



# COPILOT ZERO TO HERO

*Bi-Weekly Bootcamp Series. Expert-Led Hands-on Sessions.*



**Carike Botha**  
Chief AI Scientist, MVP



Developing a phased Copilot rollout roadmap, including pilot selection, success metrics, and adoption strategy. (ACM & Tech Readiness).

## SESSION 3: CREATING A PLAN FOR COPILOT DEPLOYMENT



IF YOU FAIL  
TO PLAN,  
YOU'RE  
PLANNING  
TO FAIL.  
BENJAMIN FRANKLIN

# AGENDA

- Introduction & Key Concepts
- Phased Copilot Rollout Roadmap
- Pilot Selection: Choosing the Crew
- Defining Success Metrics for Copilot Deployment
- Adoption Strategy: ACM & Tech Readiness
- Case Studies & Rollout Templates
- Homework



# ORGANISERS & PRESENTERS



**Tracy van der Schyff**  
Microsoft's #1 Fan, MVP



**Jacqui Muller (Soup Kitchen De Vil)**  
VP of Everything, UiPath MVP



**Carike Botha**  
Chief AI Scientist, MVP



**Jason Baxter**  
The Solution Guy, Microsoft



**Alistair Pugin (Hennie De Wet)**  
Shouting at ECM, MVP



**Warren du Toit**  
Azure Legend, Microsoft

# BI-WEEKLY SESSIONS



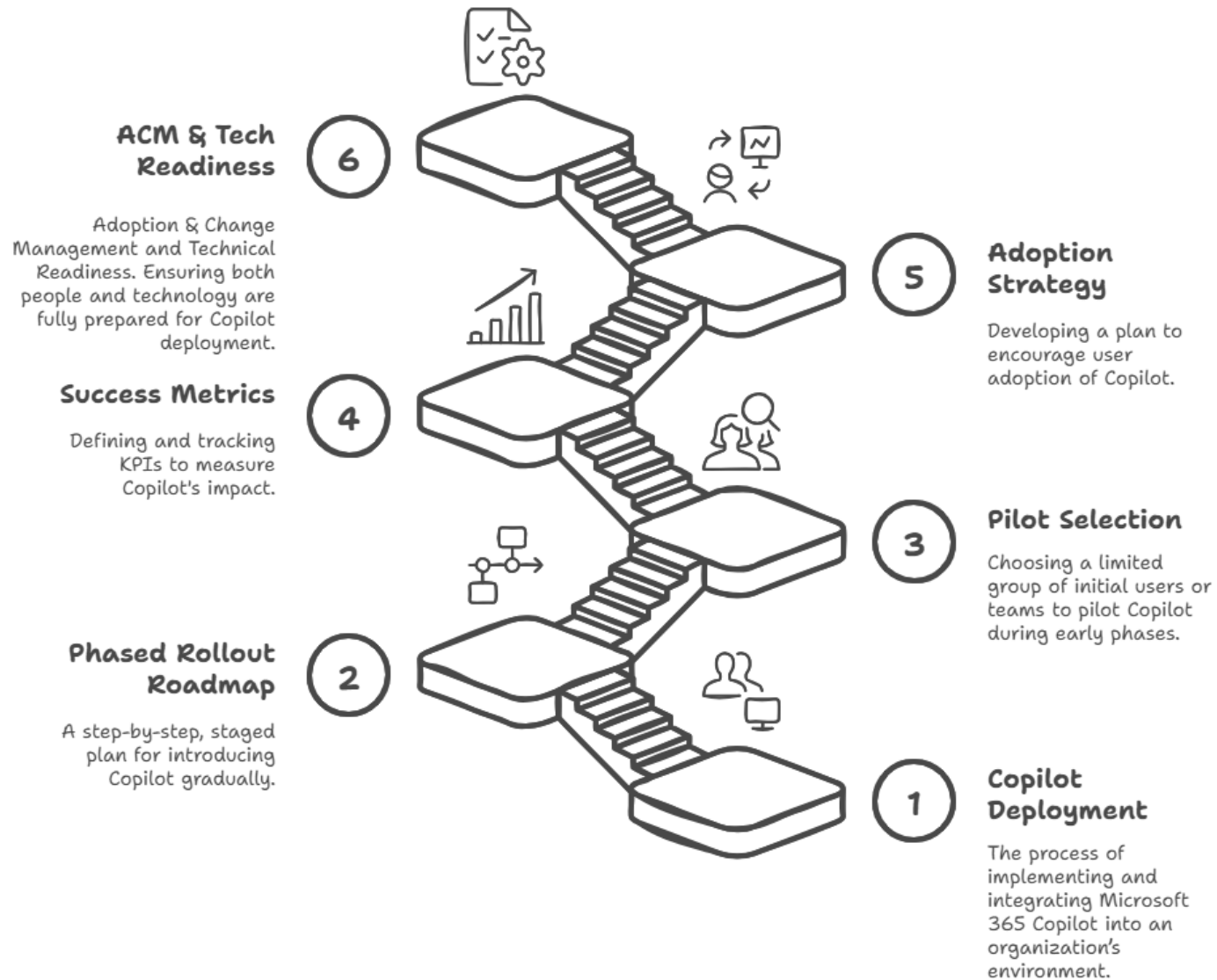
DATE	SPEAKER	TITLE	LINK
15th Jul 2025	Jason Baxter	Session 1: The Three Strategies you need for AI	<a href="#">Past</a>
29th Jul 2025	Tracy van der Schyff	Session 2: Assembling your AI Council: First steps	<a href="#">Past</a>
12th Aug 2025	Carike Botha	Session 3: Creating a Plan for Copilot Deployment	<a href="#">YOU are here</a>
26th Aug 2025	Alistair Pugin	Session 4: Preparing the Tenant	<a href="#">Register</a>
9th Sept 2025	Jacqui Muller	Session 5: Preparing SharePoint Online	<a href="#">Register</a>
23rd Sept 2025	Warren du Toit	Session 6: Preparing Teams (Meetings) for Recording & Transcription	<a href="#">Register</a>
7th Oct 2025	Carike Botha	Session 7: Preparing Power Platform & Azure	<a href="#">Register</a>
21st Oct 2025	Tracy van der Schyff	Session 8: Creating a Communication Plan	<a href="#">Register</a>
4th Nov 2025	Alistair Pugin	Session 9: Rolling Out Copilot Chat	<a href="#">Register</a>
18th Nov 2025	Jacqui Muller	Session 10: Rolling Out "Tips and Tricks" Sessions	<a href="#">Register</a>

# INTRODUCTION & KEY CONCEPTS





## Key Concepts & Terms in this Session



# PHASED COPILOT ROLLOUT ROADMAP



# PHASE 1: PLAN & PREPARE



- Complete the Microsoft 365 Copilot Optimization Assessment
- Identify Stakeholders & Build the core team
- Secure an executive sponsor
- Establish a cross-functional AI Council / Steering Committee
- Clearly communicate the business objectives
  - *"increase proposal drafting speed by 30%"*
  - *"reduce support email backlog by half"*

## 1 Get ready

User  
enablement

Select initial departments for rollout with the Scenario Library. Target a critical mass of users for rapid impact.

- ✓ Identify your success team
- ✓ Be intentional with assignment and concentrate seats



Technical  
readiness

Perform the Microsoft 365 Copilot Optimization Assessment

- ✓ Address data security, governance, and data access questions
- ✓ Build shared Copilot implementation plan with User Enablement team



# PHASE 2: PILOT LAUNCH

- This step is about starting small rather than a big-bang rollout
- Select a pilot group, a list of champions & enable Copilot for them
- Communicate to them that they are part of the trial run
- This phase is a few weeks & closely monitored for feedback
- Maintain open lines for wins/issue reporting
- Define success criteria
  - "At least 50% of pilot users actively use Copilot weekly"
  - "Quality ratings > 4/5"
- Only move to the next phase if above criteria are met

## 2 Onboard & engage

Lay the foundation for an intelligent progression of AI skills with Copilot Lab.

- ✓ Deploy training and Champion programs, engagement community
- ✓ Make ongoing training the standard

Prepare Microsoft 365 for AI deployment with the Setup Guide

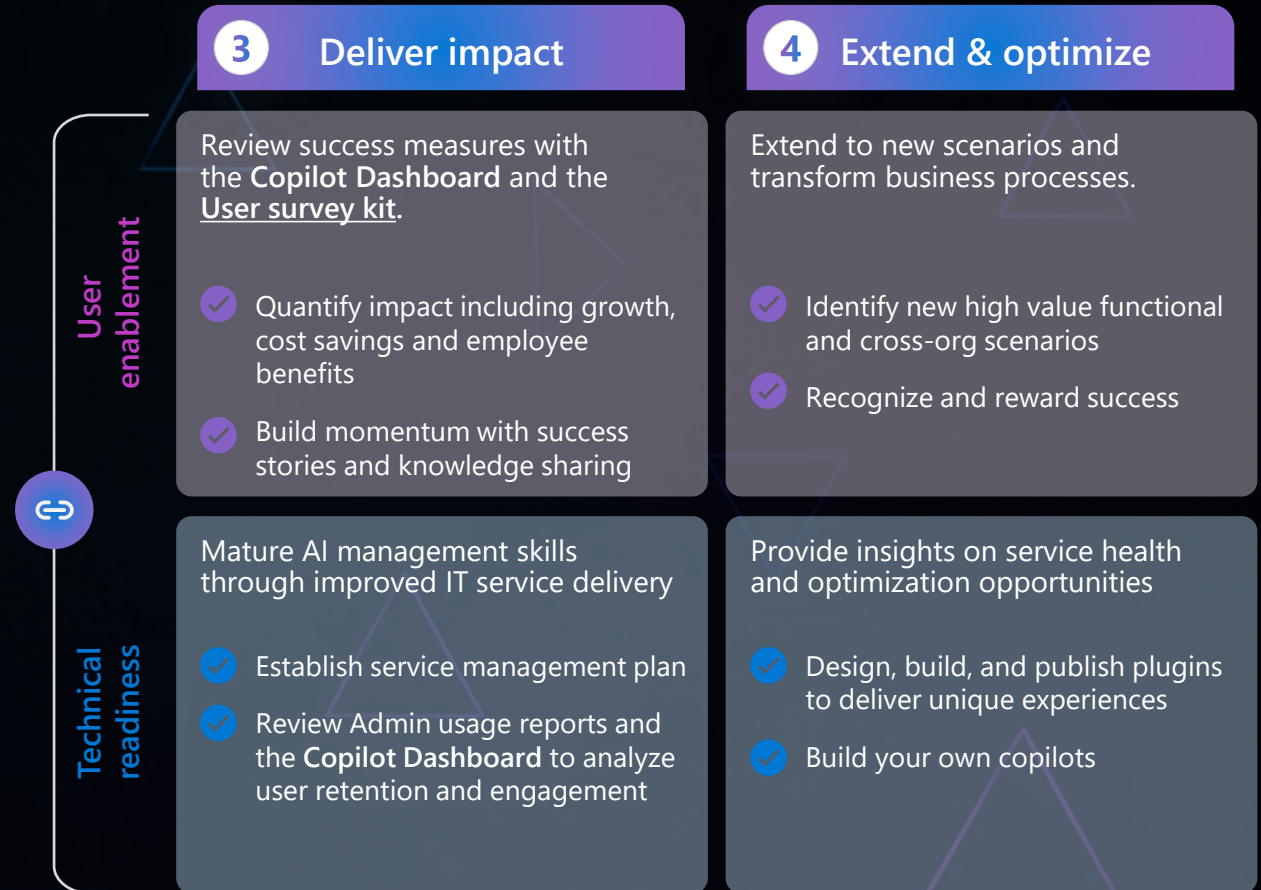
- ✓ Ensure appropriate Data Security controls are in place
- ✓ If needed, deploy updates and additional Microsoft 365 apps

User  
enablement

Technical  
readiness

# PHASE 3: EVALUATE & EXPAND

- Gather quantitative & qualitative feedback
  - Usage Logs, Survey Responses, Interview Insights etc.
- Identify what worked well & what needs improvement
- Refine your rollout plan



# PHASE 4: DEPLOY & SUSTAIN

- Sustain high adoption & optimize value
- Continue regular monitoring & KPI tracking
- Use the Copilot Usage Dashboard
- Set periodic reviews (monthly)
- Celebrate successes publicly
- Plan for long-term enablement





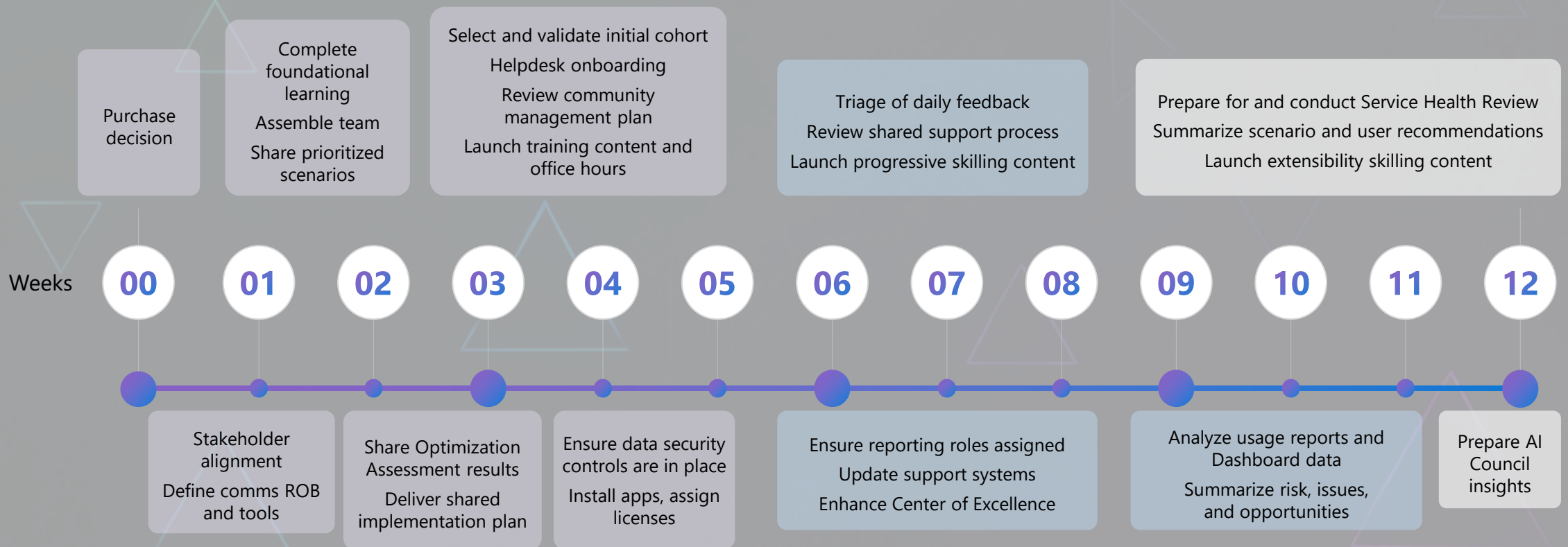
# PHASE 4: DEPLOY & SUSTAIN

First 30 days

30-60 days

Recurring tasks

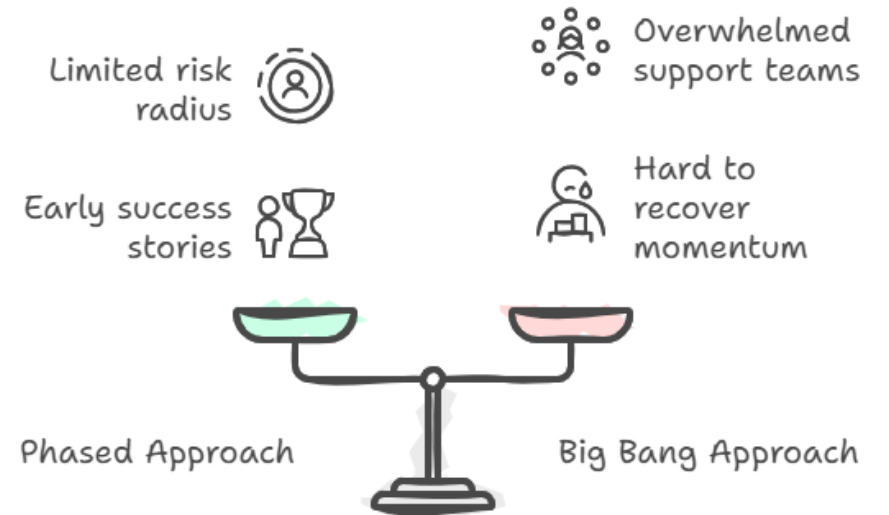
## Shared milestone view



# BEST PRACTICES

- Be flexible in your roadmap
- Be ready to extend the pilot to address issues before scaling up
- Roadmap should be a living plan
- Ensure each phase has a clear definition of done or exit criteria to prevent stalling

Choose the right implementation strategy for success.



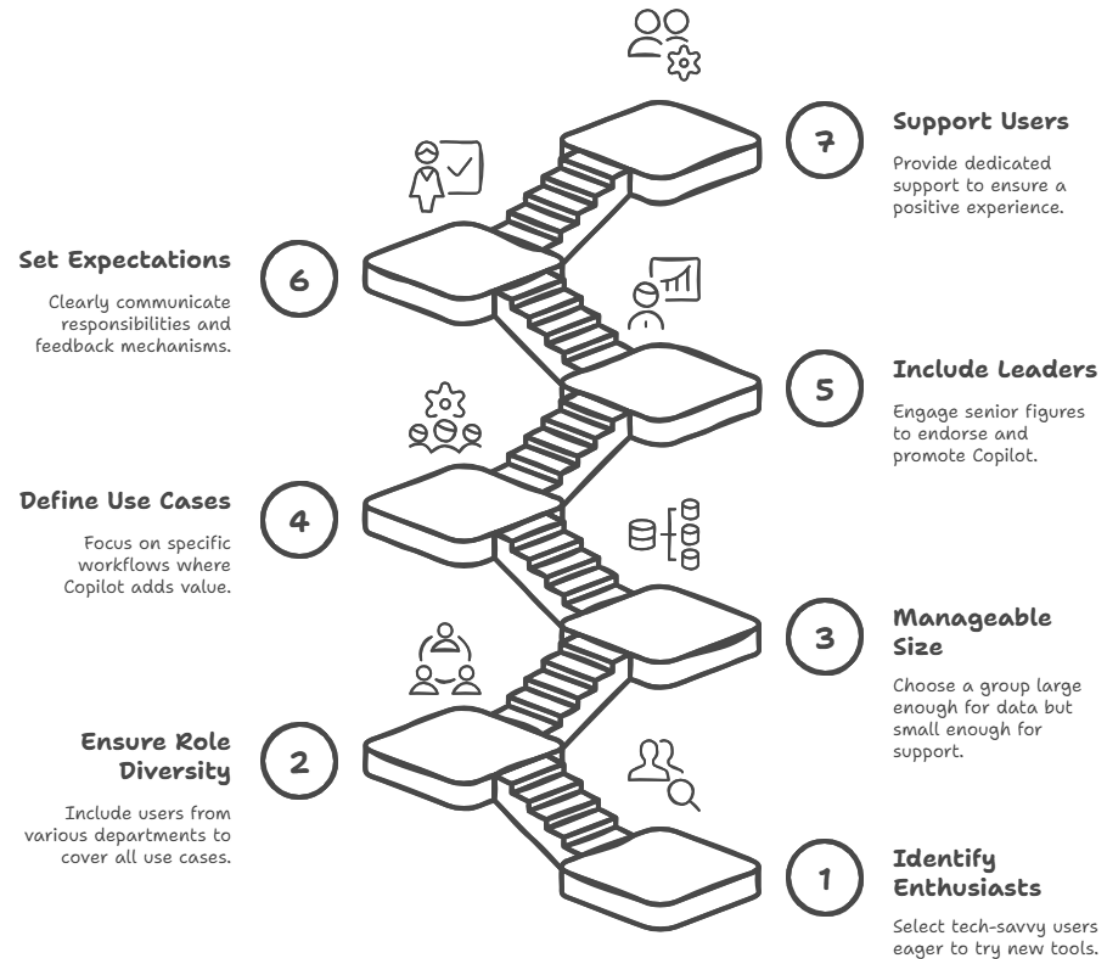
# PILOT SELECTION: CHOOSING THE CREW





# EFFECTIVE PILOT SELECTION

## Steps to Effective Pilot Selection



# NOW WHAT?

- Communicate
  - With those selected AND those not selected
- Be transparent about the pilot happening
- Match pilot scope to organisation context
- Key is to learn & build advocacy

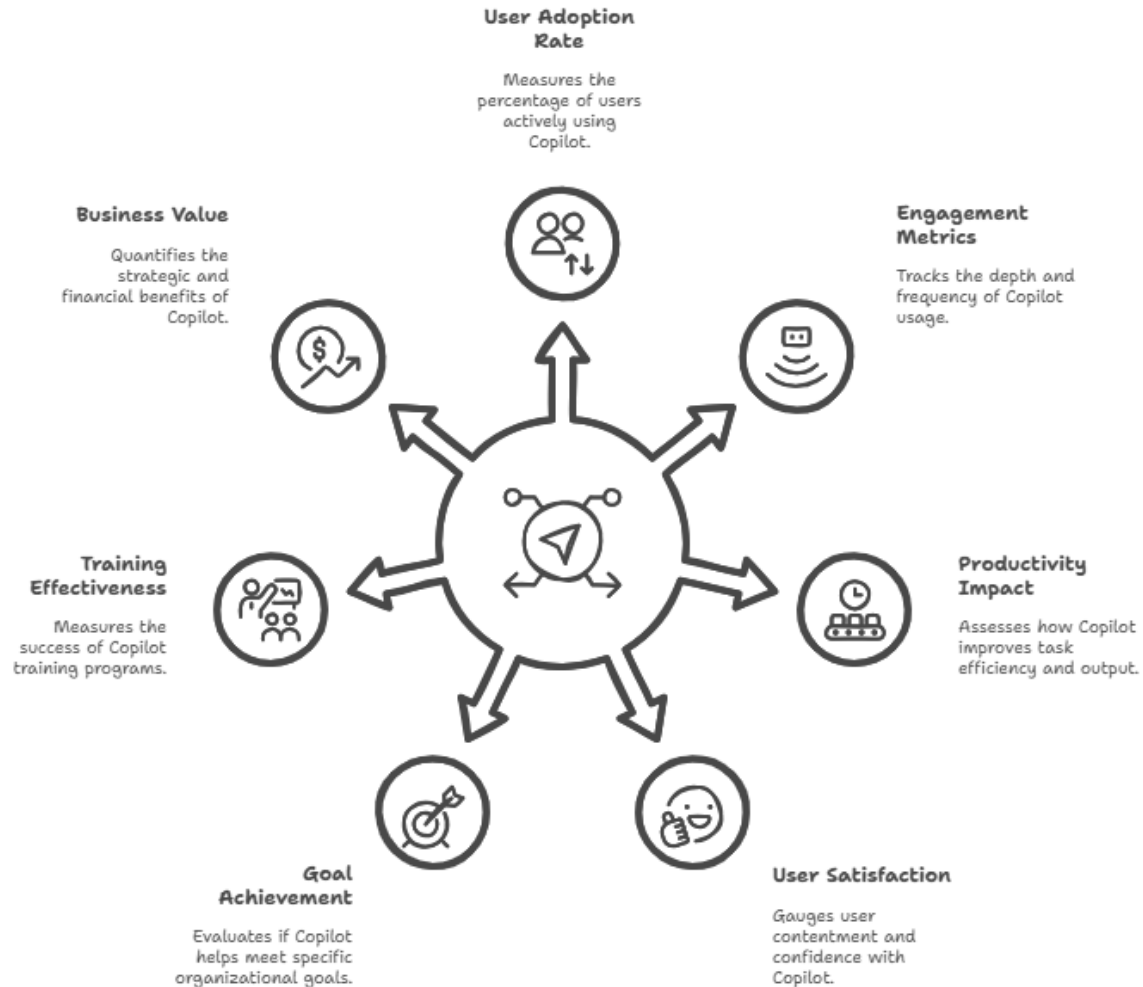


# DEFINING SUCCESS METRICS FOR COPILOT DEPLOYMENT





# COPILOT SUCCESS METRICS



- The Microsoft 365 Copilot impact report helps leaders understand the impact of Copilot usage among employees across their organization.



# IN SUMMARY



- Defining KPI's early is critical
- Share the metrics with stakeholders & leadership
- Be sure to define a rich set of metrics capturing:
  - Adoption
  - Impact
  - Outcomes aligned to your organisation goals
- As the saying goes: "You can't improve what you don't measure..."

# ADOPTION STRATEGY: ACM & TECH READINESS





## ACM Key Tactics

**Communicate early & often:** Set expectations, share the “why” and benefits.

**Train for confidence:** Hands-on demos, use-case examples, and continuous learning.

**Champion network:** Leverage enthusiastic users to support peers.

**Gather feedback:** Provide channels (surveys, forums) and act on input.

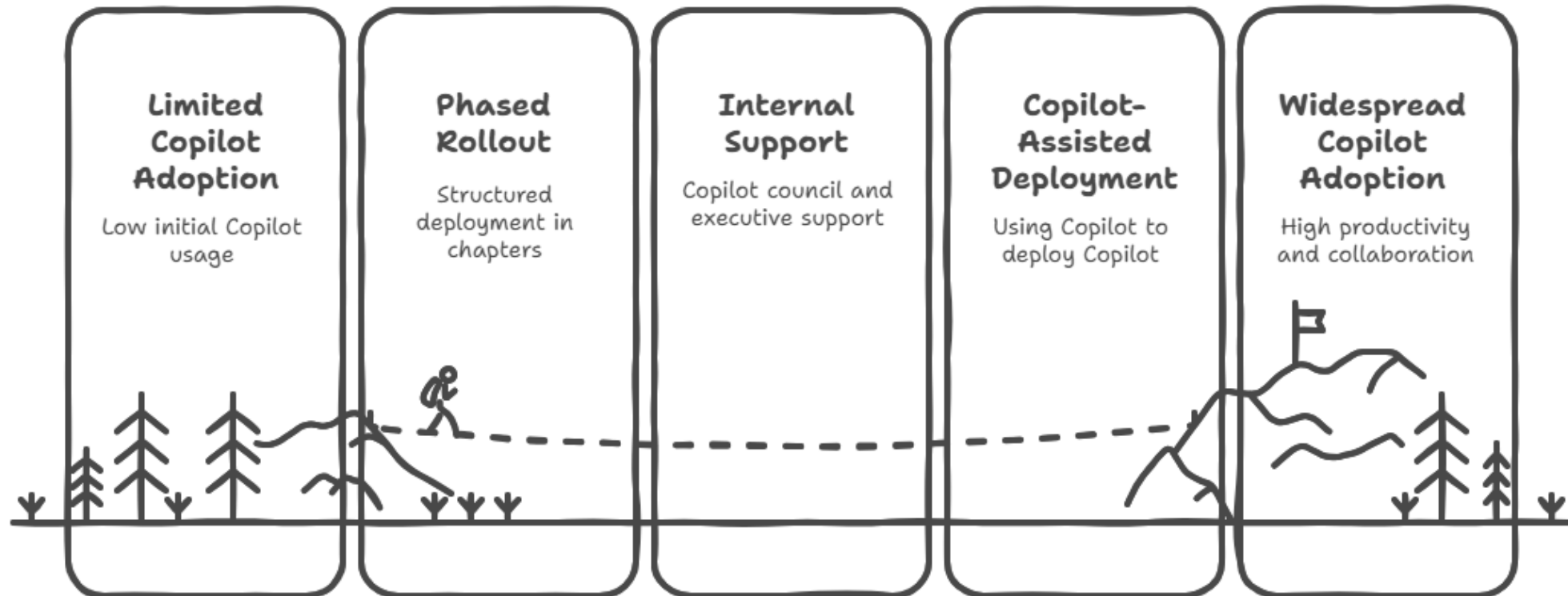
**Lead by example:** Leaders should use Copilot visibly and encourage it.

# CASE STUDIES & ROLLOUT TEMPLATES



# CASE STUDY #1 - MICROSOFT

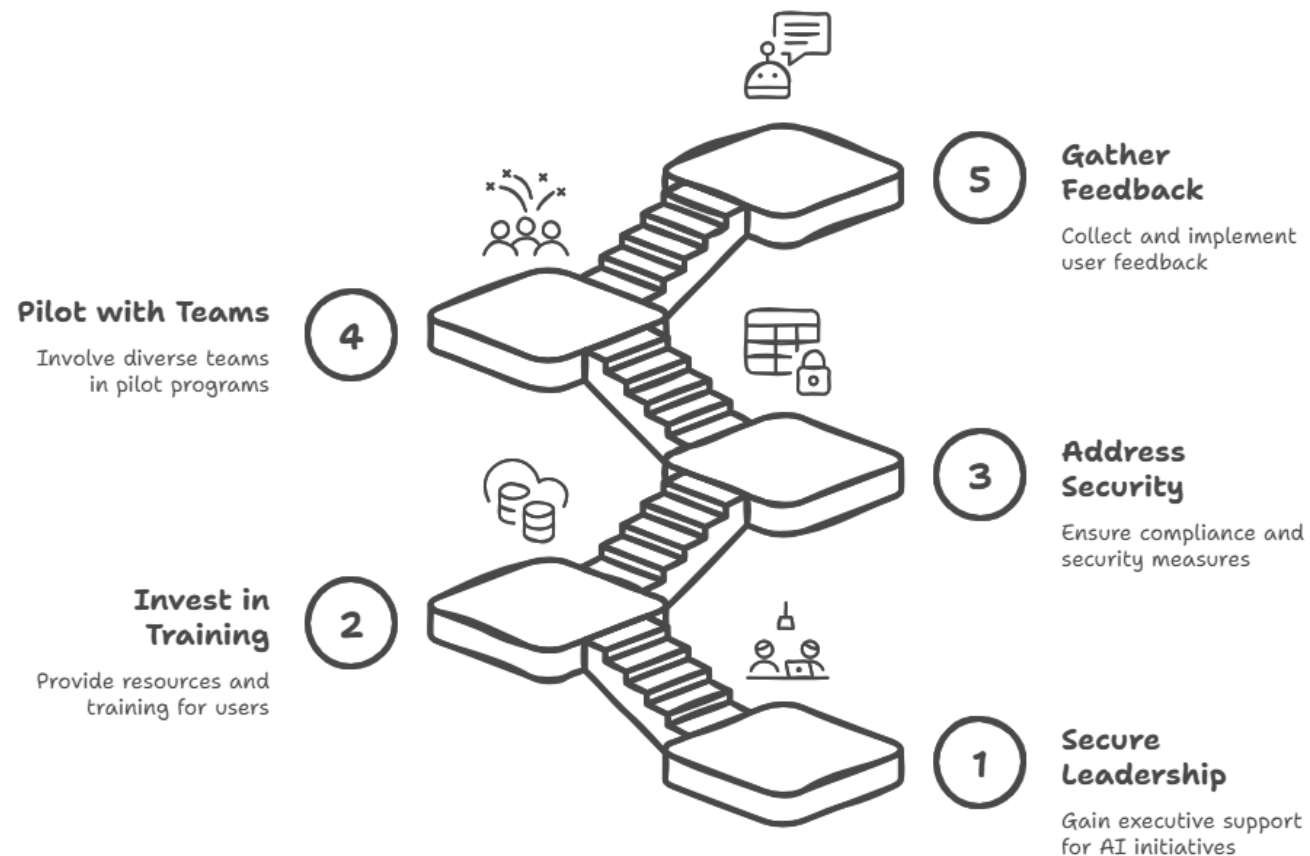
## Microsoft Copilot Rollout





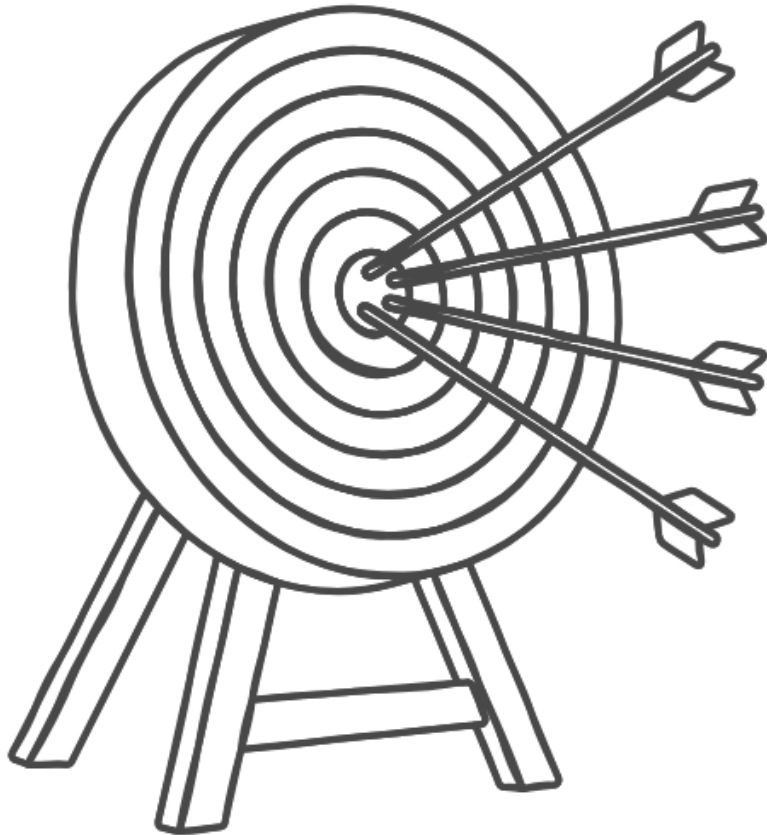
# CASE STUDY #2 - KYNDRYL

## Kyndryl's 5 best practices for rolling out Copilot



# CASE STUDY #3 – ERNST & YOUNG

## EY's AI Integration Strategy



### **AI Integration**

Seamlessly woven into strategic goals



### **Cultural Shift**

Encourages AI adoption in client work



### **AI Council**

Oversees AI deployments and strategy

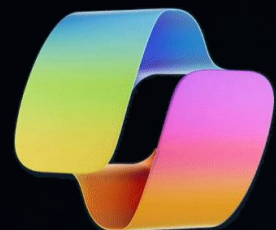


### **Generative AI Center of Excellence**

Develops and supports AI initiatives

# HOMEWORK





# COPILOT

## ZERO TO HERO

*Bi-Weekly Bootcamp Series. Expert-Led Hands-on Sessions.*

# THANK YOU