



Realize the full impact of Copilot through effective change management

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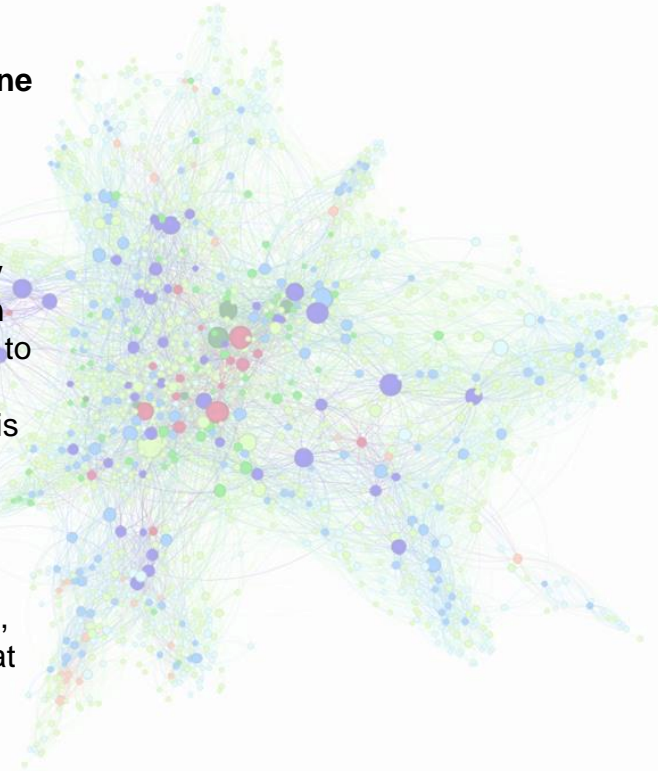
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Change management and Copilot rollout is done through your people, not at your people

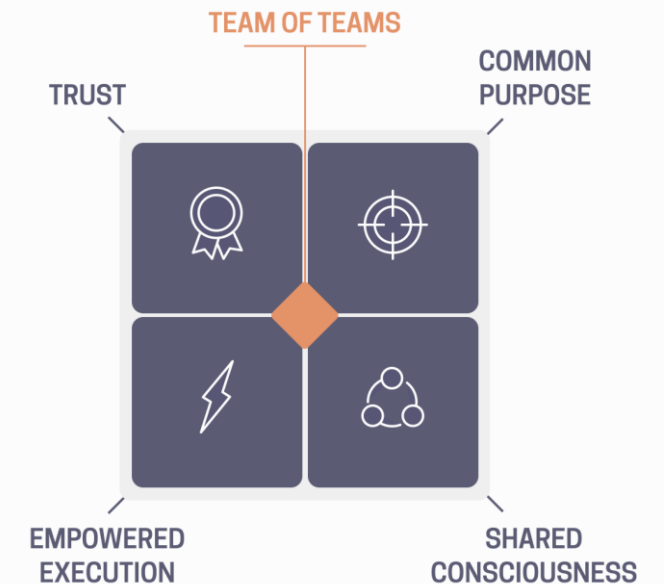
We know how organizations get work done

Network Analysis, done through both passive and active data collection, illustrates how information and collaboration actually spread throughout an organization. The key to a successful change management program is leveraging the real information brokers as champions within the network, deliberately seeding news, updates, and training to hubs that will enable scale.



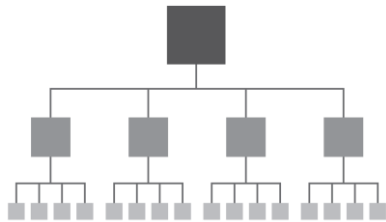
We know what it takes to sustain optimal team performance

A Team of Teams approach to enterprise change management is anchored around the performance capabilities of common purpose, trust, empowered execution, and shared consciousness. Designed to foster a networked, agile behavior of working, new digital solutions are tied directly to the strategy, context is shared in communities of practice, learning is a full-organization effort, and collaboration is accelerated.



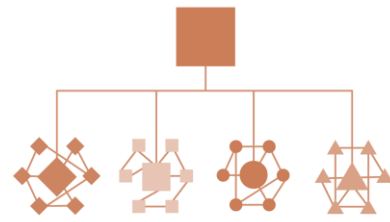
Digital Strategy is Organizational strategy

A successful Team of Teams embraces cutting-edge technology to optimize its ways of working, maximize employee productivity, and outpace its environment.



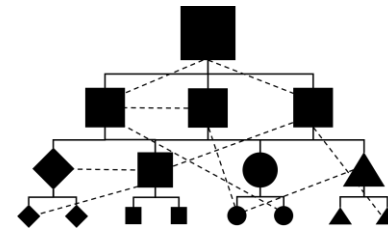
Command

- Hierarchical
- Focused on **efficiency**
- Effective in **complicated, predictable** environments
- Slow to **react** to changes in the market



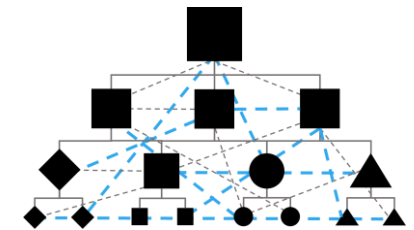
Command of Teams

- Pockets of excellence in communication and collaboration
- Teams can be constrained within silos, limiting cross-functional innovation



Team of Teams[®]

- Empowered decision making
- Networked, cross-functional style of communication
- Effective in **complex, unpredictable** environments
- Quick to **adapt** to changes in the market



Team of Teams[®] +  Copilot

- Maximize employee **productivity**
- **Automated** work and processes
- **Transparent, secure** information flow
- Harnesses all of your **organization's knowledge**
- Human connections made stronger through AI

Adoption of new digital technology is hard. Buy-in from your people, paired with real-time support and progress tracking, enable you to unlock success.

Research shows that 70% of digital transformations do not achieve their objectives.* The technology is important, but the people (organization, operating rhythm, process, and behavior) are the determining factor. Team of Teams is built to scale the power and interconnectedness of small teams across an entire organization, unlocking adaptivity and speed.

McChrystal Group recommends three factors to quickly scale organic adoption, accelerating time to ROI, by:



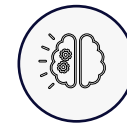
Slow is smooth, smooth is fast

Take time to deliberate objectives and build a cross-functional team to plan and management the deployment of new technology.



Using a networked approach

Driving scalable change management in complex orgs is best managed through hubs of significant influence – drive adoption and feedback in a manageable way.



Team Intelligence

Better leverage Associate experience and data to drive informed outcomes and evaluate the efficacy the Copilot rollout.

Copilot Change Management: Adoption & Behavior Upskilling | Example Timeline

Our proposed approach for a change management program for the adoption of Microsoft Copilot covers 5 workstreams over the next fiscal year (ex. April 2024 – March 2025), with sustainment activities starting the following fiscal year.

Q1 FY24 (July – Sept 2024)	Q2 FY24 (Oct - Dec 2024)	Q3 FY24 (Jan – Mar 2025)	Q4 FY24 (Apr – Jun 2025)	Q1 FY26
Stakeholder Team Creation <i>Cross-functional team to own the governance for Copilot rollout</i>				Sustainment Activities
Design Phase <i>Design Digital Learning and Ambassador programs based on research, early Ambassador Sessions & Focus Groups</i>				
Digital Learning <i>Mixture of curation and creation content pathways to upskill all Copilot users</i>				
Ambassador Cohort(s) <i>Super Users and Network Influencers make up initial cohorts</i>				
Implementation Tracking <i>Live dashboard feed, if input needs are met</i>				

The total investment in support of the change management program will depend on the scale, speed, and scope of work decided on, but over the first year, we will ensure the following specs:


- 2-4 dedicated team members
- Support from Subject Matter Experts in analytics, digital integration, and learning design
- Digital Learning reach of up to 30,000 users
- High-touch Ambassador cohorts inclusive of up to 50 Super Users, Network Influencers, and other key leaders per cohort
- Stakeholder team creation, learning design, rollout of custom digital pathways & Ambassador experiences, and implementation tracking dashboards all within one fiscal year



Customized Copilot Adoption

Copilot rollout is dependent on solid technical upskilling and purpose-driven behavior

Project Journey: Regardless of where you are in your Copilot rollout & adoption journey, we propose this phased approach to accomplish successful **Copilot adoption**. McChrystal Group will support the setup of a cross-functional team to guide adoption support, cohort training for influencers in the network, and easy-to-understand digital training for a busy workforce.

 You are here!



Grow

Evaluate where to leverage Copilot


Discern which employee populations should receive additional Copilot licenses and establish desired outcomes to guide Copilot initiatives.



1

Cross-functional Stakeholder Team

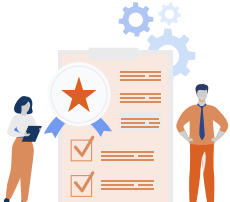
Establish a body to oversee and guide your organization's AI development, deployment, and evaluation of value to ensure a successful rollout.*



2

Curate Digital Learning


Curate an easy-to-use, self-paced digital learning place to instill Copilot hard skills, benefits, and use cases to catalyze upskilling.*



3

Deploy Ambassadors

Train and deploy Ambassadors (Copilot Super Users and Network Influencers) to champion Copilot adoption across the business through community building and influence in their teams.



4

Track Progress

Track what and how employees work via business-directed metrics and Ambassador lessons learned.



Sustain

Scale Organic Adoption

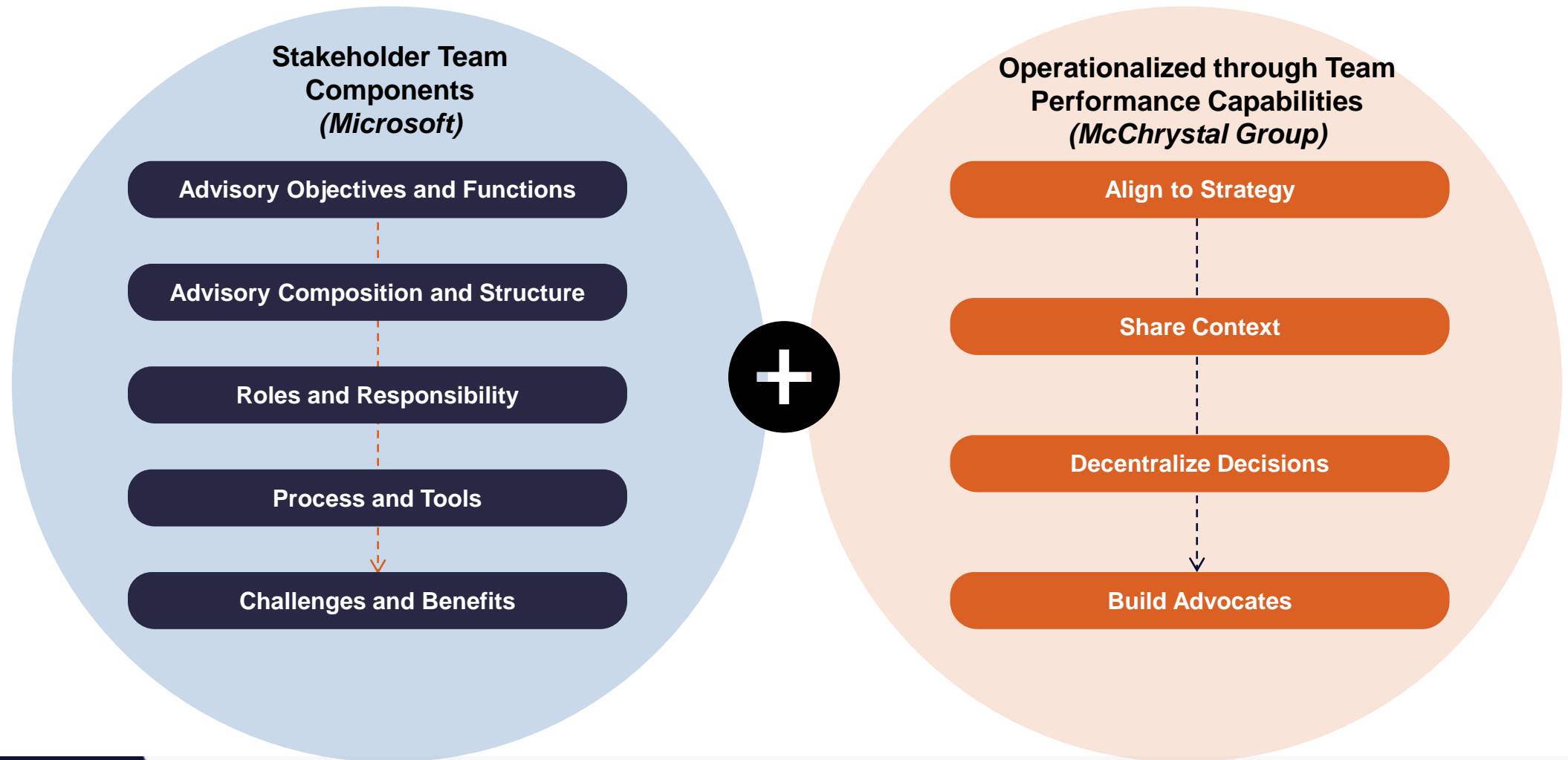
Ensure successful rollout with additional Ambassador cohort programs & digital learning journeys, further refine Stakeholder Team, and progress towards goals.*

● Stakeholder Team Creation



Successful Copilot rollout will depend on groups becoming an aligned team

McChrystal Group's foundational ethos is unlocking the power of teams – fully leveraging and using Copilot technology requires an entrepreneurial, tailored approach to thinking and building teams. We recommend starting with a new, cross-functional **Stakeholder Team** to ensure cohesive and efficient AI adoption.



Cross-functional stakeholder teams own the success of cross-functional rollouts. Strong cross-functional teams integrate SMEs and BU leads

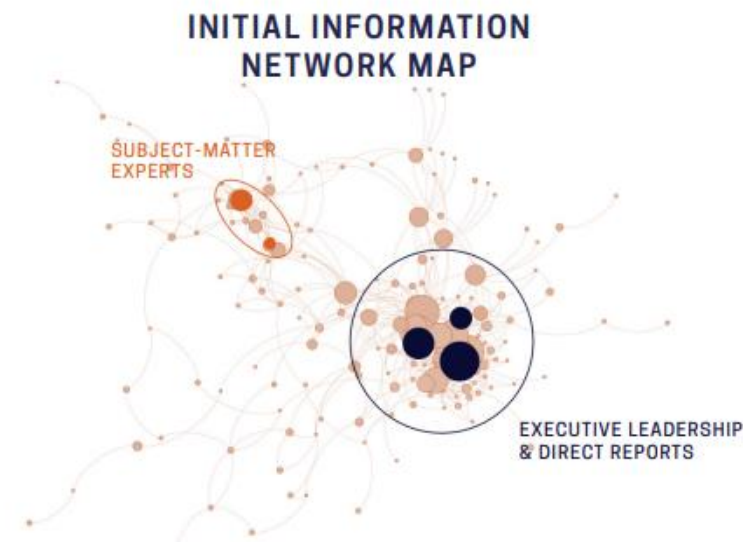
Healthy cross-functional leadership teams include the right voices but ensure the task does not feel like a second job to team members, resulting in burn out. McChrystal Group partnered with a Fortune 50 Oil & Gas company as it launched a cross-functional team tasked with executing the company's largest growth ventures.

Initial Team Conditions

- No shared definition of success between teams
- Component groups lacked unifying strategy, integration, and information-sharing processes
- Associates felt they lacked the actionable information necessary to do their jobs

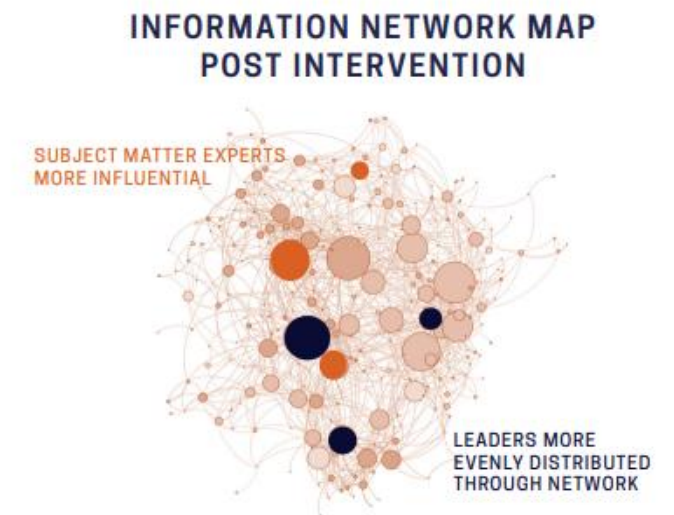
Solutions

- Vertically and horizontally align disparate groups to unify the team on objectives and strategic goals within a common framework
- Establish an operating rhythm to map information flow and support decision-making and execution
- Develop, share, and implement knowledge within a cross-functional leadership team



KEY TAKEAWAY

Clustering of a small number of senior leaders highlighted in blue represents a disconnect between leaders and the broader fragmented network.



KEY TAKEAWAY

A more even distribution of influential individuals across the network represents improved leveraging of key stakeholders and subject matter experts.

● Digital Learning



Case Study: Employees want more training to better leverage Copilot via eLearning pathways and virtual workshops

50% of one organization's survey respondents agree & strongly agree they have training needed to implement assistive technology, like Copilot for M365

Thinking about onboarding and ongoing training, what do you think your teams and even for you to deepen your knowledge would need?

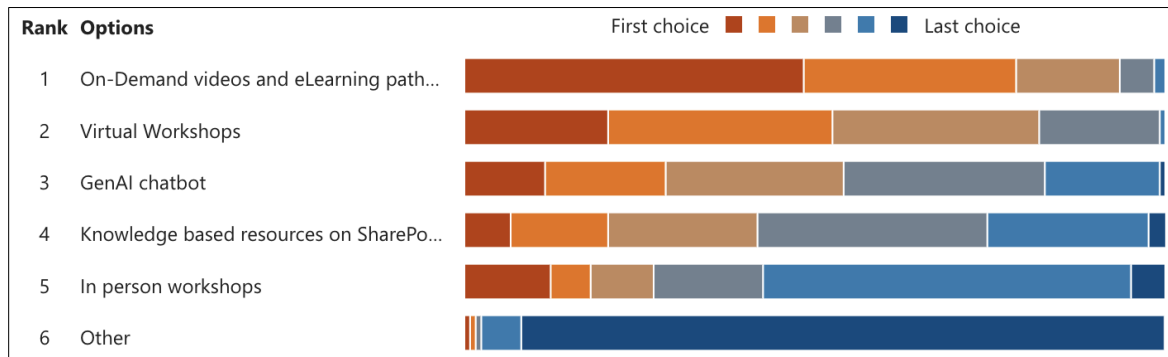


Figure 2 – MG Copilot Survey 2024

Opportunities for improvement rest in alleviating barriers to adoption: preparedness, when to use it, and Copilot limitations

Preparedness

- **Not understanding Copilot capability**
- **Time to learn** – “...It is meant to save time but honestly I haven't found the space to delve into the tool's capabilities.”
- **Need more training**
- **Prompt Engineering Challenges** – “There have also been prompts I've tried in Word that haven't worked. Would be helpful to have an AI chatbot to get guidance from in those cases.”

Implementation

- **Identifying use cases** – “Knowing the best use cases and how to get the most out of [Copilot]. ”

Copilot Capability

- **Limitations with apps** – “Can't get functionality in Excel or OneNote, both of which I use heavily. ”

Self-paced digital learning pathways guide groups through skills & behavior change through community learning with access to a digital library

Sample Learning Pathway will teach employees what Copilot is, when to use it, and how to use it – all in the context of community



Learner engages with organization's preferred online content platform or MSFT Viva or Engage tailored to where they are with Copilot
Time: 5-30 mins/day, over 1-2 weeks



Learner completes off-platform activities with Learning Community
Time: 30-60 mins over a 1-4-week period



Learner shares their Copilot application experience with peers and encourages others who are on a similar pathway
Time: 5-30 mins per week



Learner starts new pathway and can reference past content



Learner iterates application based on Learning Community takeaways and new content
Time: 5-30mins/day, over 1-4 weeks



Learner revisits or engages with new Internal platform or Viva Learning content on Copilot best practice and use cases
Time: 5-30 mins/day, over 1-2 weeks

● Ambassador Journey



Case Study: 'Super Users' drive the highest return on investment for Copilot and we want more of them

Employees who reported the highest average time savings per week, tended to find value in multiple Copilot apps – these employees, coined Super Users, will be our first Ambassador cohort.

Using Copilot in this app has accelerated my ability to accomplish my objectives.

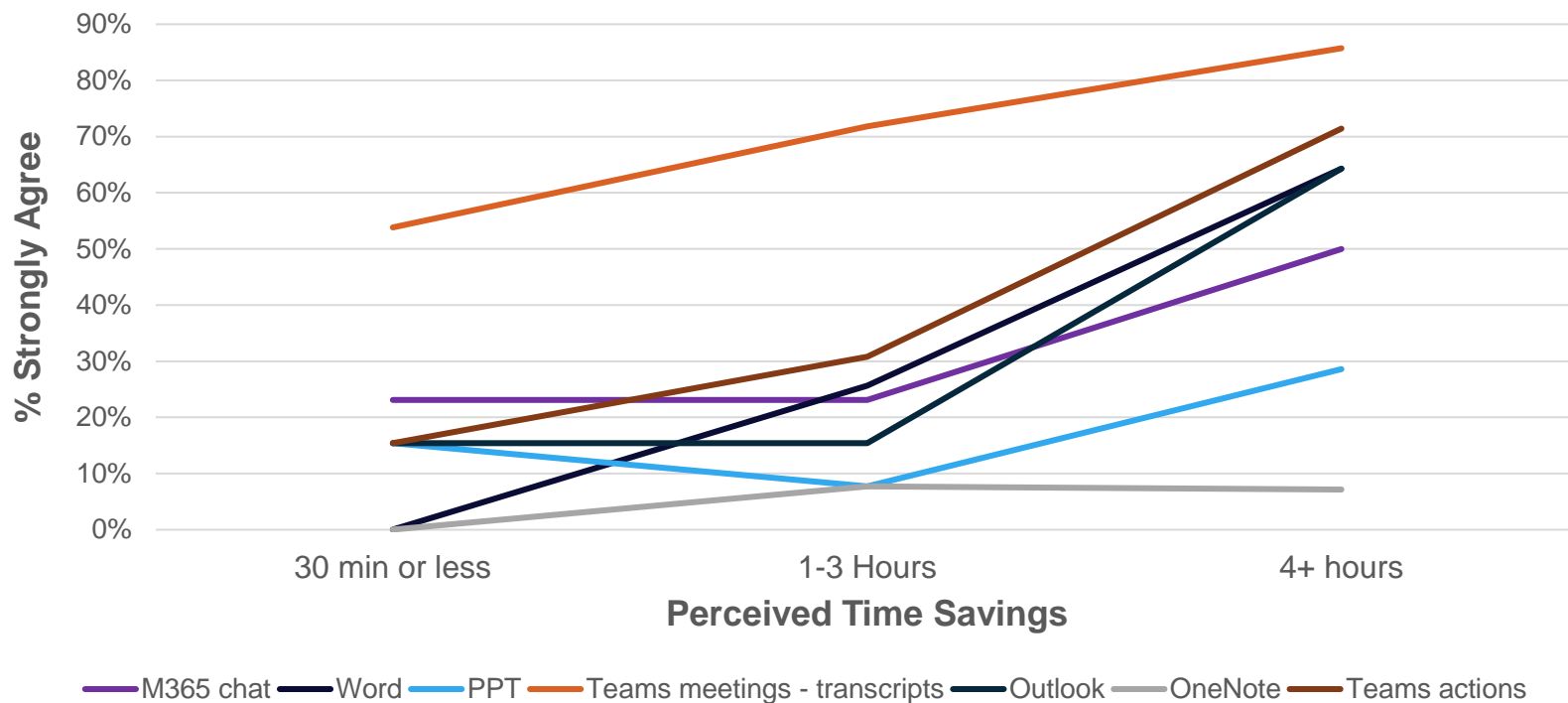
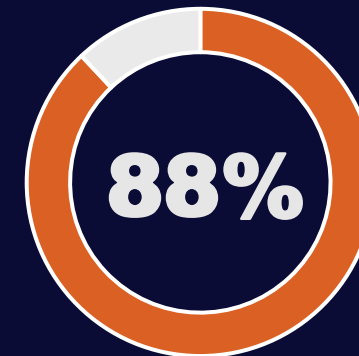


Figure 3 – MG Copilot Survey 2024



88% of Employees report that using Copilot saves them time.

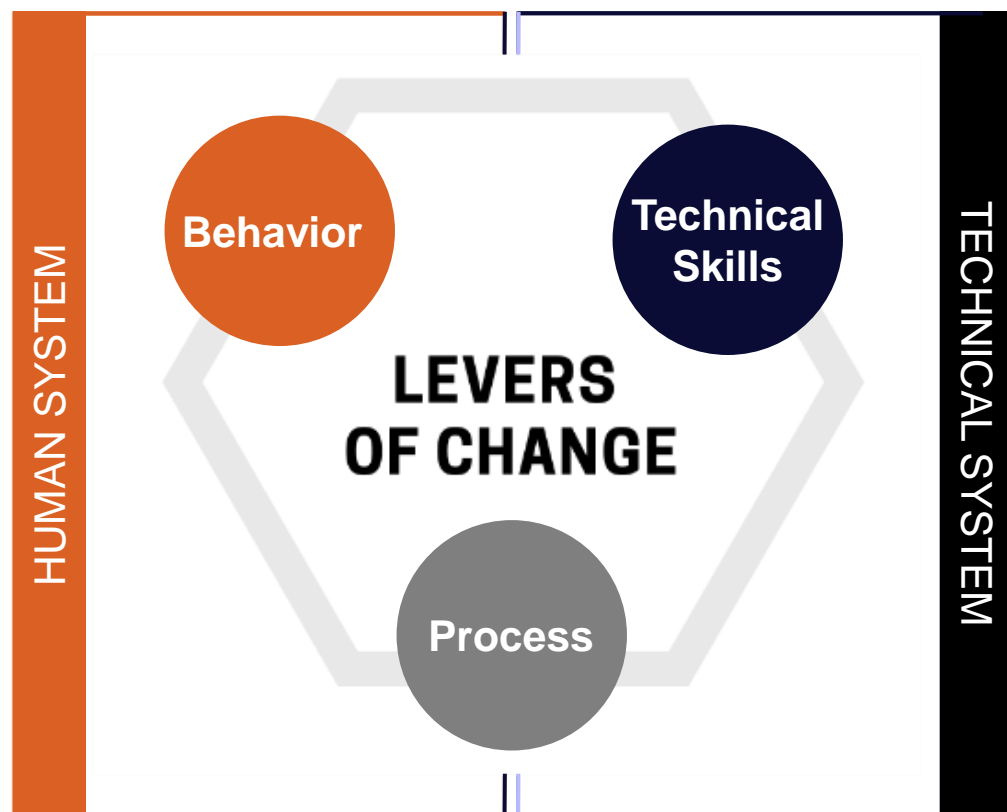
For design and planning for project and initiatives, having Copilot to gather, summarize and draft content is very useful. Furthermore, Copilot helps to keep track on the latest things around Teams and E-mails increasing productivity and focus.

Survey Respondent on Copilot use cases

'Ambassadors' champion new ways of working to increase productive collaboration habits

While the Stakeholder Team is focused strategic guidance and standardization of AI use cases in the organization, Ambassadors are employees who will use leverage AI in day jobs and with their teams. The Ambassador cohort is a subgroup chosen from across the organization at various levels to expedite adoption.

Ambassadors will serve as a catalyst for improved ways of working



Ambassador outcomes will include

Behavior

- Ambassador community that grows with each additional cohort to share learnings and connect
- Early modeling of desired behaviors, including:
 - Healthy collaboration and empowerment
 - Meeting effectiveness
 - Decision-making

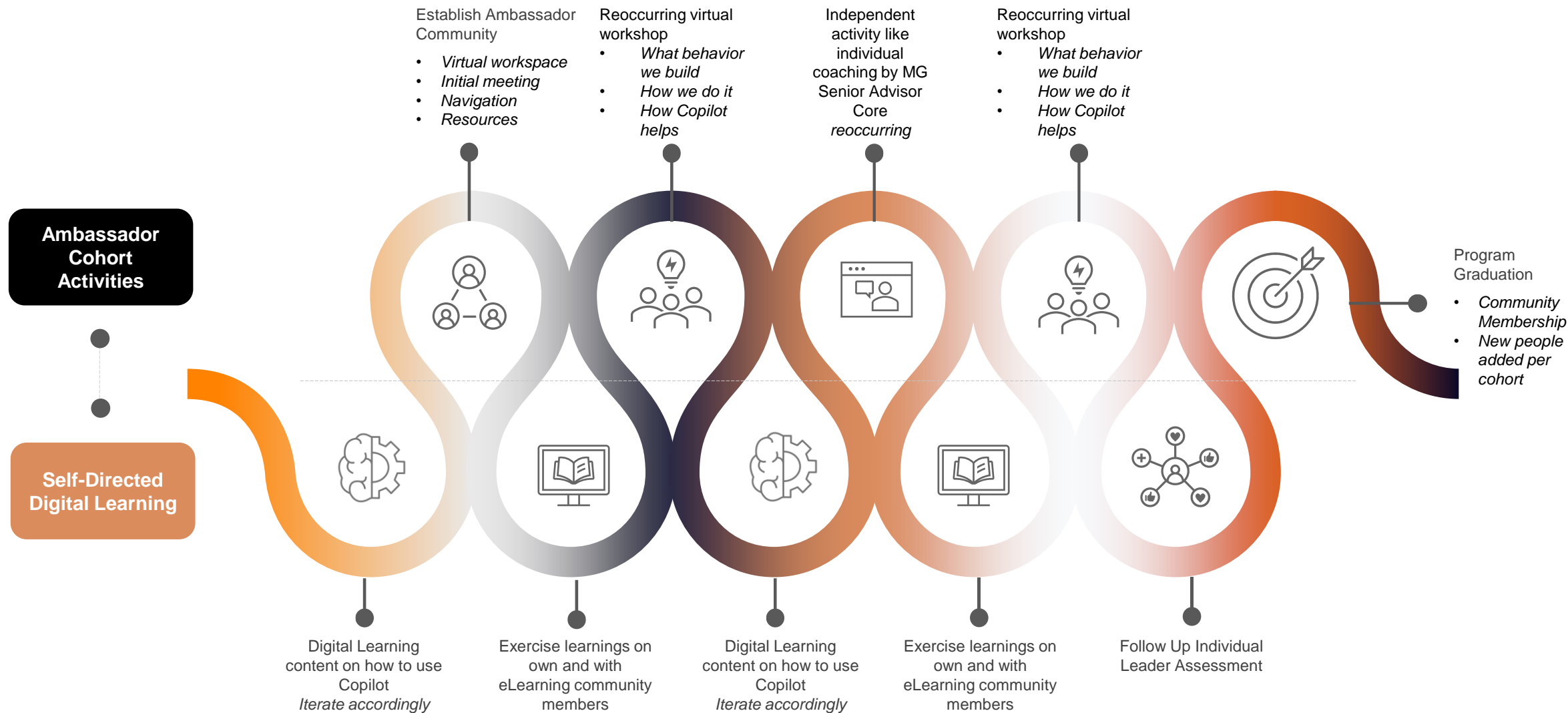
Technical Skills

- Curated Copilot Digital eLearning paths based on existing learning material
- Reinforced cultural change with Copilot
- Exercises on how to best integrate Copilot
 - Commonly used Microsoft apps
 - New Microsoft apps

Process

- Leverage Ambassadors to exemplify cultural change on top of digital upskilling
- McChrystal Group will partner with your organization's leadership to adjust program as needed based on cohort need
- Consistent rollout messaging and methods at scale via the Ambassador cohorts
- Bottom-up refinement for Stakeholder Team

The Ambassador program catalyzes super users to augment cultural change on top of digital learning



● Track Progress



Implementation tracking of both Copilot and behavior change can move Company from measuring what employees work on, to how employees work

How employees use Copilot...

...and how employees work...

...informs how adoption programs and ways of working can improve

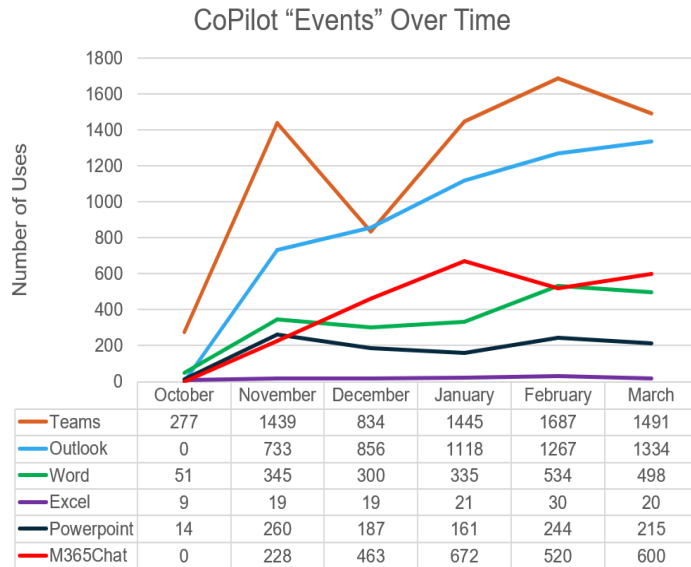
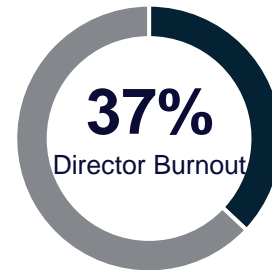


Figure 4 – MG Copilot PowerBI Dashboard - DRAFT

Collaboration and Empowerment Behavior*



Meeting Effectiveness**



Elevate Daily context to inform long-term strategic Direction



Establish a Standard Decision-Making Approach



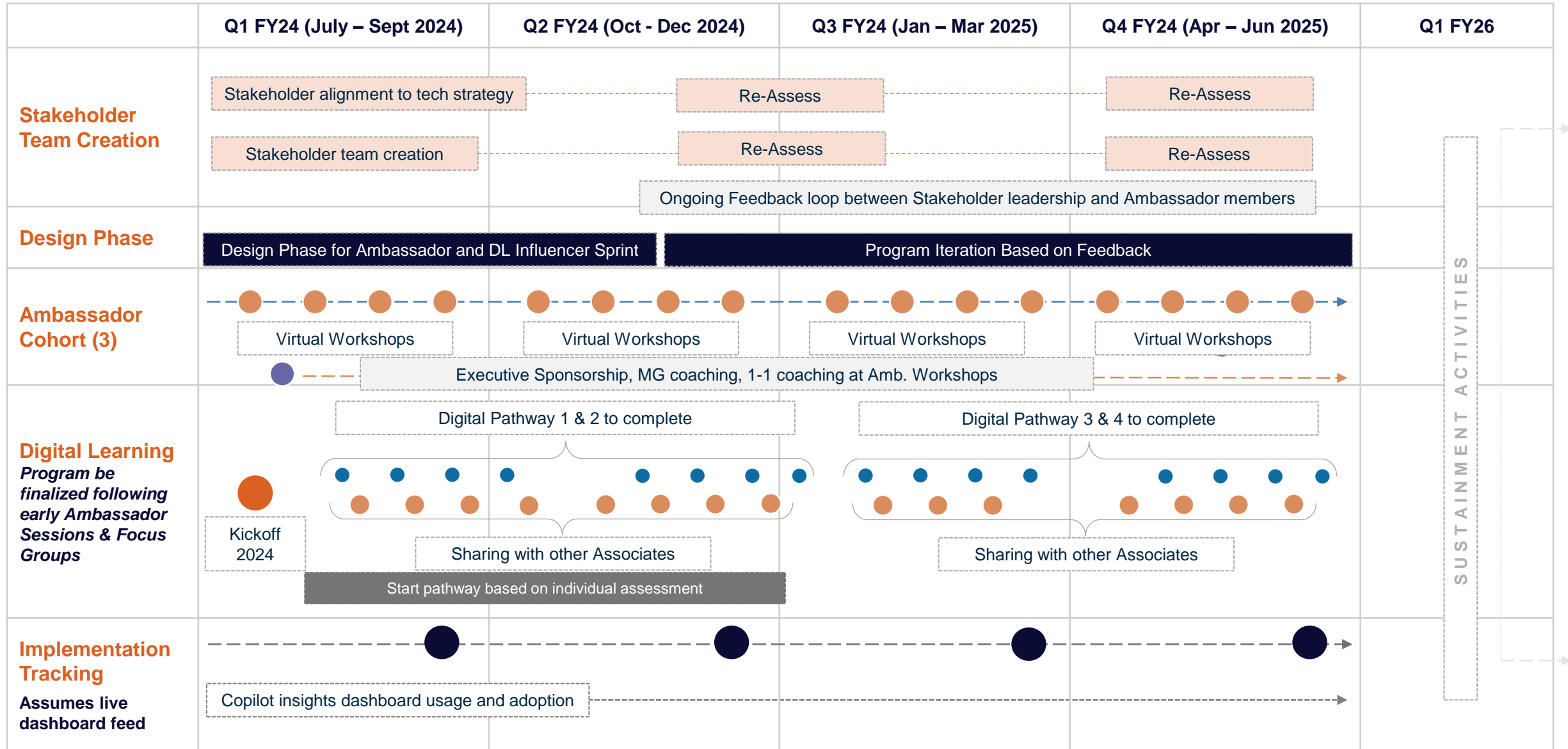
Measure ROI





- **At Your Company...**

Copilot Change Management: Adoption & Behavior Upskilling | Example Timeline



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