



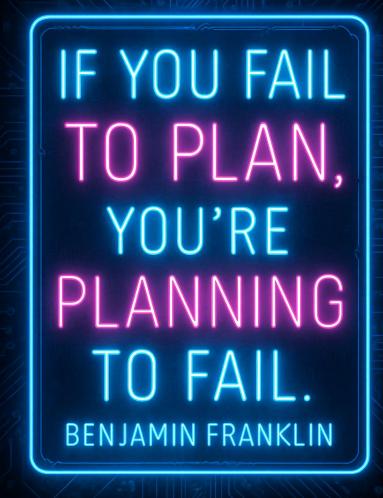
Developing a phased Copilot rollout roadmap, including pilot selection, success metrics, and adoption strategy. (ACM & Tech Readiness).











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 BothaChief Al Scientist, MVP



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

INTRODUCTION & KEY CONCEPTS



Key Concepts & Terms in this Session



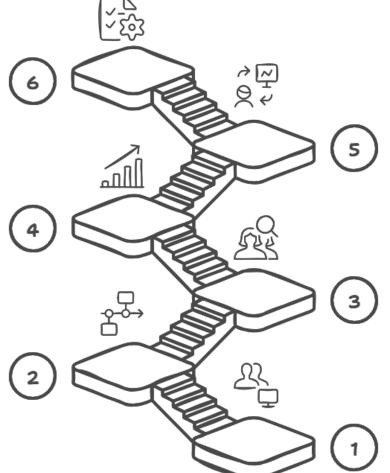
Adoption & Change Management and Technical Readiness. Ensuring both people and technology are fully prepared for Copilot deployment.

Success Metrics

Defining and tracking KPIs to measure Copilot's impact.

Phased Rollout Roadmap

A step-by-step, staged plan for introducing Copilot gradually.



Adoption Strategy

Developing a plan to encourage user adoption of Copilot.

Pilot Selection

Choosing a limited group of initial users or teams to pilot Copilot during early phases.

Copilot Deployment

The process of implementing and integrating Microsoft 365 Copilot into an organization's environment.





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"



Get ready

User ablement Select initial departments for rollout with the <u>Scenario Library</u>. Target a critical mass of users for rapid impact.

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

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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



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 Al deployment with the Setup Guide

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



PHASE 3: EVALUATE & EXPAND





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

Deliver impact

Review success measures with the Copilot Dashboard and the User survey kit.

- Quantify impact including growth, cost savings and employee benefits
- stories and knowledge sharing

Provide insights on service health and optimization opportunities

- Design, build, and publish plugins to deliver unique experiences
- Build your own copilots

User enablement

Mature AI management skills through improved IT service delivery

- Establish service management plan
- Review Admin usage reports and the Copilot Dashboard to analyze user retention and engagement

Extend & optimize

Identify new high value functional

Recognize and reward success

Extend to new scenarios and

transform business processes.

and cross-org scenarios

Build momentum with success

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

Purchase decision

Complete foundational learning Assemble team Share prioritized scenarios Select and validate initial cohort
Helpdesk onboarding
Review community
management plan
Launch training content and
office hours

Triage of daily feedback
Review shared support process
Launch progressive skilling content

Prepare for and conduct Service Health Review
Summarize scenario and user recommendations
Launch extensibility skilling content

Weeks

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01

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Stakeholder alignment Define comms ROB

and tools

Share Optimization Assessment results Deliver shared implementation plan Ensure data security controls are in place Install apps, assign licenses

Ensure reporting roles assigned
Update support systems
Enhance Center of Excellence

Analyze usage reports and Dashboard data Summarize risk, issues, and opportunities

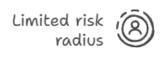
Prepare Al Council insights

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.











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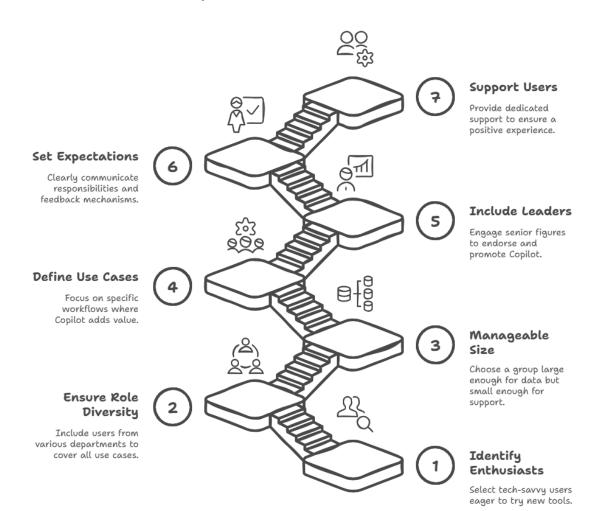
PILOT SELECTION: CHOOSING THE CREW



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

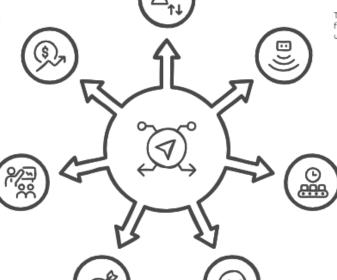


User Adoption Rate

Measures the percentage of users actively using Copilot.

Business Value

Quantifies the strategic and financial benefits of Copilot.



Training Effectiveness

Measures the success of Copilot training programs.

Goal Achievement

Evaluates if Copilot helps meet specific organizational goals.

Engagement Metrics

Tracks the depth and frequency of Copilot usage.

Productivity Impact

Assesses how Copilot improves task efficiency and output.

User Satisfaction

Gauges user contentment and confidence with Copilot. 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.

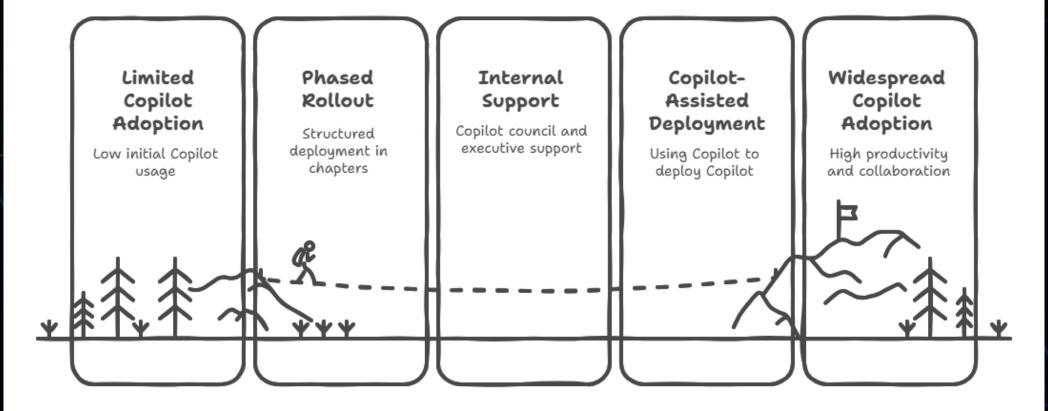
CASE STUDIES & ROLLOUT TEMPLATES



CASE STUDY #1 - MICROSOFT



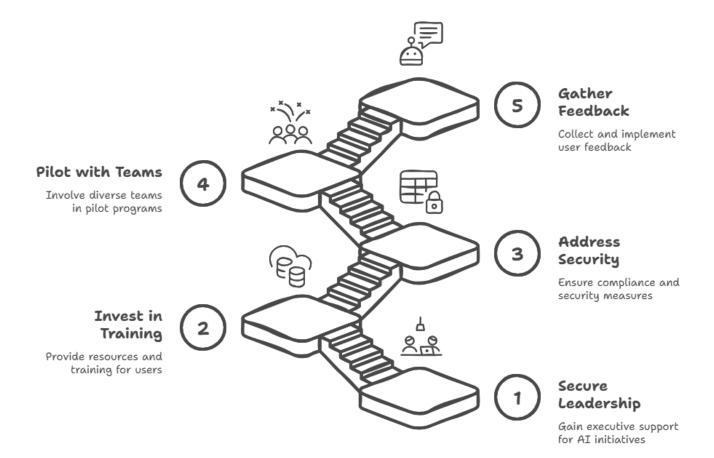
Microsoft Copilot Rollout



CASE STUDY #2 - KYNDRYL



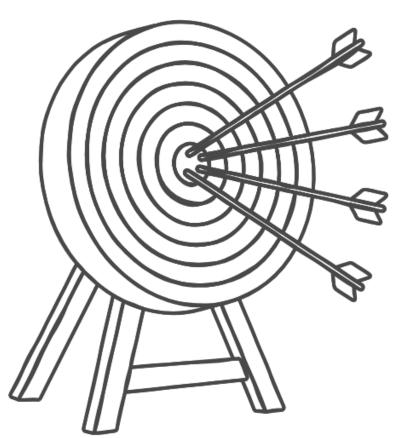
Kyndryl's 5 best practices for rolling out Copilot



CASE STUDY #3 - ERNST & YOUNG



EY's AI Integration Strategy





AI Integration

Seamlessly woven into strategic goals



Encourages AI adoption in client work



AI Council

Oversees AI deployments and strategy



Generative AI Center of Excellence

Develops and supports AI initiatives



HOMEWORK



THANK YOU