

# MICROSOFT 365 COPILOT ADOPTION: Procurement Document

**Supplier:** PivotingToAI (Trading name of Experienced Training Ltd)

**Company Registration:** 12549529 (England & Wales)

**Contact:** Chris Whitaker | [contact@pivotingtoai.co.uk](mailto:contact@pivotingtoai.co.uk)

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**Note:** This is not a brochure, this is a document made for professional purchasers and project people. It contains all the needed information to purchase our services in one place. For standard information, contact us or visit [www.pivotingtoai.co.uk](http://www.pivotingtoai.co.uk)

**Remember:** Not using Copilot at work is like buying a digger, then choosing to use a spoon.

You already own the digger. Most teams are still using the spoon.



# 1. Our standard core course

## 1-Day Course Structure

42 slides. 6.25 hours. 1/3 practice ratio. Yorkshire Method delivery.

### SECTION 1: RESET (90 mins)

#### Addresses Problem: Fear

- Elephant in the Room: Surface objections (job loss, surveillance, accuracy)
- Drain Lists: Identify tasks delegates hate (AI targets these)
- ATM Analogy: Technology transforms jobs, doesn't eliminate them

**Outcome:** Resistance converts to curiosity. Psychological safety established.



### SECTION 2: UNDERSTANDING (90 mins)

#### Addresses Problem: Low Productivity

- How AI works (pattern matching, not thinking)
- Why AI hallucinates
- Consumer AI vs Microsoft 365 Copilot
- Use-cases: Summarisation, Drafting, Retrieval, Generation

**Outcome:** Delegates understand capabilities and limitations.



### SECTION 3: SAFE (90 mins)

#### Addresses Problems: Shadow AI, Data Loss

- RAG Rule: Red (never input PII), Amber (sanitise first), Green (go fast)
- Sat-Nav Rule: AI drafts, you verify, you're liable
- Verification Standard: Check accuracy/tone/safety before distribution

#### Practice:

- RAG Snippet Sorting (classify 20 real examples)
- Hallucination Detection (spot false claims)

**Outcome:** Staff make safe data decisions independently.



## SECTION 4: BUILD (165 mins)

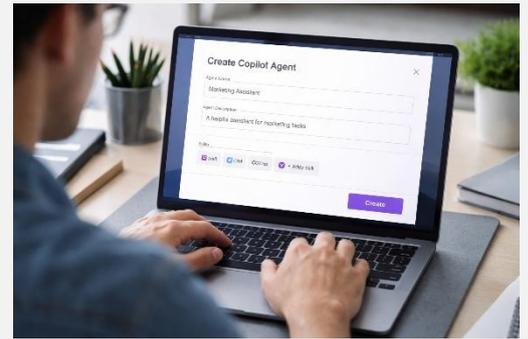
### Addresses Problems: Wasted Licences, Low Productivity

- CRISP Prompt Framework (Context, Role, Instruction, Style, Parameters)
- Power 9 Toolkit installation and customisation
- 30-Day Agent Challenge setup

#### Practice:

- Live prompt writing and testing
- Agent customisation to match organisational procedures
- Q&A surgery for specific problems

**Outcome:** Working tools installed. Habit-building plan in place.



## 2: PRICING

### Core Training Options

Delivery	Rate	Capacity	Best For
Face-to-Face (Core)	£2,500/day	Max 15	Resistant audiences, high-impact teams
Face-to-Face (Industry)	£3,000/day	Max 15	NHS, Banking, Legal, Construction
Virtual Facilitated	£2,000/day	Max 15	Distributed teams, live interaction
Virtual Large Audience	£3,500/session	Unlimited	Town halls, all-staff (max 4 hours)

### Advanced Options

Service	Rate	Capacity
AI Manager Day	£5,000/day	Max 6 (quality assurance for managers)
AI Agent Workshop	£2,500/day	Max 8 (custom builds, prerequisite: Core)
eLearning (Standard)	£9,500 one-off	Unlimited users
eLearning (Industry)	£12,000/year	Unlimited, includes annual updates

**Terms:** All prices exclude VAT (not currently charged). Travel at cost (no markup)—net 30 days.

### What's Included

- ✓ Full 6.25-hour training (42 slides, 1/3 practice ratio)
- ✓ Power 9 Toolkit installation and customisation
- ✓ 30-Day Agent Challenge (habit-building programme)
- ✓ Slide decks, quick reference guides
- ✓ Pre-training IT checklist

## 3: THE PROBLEM

### Five Critical Failures Costing Your Organisation Money

#### 1. Shadow AI

Staff are already using AI—ChatGPT, free Copilot, consumer tools—to handle company data. You don't know who's using what, where sensitive data is going, or what's being pasted into unsecured systems.

#### 2. Data Loss Risk

Confidential information leaking into consumer AI models. Average UK data breach cost: **£3.29 million**<sup>1</sup>. ICO fines now average **£2.8 million** (up from £150,000)<sup>2</sup>. One careless Prompt can trigger a breach.

#### 3. Wasted Licences

You're paying £24/user/month for Microsoft 365 Copilot. Without training, **95% of Staff won't use it effectively**<sup>3</sup>. That's £27,360/year wasted on 100 unused licences.

#### 4. Low Productivity

Staff struggle with email overload, document summarisation, and repetitive tasks. The tool that could save 15-30 minutes/day sits unused because no one showed them how.

#### 5. Fear & Resistance

Staff fear AI will eliminate their jobs. Without addressing this, they'll resist adoption, hide usage (Shadow AI), or sabotage implementation through passive non-compliance.

## The Solution: Governance-First Training

PivotingToAI specialises in training resistant Staff in regulated environments. We address fear first, then teach safe usage, then build productivity habits.

**The RAG Rule:** Red/Amber/Green data classification (Staff learn what's safe in 3 seconds)

**The Sat-Nav Rule:** AI drafts, humans verify and decide (prevents over-reliance)

**The Yorkshire Method:** Listen, instruct, practise, discuss (active learning, not lectures)

**Power 9 Toolkit:** 9 pre-built agents staff customise for immediate productivity

**Outcome:** Staff trained to safe operation within 1 day. Expected productivity gain: **15-30 minutes/day** (£1,200+ value per employee/year<sup>4</sup>).

**This document states facts and figures. Please note that everything we do is heavily researched and proven. We do not include opinions in training materials, only facts. All evidence is referenced on ( 21).**

## 4: HOW TO BUY

### 4-Step Process

#### Step 1: Email Requirements

[contact@pivotingtoai.co.uk](mailto:contact@pivotingtoai.co.uk)

Include: Delivery option, dates, delegate count, sector (if industry-specific)

#### Step 2: Statement of Work

We issue an SOW confirming scope, delivery mode, and price. Dates held 48 hours.

#### Step 3: Purchase Order

Issue PO to **Experienced Training Ltd** (Company No. 12549529)

#### Step 4: Delivery

Pre-training checklist for the IT team. Training delivered. Materials provided.

### Why Us

**2,000+ live sessions** delivered (NHS, banking, construction, Met Police)<sup>5</sup>

**Communication Psychology qualified** (behaviour change specialist)<sup>5</sup>

**Senior Change Manager** at a major international bank<sup>5</sup>

**30+ years combined training experience** in regulated sectors<sup>5</sup>

**G-Cloud 15 approved** (Lot 3: Cloud Support)

We're not marketing graduates reading slides. We're the "Training Emergency Service"—we rescue failed training projects.

## 5: THE POWER 9 TOOLKIT

### 9 Pre-Built Agents—Immediate Productivity

We don't just teach theory. Delegates leave with working tools.

#### 1. Email Writer

70% reduction in drafting time. Draft emails in your voice.

#### 2. Fact Checker

£5k+ risk mitigation per prevented error. Verifies AI claims.

#### 3. Virtual Manager

2 hours/week recovered. Triage tasks into "now" vs "later".

#### 4. Brainstorm Buddy

60 seconds to a viable shortlist. Generates commercial ideas grounded in budget reality.

#### 5. Argue Both Sides

5x stronger proposals. Pre-mortem analysis finds plan weaknesses.

#### 6. Emotional Support

8/10 dispute resolution success. Converts angry rants into professional responses.

#### 7. Make My Case

3x persuasion power. Adapts arguments to the audience.

#### 8. Jargon Translator

50% faster reading. Rewrites corporate waffle into plain English.

#### 9. Prompt Maker

80% improvement in output reliability. Writes better Copilot instructions.

**These are personal tools staff control. We empower individuals, not replace them.**

## 6: ADVANCED OPTIONS

### Beyond Core Training

#### AI Manager Day (£5,000/day)

**For:** Non-technical managers who need to quality-check AI output (not create it)

**Content:**

- Quality assurance frameworks
- Governing Shadow AI in teams
- Spotting hallucinations and bias
- Setting team AI usage policies

**Constraints:** Max 6 delegates. Core training is recommended first.

#### AI Agent Workshop (£2,500/day)

**For:** Teams needing custom agents beyond Power 9

**Prerequisite:** Core Course completion

**Deliverables:**

- Bespoke agent development
- Integration with internal procedures
- Advanced automation (e.g., Copilot + CRM data)

**ROI Example:** One agent saving 15 min/day pays for itself in 8 weeks.

**Constraints:** Max 8 delegates.

#### eLearning

**Standard (£9,500 one-off):**

- Interactive modules, generic business context
- SCORM files for your LMS
- One-off organisational licence

**Industry-Specific (£12,000/year):**

- Sector scenarios (NHS, Banking, Legal, Construction)
- Annual enterprise licence, unlimited users
- Includes annual content updates

## 7: BLENDED & BESPOKE SOLUTIONS

### For Complex Organisations

Standard courses don't fit every situation. If you have:

- 50+ delegates across multiple sites
- Shift workers requiring non-standard delivery times
- Multiple sectors in one organisation
- Legacy system constraints
- Board-level scepticism

We design custom delivery models.

#### Blended Learning Example

- **Exec leadership:** Face-to-face (max impact)
- **Frontline managers:** Virtually facilitated (geographically dispersed)
- **All Staff:** eLearning (baseline at scale)

#### Custom Elements:

- Shift pattern accommodation
- Site-specific scenarios (your documents, your workflows)
- Branded digital avatars
- Management approval workflows and dashboards

#### Process

1. 30-minute consultation (free)
2. We propose a delivery mix and timeline
3. Fixed-price quote issued
4. Delivery as agreed

**Pricing:** Quoted on request. Volume discounts for 50+ training days.

## 8: SECTOR SPECIALISMS

### Regulated Industries

We adapt training for specific compliance requirements.

#### Banking & Financial Services

**Focus:** MNPI handling, FCA compliance

**Content:**

- Market-sensitive data classification
- Secure analysis workflows
- Audit trail requirements

**Example:** Analyst uses Copilot to summarise public 10-K filings (safe) but never inputs client portfolio details (breach).

#### NHS & Healthcare

**Focus:** Caldicott Guardian principles, patient data anonymisation

**Content:**

- DSPT alignment
- Clinical coding support
- NHS Numbers/DOBs are Red data (never in prompts)

**Sector Agents:**

- PALS Drafter (compassionate family responses)
- Plain English Translator (medical notes for patients)
- Rota Checker (validates shifts against Working Time Directives)

#### Legal (SRA-Aligned)

**Focus:** Client privilege, contract analysis

**Content:**

- Privilege protection (never input privileged communications)
- Precedent checking
- Billable unit optimisation

**Sector Agents:**

- Gold Precedent Checker (compares contracts to firm standards)
- Bundle Indexer (chronological court bundle generation)
- Attendance Note Drafter (dictation to formal File Notes)

**Construction & Infrastructure**

**Focus:** NEC4 contracts, site safety, RAMS

**Content:**

- Commercial sensitivity (tender pricing = Red)
- Site safety (draft RAMS = Amber)
- Regulatory alignment (Part L, Building Regs)

**Examples:** NEC4 early warnings, snagging lists, method statements

**Local Government & Social Care**

**Focus:** FOI requests, safeguarding

**Content:**

- Public data (planning specs = Green)
- Safeguarding data (case notes = Red)
- Transparency requirements

## 9: THE TEAM

### Specialist Credentials

#### Chris Whitaker (Founder & Lead Trainer)

- 2,000+ face-to-face sessions (NHS, banking, construction, Met Police)<sup>5</sup>
- Communication Psychology qualified (behaviour change specialist)<sup>5</sup>
- Senior Change Manager at a major international bank<sup>5</sup>
- Data Librarian and MCSE-trained (technical background)
- 10+ years as a day-rate contractor (survival-tested)

#### Why This Matters:

Communication psychology is the science of how humans adopt new behaviours. Generic trainers teach software features. Chris teaches how to change minds.

#### Methodology Development

**John Sidebottom:** 30+ years teaching (NHS, Met Police, construction). Co-developed the core course. <sup>5</sup>

**Consultant Network:** Quality engineering (ISO standards), sector domain knowledge for content validation. Senior Accountant, Fire Service e-learning developer. (names anonymous for privacy)

# 10: METHODOLOGY

## Proprietary Frameworks

### The Yorkshire Method

**Listen → Instruct → Practise → Discuss**

Not death by PowerPoint. We don't lecture for 6 hours.

1. **Listen:** Surface objections/fears before teaching
2. **Instruct:** One concept at a time (15-minute blocks)
3. **Practise:** Delegates do it with real tasks immediately
4. **Discuss:** Group debrief to troubleshoot

**Result:** Retention rates 25-60% higher than passive learning<sup>6</sup>.

### The RAG Rule

**Red (STOP):** Never input PII, credentials, NHS numbers, financial accounts, privileged communications, tender pricing

**Amber (PAUSE):** Sanitise first (remove names, redact sensitive info)

**Green (GO):** Public content, templates, generic learning

**Result:** Staff make safe decisions in 3 seconds without escalating to IT.

### The Sat-Nav Rule

AI is like GPS. Sometimes it's wrong. You don't drive into a lake just because it told you to.

**Principle:** Copilot drafts. Humans verify and decide. You're liable for output, not the AI.

### The CRISP Prompt

**Context:** "I'm preparing a board paper on Q4 performance"

**Role:** "Act as a strategy consultant"

**Instruction:** "Summarise these 5 documents into 3 key insights"

**Style:** "Plain English, no jargon"

**Parameters:** "Max 200 words, bullet points"

**Result:** 80% improvement in output reliability.

## Anti-Department AI

We don't build automation that replaces jobs. We build personal assistants that empower individuals.

Power 9 agents = Staff control their own tools—personal productivity, not workforce reduction.

**Why:** Resistance to AI = disguised job loss fear. Frame AI as a personal assistant (calculator, spell-checker), resistance converts to enthusiasm.

# 11: WHY WE'RE DIFFERENT

## PivotingToAI vs Generic Providers

**Bottom Line:** Generic providers teach features to willing learners. We teach behaviour change to resistant Staff in regulated environments.

What	Generic Providers	PivotingToAI
<b>Facilitators</b>	Marketing graduates, no sector experience	2,000+ sessions. Communication psychology. Banking/NHS/construction background.
<b>Focus</b>	Teach people who don't make PowerPoints how to make PowerPoints in Copilot	Teach people to empower themselves using personal agents they control and update
<b>Audience</b>	Tech enthusiasts	Resistant, fatigued, curious Staff in regulated sectors
<b>Safety</b>	Generic disclaimer ("Don't input sensitive data")	RAG Rule taught and practised. Staff classify 20 examples.
<b>Support</b>	Certificate issued. No follow-up.	30-Day Agent Challenge (structured habit-building)
<b>Retention</b>	75-85% abandon tools after training <sup>7</sup>	Higher (governance-first methodology)
<b>Customisation</b>	Static slides for all	Sector scenarios (NHS/Banking/Legal/Construction)
<b>Trainers</b>	Read slides, never handled hostile rooms	Training Emergency Service. Rescue failed projects.
<b>Philosophy</b>	"AI will transform your business!" (hype)	"AI is fallible. Learn to verify." (pragmatism)
<b>Output</b>	Department automation (job replacement fears)	Personal assistants (individual empowerment)

**Bottom Line:** Our trainers can handle any situation you give us and walk out with provable results. We have years of experience in achieving results.

## 12: THE EVIDENCE

### Why Generic Training Fails

All claims supported by published research. Full citations on 21.

#### Training Drop-Off

**Generic corporate training completion: 15-20%** (drop-off: 80-85%)<sup>6</sup>  
**Worst case: 96% dropout** (MIT 2019)<sup>7</sup>

**Translation:** 4 out of 5 employees abandon tools after generic training. Investment wasted.

**Our Approach:** 30-Day Agent Challenge builds habits through weekly milestones.

#### AI Initiative Failures

**70-85% of AI initiatives fail to meet outcomes**<sup>8</sup>  
**42% of companies abandoned most AI initiatives in 2025** (up from 17% in 2024)<sup>8</sup>  
**95% of companies using AI report that it failed to generate revenue**<sup>3</sup>  
**Only 5% of enterprise AI systems reach production**<sup>9</sup>

**Translation:** Enthusiasm is high. Successful implementation is rare. The gap is training and governance, not technology.

#### Data Breach Costs

**UK average: £3.29 million**<sup>1</sup>  
**UK SME average: £75,000**<sup>10</sup>  
**Financial services UK: £5.74 million**<sup>1</sup>  
**ICO fines: £2.8 million average (2025)**<sup>2</sup>

**Translation:** One breach from ungoverned AI exceeds the cost of training the entire organisation.

#### Retention Benefits

**AI-trained employees 25% more likely to stay**<sup>11</sup>  
**94% more likely to stay at companies investing in development**<sup>12</sup>

**Translation:** Training is a retention tool. Failing to train signals you don't invest in people.

# 13: WHY THEY FAIL

## Three Root Causes

### 1. Features, Not Behaviour Change

**Problem:** Generic training teaches "how to summarise a document." Delegates return to their desks, face a real task, but can't apply it. The gap between demo and reality is too wide.

**Evidence:** 80-85% abandon tools after generic training<sup>67</sup>.

**Our Solution:** The Yorkshire Method builds habits through immediate application. Delegates practise with their real tasks during training.

### 2. Safety Is an Afterthought

**Problem:** Generic training says "Don't input sensitive data" (2-minute disclaimer). Staff return to work, paste client details, create breach. We weren't taught how to classify data quickly.

**Evidence:** 43% of UK businesses had breaches in 2024<sup>13</sup>—average cost: £3.29 million<sup>1</sup>.

**Our Solution:** RAG Rule protocol with practice exercises. Delegates sort 20 real examples. Builds muscle memory for safe decisions.

### 3. Resistance Ignored

**Problem:** Staff fear job loss. Generic training dismisses with platitudes ("AI augments, not replaces!"). Fear goes underground as passive resistance.

**Evidence:** 69% of UK organisations have no AI access controls<sup>14</sup>. Staff use consumer AI outside corporate systems (Shadow AI).

**Our Solution:** RESET module surfaces objections before teaching tools. We validate fears, use historical analogies (ATM/bank teller). Resistance converts when people feel heard.

### The Compound Effect

Generic training fails on all three:

- Feature-focused (doesn't build habits)
- Safety afterthought (creates compliance risk)
- Ignores resistance (drives Shadow AI)

**We invert this:**

- Behaviour-focused (Yorkshire Method)
- Safety as foundation (RAG Rule)
- Addresses resistance (RESET module)

**Result:** Higher retention, safer usage, sustainable adoption.

## 14: DETAILED PRICING

### All Options

Service	Rate	Capacity / Constraints
Face-to-Face (Core)	£2,500/day	Max 15
Face-to-Face (Industry)	£3,000/day	Max 15 (NHS/Banking/Legal/Construction)
Virtual Facilitated	£2,000/day	Max 15
Virtual Large Audience	£3,500/session	Unlimited (max 4 hours)
AI Manager Day	£5,000/day	Max 6. Core recommended first.
AI Agent Workshop	£2,500/day	Max 8. Prerequisite: Core completion.
eLearning (Standard)	£9,500 one-off	Unlimited. Updates are charged separately.
eLearning (Industry)	£12,000/year	Unlimited. Includes annual updates.
Blended Solutions	Quoted	Custom scope. Volume discounts for 50+ days.

### What's Included (Core Training)

- ✓ Full 6.25-hour day (RESET/UNDERSTAND/SAFE/BUILD)
- ✓ Power 9 Toolkit installation and customisation
- ✓ 30-Day Agent Challenge materials
- ✓ Slide decks (PDF), quick reference guides
- ✓ Pre-training IT checklist

#### Not Included (Available as Add-Ons):

- AI Manager Day
- AI Agent Workshop
- Follow-up clinics (quoted on request)
- Bespoke agent development beyond Power 9

### Commercial Terms

**VAT:** Not charged (supplier not VAT registered)

**Travel:** At cost (no markup) outside South Yorkshire

**Payment:** Net 30 days

**Invoicing:** Upon completion (or upfront for eLearning)

**G-Cloud 15:** Available via Digital Marketplace (Lot 3)

# 15: SLA SUMMARY

## Service Level Agreement

### 1. Cancellation & Rescheduling

Dates reserved exclusively. Late cancellations prevent reselling.

- **11+ Working Days' notice:** No charge. Free rescheduling.
  - **10 or fewer Working Days' notice:** 100% of the fee is payable.
  - **Rescheduling within 10 days:** Treated as cancellation (100% fee) unless waived at our discretion.
  - **Non-attendance:** No refunds for individual no-shows.
- 

### 2. Intellectual Property

**Ownership:** PivotingToAI retains all IP (materials, RAG Rule, Power 9, CRISP, Yorkshire Method).

**Licence:** Perpetual, non-exclusive, royalty-free for internal use only.

**Restrictions:** No reselling, sub-licensing, or public distribution without written consent.

### 3. Data Protection

**Environment:** Training in your Microsoft 365 tenant

**No Data Retention:** We don't store or process your data

**GDPR Compliance:** Both parties comply with UK GDPR

**Sanitised Data Only:** No live sensitive data in exercises

### 4. Liability & Exclusions

**We provide:** Training and adoption support

**We're NOT liable for:** Microsoft platform changes, Microsoft bugs/outages

**We do NOT provide:**

- Legal advice (operational guidance only)
- Guarantees of AI accuracy (we train verification)
- Tenant re-architecture
- 24/7 Microsoft support
- Coding/Python training

**Total Liability:** Limited per G-Cloud 15 Framework.

# 16: BUYER PREREQUISITES

## What You Must Provide

Training cannot proceed without:

**1. Licensing:**

Active Microsoft 365 Copilot licences assigned to all delegates before training.

**2. Access:**

Hardware, internet, and software permissions for delegates to participate.

**3. Environment:**

Training in your M365 tenant (not demo environment).

### If Prerequisites Not Met

Session deemed delivered. Full fee payable.

**Mitigation:** Pre-training checklist issued to IT team.

## Scope Boundaries

### What We Don't Do:

**No Legal Advice:** Operational guidance only. Consult your legal team for compliance interpretation.

**No AI Accuracy Guarantee:** AI hallucinates. We train verification (Sat-Nav Rule), but users are responsible for the output.

**No Tenant Configuration:** We don't configure M365, migrate data, or administer permissions.

**No 24/7 Support:** Contact Microsoft for platform outages.

**No Coding:** Low-code/no-code agent building only.

## 17: INCLUDED VS ADD-ONS

### Core Training Package

#### Included:

- ✓ 6.25-hour training (RESET/UNDERSTAND/SAFE/BUILD)
- ✓ Power 9 Toolkit (9 agents installed and customised)
- ✓ 30-Day Agent Challenge (habit-building)
- ✓ Slide decks, quick reference guides
- ✓ Pre-training IT checklist
- ✓ RAG Rule, Sat-Nav Rule frameworks
- ✓ CRISP prompt training
- ✓ Yorkshire Method delivery

### Add-Ons (Separate Purchase)

#### AI Manager Day (£5,000/day):

- Quality assurance for non-technical managers
- Governing Shadow AI
- Max 6 delegates

#### AI Agent Workshop (£2,500/day):

- Bespoke agent development beyond Power 9
- Prerequisite: Core completion
- Max 8 delegates

**Follow-Up Clinics:** Quoted on request (3-6 months post-training)

**Bespoke Agents:** Quoted based on complexity

**Management Dashboards:** Usage tracking, quoted on request

## eLearning Comparison

Feature	Standard (£9,500)	Industry (£12,000/year)
Content	Generic business	Sector-specific
Licence	One-off	Annual enterprise
Updates	Charged separately	Included
Format	SCORM	SCORM
Practice	✓ Interactive	✓ Interactive + sector scenarios

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## 18: ROI CALCULATOR

### Business Case Template

#### Scenario 1: Productivity (100 Users, £40k Salary)

Item	Calculation	Annual Value
Time saved per user	15 min/day × 220 days	55 hours/year
Value of time	55 hours × £20/hour	£1,100/user
Total benefit (100 users)	£1,100 × 100	<b>£110,000</b>
Training cost	2 days @ £2,500 (7 cohorts)	<b>(£5,000)</b>
<b>Net Benefit</b>		<b>£105,000</b>
<b>ROI</b>		<b>2,100%</b>
<b>Payback</b>		<b>&lt;1 month</b>

### Scenario 2: Risk Avoidance

Item	Value
UK average breach cost <sup>1</sup>	£3.29 million
Training investment	£5,000
Training as % of breach	<b>0.15%</b>
Risk reduction (governance) <sup>4</sup>	80%
<b>Risk avoidance value</b>	<b>£2.6 million</b>

**Translation:** Training costs 0.15% of potential breach. Even 5% risk reduction justifies investment.

### Scenario 3: Licence Utilisation

Item	Value
Copilot cost	£24/user/month
Annual (100 users)	£28,800
Adoption without training <sup>3</sup>	5% (95% wasted)
<b>Wasted licence cost</b>	<b>£27,360</b>

**Translation:** You're already paying. Without training, 95% is wasted.

### Scenario 4: Retention

Item	Value
Replacement cost	50-200% of salary <sup>15</sup>
Replace 1 employee (£40k)	£20,000-£80,000
Retention improvement <sup>11</sup>	25% more likely to stay
<b>Avoided turnover (1 departure)</b>	<b>£20,000-£80,000</b>

**Translation:** If training prevents one departure, it pays for itself multiple times.

## 19: TERMS & GLOSSARY

### Key Terms Explained

#### AI & Technology

**AI** = Computer systems performing tasks requiring human intelligence

**AI Agent** = Pre-programmed assistant in Copilot that remembers preferences/workflows

**AI Hallucination** = When AI confidently states false information as fact

**Bespoke** = Custom-built for your requirements

**CRM** = Customer Relationship Management (Salesforce, Dynamics)

**Digital Avatars** = Computer-generated presenters in eLearning

**eLearning** = Digital training delivered online (not instructor-led)

**Legacy Systems** = Older IT infrastructure still in use

**LMS** = Learning Management System (delivers/tracks online training)

**Microsoft 365 Copilot** = Microsoft's secure AI assistant in Office apps. £24/user/month.

**SCORM** = Technical standard for eLearning files (works in any LMS)

**Shadow AI** = Staff using consumer AI tools (ChatGPT) for work outside company systems, often hiding usage

## Data & Security

**DSPT** = Data Security Protection Toolkit (NHS standard)

**GDPR** = General Data Protection Regulation (UK/EU data law)

**ICO** = Information Commissioner's Office (UK GDPR regulator)

**MNPI** = Material Non-Public Information (confidential financial data)

**NHS Number** = Unique patient identifier (sensitive personal data)

**PII** = Personally Identifiable Information (names, addresses, etc.)

**Sanitise** = Remove identifying information before AI processing

## Regulatory

**10-K Filing** = US company annual report (public, safe for AI)

**Caldicott Guardian** = NHS role protecting patient confidentiality

**Client Privilege** = Lawyer-client communications are confidential

**FCA** = Financial Conduct Authority (UK financial regulator)

**FOI** = Freedom of Information (UK public access law)

**NEC4** = New Engineering Contract v4 (UK construction standard)

**RAMS** = Risk Assessment Method Statement (construction safety)

**SRA** = Solicitors Regulation Authority (UK legal regulator)

## Training

**Blended Learning** = Mix of delivery methods (face-to-face + eLearning)

**BLUF** = Bottom Line Up Front (conclusion-first writing)

**Communication Psychology** = Science of how humans adopt new behaviours

**CRISP Prompt** = Our framework: Context, Role, Instruction, Style, Parameters

**Day-Rate Contractor** = Self-employed trainer hired by the day

**MCSE** = Microsoft Certified Systems Engineer (legacy qualification)

**Pre-Mortem** = Identifying what could go wrong before execution

**Prompt** = Instructions you give to AI

## Our Frameworks

**30-Day Agent Challenge** = Post-training habit-building programme

**Power 9 Toolkit** = Our 9 pre-built agents staff customise

**RAG Rule** = Red/Amber/Green data classification (our framework)

**Sat-Nav Rule** = AI suggests, humans verify (our framework)

**Yorkshire Method** = Our delivery: Listen → Instruct → Practise → Discuss

## Procurement

**G-Cloud 15** = UK Government procurement framework

**PO** = Purchase Order

**SOW** = Statement of Work

## 20: DECISION CHECKLIST

### Procurement Evaluation

#### Risk Mitigation

- Shadow AI governance addressed (69% of UK orgs have no AI controls<sup>14</sup>)
- Data leakage risk quantified (average UK breach: £3.29 million<sup>1</sup>)
- Compliance alignment confirmed (GDPR/FCA/SRA/Caldicott)
- Acceptable Use Policy for AI drafted/planned

#### Financial Case

- ROI reviewed ( 18)
- Payback acceptable (<1 month for 100 users)
- Licence utilisation improvement quantified
- Budget approval obtained

#### Operational Readiness

- Prerequisites confirmed:
  - Active Copilot licences assigned
  - Hardware/internet/permissions in place
  - Training in your M365 tenant
- Delivery mode selected:
  - Face-to-face (resistant audiences)
  - Virtual facilitated (distributed teams)
  - eLearning (scale)
  - Blended (custom)
- Sector variant identified:
  - Banking/Financial
  - NHS/Healthcare
  - Legal
  - Construction
  - Generic
- Cohorts planned (max 15 per session)

## Contractual

- SLA reviewed ( 15):
  - Cancellation (11-day threshold)
  - IP (internal use licence)
  - Data protection (no retention)
  
- Exclusions understood ( 16):
  - No legal advice
  - No AI accuracy guarantee
  - No tenant configuration
  - No 24/7 support
  
- Payment terms acceptable (Net 30)
  
- Procurement route confirmed (PO or G-Cloud 15)

## Stakeholder Alignment

- IT team briefed
- HR/L&D aligned
- Leadership buy-in
- Delegate communication plan

**Next Action:** [contact@pivotingtoai.co.uk](mailto:contact@pivotingtoai.co.uk)

# 21: CITATIONS & EVIDENCE

## All Claims Attributed

### <sup>1</sup> UK Data Breach Costs

IBM, "Cost of a Data Breach Report 2025: United Kingdom Edition" (Ponemon Institute, 2025). UK average: £3.29 million. Financial services: £5.74 million.

### <sup>2</sup> ICO Fine Increases

Measured Collective, "ICO Enforcement in 2025: Record Fines" (January 2026). Average fine: £150,000 to £2.8 million.

### <sup>3</sup> AI Revenue Failure

Futurism, "Data Shows That AI Use Is Now Declining at Large Companies" (September 2025). 95% of US companies report AI failed to generate revenue.

### <sup>4</sup> Productivity & ROI

ThriveSparrow, "AI Upskilling for Employee Retention" (August 2025). ROI calculations for AI training.

### <sup>5</sup> Experienced Training Credentials

Experienced Training Ltd, "Face-To-Face Training" (2024). 2,000+ sessions, communication psychology, banking experience.

### <sup>6</sup> Training Retention Rates

Continu, "Corporate eLearning Statistics 2025" (2025). Microlearning: 25-60% higher retention vs traditional. 80% completion vs 20%.

### <sup>7</sup> Course Dropout Rates

Level Up, "Training Completion Rates" (2023). Average: 15%. MIT 2019: 96% dropout for some courses.

### <sup>8</sup> AI Initiative Failures

Fullview, "200+ AI Statistics 2025" (November 2025). 70-85% fail. 42% abandoned (up from 17%).

### <sup>9</sup> Enterprise AI Production

MIT Nanda, "State of AI in Business 2025" (2025). Only 5% reach production.

### <sup>10</sup> UK SME Breach Costs

Forensic Control, "Data breach costs for UK SMEs" (2025). Average: £75,000.

### <sup>11</sup> AI Training & Retention

ThriveSparrow, "AI Upskilling" (August 2025). 25% more likely to stay.

### <sup>12</sup> Development Investment

iTacit, "AI Employee Retention 2025" (August 2025). 94% more likely to stay.

**<sup>13</sup> UK Breach Statistics**

techUK / UK Government, "Cost of cyber attacks" (2024). 43% had breaches.

**<sup>14</sup> Shadow AI & Governance**

IBM UK, "UK Breach Costs" (August 2025). 31% have governance. 69% lack AI controls.

**<sup>15</sup> Replacement Costs**

HR industry standard: 50-200% of annual salary.

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