# Copilot project rollout plan

Use this two-page plan with the people doing the work, the trainer and IT. Start with what you agreed with the sponsor, then work through the details needed to run a useful pilot.

**Project / team / project lead**

## What are we taking on?

Name the pilot output, the teams involved and what can wait. Who agrees to changes along the way?

## Which workbook or task will we use?

Link to a fictional or approved example. Identify its tables, key columns, handoffs and where the result goes.

## How will we know the result is right?

Explain missing values, uncertain matches and allowed changes. List 3-5 checks and who will review them.

## What do people need to learn?

Roles and numbers; Excel and Copilot experience; what people will practice and do on their own; who can help.

## Can people actually do the exercise?

Have IT test with a learner account, device and file location. Record who tested, when, the result and a fallback.

## What needs to be ready for the pilot?

Trainer, dates/time zones, hands-on or demo, files/platform and practice time. Agree on recording and reuse.

## What could hold this up?

Think about data approval, access and staff time. Give each open question a next step, a person and a date.

# Rollout and progress review

Keep this page handy as you run the pilot and decide what to do next. Link to the actual work and any longer task logs in your usual project files.

## Who is doing what, and by when?

| Stage / evidence needed | Owner / date / evidence or remaining action |
|---|---|
| **Ready for pilot**<br>Scope agreed; example approved; IT rehearsal passed or fallback agreed. | |
| **Pilot and practice**<br>Deliver session; complete a fresh task; capture checks and support needed. | |
| **Review and rollout**<br>Sponsor reviews evidence; expand, adapt or stop; assign ongoing support. | |

## What are we hoping to improve?

Name the task, required checks, target improvement and review date. Compare work of similar size and difficulty.

## Small baseline and follow-up

| Measure | Before training | After practice |
|---|---|---|
| Date / task size / method (include AI) | | |
| Prepare/build + review + correction minutes, across all people | | |
| Total active person-minutes | | |
| Checks passed / total; final accepted? | | |
| Help: none / hint / step-by-step | | |

Start with a typical attempt; repeat if results vary. Compare accepted outputs, note changed conditions and log waiting separately. A small comparison suggests progress; it does not prove cause.

## What should happen next?

What changed, and what does the work show? Expand, adapt or stop? Name who will help and when to review again.