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WELCOME

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WHAT WE'RE EXPLORING TODAY

Tomorrow’s World: Cybersecurity Essentials for AI Adoption in Case Management

- An overview of Crest IT Solutions
- The evolution of AI as a support tool for case managers
- Risks associated with using AI assistants without appropriate safeguards
- How AI can be deployed securely using the right tools and controls

Managed IT Support

Cyber Security & Compliance

Cloud & Microsoft 365

IT Audits & Consultancy

IT Hardware & Leasing

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WHO WE ARE

Crest IT Solutions delivers Managed IT Services

Including:

- Managed IT Support
- Cybersecurity and Compliance
- IT Audits and Consultancy
- Cloud & Microsoft 365 Solutions
- IT Hardware Sales and Leasing

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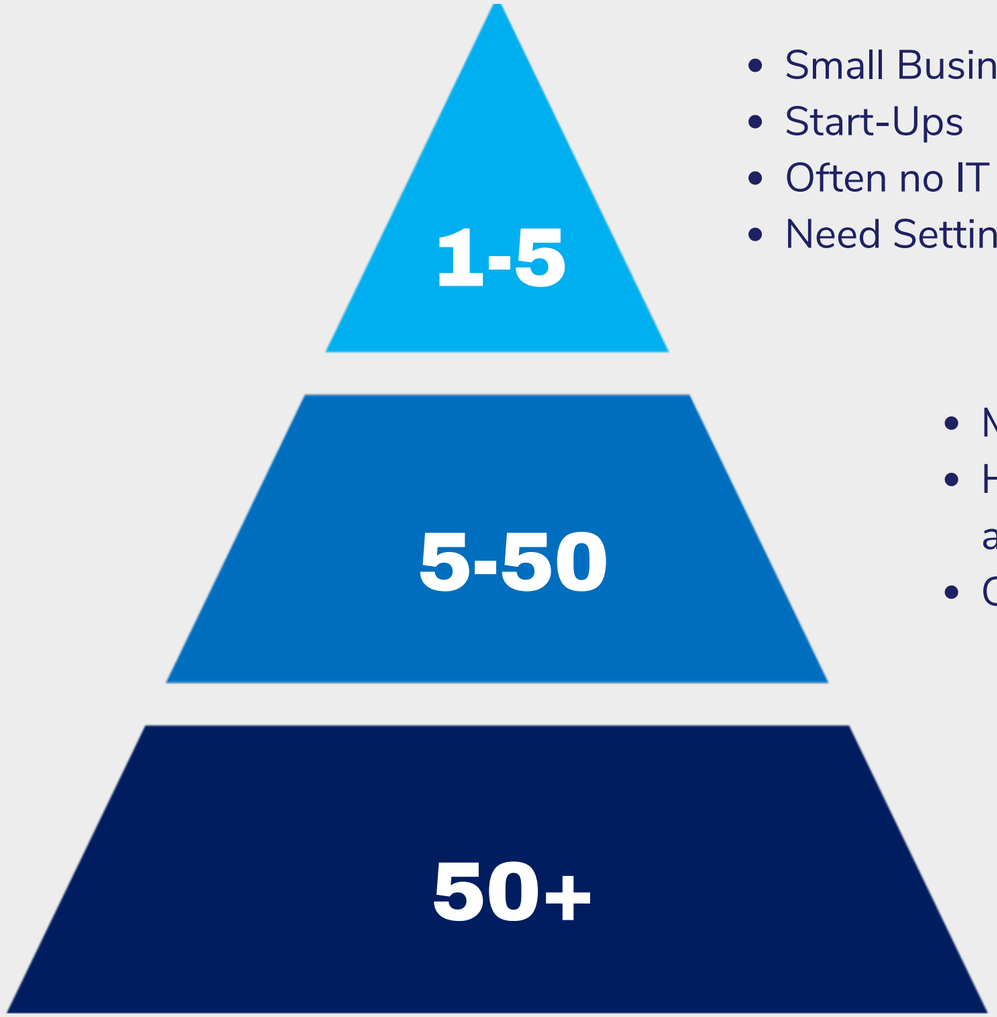
WHO WE SUPPORT...



- Small Businesses
- Start-Ups
- Often no IT support in place
- Need Setting Up Efficiently & Securely IT

- Medium Businesses
- Have Simple IT Setups, but it’s not always working well, and restricts growth
- Often want better value or service

- Larger Businesses
- Often have in-house IT teams
- Need extra support and expertise, and more in-depth reporting and security

CREST IT SOLUTIONS AND THE CASE MANAGEMENT SECTOR

Crest IT Solutions began working in the Case Management Sector over 6 years ago. We now support a large number of case managers across the UK.

LET'S VOTE...

Type YES in the chatbox if you're already using AI...

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TIMES ARE CHANGING...

AI use is growing..

Soon it will be embedded in everyday work processes...

IS YOUR AI STRATEGY SECURE?

AI IS ALREADY IN YOUR WORKFLOW...

Everyday tasks...

- Drafting quotations & cost estimates
- Summarising case notes
- Writing client updates
- Searching large volumes of documents
- Email and letter drafting

New tasks...

- Predicting outcome & risk
- Signposting clients to AI chat for advice on care
- Embedding AI in case management software

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PROCEED WITH CAUTION...

AI can be transformative, but without strong cybersecurity foundations, innovation can quickly lead to...

DATA BREACHES | **COMPLIANCE FAILURES** | **LOSS OF TRUST**

REAL-WORLD CONSEQUENCES...

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A paralegal at a UK law firm repeatedly used ChatGPT to summarise witness statements and client correspondence. Because the firm had no enterprise agreement or data protection guarantee with the AI provider, and the public model logs user inputs for training, this practice meant that confidential and privileged client data was stored and used beyond the firm's control.

The firm faced a difficult decision on how to handle the exposure, including whether to disclose it to affected clients. Ultimately they decided they had to inform clients, manage the reputational fallout, and update their policies and controls to prevent recurrence. Some clients moved their work elsewhere and a regulatory (SRA) investigation into data handling practices was opened.

RISKS OF PUBLIC AI TOOLS...

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1 Data Exposure & Leakage

- AI tools require data
- If not used correctly, data can be exposed
- Puts sensitive information at risk

RISKS OF PUBLIC AI TOOLS...

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2

Shadow AI & Unapproved Tools

When case information is entered into unapproved AI:

- Lose control of your own data
- Your organisation becomes uncompliant

RISKS OF PUBLIC AI TOOLS...

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3 **Regulatory Risk**

Raises Compliance Questions:

- Who is responsible for AI decisions
- How is data processed & stored
- Can outcomes be explained & audited

RISKS OF PUBLIC AI TOOLS...

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4

Increased Attack Surface

Attackers are targeting:

- AI models
- Data pipelines
- User access to AI enabled systems

IT’S TIME TO VOTE AGAIN...

Type YES in the chatbox if you’ve heard of Grok...

PUBLIC AI MODELS VS MS COPILOT

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PUBLIC AI MODELS CHATGPT / GEMINI / GROK	MICROSOFT COPILOT
✗ No organisational controls	✓ Works inside Microsoft 365
✗ No clear data retention policy	✓ Uses existing permissions
✗ No contractual protection for organisations	✓ Data is not used to train public models
✗ No guarantee of where data is begin processed or stored	✓ It is designed for enterprise use

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TAKE CONTROL OF YOUR AI

With an integrated AI assistant such as Microsoft Copilot, you can take full control...

- Data Policies
- AI Security
- Control Access & Permissions

TAKE CONTROL OF YOUR AI

With an integrated AI assistant such as Microsoft Copilot, you can take full control...

Data Policies

- Control the data AI can access
- Control where that data is stored
- Control who can see the data
- Control how long data is retained

TAKE CONTROL OF YOUR AI

With an integrated AI assistant such as Microsoft Copilot, you can take full control...

AI Security

- Work within a secure cloud environment
- Be subject to strong access management protocols
- Only be accessible through multi-factor authentication
- Be subject to regular patching & updates

TAKE CONTROL OF YOUR AI

With an integrated AI assistant such as Microsoft Copilot, you can take full control...

Control Access & Permissions

- Role based access controls
- Least privilege permissions
- Logging & monitoring of AI usage

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PREPARATION IS KEY.

Tools such as Copilot don’t eliminate risk, they change it.

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USING COPILOT SAFELY...

Review Permissions

Identify Confidential Data

Educate Users

Monitor & Review

Key: Ensure Microsoft Copilot is set up correctly.

THE FUTURE

AI is not a novelty, it is here to stay. The winners will be the organisations using it responsibly and consistently.

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CAN WE HELP?

- Microsoft Copilot Readiness Reviews
- Microsoft 365 Permission Audits
- Security Baselines for Sensitive Client Data
- Ongoing IT Security Support

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THANK YOU FOR ATTENDING!

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