





Agenda

O1 Get excited

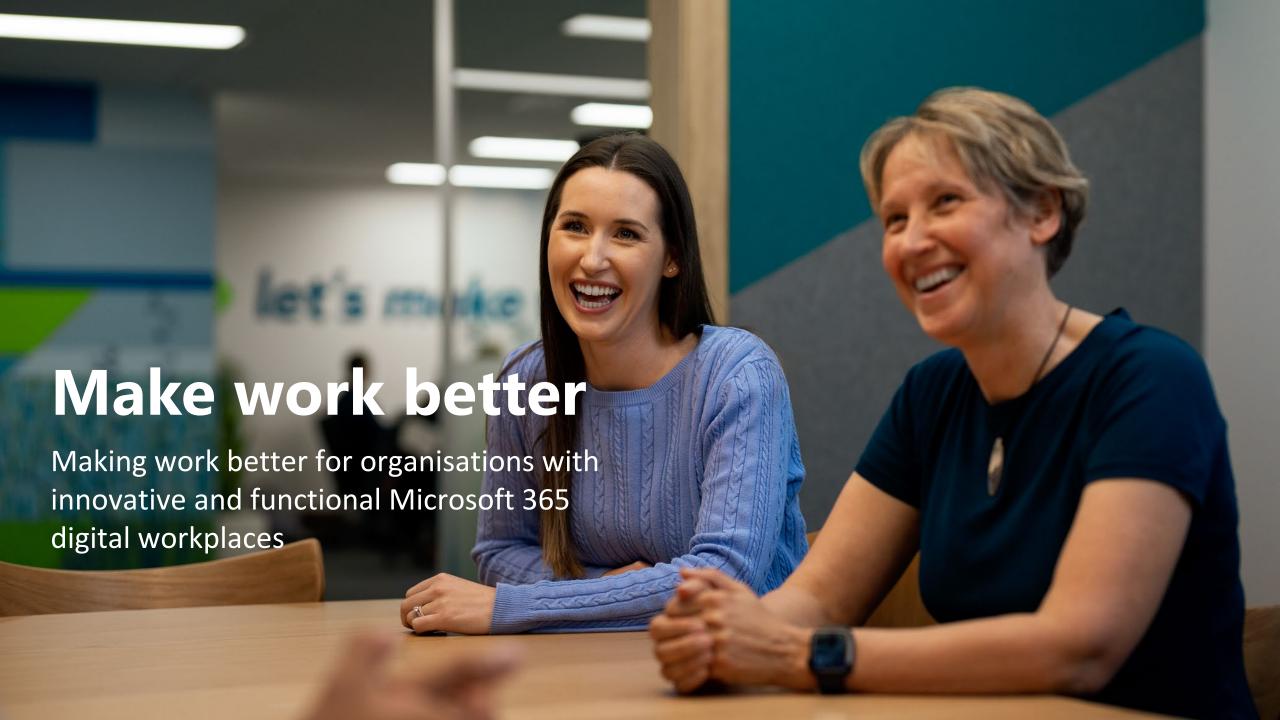
Understand the transformative potential of generative AI

02 Get ready...

Ensure your content readiness and user enablement plan for a successful Copilot rollout

03 ...Take -off!

Empower your team for a seamless incorporation of Copilot into daily work routines





We're focused on Microsoft 365 digital workplaces



Microsoft 365 digital workplaces

Implementations – full and/or EDRMS
Intranets
Reviews/Makeovers
Training
Strategy/Tactics



Tech independent **Information Management**

Reviews/Roadmaps PRA/IM Training Data



Digital Strategy

Roadmaps Governance Business Case

Located in

- Auckland
- **Wellington**
- Christchurch
- Dunedin









The pre-flight checklist

Get Excited

Get Ready

Take Off!



Awareness

Develop understanding and leadership capabilities to leverage AI for business outcomes

- Foundational understanding
- Business strategy
- Al governance group creation
- Provide clarity and prioritisation for cohorts



User Enablement

Manage the human transformation through robust user enablement programs and engagement

- Promote self selection of scenario-based groups.
- Support and empower
- Authentically integrate feedback



Foundation

Understand your content and capability in order to deliver results

- Ensure you understand your content
- Manage and mitigate risk by implementing (additional) security.
- Configure appropriately

Responsible Al principles



Select and activate your Copilot **influencers**, in partnership with your Al governance group.



Define initial high value **scenarios** and target users for rapid value

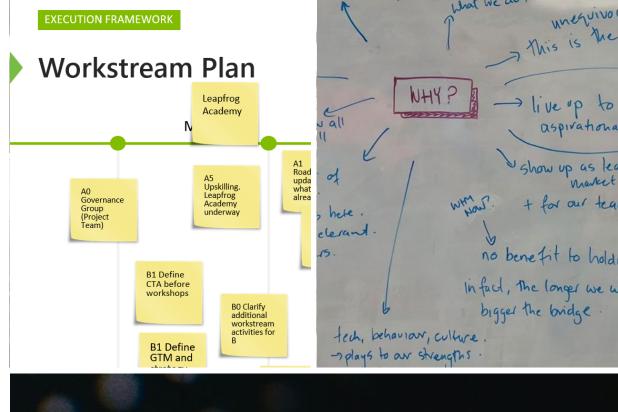


Define your path to **content** readiness for compliance and peace of mind



What we did

- Established a governance group
- Briefing to the board
- Defined the "why" for us as an organisation
- Develop our roadmap and plan
- Cohort plan and communication plans

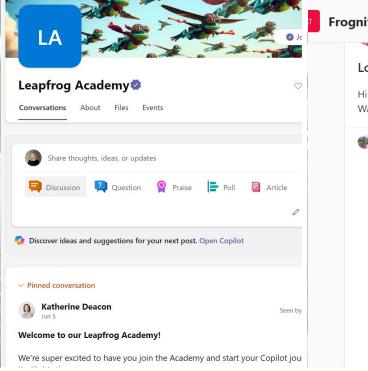


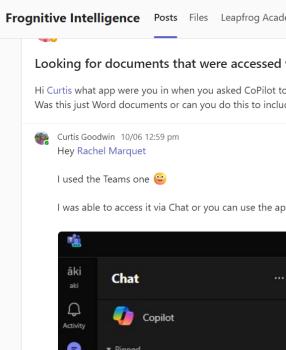




What we did

- Internal demos and launch
- Self formation of cohorts
- Daily lunch & learns
- Support and empower users through Viva Engage
- Encourage users to share stories and support each other
- #promptwizardry











What we did

- Retention & disposal
- Filing process review
- Technical readiness assessment
- Procure licensing



- Receipts for expenses
- Programme downloads (such as SPFx starter kit)
- Microsoft Team Chat shared files (Out of the box behaviour)

ocument Naming

All documents must be named using the following conventions:

- . Start with the short abbreviations for the Customer e.g. ADHB.
- Include the type of the document e.g. SOW, Report, Design, etc. This is important to help Smart Records infer the document type.
- Documents received from a third party, must be saved in "Reference Background Info".
- End with the date using the 2023-04-13 format.
- . The word SENT added to the filename if it has been shared with a third party.

Information Ownership

All information created or received as part of business activities belong to the IL, regardless of physical location, source or medium. Employees, agents, and contractors are accountable for the management of this information.

Information created by contractors on behalf of it, which relate to business activity are the property of it unless there is an explicit agreement between the parties specifying any exclusions.

Privacy and Confidentiality

Information covered by the Privacy Act or that which has legal or commercial sensitivity must be protected from unauthorised access.

IL is responsible for providing the correct level of security for each digital workplace in $\bar{a}ki$ SharePoint Workspaces/Teams.

Information Access

IL staff will be provided open access to information and records unless there is good reason to restrict.

 $\bar{a}ki$ and the information stored within must be protected against loss, unauthorised access and modification.





especially for

important case files





Migrate curated legacy info so CoPilot can access it Protect confidential + private info so it isn't divulged

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peace of mind

The age of Copilots



Hearsay

Our roller coaster journey... to Orlando

To see firsthand the hype vs real advances



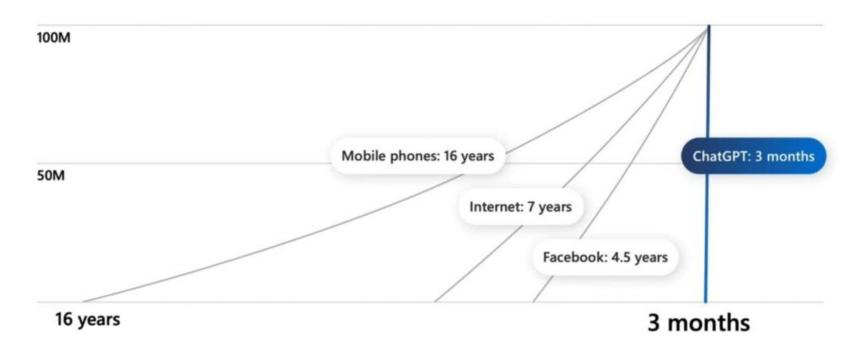






Generative AI technology is here

Time to reach 100M users



Source: Microsoft Research

2024 Work Trend Index

from Microsoft and LinkedIn



Finding 1

Employees want Al at work—and won't wait for companies to catch up

They're bringing their own tools even as leaders face Al inertia.

- 75% of knowledge workers around the world use generative Al at work.
- 78% of AI users are bringing their own AI to work (BYOAI).
- While 79% of leaders believe their company needs to adopt AI to stay competitive,
 60% of leaders worry their organization's leadership lacks a plan and vision to implement it.



Finding 2

For employees, AI raises the bar and breaks the career ceiling

Some are itching for a career change, and there is a massive opportunity for those willing to skill up on Al.

- 66% of leaders say they would not hire someone without AI skills.
- 71% say they'd rather hire a less experienced candidate with Al skills than a more experienced candidate without.
- There was a 142x increase in skills like Copilot and ChatGPT added to LinkedIn profiles last year.



Finding 3

The rise of the AI power user—and what they reveal about the future

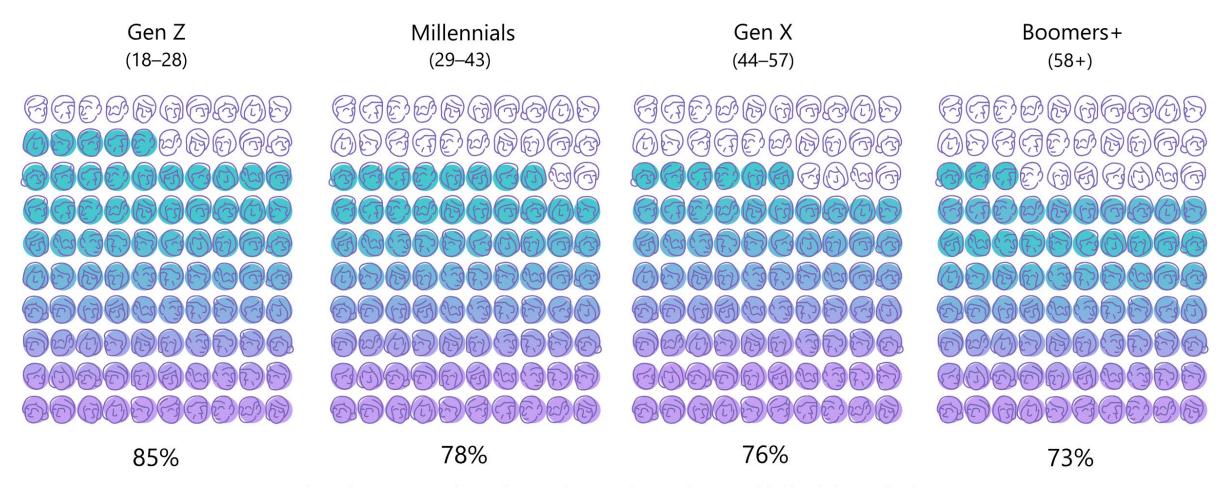
Power users use AI at least several times per week. They say it saves them more than 30 minutes per day.

- Frequently experimenting with AI is the #1 predictor of an AI power user.
- Power users say Al boosts their creativity (92%) and helps them focus on the most important work (93%).
- Al also helps them feel more motivated (91%) and enjoy work more (91%).

Ref: https://aka.ms/wti





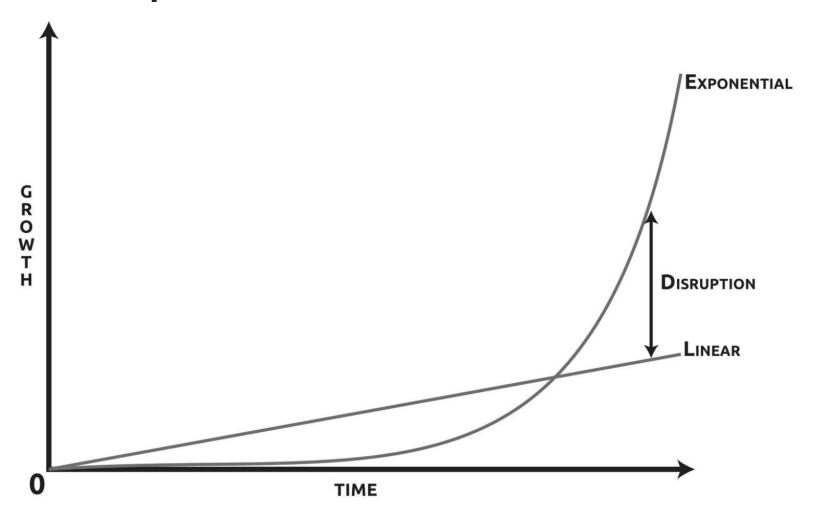


Share of survey respondents who are using AI tools at work not provided by their organization

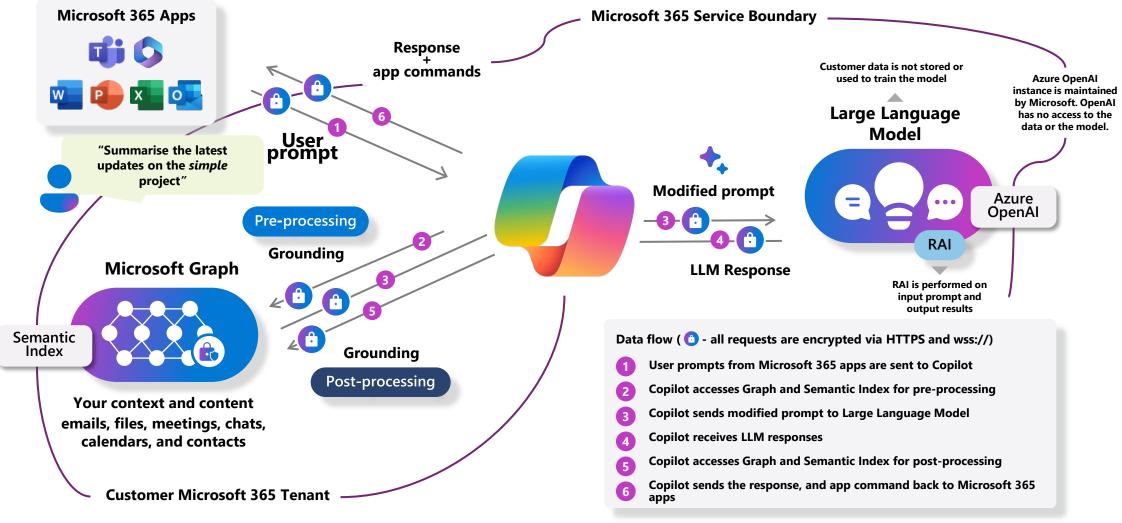
Ref: https://aka.ms/wti



Minimise disruption



Copilot M365: How it works



What's possible now



Copilot: your personal AI assistant

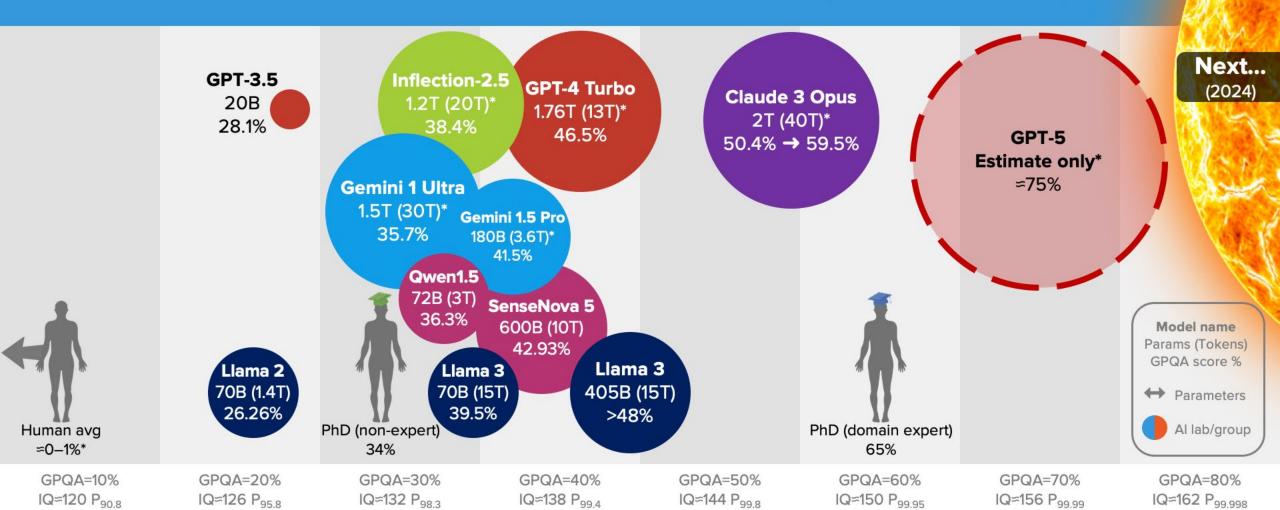
- Personalised assistance
 - ...tailored support to help you get started with content generation
- Streamline all those meetings!
 - ...reduce low value interaction and amplify high value insights and action
- **Unlock insights**
 - ...access concise explanations and summaries across content in multiple places
- **Empowering collaboration**
 - ...where You + Me + AI multiplies the possibilities
- **Learning and coaching**
 - ...with real-time writing assistance and interactive feedback during meetings
- Safely grounded in your content
 - ...within the bounds of your security, privacy and compliance context.



The future is now



LARGE LANGUAGE MODELS + GPQA (MAY/2024)



Model sizes near to scale. * Estimates based on independent analysis. Selected highlights only. IQ correlation: https://lifearchitect.ai/visualising-brightness/ PhD/IQ correlation: ht





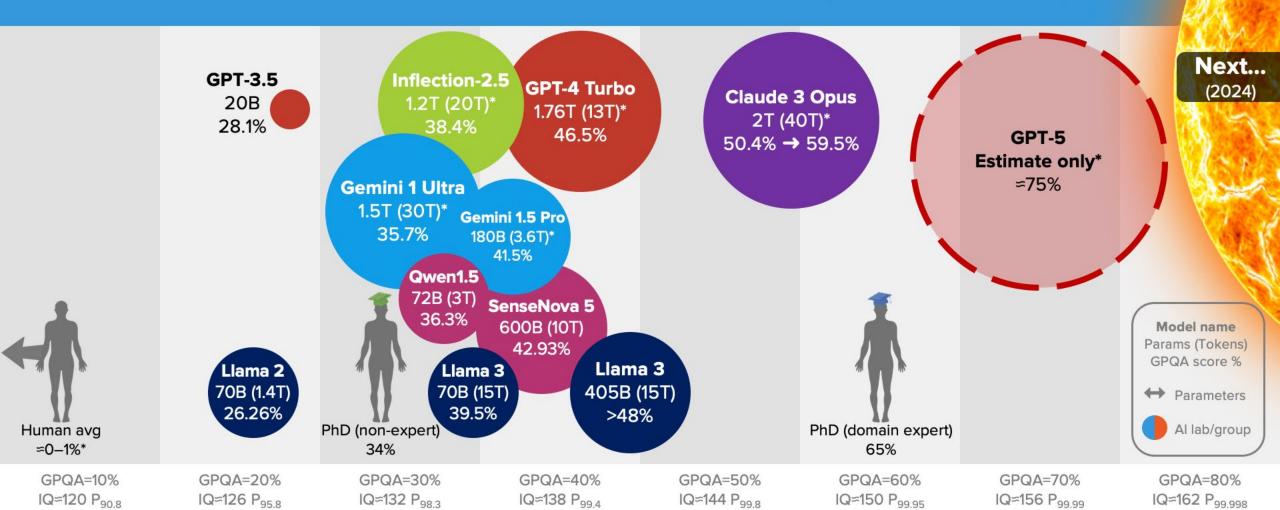
You

A reaction of a liquid organic compound, which molecules consist of carbon and hydrogen atoms, is performed at 80 centigrade and 20 bar for 24 hours. In the proton nuclear magnetic resonance spectrum, the signals with the highest chemical shift of the reactant are replaced by a signal of the product that is observed about three to four units downfield. Compounds from which position in the periodic system of the elements, which are also used in the corresponding large-scale industrial process, have been mostly likely initially added in small amounts?



GPQA example

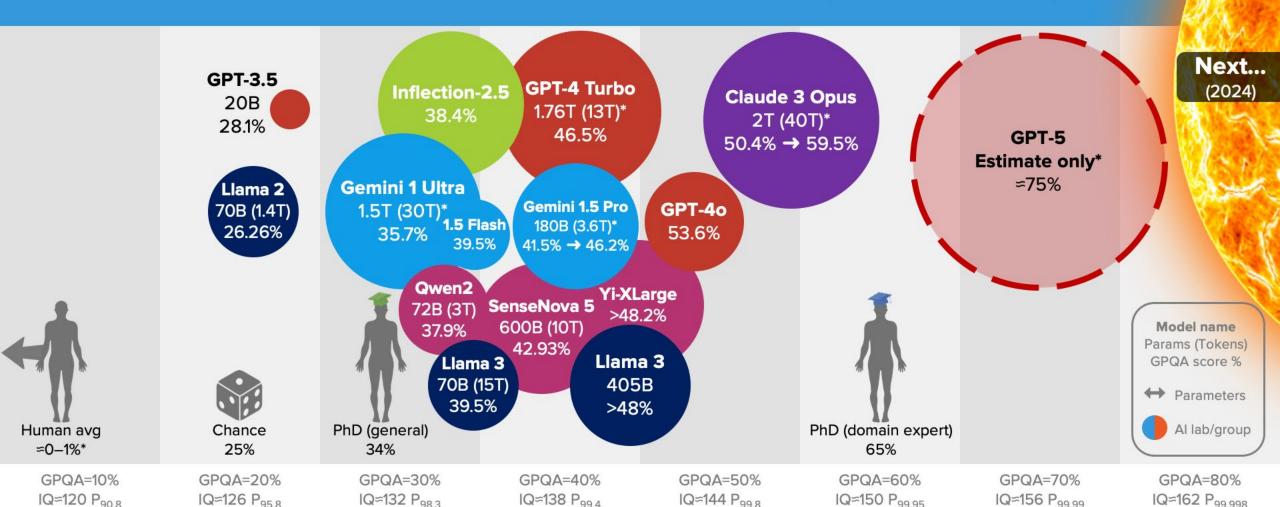
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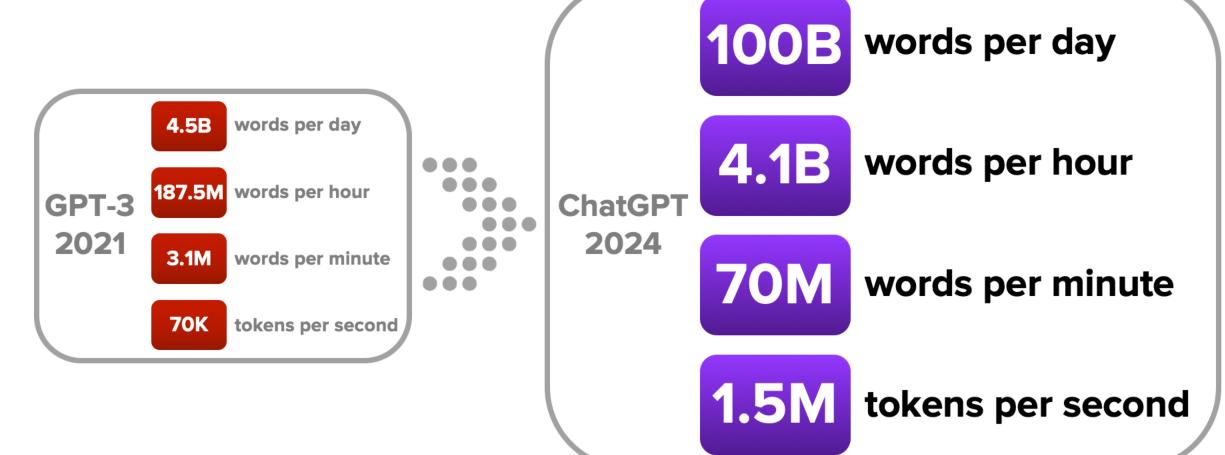
LARGE LANGUAGE MODELS + GPQA (JUN/2024)



Model sizes near to scale. * Estimates based on independent analysis. Selected highlights only. IQ correlation: https://lifearchitect.ai/visualising-brightness/ PhD/IQ correlation: https://lifearchitect.ai/wow.religiournal.com/pdf/ijrr10001.pdf All models: https://lifearchitect.ai/models-table/ Alan D. Thompson. 2024.



TOTAL CHATGPT OUTPUT WORLDWIDE (FEB/2024)





A day in the life with Copilot



A day in the life scenarios

I'D LIKE TO...



Plan my day using Copilot



Quickly summarise and wade through complex email



Collaboration superpowers



Supercharge the meeting experience



What I need to know about BYOD



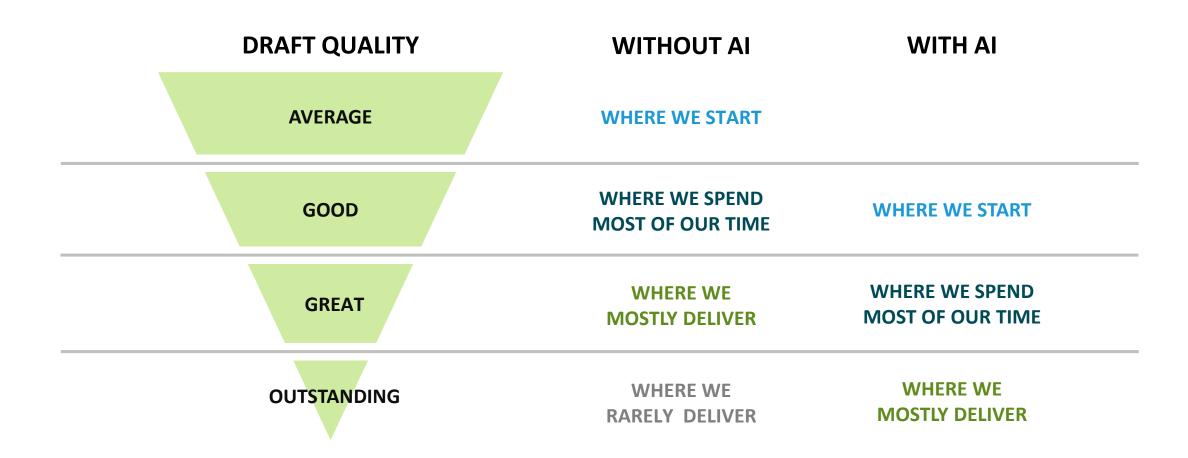
Create a board presentation for this afternoon



Quick start on some data analytics



It's Not About More Content, But Better Content



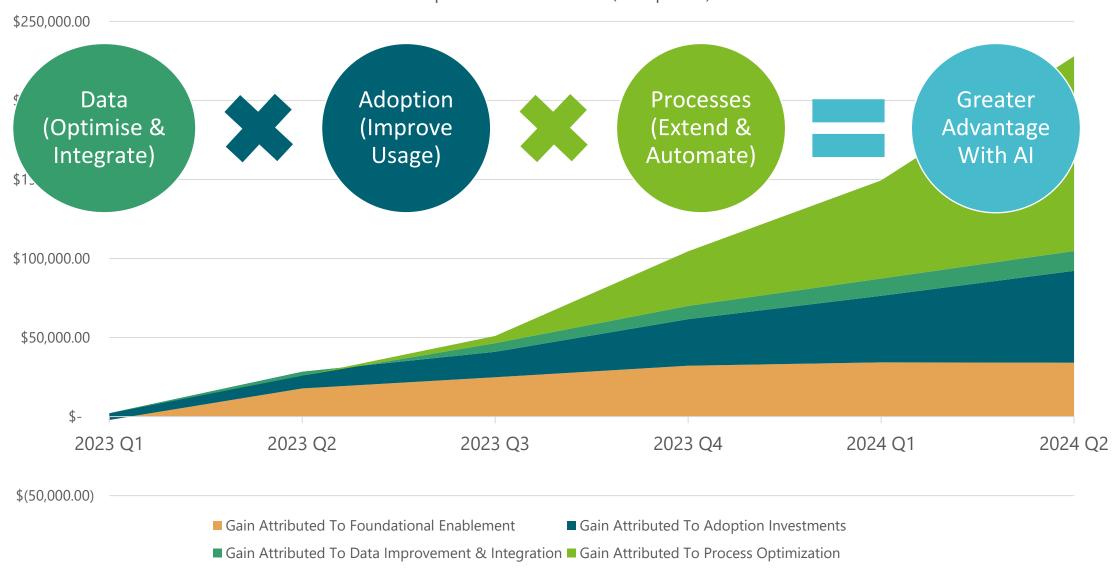
Copilots



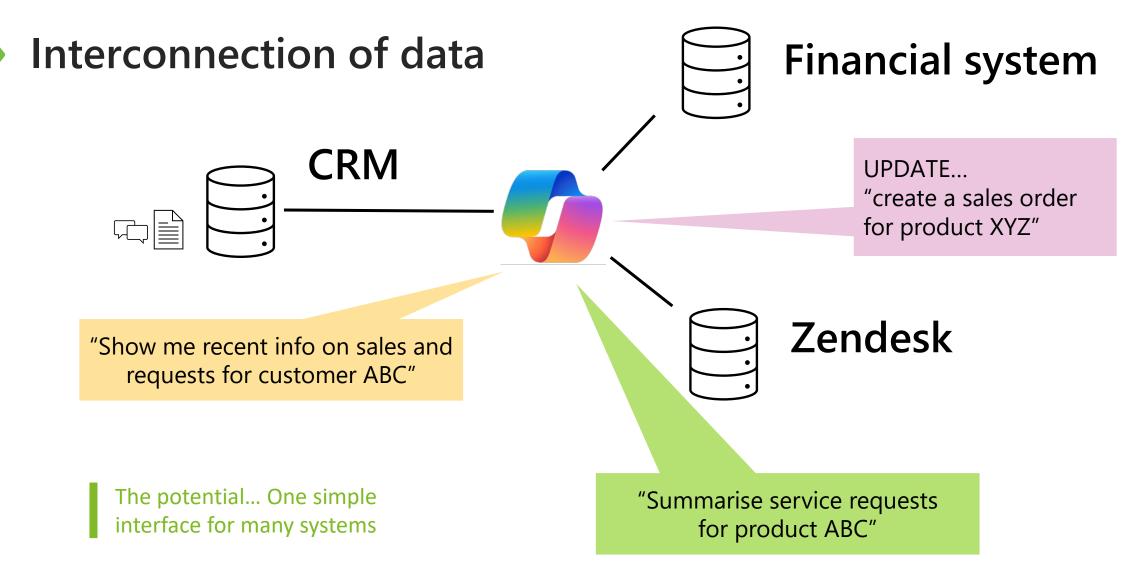
Extensibility is the ROI game changer











COPILOTS



Knowledge bases, FAQ, Policy libraries



I have found a possible security issue, what should I do:

Add people, files, and more for better results

OUESTION

AUTHORITATIVE ANSWER

No Menus

No opening page/docs

Just straight to the point



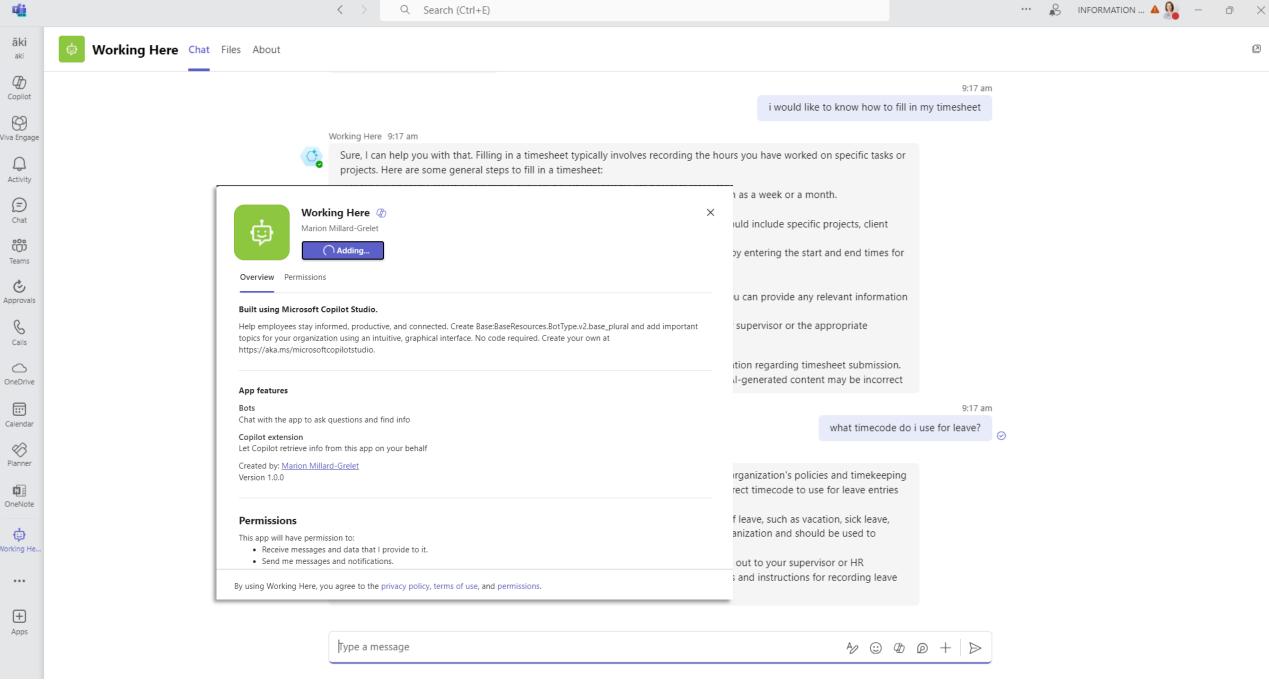


Copilots, are we there yet?

- Super easy to get started even I can do it.
- But...

Before we show you, we learned some things...

• We set up a custom copilot that looks at the content in our working here intranet site across pages, policies and procedures.





Finding our why... will over like ours This is the future of AI. I had information 15 Survive if we don't? What we do. do more with less. fater, get to grality sooner - live up to our > best place to work in NZ! We don't yet know all aspirational name · ppl, the benefits we'll ·tods - do things that were cost -· customers. I show up as leaders in the prohibitive pre-capilot employer of + for our team - best tools here. 7 caseer accelerant. walk the talk. -true stories for our the I.L. "lab".

Customers. - info. leaders. no benefit to holding back. have's have nots. we don't want to number - credibility / integrity in fact, the longer we wait, The away the latter. bigger the bridge. - raising the bar, redefining what good looks like. tech, behaviour, culture. -> plays to an strengths. - understand needs, act in best interest, - uniquely placed to , make complex supe 4 cust · play for arrselves

Get ready!





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User Enablement

Why this matters





Identifying POC cohorts

Selecting the right participants for your POC program is key to gain valuable insights and inform and roll out you org-wide launch.

- Don't leave it to chance or just assume its going to happen! Promote self selection and cohort formation.
- Users primarily from similar lines of business or departments, preferably those who work together on a project or business process.
- Likely Champions or leaders who will become advocates during the launch to the entire organisation.
- Cohort members will support following groups/users during launch.



OUR EXPERIENCE

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Likely Champions or leaders who will become advocates during the launch to the entire organisation.



Cohort members will support following groups/users during launch.

Copilot Cohort

Who	Why		
Clara	Copilot workshops / Cadence calls – I will be co-leading the Copilot workshops with Mark and Katherine. It would be great to have a range of day-to-day examples that I could demonstrate to customers in these workshops or our regular cadence calls		
	Customer cadence meetings — I am keen to use Copilot to transcribe & summarise meetings and pull-out actions so I can give the customer my full attention while ensuring nothing is missed		
	Case Studies – we've not written up many case studies recently due to resource / time constraints. The IAM team are keen to trial the effectiveness of using Copilot to write up case studies from staff & customer interviews, so we have library of current reference material for use in bids and new business work.		
	SoW – I often rely on ChatGPT to get started on the summaries for SoWs. Using Copilot will prevent the need to anonymise prompts and will allow me to direct prompts to previous Sows for reference in the summary.		
Chris	Keeping track of tasks, I'm hoping it can give me reminders when things inevitably foff my plate Surmising action points from meetings		
Bryce	Assisting with tone in the trickier emails I have to send from time to time I'd like to use Copilot to help create process documentation, for helping translate comms between internal and external audiences, and for driving meetings/summarising action points. Having Copilot means I can be more IL-specific with my prompts instead of having to go vague when using ChatGPT.		
	"What other platforms would you use CoPilot alongside?" Zendesk - the obvious things like helping generate replies to service requests, but I would also use it to help me generate specific insights via the reporting engine Zendesk Explore. I've used ChatGPT in the past to help create/fix/simplify Excel formulas for things like		

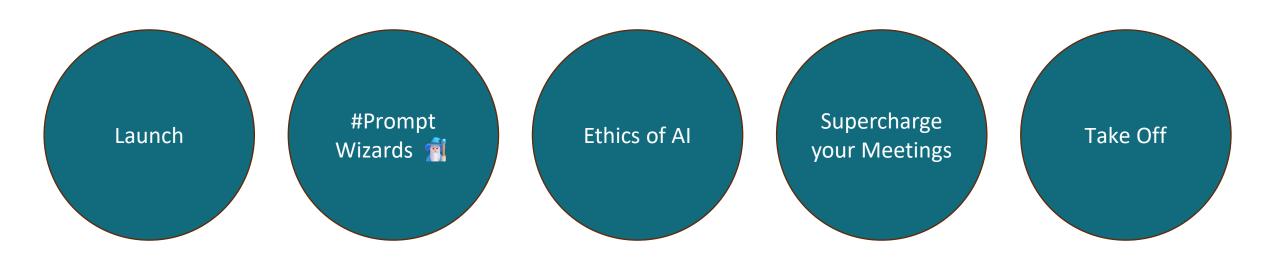


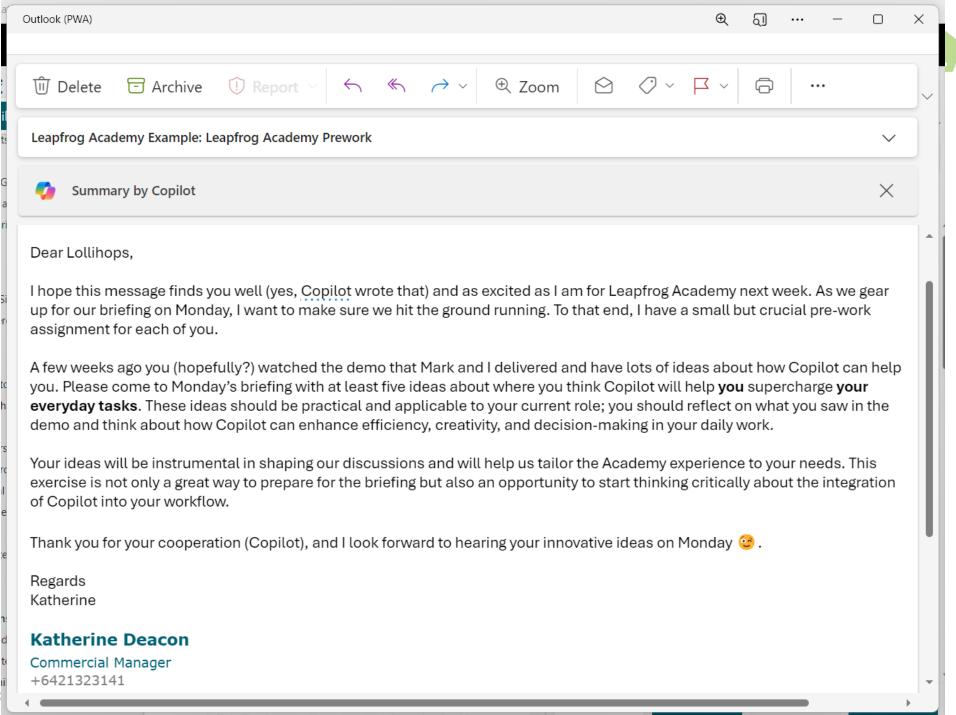
Week one

- Morning snack
- Chunky lunch
- A scenario to practise
- At the end of week one...



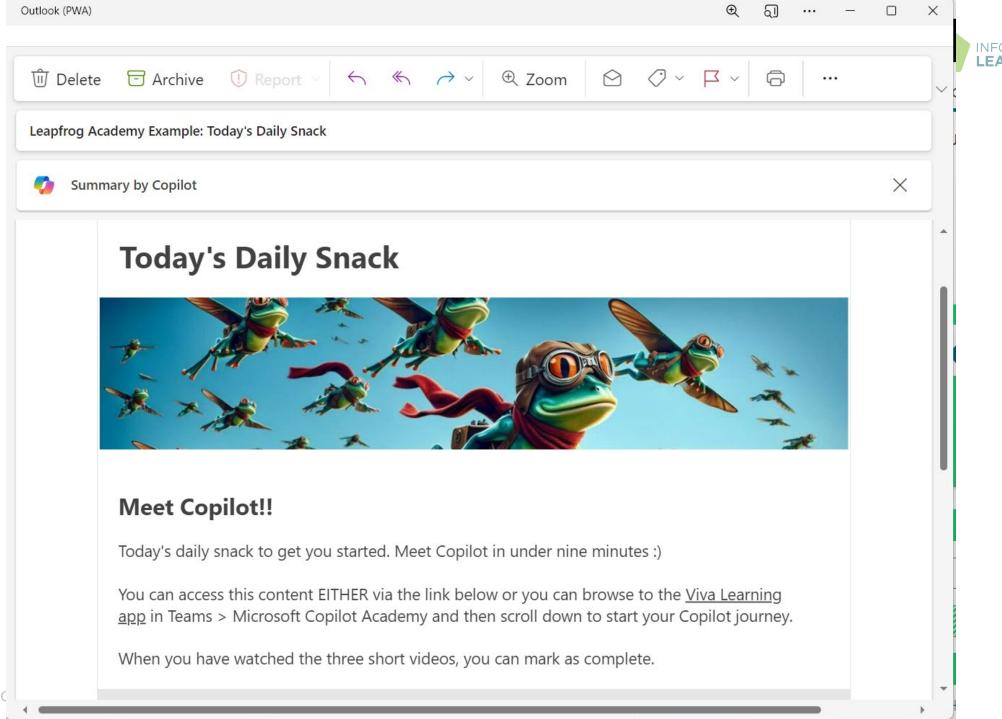


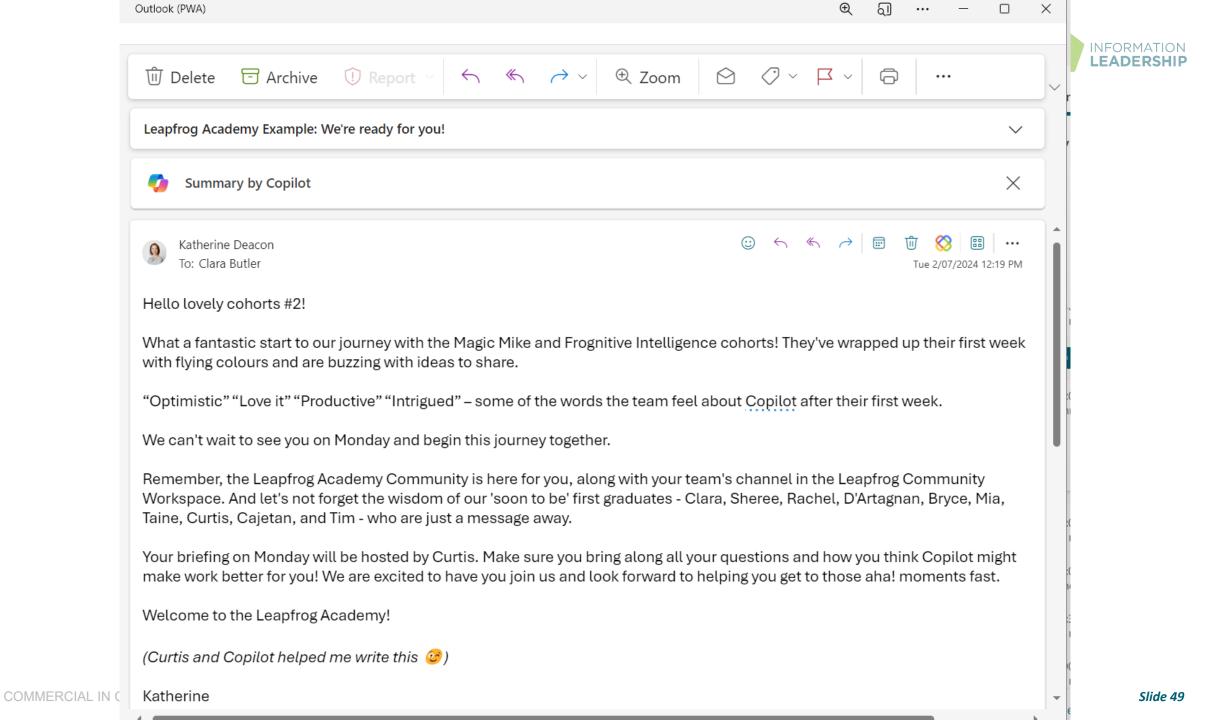




Slide 47

INFORMATION





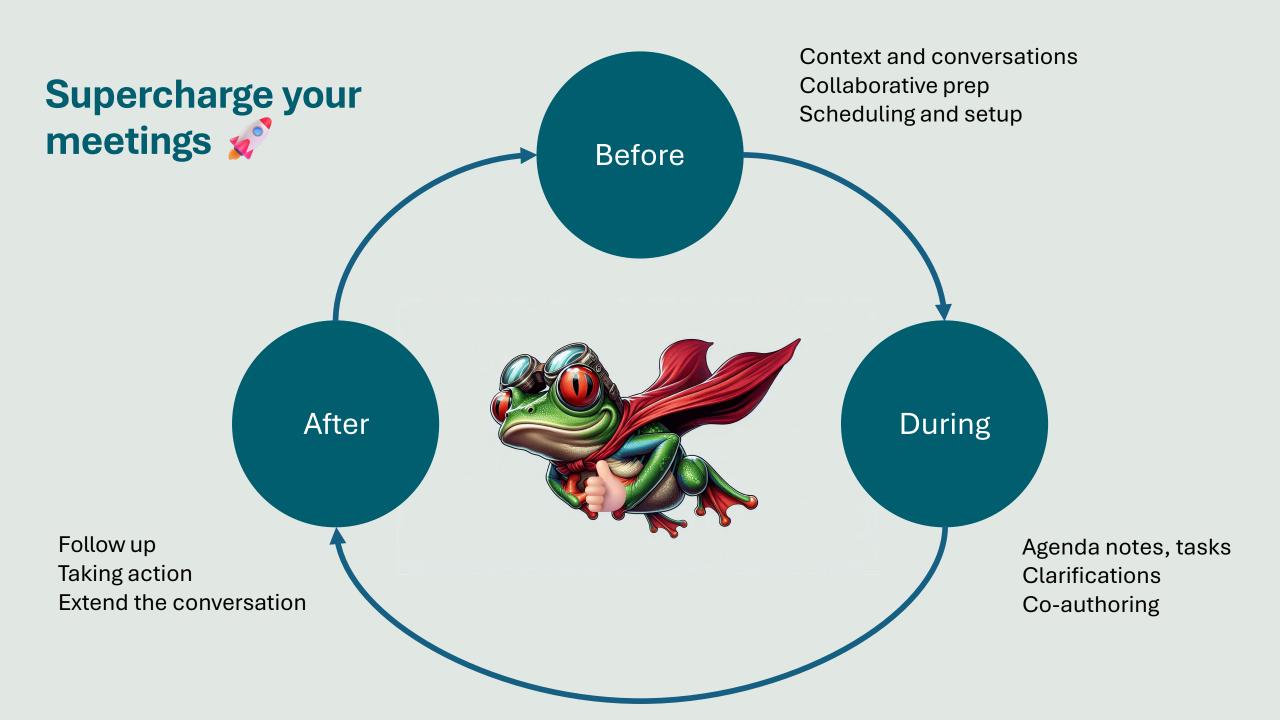


What are they good for?

- Problem solving brainstorms, cocreation, analysis, trouble-shooting.
- Share information Report something to a group. Learn something.
- Get approval or a decision or feedback on an idea or plan.
- Connect emotionally to generate energy or build and maintain relationships.

Why do we make them so hard?!

- Lack of preparation no pre-reading, no time to pre-read.
- Getting off track no agenda, poor moderation.
- Lack of follow-up no notes, no action items, can't find the content.
- Overload vs FOMO too many meetings, not in the loop.



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Content Readiness



Content Readiness



What is sensitive?

Where does data live?

Who has access?

How is it used?

What is the risk?



Define what is sensitive to the organisation

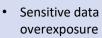
Generic & customer specific

- Company secrets
- Highly confidential
- Personal Identifiable Information

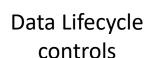
Created inventory of all data repositories Considered as copilot source

- Microsoft 365
- 3rd party sources Structured and unstructured

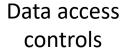
- What content can employee access
- Internal & external to the organisation
- Access control and access management
- Oversharing

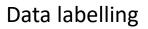


- Unprotected data
- Is the use of sensitive data managed
- What if data is exposed Which data could harm the organisation
- What would be the impact & cost
- Are we at risk
- Are we compliant









Data classification



- Minimize obsolete data
- Retention policies and automatic deletion
- Records management for business, legal or regulatory record keeping requirements
- Protect sensitive information
- Data encryption Watermarking
- Prevent Data loss
- Protect against Oversharing and external sharing

- Optimize access permissions, remove, block
- Correct oversharing
- Exclude data sources
- Apply sensitivity labels to data
- Manual, user initiated
- Automatic, based on content, location, purpose, etc.
- Select and define sensitive info types
- Generic, out of the box
- Customer specific, custom defined to specification



Organisational risk tolerance define next steps.

Low risk: Enable copilot

Medium risk: Implement (additional) data security and in parallel enable coplot.

<u>High risk</u>: Implement data security before enabling copilot.

Elevate Productivity





Key tactics to increase content readiness and reduce risk



Delete old, duplicated or unimportant content



Access restricted especially for
important case files



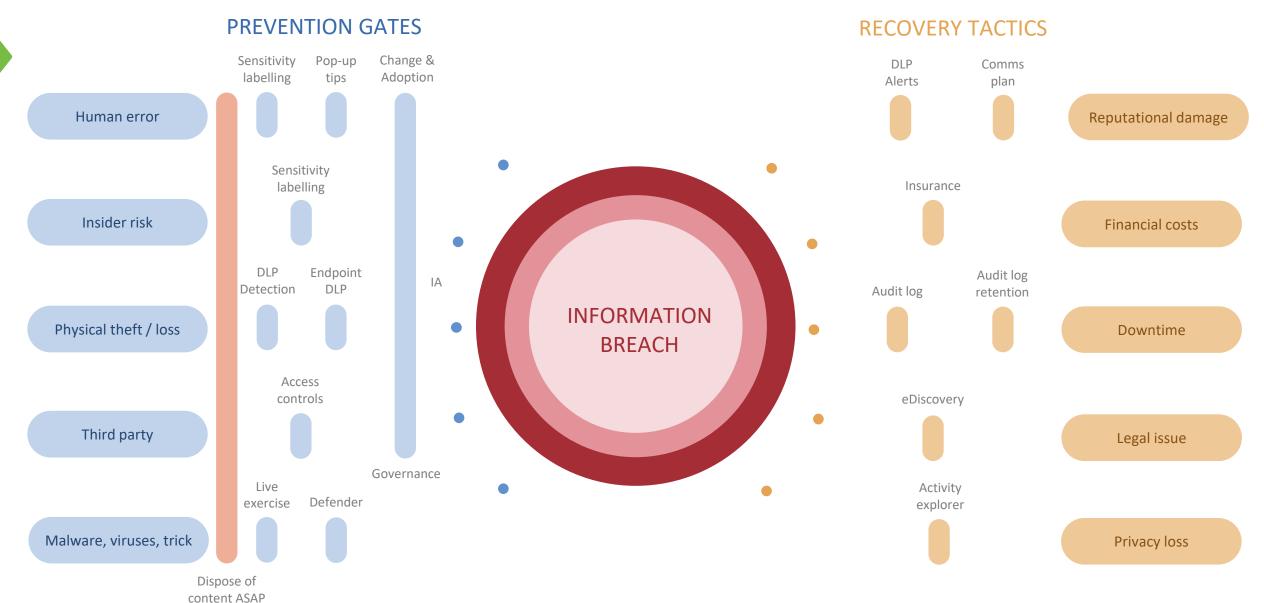
Migrate curated legacy info so CoPilot can access it



Protect confidential + private info so it isn't divulged

... and avoid information breaches





iWorkplace OneDrive Manager





Take-off!





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Change and Adoption Framework



- √ Change Management Workshop
- ✓ Change Management Team Kick-off
- ✓ Change and Adoption Strategy
- ✓ Stakeholder Impact Assessment



PLAN

- √ Communication
- √ Champions
- ✓ Training
- ✓ Roll-out approach
- ✓ Governance in BAU



IMPLEMENT

Support implementation of the Plans:

- √ Communication
- ✓ Training
- ✓ Support Go Live and post Go Live
- ✓ Monitor adoption



MONITOR in BAU

- ✓ BAU governance
- ✓ Monitor adoption
- ✓ Rollout adoption campaign
- ✓ Collate and share success stories
- ✓ Run refresher training
- ✓ Engage with teams with low usage









Documentation

creating new workflows, reviewing and suggesting improvements.

Sheree Buckley-Simpson

Bryce Gravatt

Review policies and produce FAQ's

Katherine Descon

To gather resources on topics I am working on - and things to help with wellbeing eg: mindfullness

Clare Butler

A way to compile info

from Teams/Outlook

we're not missing any

regarding SR's so

info

Catagorise and compile notes from brainstorming sessions. Compile actions from those

help me to find content to answer questions in rfp responses

Help write new case studies quickly

Summary of the documents I worked on during the day (for timesheets!)

catagories.

Sheree Buckley-Simpson

Help me summarise the emails I get from Zendesk without having to read the entire email trail

Clara Butler

help organise notes Draft SoWs refering on iWorkplace to existing SOWs and products into ppt summarising in new slides for meeting doc

Bryce Gravett

Shenne Buckley-Simpson suport learning by summarising various documents on different iWorkplace apps.

Communication

Prepare emails for

sending expense

approval requests

Tim Bley

Help me draft

professional

Clara Butler

customer emails and

have them appear

Ensure our recommendations provided to client is as per Microsoft best practice

Shares Backley-Simpson help write emails to customers and check tone, summarise meetings and actions

Develop comms and training plans/ideas

Customer cadence calls - summarise meetings, call out actions

Analysis

Analyse financial data to provide insights and trend analysis

Help analise Excel exports of Zendesk data

For personal

developement, to

review meetings,

tone + time talking

Curtis Goodwin Summarise actions/next steps from workshops and meetings

Collecting action points from planning sessions

Training

Help prepare team coaching sessions

Helping to create training documentation from process docs

Clare Butler

D'Arragion NicCornick

Help to better understand the features of Microsoft apps

Support learning by recording app demos & transcribing /

summarising

Provide different change/adoption activities or examples

I'm interested to try CoPilot in Power BI

Desktop



5





















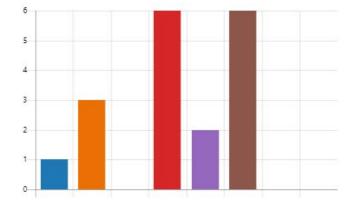
1. Where has CoPilot provided the most value?

	Task Organisation	1
•	Creating content (eg: emails, c	3
•	Automation (eg: analysing dat	0
•	Meeting summaries	6

Training preparation
 Searching for information

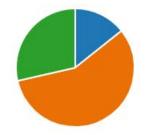
No value

Other



2. Has CoPilot improved your productivity?

Not at all
 A little
 A lot
 2



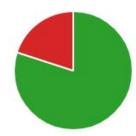
3. What further support do you require with CoPilot?

Additional Leapfrog Academy ... 0

Further support materials (

More time to spend practicing... 4

Other





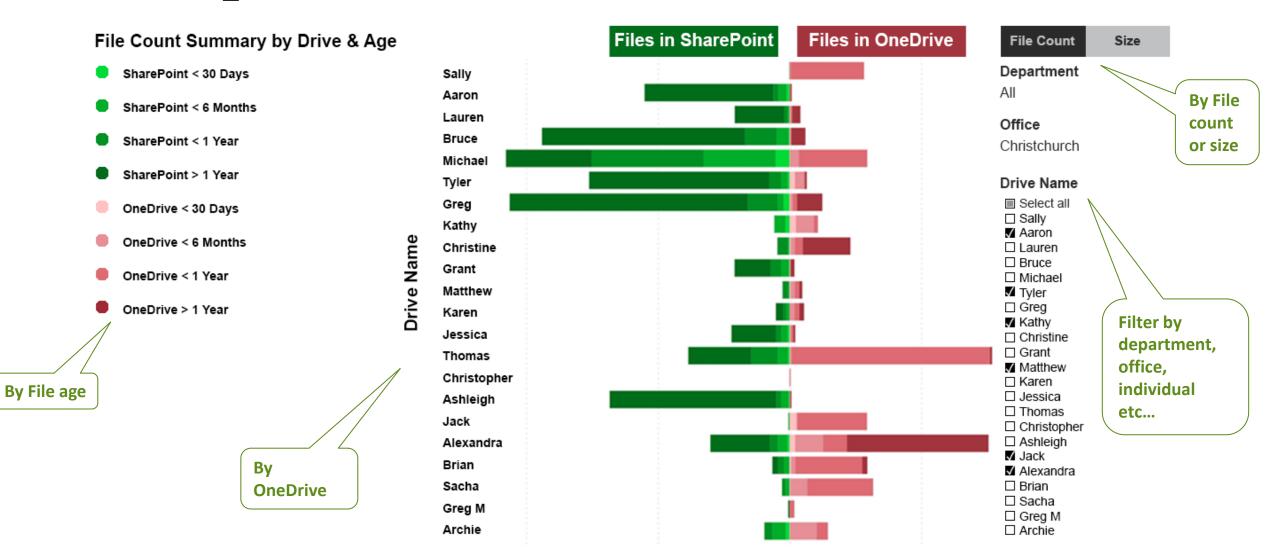


Stories from the lily pond

DRAFT QUALITY	WITHOUT AI	WITH AI
AVERAGE	WHERE WE START	
GOOD	WHERE WE SPEND MOST OF OUR TIME	WHERE WE START
GREAT	WHERE WE MOSTLY DELIVER	WHERE WE SPEND MOST OF OUR TIME
OUTSTANDING	WHERE WE RARELY DELIVER	WHERE WE MOSTLY DELIVER



ODM Insights





#Feels

Productive Learning Optimistic Ambitious

Confident

Optimistic

WIP (Work in Progress)

More comfortable with it

Intrigued

Love it!

It is Chat GPT for Office

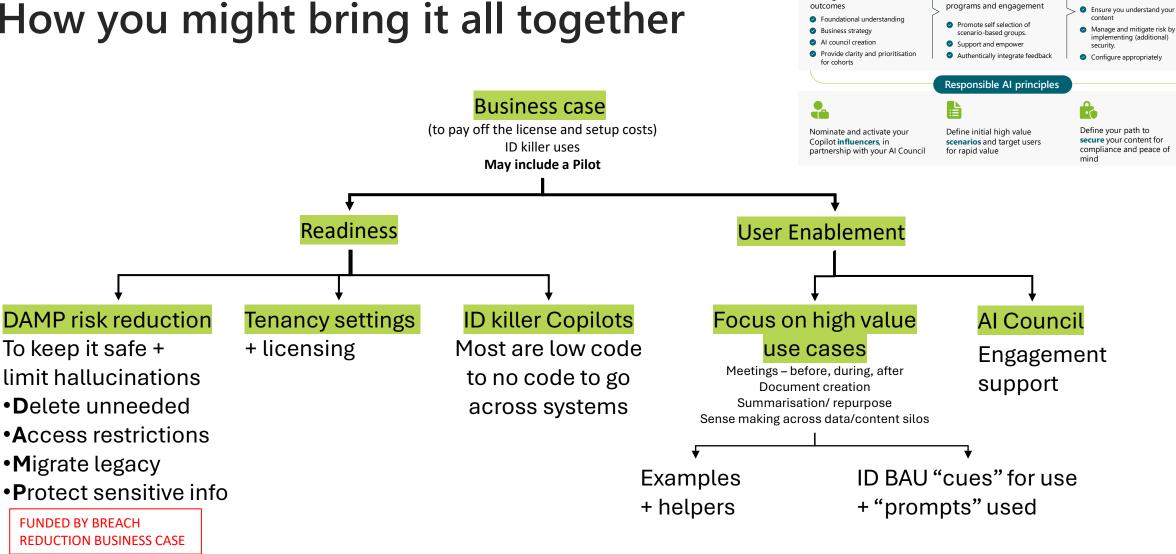
slido



How do you feel about Copilot?



How you might bring it all together



80

Foundation

Understand your content and

capability in order to deliver

Awareness Develop understanding and

leadership capabilities to

leverage AI for business

User Enablement

Manage the human

transformation through

robust user enablement



How we can help!

- People are creatures of habit; to maximise value we need to build new habits. User enablement is key!
- Content is King. Safe foundations will make a massive difference. We can help with policy guidance, DAMP and content assessment.
- Challenges exist in "sense making" and "prompt engineering" when using AI.
- Copilots: In an ever-changing landscape let us guide you in the development and extension of Al

FUTURE GAZING: WILL YOU THRIVE OR DECLINE?

- Haves and have nots
- Productivity as normal or super charged
- Attracting and retaining key staff Al environment expected

