📋 Readiness Checklist – Are You Copilot Ready? 🚀

Use this checklist to quickly assess if your team or organization is prepared for Copilot deployment. **Check off each item** as you go to cover all key aspects!

✅ **Executive Sponsor Identified** 👑 – We have a senior executive who openly sponsors the Copilot initiative and will drive adoption from the top. *(Who is it?)*

✅ **Goals Defined** 🎯 – We've clearly defined what we want to achieve with Copilot (e.g., efficiency or quality targets). *(List 1–2 key objectives)*

✅ **Pilot Group Selected** 👥 – We've chosen a pilot group that's representative **and** enthusiastic. *(Who's in the pilot? Departments/roles?)*

✅ **Success Metrics Set** 📊 – We've established measurable success criteria (adoption rates, time saved, etc.). *(Top 3 metrics?)*

✅ **Communication Plan Ready** 📣 – Initial announcement, periodic updates, and FAQs prepared. *(Launch email draft ready? Yes/No)*

✅ **Training Resources Prepared** 📚 – User training scheduled or materials ready (live demo, guide, champion support). *(First training date: _____)*

✅ **Support Structure in Place** 🛠 – IT helpdesk and/or Copilot champions ready to assist promptly. *(Helpdesk script/FAQ updated?)*

✅ **Data/Security Check Done** 🔒 – Reviewed security settings, permissions, and compliance. *(Any high-risk data areas?)*

✅ **Technical Requirements Met** 💻 – All pilot users have licenses, updated Office apps, and Teams compatibility. *(Verified with IT? Yes/No)*

✅ **Feedback Loop Established** 💬 – Mechanism (survey/forum) for user feedback, plus a regular review plan. *(Which mechanism?)*

✅ **Post-Pilot Plan** 🚀 – Criteria for moving from pilot → full rollout are defined. *(Criteria agreed? Yes/No)*

✅ **Risk Mitigation Considered** ⚠ – Potential risks identified (e.g., misunderstanding AI outputs, initial productivity dip) and mitigation planned. *(Any unresolved risks?)*

💡 *Ideally, all boxes should be ticked before a full deployment. Any unticked box = needs attention!*

🛠️ Practical Exercises – Time to Get Hands-On! 🎯

These exercises help you **turn theory into practice** for a Copilot rollout.

1️⃣ Draft a Phased Rollout Timeline 🗓️

- Break it into **3+ phases** (Pilot, Expansion, Full Deployment).

- Assign durations/dates + 2–3 key activities per phase.
  Example:

- *Phase 1 (Jan–Feb)* → Enable 50 pilot users, weekly check-ins, collect feedback

- *Phase 2 (Mar)* → Rollout to Sales & Marketing, run training workshops

- *Phase 3 (Apr)* → Rollout to all users, start monthly metrics reporting

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2️⃣ Identify Pilot Candidates 👤

- List **5–10 ideal pilot users** + one-line rationale each.

- If you can't name people, name roles instead (e.g., "Customer support rep handling many emails").

- Cover **at least 3 departments** for diversity.

3️⃣ Success Metric Brainstorm 📈

- Pick a Copilot use case (e.g., meeting summaries, Excel analysis).

- Define **1 efficiency metric** + **1 quality metric**.

- Write how you'd collect the data (e.g., stopwatch test, short survey).

4️⃣ Craft a Communication Piece ✉️
Choose ONE:

- 📧 CIO email announcing the pilot

- 📰 Newsletter blurb sharing early results

- ❓ FAQ answer to *"Will Copilot take my job?"*

Keep it positive, transparent, and reassuring.

5️⃣ Plan a Training Activity 🎓

- Create a quick **15-minute exercise** to get hands-on with Copilot.

- Could be *prompt drafting*, a *PowerPoint mini-project*, or *task time reduction*.

- Define steps + learning objectives.

6️⃣ Tech Readiness Audit 🔍

- Make a **mini checklist**: licenses, Office version, excluded projects, etc.

- Try answering at least one by checking with IT or admin settings.

💡 **Tip:**

- Exercises 1–3 → Planning & Metrics

- Exercises 4–5 → Communication & Training

- Exercise 6 → Technical Readiness

By completing these ✅, you'll have simulated **the full Copilot planning process** — from **stakeholder buy-in** to **final rollout readiness**.