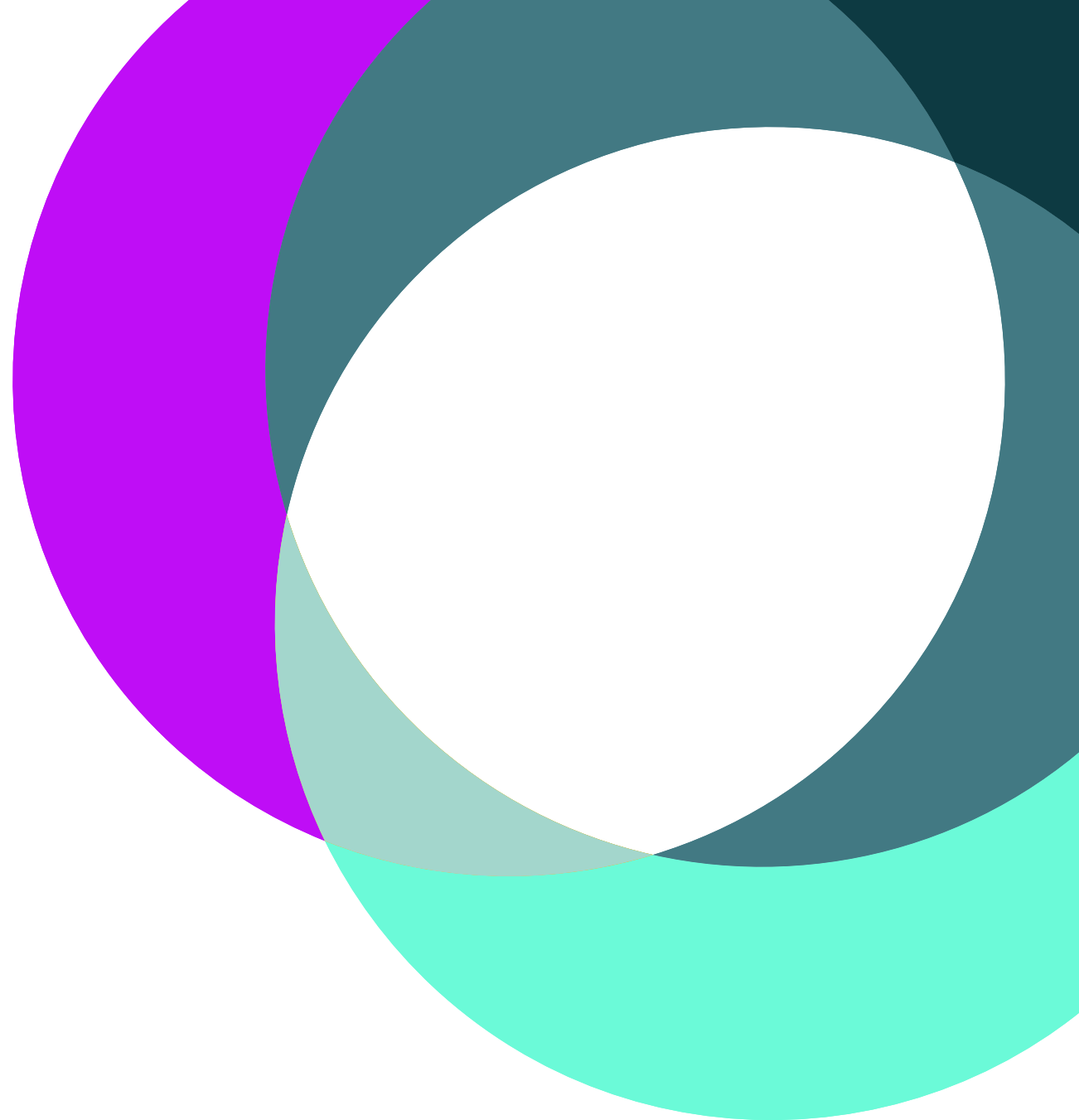# How to maximise early rollout success

Fajar Raja

Andy Wyatt

Kallum Beazley

Introducing our Adoption and Change Management Experts

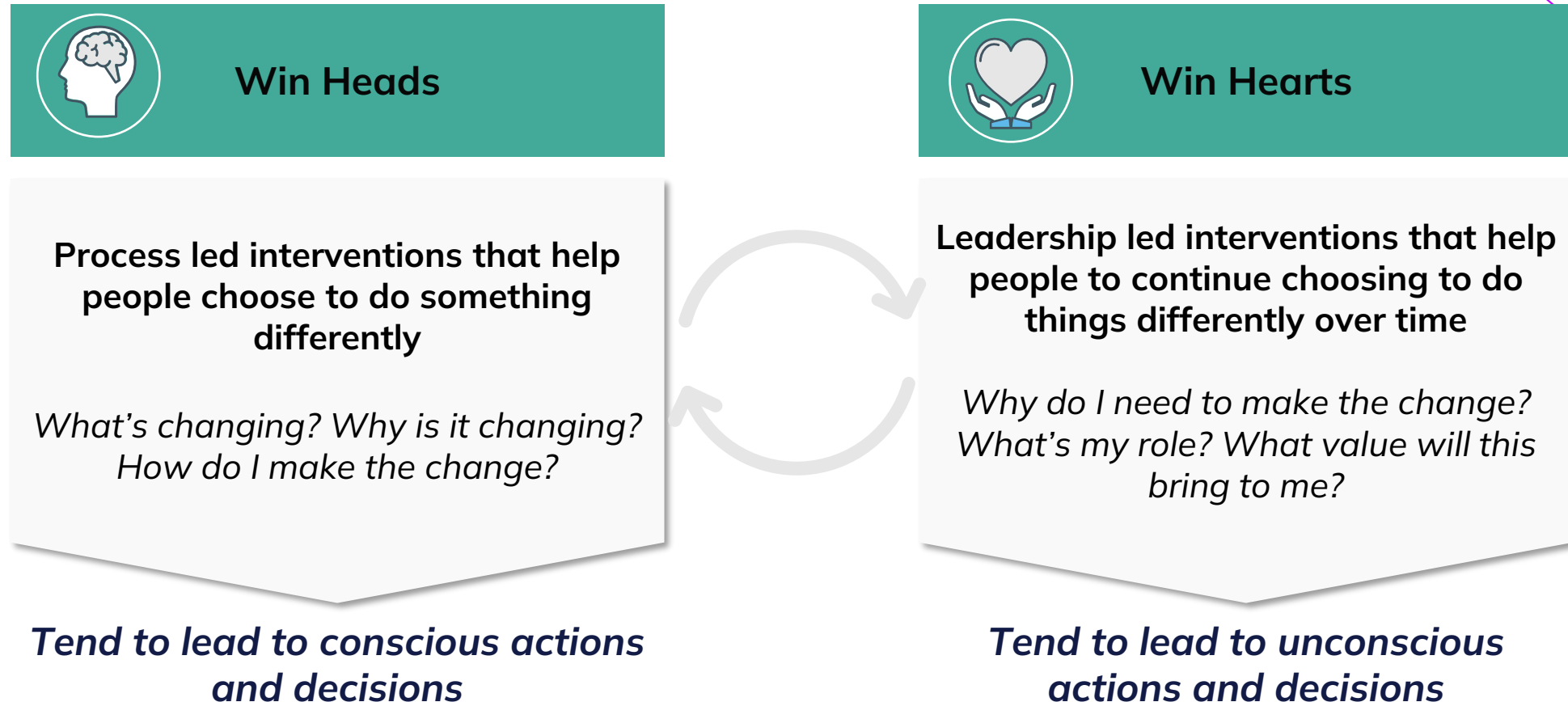Customer Adoption Director,
Adoption Practice

Practice Lead,
Digital Workplace Practice

Head of NHS Major Accounts /
Copilot Change Champion

Adoption is people choosing to do - and continue to do - something differently

This can be anything from behaviours to ways of working, processes to technology

Win Heads

Process led interventions that help people choose to do something differently

What's changing? Why is it changing? How do I make the change?

Tend to lead to conscious actions and decisions

Win Hearts

Leadership led interventions that help people to continue choosing to do things differently over time

Why do I need to make the change? What's my role? What value will this bring to me?

Tend to lead to unconscious actions and decisions

The human aspect is crucial for sustainable change and transformation

Almost 72% of the failed transformations are due to management behaviour and resistance to change

Percentage of transformation programs that fail

70%
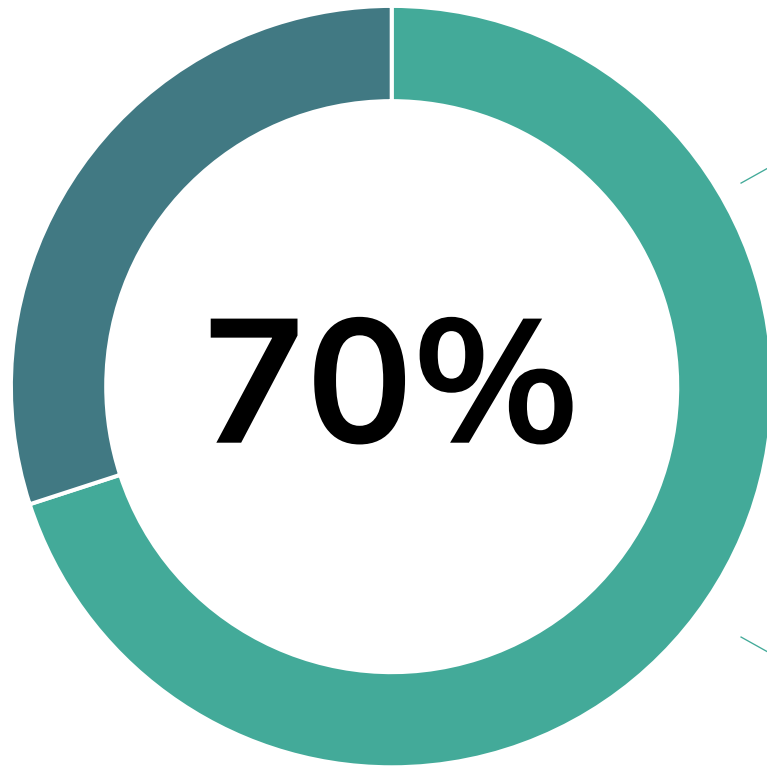
Contributing factors

Other obstacles	14
Inadequate resources or budget	14
Management behaviour does not support change	33
Employee resistance to change	39

Source: McKinsey & Co

Successful change pass through successful adoption

People need to be supported through the change and transformation lifecycle

Addressing the rational element of change is only the starting point. Understanding the emotional and political dimensions is equally important and should not be overlooked. Successful projects take account of all three dimensions.

Rational

➢ Why should I change?

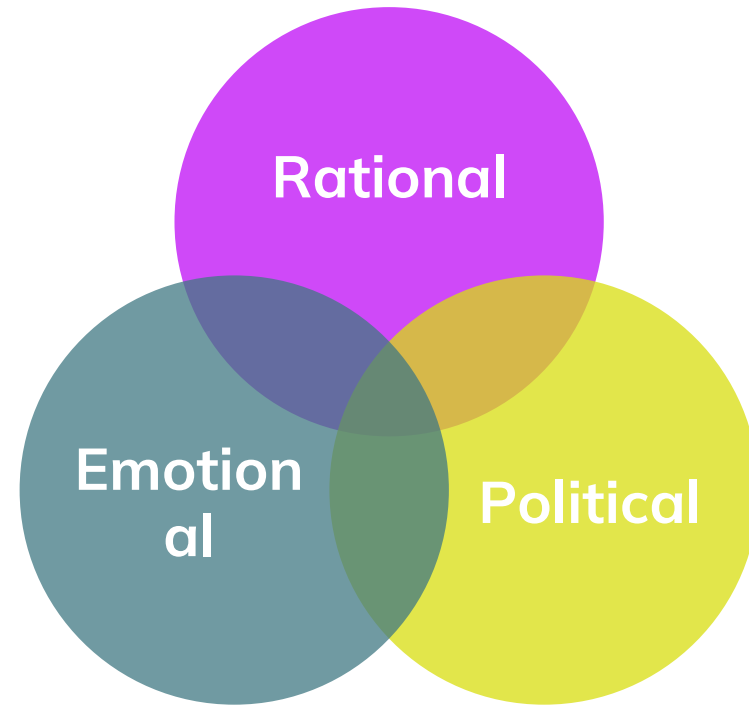➢ What are the benefits?

➢ Is the new model really better?

Emotional

➢ Is the effort worth it?

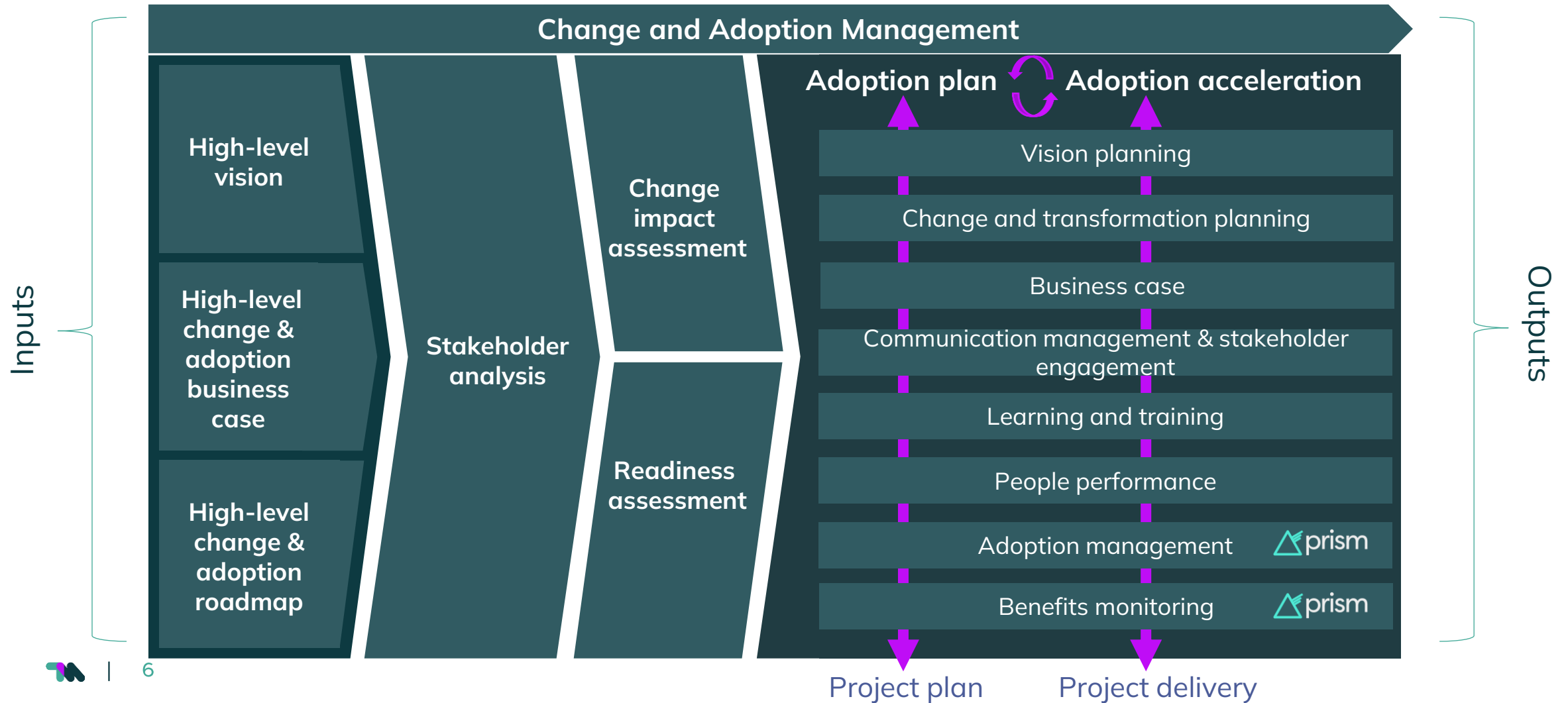➢ Am I going to be successful?

➢ What if I don't like it?

Political

➢ What's in it for me?

➢ Is there a risk for my position?

➢ What will my power be tomorrow?

Rational

Emotional

Political

Managing the change must be embedded within the overall programme plan

Inputs

Outputs

Change and Adoption Management

Adoption plan ↻ **Adoption acceleration**

High-level vision		
High-level change & adoption business case	Stakeholder analysis	Change impact assessment
High-level change & adoption roadmap		Readiness assessment

- Vision planning
- Change and transformation planning
- Business case
- Communication management & stakeholder engagement
- Learning and training
- People performance
- Adoption management △prism
- Benefits monitoring △prism

Project plan

Project delivery

Use case Adoption Approach

What have we learnt from our client engagements?

Basic Prompting

Seamlessly integrated into Microsoft 365 applications like Word, Excel, and PowerPoint.

Assists users with tasks ranging from drafting emails to generating data visualisations.

Designed to be user-friendly, making them accessible to individuals of all skill levels.

Interactive tutorials, case studies, and live demonstrations assist users in understanding and experiencing the tool's impact.

Advanced Prompting

Offers deeper customisation and creative exploration.

Enables users to generate persuasive arguments, draft strategic plans, or brainstorm innovative solutions.

Tutorials on effective prompt writing and hands-on exercises aid users in maximising Copilot's potential.

Competitions showcasing inventive uses of advanced prompting to solve problems or spark ideas make AI interaction an engaging experience.

Personal Agents

Users can create their own agents tailored to help with a specific process or task.

Can be built quickly with little technical knowledge required.

Manages tasks such as scheduling, responding to Customer inquiries, and monitoring workflows with human oversight.

Operates alongside human users, enhancing efficiency and scalability.

Sharing examples from other organisations helps build confidence and interest in Agentic AI's capabilities.

Operational Agents

Acts as an autonomous agent capable of proactive decision-making.

Can operate independently of human users to automate complex organisational processes at scale.

Generally, requires more time to configure and deploy.

By acting independently, they optimise operations and free up human resources for higher-value activities.

Can integrate with existing Line-of-Business applications and systems to retrieve and manipulate data.

Personal Productivity AI

Enterprise AI

Technical Adoption Approach

What have we learnt from our client engagements? Organisations typically progress through **three phases of AI maturity**

Copilot Chat

Goal: Build digital confidence and introduce AI to all staff.

Activities:
- Enable Copilot Chat for broad access.
- Focus on basic scenarios (e.g. summarising, drafting).
- Train users and activate champions.

Copilot for M365

Goal: Embed Copilot into daily workflows.

Activities:
- Target high-impact cohorts (e.g. corporate services, clinical leaders).
- Deliver training and monitor adoption via Prism or Copilot Dashboard.
- Build business cases and measure ROI.

Copilot Studio Agent

Goal: Automate complex processes and scale AI impact.

Activities:
- Design and deploy custom agents.
- Use Copilot Studio for advanced prompting and orchestration.
- Establish governance and a Centre of Excellence

Why use each Copilot tool?

Copilot Chat

Purpose: Entry-level conversational AI experience.

Use Cases: Summarising meetings, generating content, analysing data, creating visualisations, and interacting with Copilot Pages.

Strengths:
- Free and secure web-based experience.
- Includes Code Interpreter and image generation.
- Enterprise Data Protection and IT admin controls.

Limitations:
- Limited integration with Microsoft Graph data.
- Metered usage for agents grounded in tenant or third-party data.

Copilot for M365

Purpose: Deeply integrated AI assistant across Microsoft 365 apps.

Use Cases: Drafting documents, managing emails, preparing meetings, analysing. spreadsheets, and automating workflows.

Strengths:
- Full access to organisational data via Microsoft Graph.
- Personalised experiences and pre-built agents.
- Seamless integration with apps like Word, Excel, Outlook, and Teams.

Limitations:
- Requires licensing and readiness (technical, privacy, and change management).
- Best suited for high-volume knowledge workers.

Copilot Studio Agent

Purpose: Custom AI agents tailored to specific workflows.

Use Cases: Automating structured tasks, triaging requests, generating reports, responding to queries.

Strengths:
- Low-code/no-code platform for building agents.
- Supports advanced prompting and orchestration.
- Enables agent-run workflows and digital labour.

Limitations:
- Requires maturity in AI adoption and governance.
- Best deployed after foundational Copilot usage is established.

Challenges to Overcome

Business Alignment

Challenge: Lack of a clear vision for how Copilot evolves from a personal assistant to a digital colleague.

Impact: Leads to low uptake, limited ambition, and missed opportunities.

Solution: Define a strategic roadmap and align Copilot capabilities with business goals

Use Case Clarity

Challenge: Vague or generic use cases hinder early success.

Impact: Poor engagement and limited ROI.

Solution: Identify high-impact, role-specific scenarios through workshops and immersion sessions

Platform Readiness

Challenge: Inadequate infrastructure, outdated software, or poor data hygiene.

Impact: Blocks deployment or degrades performance.

Solution: Conduct readiness assessments covering identity, security, data architecture, and licensing.

Security and Compliance

Challenge: Concerns around data access, processing, and regulatory compliance (e.g. GDPR, HIPAA).

Impact: Risk of breaches, fines, and loss of trust.

Solution: Implement robust governance, encryption, sensitivity labels, and audit trails.

Governance and Oversight

Challenge: Lack of clear policies for responsible AI use.

Impact: Legal exposure and inconsistent user experiences.

Solution: Establish an AI council, define usage policies, and ensure auditability of outputs.
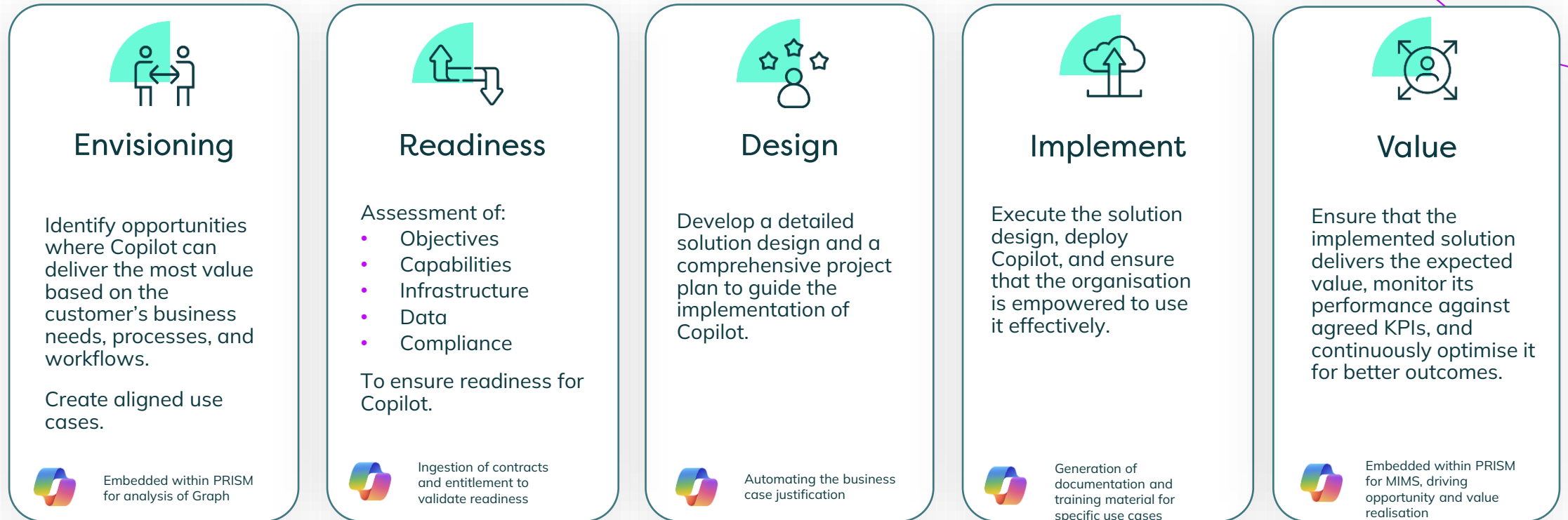
Scalability

Challenge: Moving from basic assistants to fully operational agents requires maturity.

Impact: Overreach or underperformance in automation.

Solution: Start with foundational use, then progress to agent development with Copilot Studio, supported by structured engagements like the Agent Launchpad.

Copilot Delivery Approach

How can we support the deployment of Copilot within an organisations?

Envisioning

Identify opportunities where Copilot can deliver the most value based on the customer's business needs, processes, and workflows.

Create aligned use cases.

Embedded within PRISM for analysis of Graph

Readiness

Assessment of:
- Objectives
- Capabilities
- Infrastructure
- Data
- Compliance

To ensure readiness for Copilot.

Ingestion of contracts and entitlement to validate readiness

Design

Develop a detailed solution design and a comprehensive project plan to guide the implementation of Copilot.

Automating the business case justification

Implement

Execute the solution design, deploy Copilot, and ensure that the organisation is empowered to use it effectively.

Generation of documentation and training material for specific use cases

Value

Ensure that the implemented solution delivers the expected value, monitor its performance against agreed KPIs, and continuously optimise it for better outcomes.

Embedded within PRISM for MIMS, driving opportunity and value realisation

PRISM and Copilot Enabled Solution

Our Internal Adoption Programme with MS 365 Copilot

Situation

- **67 Copilot licenses** were distributed to our Sales Team to streamline workflows and reduce admin-heavy tasks.

- However, there was **no formal** training, so users were **unclear** on how to maximise Copilot's benefits.

Our Adoption Approach

- Onboarding Change Champions (**10% of target audience**).
- Persona-building and user journey mapping.
- Train-the-trainer approach
- Comms & engagement and creation of collaboration channel
- 6 Champion-led training sessions
- Activity-based final workshop

The Impact

- Increased collaboration between the team.
- Significant increase in monthly operations using Copilot between March and April.
- Dedicated Champions to keep Copilot conversations going.
- Increase in demand from other areas of the business with licenses.
- Reusable training collateral.
- Viva Engage Community

Being a Copilot change champion

Kallum Beazley

Starting Out

Balancing Learning and Work

- Balancing formal training, self-learning, and workload required disciplined time management and focus.

Intrinsic Motivation

- Passion for technology and desire to improve collaboration sustained engagement despite challenges.

Hands-On Experience

- Practical exploration of Copilot's capabilities helped build insights and confidence to support peers.

Commitment and Curiosity

- Dedication and curiosity were essential to mastering new tools and driving meaningful change

Champions Network

Community of Early Adopters

- Champions Network provided a platform for sharing experiences and learning practical tips among early adopters.

Peer-to-Peer Knowledge Transfer

- Champions absorbed training from experts and delivered tailored sessions to peers based on specific job roles.

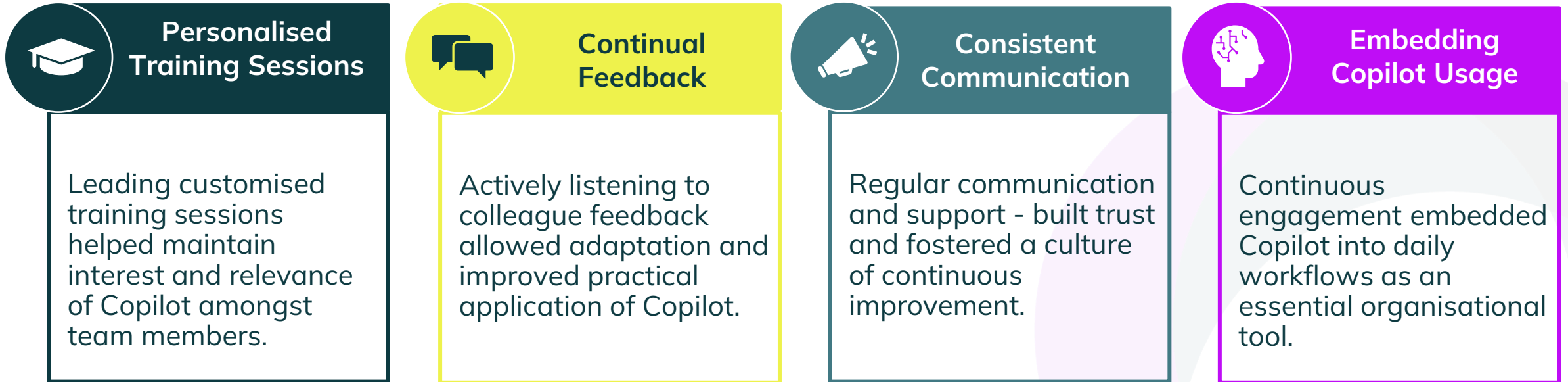## Ongoing Engagement and Feedback

- The network facilitated one-on-one training, Show & Tell meetings, and open feedback channels to sustain momentum.

Empowering Collaborative Growth

- The collaborative environment enhanced learning and empowered members to support each other effectively.

Ongoing Engagement

Personalised Training Sessions

Leading customised training sessions helped maintain interest and relevance of Copilot amongst team members.

Continual Feedback

Actively listening to colleague feedback allowed adaptation and improved practical application of Copilot.

Consistent Communication

Regular communication and support - built trust and fostered a culture of continuous improvement.

Embedding Copilot Usage

Continuous engagement embedded Copilot into daily workflows as an essential organisational tool.

The Learning Curve

Exploring Copilot

- Automated workflows
- Teams Facilitator
- SharePoint searching

Practical Experimentation

- Hands-on testing of Copilot Agents
- Exploring role-based use cases

Building Competency and Confidence

- Learning through doing
- Learning through teaching
- Increased usage within the workday

Unlocking Potential

- Becoming a trusted team resource
- Greater efficiency and productivity
- Increased focus

Challenges

Boiling the Ocean

- Copilot and its possibilities are endless.

Time Management

- Work vs. Learning

Engaging Colleagues

- Patience and persistence helped engage colleagues and increased collaboration

Learning Curve

- Prompting is a skill

Key Lessons
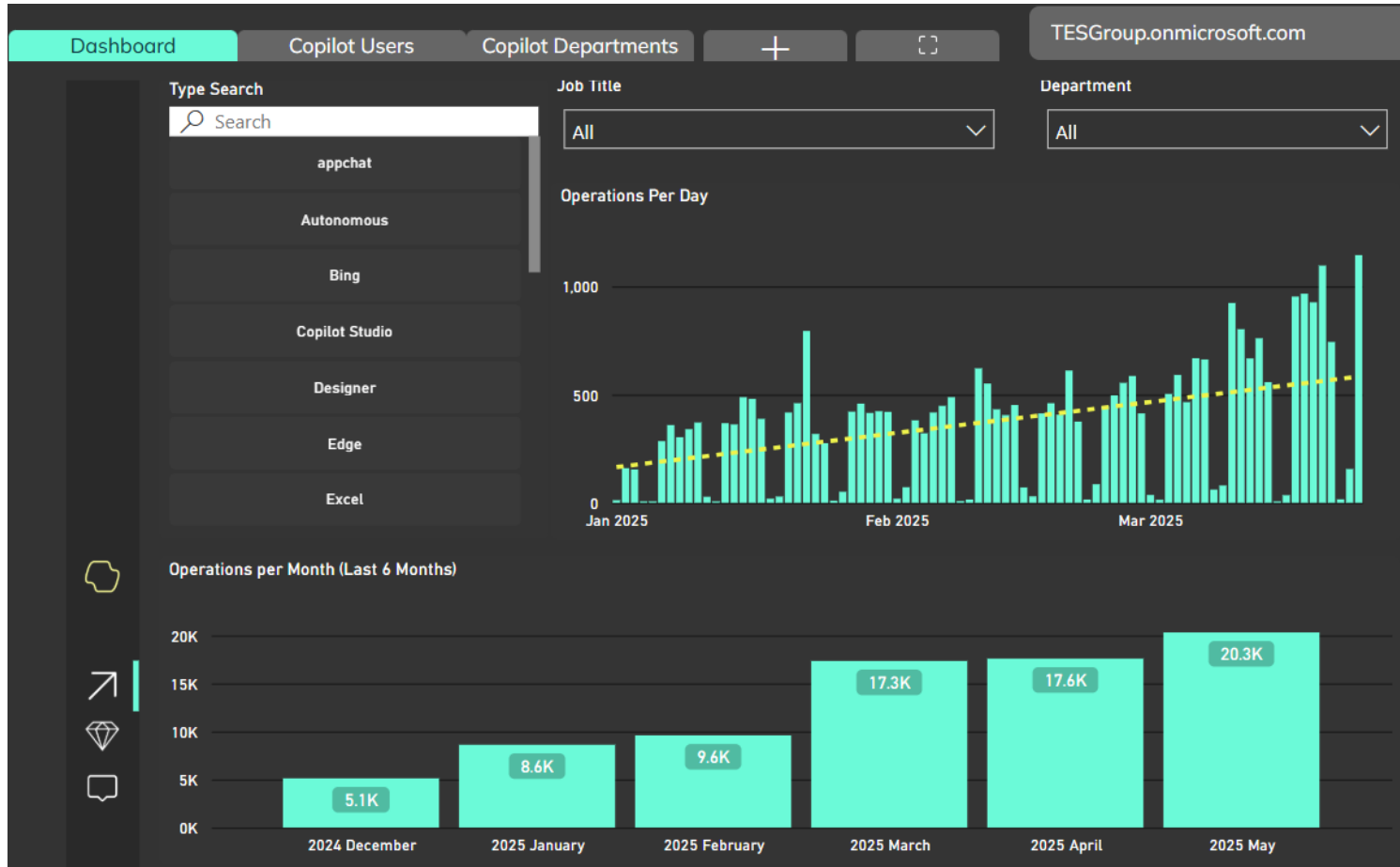
The power of the Champions Network

Leading by example

Experimentation culture

Agents of change

Analysis and monitoring

Prism platform

Prism by Trustmarque is a Microsoft digital intelligence platform built to **maximise the value** of your IT investments.

Designed for products such as Microsoft 365, Azure, and Copilot, Prism delivers **deep visibility**, **actionable insights**, and **tailored recommendations** across licensing, cost optimisation, and compliance.

With **advanced analytics** and **powerful reporting**, Prism enables smarter, faster decision-making which helps organisations streamline operations, eliminate waste, and drive innovation through to adoption.

Key takeaways to maximise early rollout success

Don't make the same mistakes made by others!

Challenge	Trustmarque Solution
Stakeholder disengagement	Co-design workshops with business and IT leaders.
Change fatigue	Phased rollouts with behavioural nudges, Change Champions and communications and engagement.
Learning and development gaps	Role-based enablement paths for Microsoft 365, Azure, and Copilot.
Strategic misalignment	Business value mapping and KPI tracking from day one.
Underutilisation of licenses	Trustmarque's Prism dashboard.

Want To Know More?

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Talk to us about your Copilot adoption – how can we help?
Schedule an informal conversation with us.

Questions

Thank You

TRUSTMARQUE