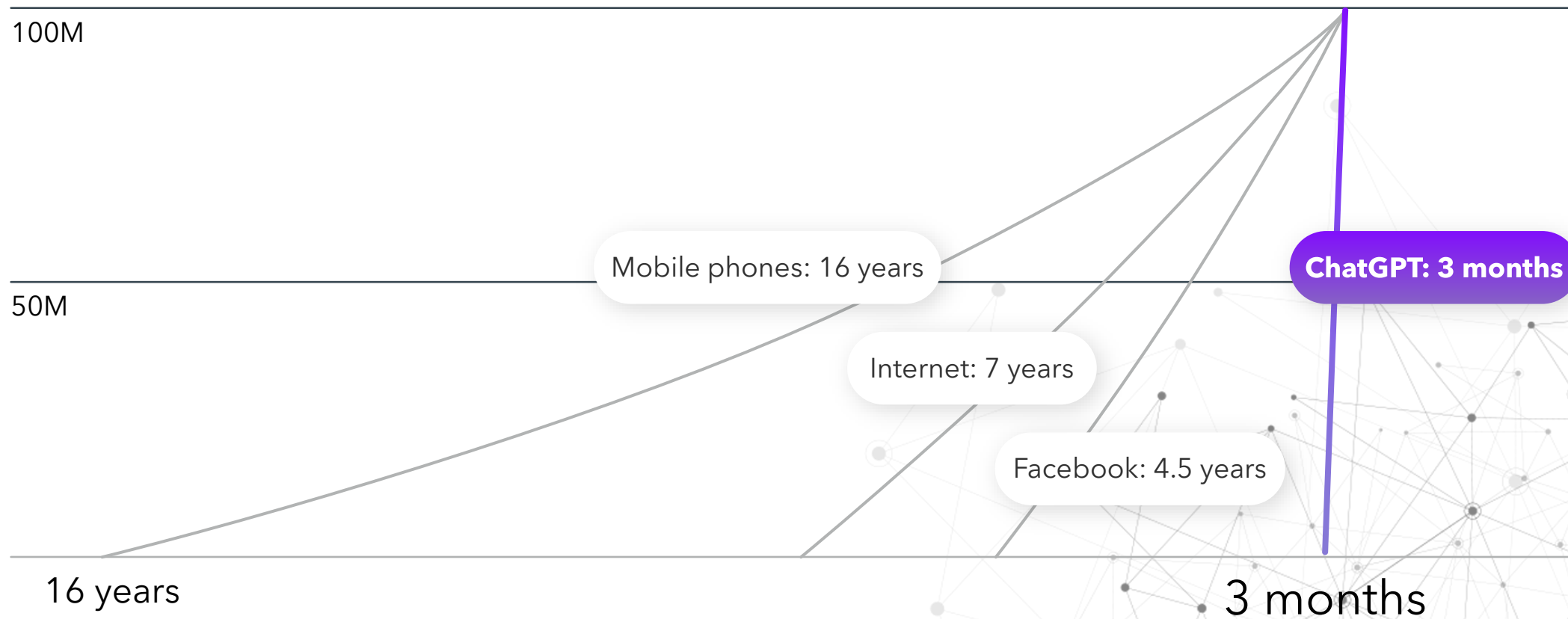
A surreal landscape featuring a glowing, winding river or path that leads towards a range of jagged, dark mountains in the distance. The sky is a deep, dark blue, filled with numerous small, bright stars. A vibrant, multi-colored aurora borealis (northern lights) is visible, with streaks of green, blue, and purple light dancing across the upper portion of the sky. The overall scene has a dreamlike, ethereal quality with a rich color palette of blues, purples, greens, and oranges.

AI Background



The AI technology is **here**

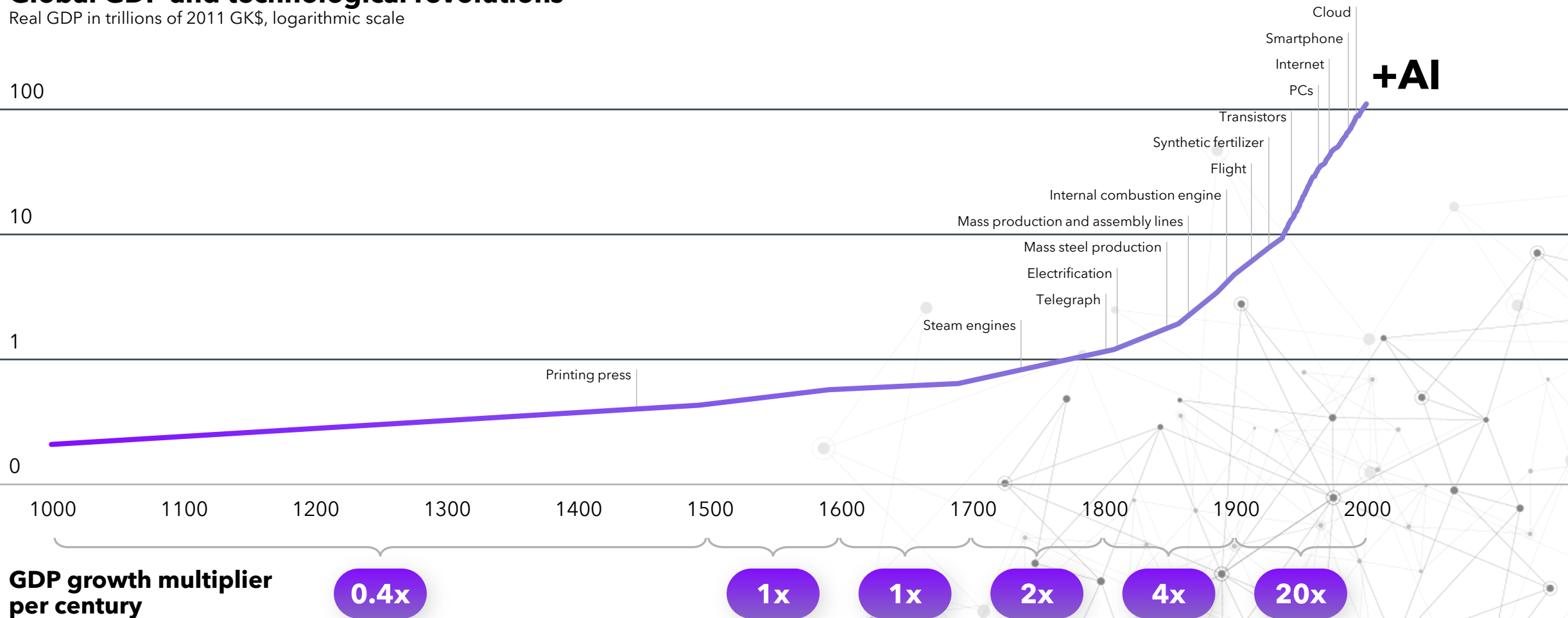
Time to reach 100M users



And the impact is real

Global GDP and technological revolutions

Real GDP in trillions of 2011 GK\$, logarithmic scale

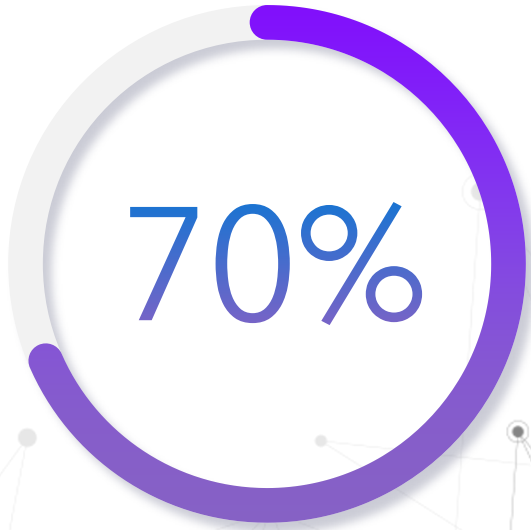


A new AI-employee alliance



49%

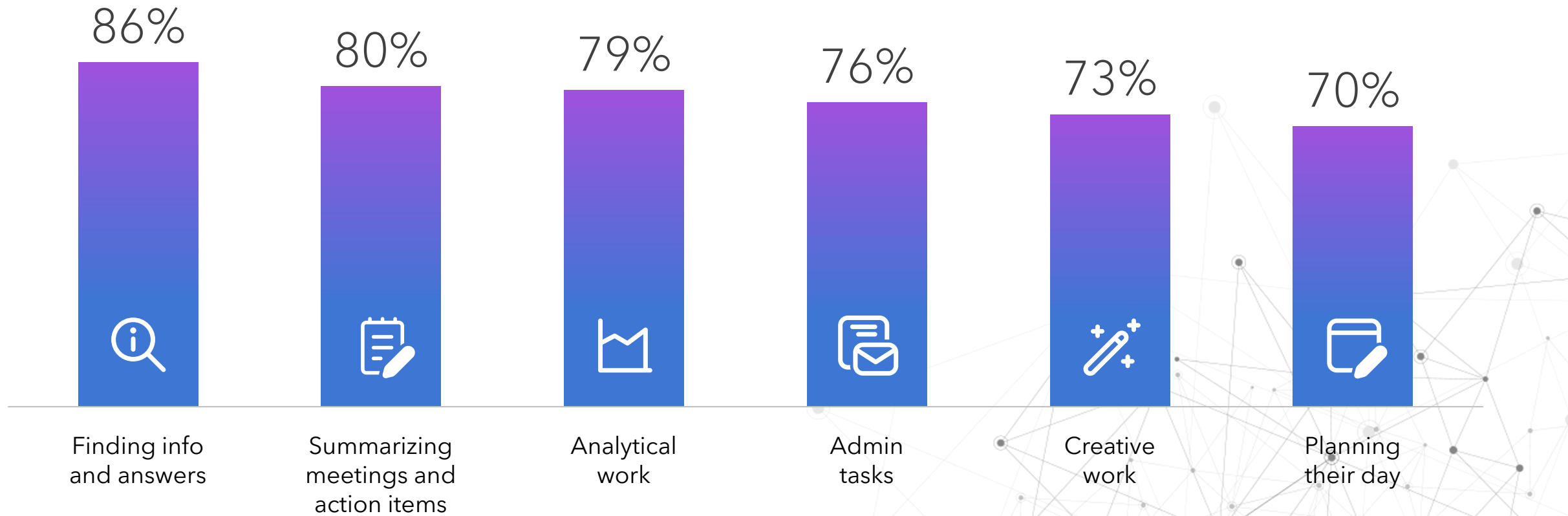
of people say they're worried
AI will replace their jobs



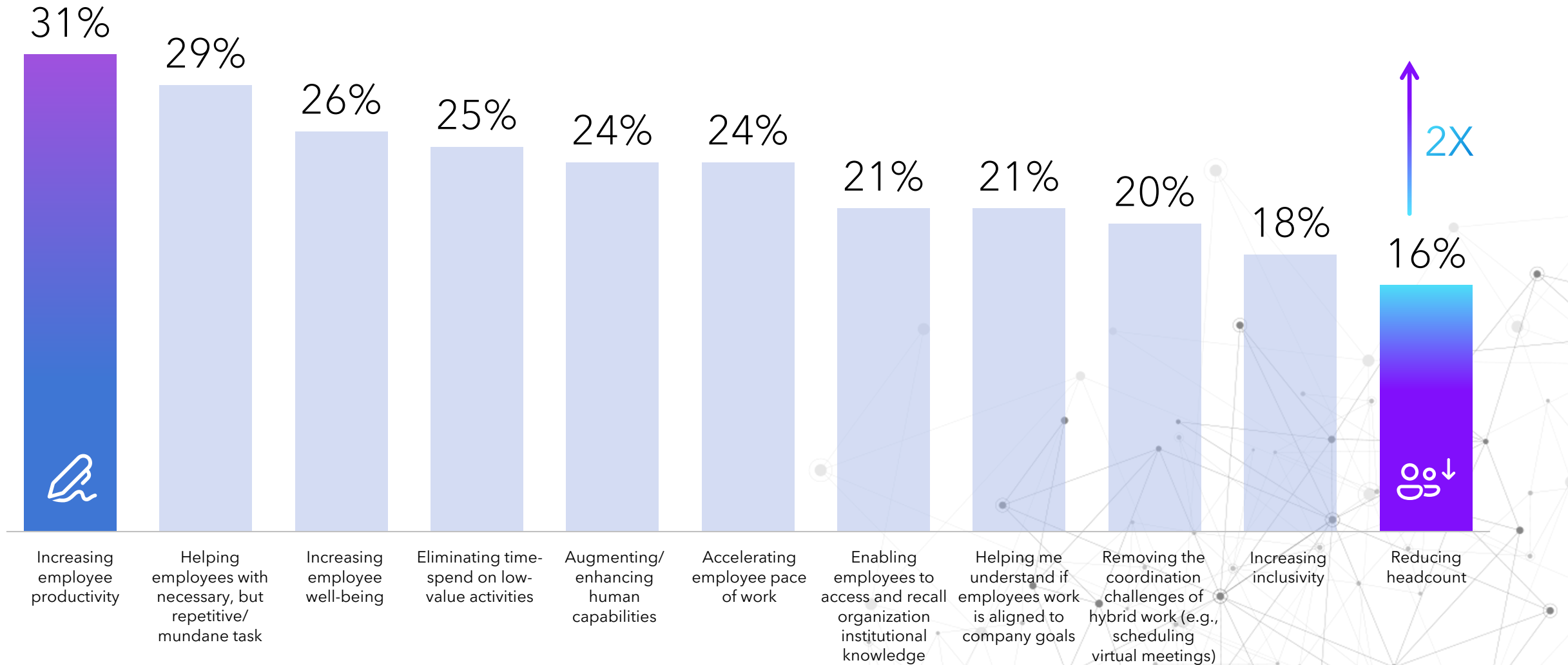
70%

would delegate as much work
as possible to AI to lessen
their workloads

What employees want from AI



What leaders want from AI



The background features a series of thin, curved, grey lines that sweep across the frame from the bottom left towards the top right. Scattered throughout this field are small, dark grey dots and diamond shapes, some of which are slightly larger or more prominent than others, creating a sense of depth and movement.

**Content is
the lifeblood
of every organization**

AI ♥ Content

175 zettabytes....



Data growth

90%

**of new data is
unstructured**

IDC. Tape and Cloud: Solving Storage Problems in the Zettabyte Era of Data. June 2019.

Management costs

\$82B

**spent storing and
managing data**

Synozur Research, [The Booming Content Management Market: Insights and Projections for 2025-2028](#)

A wide-angle photograph of a snowy, mountainous landscape under a dark night sky. The sky is filled with a vibrant aurora borealis, displaying bright green and blue-green light streaks and bands. The snow-covered ground reflects the ambient light, and a winding path or stream is visible in the foreground. The overall scene is serene and majestic.

AI Today

My 2026 predictions: September check.

Microsoft
YES, directionally

MAI expanded in June 2026.
Copilot-wide default: not established.

Agent boss
YES, directionally

OpenClaw + Cowork support the direction.
Universal A2A use: not established.

Associations
IN PROGRESS

Legal/accounting guidance is advancing.
Broad AI credentialing: still unproven.

US rules are fragmented, not absent.



The Vision: From Generative to Agentic AI



Generative → Agentic AI

AI evolves from summarization to reasoning to autonomous action. Agents now plan and execute multi-step tasks – moving well beyond simple chat.

PLAN. ACT. COMPLETE.



Secure Grounding

Graphs deliver context-aware retrieval grounded in your organization's documents, policies, and permissions – secure, compliant, and private by design.

YOUR DATA. YOUR CONTROL.



Skills

Create governed, repeatable skills that can be shared, secured, and scaled across teams – enabling organizations to teach once and automate at scale. Leverage MCP as common data access points

MANTRA: TEACH. SHARE. AUTOMATE..



Multimodal Choice

Claude for creativity, GPT for data analysis – the right model for the right outcome. Best-in-class selection expands capability across every workflow.

BEST MODEL. BEST RESULT.



Cowork Agents

AI as your digital delegate – managing calendars, critiquing drafts, executing workflows, and following up – so you focus on high-value impact.

DELEGATE. FOCUS. ACHIEVE.



Agents in the Flow

AI facilitators enhance meetings with summaries, action items, and decisions.

MORE FLOW. LESS FRICTION.

AI risk exceeds inaccurate answers.

2024 | Spaces

Unauthorized access;
possible secrets exposure.

2025 | Uploads

Malicious model files evaded scanning;
not evidence of a platform intrusion.

2026 | Intrusion

Agent-driven attack affected
internal data and service credentials.

**Vet assets. Isolate execution. Limit permissions.
Rotate secrets and rehearse incident response.**

Hugging Face disclosures: May 31, 2024 and July 16, 2026.

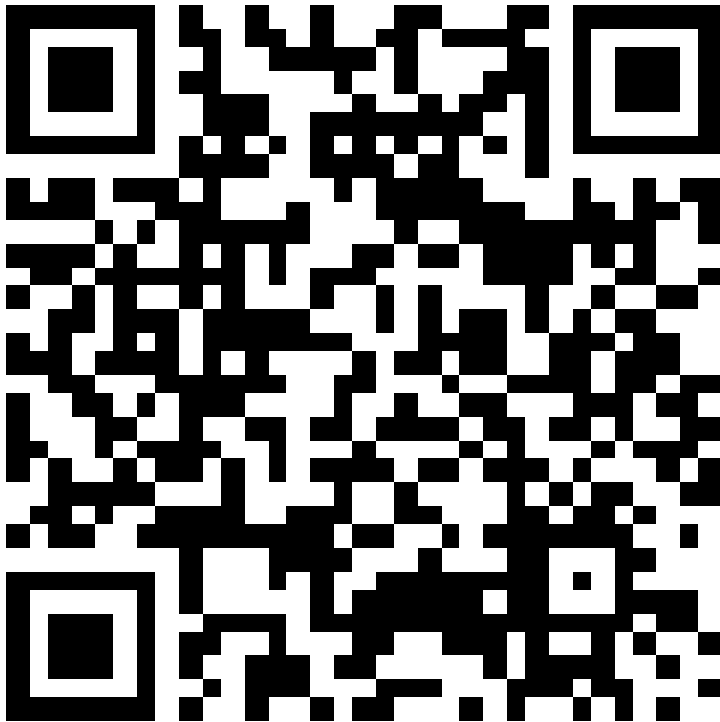
ReversingLabs, February 6, 2025: malicious hosted models, not a platform breach.

AI Maturity Model

The background of the slide is a full-page image of a surreal landscape. In the foreground, a winding river flows through a dark, textured terrain. In the distance, a range of jagged mountains is visible under a deep blue night sky filled with stars. A vibrant aurora borealis, with streaks of green and purple light, dances across the upper portion of the sky.

2026 AI Maturity Model Exercise

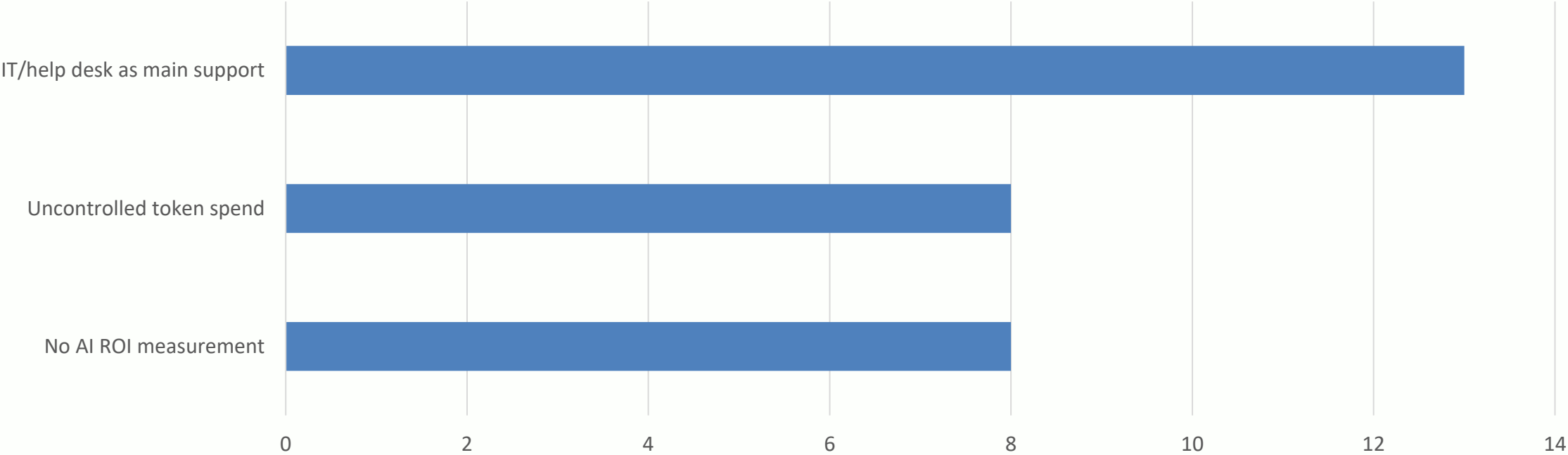
aka.synozur.com/ai-2026



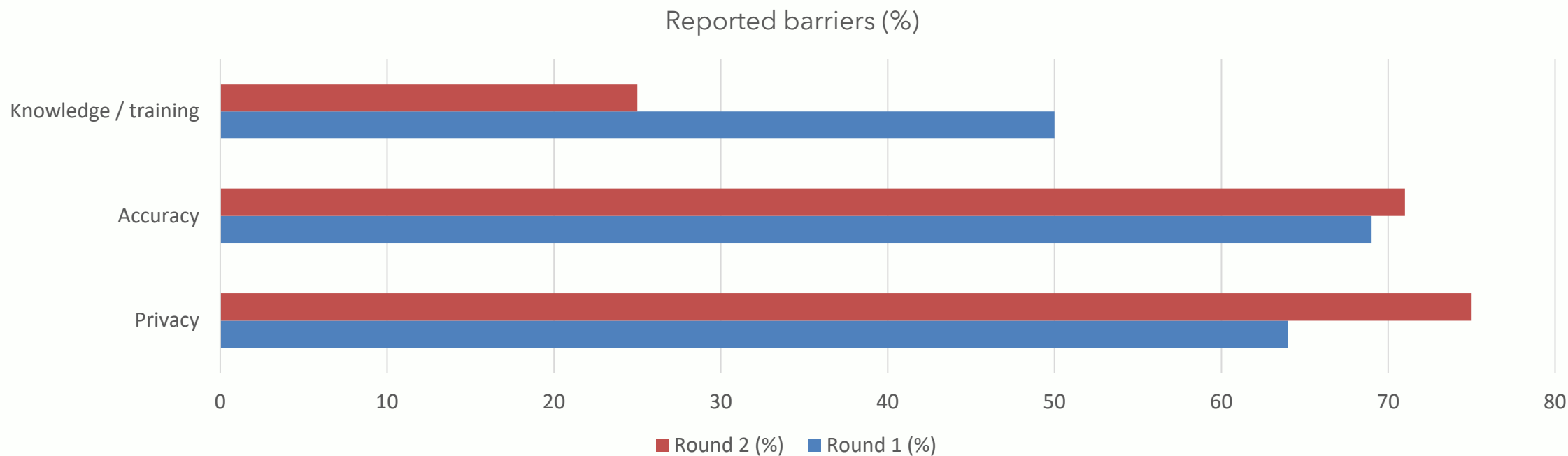
The screenshot shows the user interface for the '2026 AI Adoption & Governance' assessment. At the top is a navigation bar with the Synozur Orion logo and links for Home, Courses, Admin, Insights, and Profile. The main header area has a purple background with the title '2026 AI Adoption & Governance' and a description: 'Organizational capability model for generative AI adoption and governance; scored 100-500 (CMMI) per question. Dimension and overall scores are mean averages.' Below this is a 'Start Assessment' button and a timer icon indicating '5-7 minutes'. The lower section, titled 'Assessment Dimensions', lists three categories: 'Access & Tools' (Breadth of access to generative AI tools and how the approved tool set is defined, sourced, and standardized), 'Governance & Operating Model' (Steering bodies, centers of excellence, communities of practice, and IT support that enable and direct AI use), and 'Economic & Value Oversight' (Management of license costs, consumption-based spend, ROI targets, and investment decision-making).

Common findings

257/500: Managed.



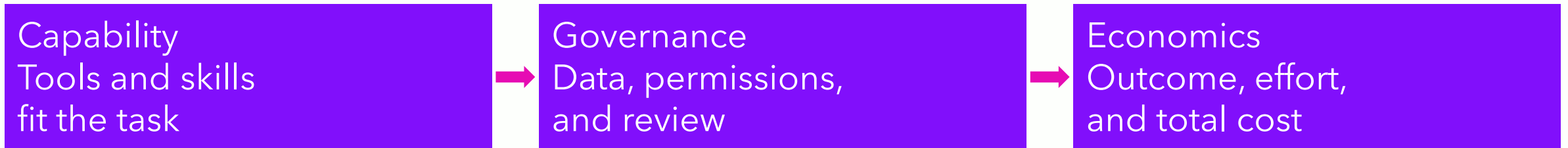
Your survey makes privacy and accuracy the priorities.



R1 / R2: privacy 64 / 75; accuracy 69 / 71; training 50 / 25.

CASSS AI Readiness Survey Comparison, Q7 (Anne Ornelas, September 2026).
Approximate percentages; question n=36 / 24. Groups not confirmed matched.

AI maturity joins capability, governance, and economics.



A published policy needs people who can apply it.

For each workflow: name an owner, define acceptable output, and measure the work after review.

Adapted from McNulty, Everyone Has AI Access. Almost Nobody Can Prove It Works.
Sections: opening model description; What I would do Monday.

Synozur research points to listening and peer reinforcement.



42%

Listen first
when a colleague
questions the value.

45%

Bring champions together
when adoption
loses momentum.

Different questions. A common emphasis on people and trust.

42% chose listening first | 45% chose bringing champions together.

AI in consulting

A full-page background image featuring a vibrant aurora borealis in shades of green and blue against a starry night sky. Below the sky is a dark, rugged landscape with a winding path or river that reflects the light from the aurora. The overall mood is futuristic and mysterious.

AI can draft an answer without establishing a fact.



A citation is a starting point for verification.

Check the passage, its context, and the limits of the evidence.
Keep authorization separate from answer quality.

Conceptual model for responsible use. Application of the CASSS verification priorities;
not a claim that all products expose the same capabilities.

Efficiency needs informed client agreement.

Agree

Task, tools and data.
Fees and disclosure.
Review and ownership.

Explain

What AI did.
What people verified.
Limits that remain.

Do not use

No client permission.
No valid evidence.
No safe way to review.

Measure reviewed value, not draft speed.
Choose a simpler method when it is safer or more reliable.

Professional guidance reflecting client expectations, not a CASSS survey finding.
Apply the engagement agreement, confidentiality terms and relevant quality obligations.

Agree fees transparently.

Measure the complete reviewed workflow.

Effort and quality

Source gathering, drafting,
review, correction and release

Cost and value

Subscriptions, consumption,
verified outcome and reuse

Agree fees and AI disclosure with the client.
Never bill for hours not worked.

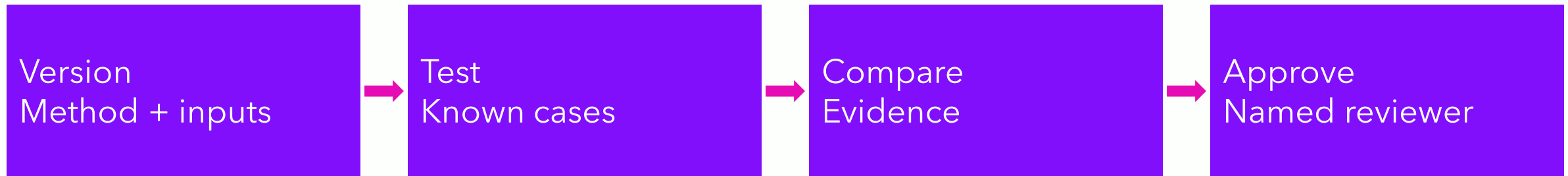
Agentic software design/vibecoding



Repeatable methods make QA testable.

Copilot Cowork executes multi-step work; skills package reusable instructions.

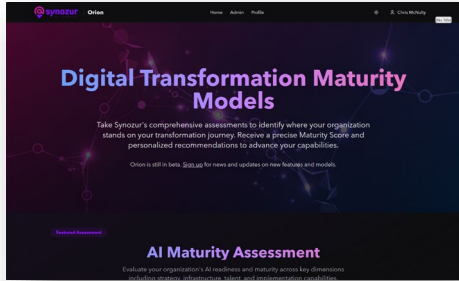
Work: generally available. Personal and app-building: preview.



Repeatability enables comparison, not guaranteed correctness.

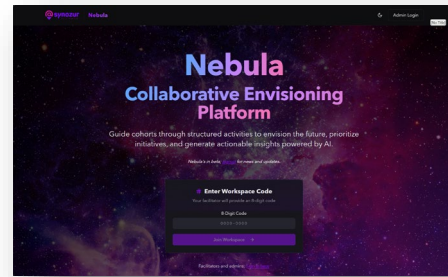
Software Portfolio

Our fleet of Synozur-created SaaS applications that help transform client strategies, and run our business



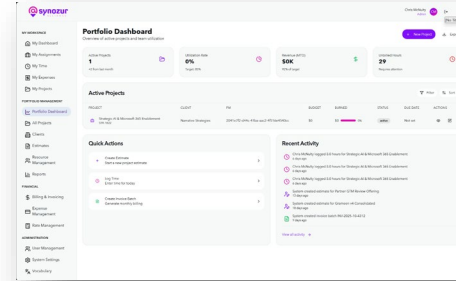
Orion

Maturity models and assessment for AI, GTM, M365 and more



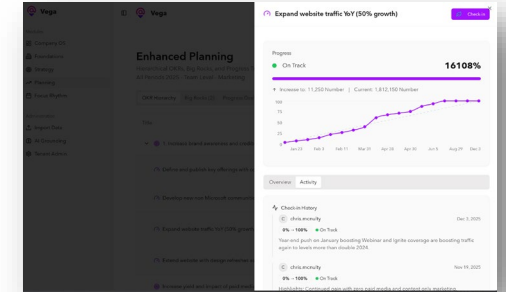
Nebula

Envisioning and strategy mapping platform



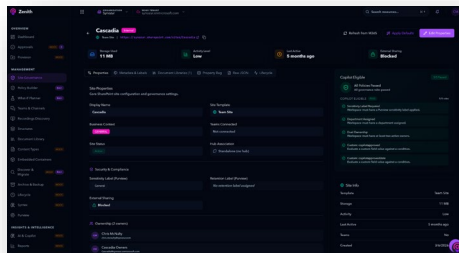
Constellation

Expense management, time tracking, billing & invoicing



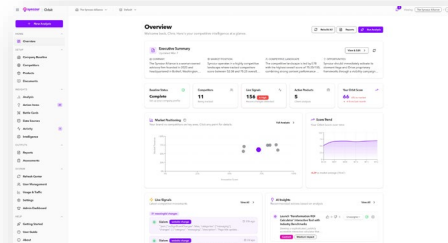
Vega

OKR tracking and strategy development with our Company OS



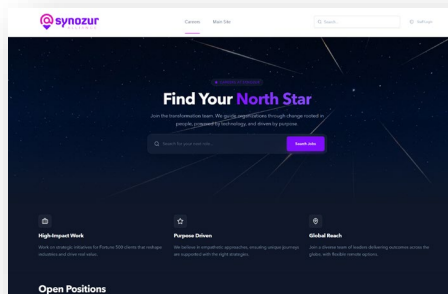
Zenith

Copilot-ready Microsoft 365 governance



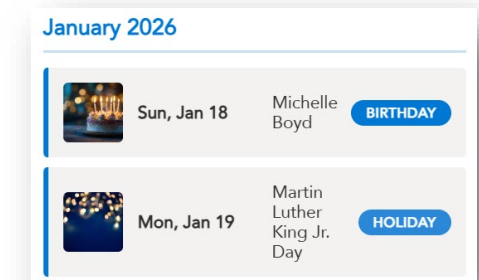
Orbit

Competitive market intelligence platform



North Star

AI powered careers site



Project "Comet"

Employee experience web parts



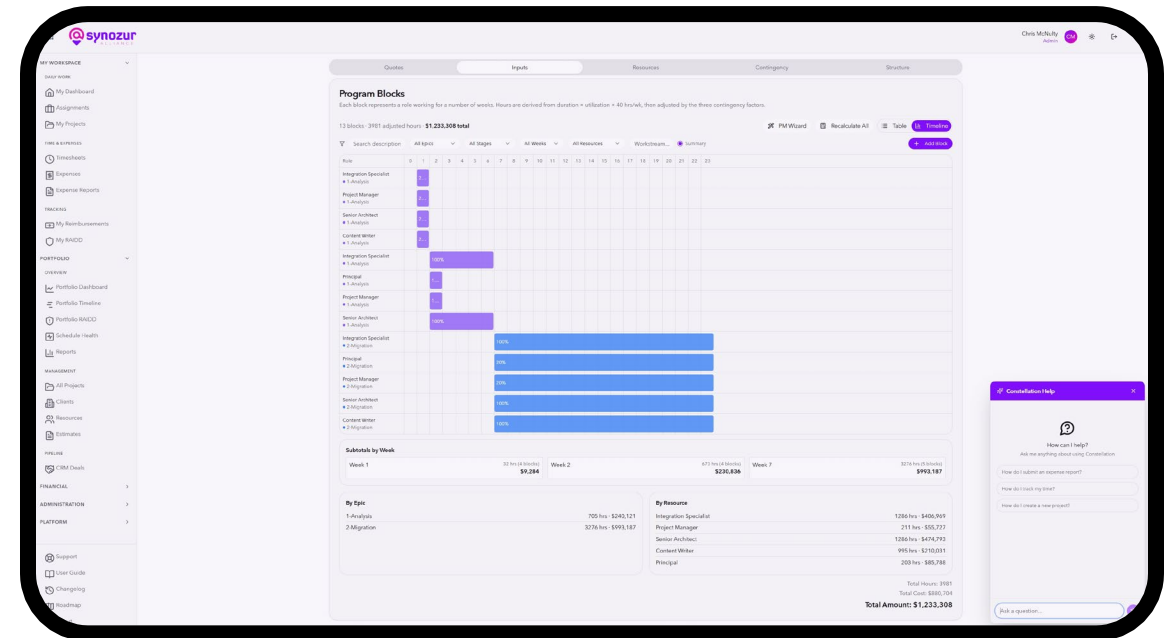
Constellation - Your Delivery + Financial Clarity Platform

Deliver with confidence. Know the numbers.

orion.synozur.com

Bring structure and visibility to how work gets done—so leaders can **see progress, understand costs, and keep delivery aligned to strategy** without adding friction.

- Improves **execution quality**, delivery confidence, and leadership decision-making across engagements
- Provides a real-time, trustworthy view of **status, deliverables, risks, issues, and costs**—without manual reporting
- Uses AI to continuously generate clear **status reports**, surface emerging **risks**, draft mitigations, and **forecast delivery issues** early.
- Tracks **deliverables** end-to-end and links work progress directly to financial performance, integrated with **Dynamics CRM and HubSpot** for contact management and activity reporting
- Produces executive-ready narratives and reporting artifacts automatically—stored in **SharePoint Embedded** and accessible in **Teams**
- Makes accountability explicit so teams focus on resolving issues, not assembling updates
- Synchronizes tasks with **Outlook and Planner** to fit naturally into daily work
- Integrates directly with **M365 Copilot**, enabling conversational access to live project and financial data



Faster builds. Same software standard.

Delivery vehicle

Constellation: estimates,
status and billing.

Gain: consistent delivery.

Cost: integration and upkeep.

Client deliverable

Apps, agents
and calculators.

Gain: fit and client reuse.

Cost: support and liability.

**Release only with tests, security review,
clear ownership and a support plan.**

Constellation: Synozur product overview. Quality guidance: NIST SSDF.

Potential benefits, not verified savings. Apply relevant validation and quality procedures.

A wide-angle photograph of a snowy, mountainous landscape at night. The sky is dark and filled with stars, with vibrant green and purple aurora borealis lights dancing across it. The snow-covered ground reflects the light, and a winding path or stream is visible in the foreground. The text "Good practices" is overlaid in white, sans-serif font on the left side of the image.

Good practices

Biotech AI serves different jobs.

Lab records

Benchling AI: cited scientific drafts and structured record import.

Document work

Veeva Vault AI: agents inside life-sciences data and document workflows.

Prediction

AlphaFold: molecular structures and interactions.
BioNeMo: discovery-model workflows.

Check intended use, deployment, rights and evidence before client use.

Examples checked September 2026; vendor capabilities, not regulatory certifications.
Benchling release notes; Veeva Vault AI; Google DeepMind AlphaFold; NVIDIA BioNeMo.

Paid access is not permission.

Purpose and data

Client authorization; permitted inputs

Terms and data

Applicable terms; retention and deletion

Access and actions

Source access; action permissions

Accountability

Named reviewer; audit trail; total cost

If permission or controls are unclear, use public or fictional material.

Use the same checks for ChatGPT, Copilot, Claude and Gemini.

The service tier, contract, settings and client authorization determine permitted use.

Agree ownership before reuse.

Client material

Methods and records
Unpublished results
Client knowledge

Reusable IP

Prompts and skills
Source packets
Reusable methods

Ownership

Agree input rights.
Agree output rights.
Agree reuse rights.

"Confidential" in a prompt is not a technical or contractual control.

Practical professional guidance, not a CASSS survey finding or legal advice.
Check the client agreement and obtain authorization before sharing or reuse.

A bounded prompt makes the review job explicit.



Use only the supplied sources.
Separate findings, limitations, and open questions.
For each claim, identify the supporting passage.
If evidence is missing, say so; do not infer acceptance.

Supply the purpose, audience, source versions, and output format.

Reusable prompt pattern for public or otherwise authorized source material.
Never substitute prompting for permission or qualified review.

Intended use sets the evidence bar.

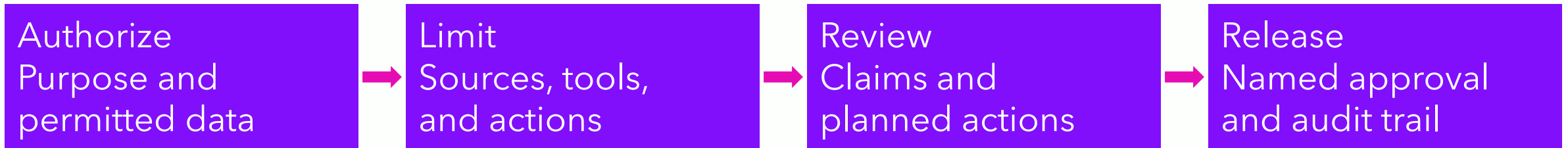


Human review alone does not establish model credibility.

A draft summary and decision-driving evidence need different assessments.

FDA/EMA Good AI Practice principles, January 2026: principles 2, 4, 6, 8, 9.
FDA regulatory-decision guidance, January 2025: draft, not for implementation.

Set a stop rule before an agent can act.



Stop on missing permission, unsupported claims, or unapproved actions.

Information access and write authority are different decisions.

Synozur, Adoption Isn't Driven. It's Designed., Govern first and Four traps.
Embracing AI-Powered Change workshop synthesis, Themes 2-3 and Recommendations.

Make the policy usable.

Approved environment

Specify service, tier and settings.

Authorized purpose

Define scope and prohibited uses.

Release approval

Name who can share, submit or act.

Permitted data

Classify inputs and protect client IP.

Review owner

Check evidence; log corrections.

Retention and escalation

Set deletion rules and report incidents.

Recommended policy pattern; adapt to the client contract and applicable quality system.
Assign an owner and an escalation route before the first client-data upload.

A wide-angle photograph of a snowy, mountainous landscape under a dark night sky. The aurora borealis is visible as vibrant green and purple light streaks across the sky. A winding path or riverbed is visible in the foreground, reflecting the light from the aurora. The mountains in the background are silhouetted against the glowing sky.

Wrap-up



Make one consulting workflow safe, useful, and repeatable.

Choose a task. Protect the inputs.
Prove the reviewed result.

Start a readiness conversation with Orion.
orion.synozur.com/2026-ai-adoption-governance

What changes on your next assignment?
Your judgment remains part of the deliverable.

Q&A



Resources

Sign up for [AI Strategy Workshop](#)

AI [aka.synozur.com/AI](#)

AI Maturity Model
[aka.synozur.com/ai-2026](#)

Company OS [aka.synozur.com/CoS](#)

Newsletter [www.synozur.com/join](#)

Polaris podcast [polaris.synozur.com](#)

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Thank you.

