Leading in the Era of AI:

# It's not about AI -
# It's about *trust*

December, 2023

**By Karuana Gatimu, Principal Manager**
**Microsoft 365 Customer Advocacy Group**
**December, 2023 – Updated March, 2024**

Disclaimer: This document has been prepared by Microsoft to provide insights into service adoption best practices for generative AI experiences including, but not limited to Microsoft Copilot and Copilot for Microsoft 365.

This document is provided on an "as is" basis and to the maximum extent permitted by law Microsoft disclaims all conditions, warranties, and guarantees, express or implied, including but not limited to any warranty or guarantee that the use of the framework set out in this document will not infringe any rights or any warranty or guarantee of merchantability or fitness for a particular purpose. The document is intended to be used to supplement and inform your Microsoft 365, Microsoft Copilot and/or Copilot for Microsoft 365 adoption approach for your organization. Content specified in the document should be used as an example only. Before using components set out in this document, you should evaluate their suitability for your organization. In particular, if you choose to act upon the recommendations of the approach, then you do so at your own risk.

Apart from any use permitted under the Copyright Act 1968, and the rights explicitly granted above, all rights are reserved.

V3.2

Microsoft

With the rise of generative AI services like [Microsoft Copilot](#) and many others our approach as IT professionals, User Experience and Adoption Specialists must evolve. You may think that it is all about the new capabilities and their ability to transform our everyday experience. It is, but that's not what I want to talk about. I want to talk about people. The #PeopleFirst strategy has never been more important than today with AI services being launched by every vendor.

The ability for you and those around you in your organization to leverage these services for positive impact is not based on the service itself, but instead on the business users' ability to integrate these capabilities into their daily workflow. They must have, what I refer to, as their own "***aha moment***" with these capabilities where their value is personally understood and viewed as a useful investment of time and focus. **Our job as technology and adoption leaders is to architect that aha moment with intention, compassion, and skill.**

After all this isn't anyone's first rodeo with "transformative" technology. We've all been there. We've rolled out something we think is utterly fantastic only to get underwhelming usage numbers and spicy feedback from our business users and leadership. Often, we have failed to translate a list of features into compelling scenarios for our business users in a way that matters to them. **We forgot to clearly articulate the "why" for them not just focus on the "what."** We are also dealing with unprecedented fragmentation of our focus with 68% of people saying they don't have enough uninterrupted focus time during the workday.[1]

In a standard roll out this can be remedied with appropriate campaigns, success stories, community calls and the like and some of those traditional adoption methods will be helpful for Copilot and generative AI experiences. However, what is different here is that we are not teaching a new drop-down menu or dialog box that needs to be configured. **We are nurturing a relationship between our business users and their Copilot experience.** We are tasked with unlocking the creativity, productivity and satisfaction that comes from clear communication between the two. Each business user's method of communicating will vary based on their role, background, experience, and personality.

---

[1] [Work Trend Index | Will AI Fix Work? (microsoft.com)](#)

Microsoft

We must move from the counts & amounts of who's using our solutions to the measure that matters: user experience satisfaction. We must capture the inspiration and ideas of our organization, create and foster connections, and most importantly ensure that insights and outcomes deliver business value to individuals, teams, and the



Figure 1: Some components involved in creating user satisfaction. For illustration only. Not an exhaustive list.

organization as a whole. This is true whether you are a large multinational company or a medium sized business with only two offices. The application of newly unleashed creativity, productivity, and skills from our business users in a satisfying experience is a core element of becoming an AI powered organization and also evolving the culture of your company as a whole.

To successfully navigate this and prepare for the future evolution of these experiences we must embrace a #PeopleFirst strategy and three of the key principles within its framework:

*Human connection cannot be replaced. It is essential to successfully implement technology in your organization, and especially generative AI experiences.*

It is not optional to have a community of practice for your business users. It is an essential tool in expanding their comfort, practice, and experience with these tools. There are many ways to create this community either with our guidance or by expanding an existing community, but creating a center of gravity for this learning must be central to your strategy.
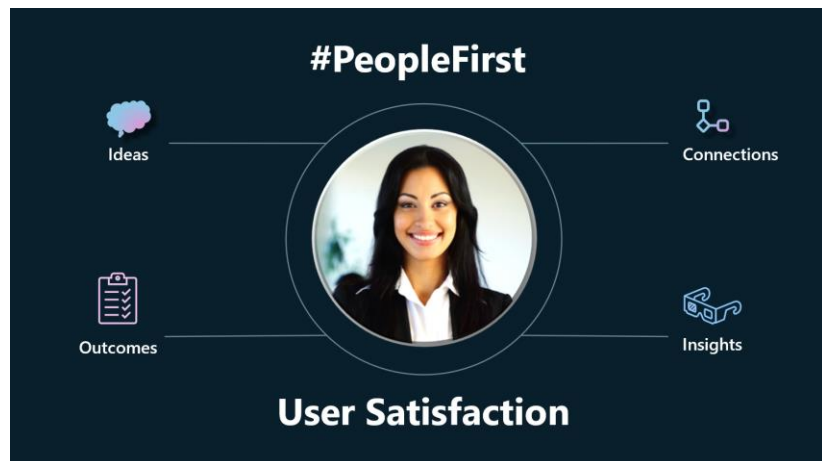
Microsoft

*Community leaders will make or break your organizations'
successful navigation of the journey to becoming AI powered.*

Your community needs leaders that are recognized, supported, and trained in both technology and driving change. In supporting the work of our own early adoption customers, we quickly learned that those organizations who had established adoption and user experience team more easily supported business users in becoming AI powered. This in turn sped time to value for their investment in Copilot services. Where are those people in your organization? If you haven't been identifying and nurturing them, now is the time. Remember that user experience leaders like myself and the thousands in our Microsoft 365 Champions Community and partner ecosystem are more clearly motivated by helping people than the technology itself.  Our work is made meaningful by the human connections we foster.

*The emotional state of your business users must be included in
their user experience and adoption journey.*

Humans do not make decisions based on logic alone. The "Think. Feel. Act." model has been used in cognitive behavior therapy for decades, but we do not often align it with our adoption methodologies in the field in a practical manner. Factoring in the current emotional state of business users at key moments in the user journey will allow you to design specific micro-actions to respond and influence their behavior.

## Mapping Micro-actions

As we move into 2024 more tools from Microsoft will become available to you but here is an example map for a standard business user (information worker role) journey at key moments abbreviated for this article. Note the key elements: the question, underlying feelings, micro-action, and desired outcome. This new user experience method has been specifically designed for Copilot adoption or any experience that relies heavily on hand-on

Microsoft

customizable experience by the user and augments the existing best practices within the [Microsoft 365 Adoption Framework[2]](#).

## Example map:

| | |
|---|---|
| **Discover/Try Phase** | **"Why should I care about this new service?"** |
| Feeling | Indifference, Resistance, Curiosity & Confusion |
| Go Do | Get familiar with capabilities & requirements (multi modal comms & engagement) |
| **Outcome** | **Prepare for Change** |
| **Envision / Inspire Phase** | **"How will I use this new capability?"** |
| Feeling | Anxiety, Curiosity & Confusion |
| Go Do | Direct learning with community |
| **Outcome** | **Aha Moment - Understand Scope of Change** |
| **Onboard & Empower Phase** | **"When can I use this new capability?"** |
| **Feeling** | **Anticipation, Frustration, Curiosity & Intrigue** |
| **Go Do** | **Attend rapid learning series & expand community connection** |
| **Outcome** | **Gain Copilot knowledge from peers** |
| **Realize / Drive Value Phase** | **"How does this make my experience better?"** |
| Feeling | Confidence, anticipation |
| Go Do | Role based training with community of peers |
| **Outcome** | **Personal scenario use; physical experience of change** |

Note that the initial question may or may not be directly spoken. This may be an unarticulated concern of the decision maker resulting in feelings of curiosity and concern. As we complete a successful initial conversation with that business leader, we aim to remove concern and replace it with understanding.

In your organization you may have different micro-actions, but the overall methodology is designed to address the underlying feelings which will impact the behavior of our user communities, stakeholders, and ourselves. In 2024 our Microsoft 365 Adoption practice, led by my team and others across Microsoft, will release more tools and information on how to leverage this model alongside our updated [Modern Collaboration Architecture (MOCA)](#) to provide practical, actionable adoption guidance. As always, our guidance is meant to work alongside theoretical models like Prosci™ and others as a complimentary, actionable toolkit.

---

[2] See our updated [Copilot Implementation Framework](#) which directly address the User Enablement workstream and the skills, practices and tools required to be successful which has been updated as of March, 2024.

Microsoft

At all times we must remember that with each interaction what we are building is not only skill with a new capability but trust between our users and ourselves and our users and the new experience. For those of us for whom User Experience and Adoption is a profession, trust is to be valued above all corporate standardized messaging, standard IT responses to human problems and vendors who will tell you their product is the best thing ever. We must authentically put our users' trust above all else if we are to help them along this journey and make up for the technology failures in their past.

---

***Trust is fundamental to driving change.*** *We must authentically put earning and retaining our users' trust above all else if we are to help them along this journey and make up for the technology failures in their past.*

---

This article incorporates thought leadership from across our research groups, in our Microsoft Partner community, throughout the adoption discipline as a whole and from – most importantly – feedback from customers. Our user experience and adoption methods must be simplified and yet more powerful than ever. The full User Adoption Kit for Copilot in Microsoft 365 provides you with role based guidance, a template for a User Experience Strategy document and so much more.  I hope you find that content and all we are doing across the community valuable. When you have questions don't hesitate to reach out here or better yet in the Microsoft Driving Adoption community so you can learn from each other.

This journey is just beginning. We are in it together. By building trust and putting our human connections first we will get the most from AI and all it offers to our planet, our organizations and each other.

Microsoft