Odokai

PLAYBOOK

AI Adoption Guide

A practical path from first agent to AI-native business, written for UK organisations of 20 to 1,000 people.

BEFORE YOU START

AI adoption is a business change, not a software install

Most pilots stall

Trying AI is easy. Turning it into lasting gains is where most organisations get stuck: a promising pilot, then a long plateau.

SME's have an edge

Short decision chains and close-knit teams mean you can move from first idea to everyday habit in weeks, not years.

This guide is the route

Five stages, fifteen steps and the checklists we use with clients, adapted for teams without an AI department.

WHERE UK BUSINESSES ARE TODAY

Plenty of trying. Far less gaining.

32%

of UK businesses now use at least one AI technology, double the 2025 figure.

DSIT, AI Adoption Survey 2026

95%

of enterprise generative-AI pilots studied showed no measurable impact on profit and loss.

MIT NANDA, The GenAI Divide, 2025

67%

of UK AI adopters say limited skills and expertise are holding them back.

DSIT, AI Adoption Survey 2026

The gap isn’t access to tools. It’s the plan, the people and the habits around them.

THE 70% RULE

The tool is the easy part.

BCG’s 10-20-70 rule: about 10% of the value from AI comes from algorithms, 20% from technology and data, and 70% from people and processes.
Plan your effort the same way.



10% models **20% tech and data** **70% people and processes**

Source: BCG

THE ODOKAI ADOPTION PATH

Five stages, fifteen steps

01

Orient

Weeks 0–2

- Agree the business case
- Name sponsor, lead and champions
- Set the guardrails

02

Prove

Weeks 2–4

- Pick three workflows
- Build one working agent
- Measure before and after

03

Embed

Weeks 4–9

- Connect your systems
- Decide what agents do alone
- Train the champions

04

Scale

Months 2–6

- Launch it like a product
- Lead the change
- Make progress visible

05

Own

Month 6 onwards

- Measure what matters
- Move to automation
- Own your AI stack

Tip Go broad before you go deep. Everyday tasks build the intuition that later makes automation work.

WHO DOES WHAT

Four roles, even in a small team

Sponsor

Usually the CEO or MD

Sets the why, protects the time and measures AI progress at every leadership meeting.

AI lead

COO, Ops lead or a fractional Chief AI Officer

Owns the plan, the champions, the metrics and the day-to-day decisions.

Systems partner

In-house IT or your managed service provider

Handles sign-on, security, connections and data access. Involve them from day one.

Champions

One per team, picked for curiosity

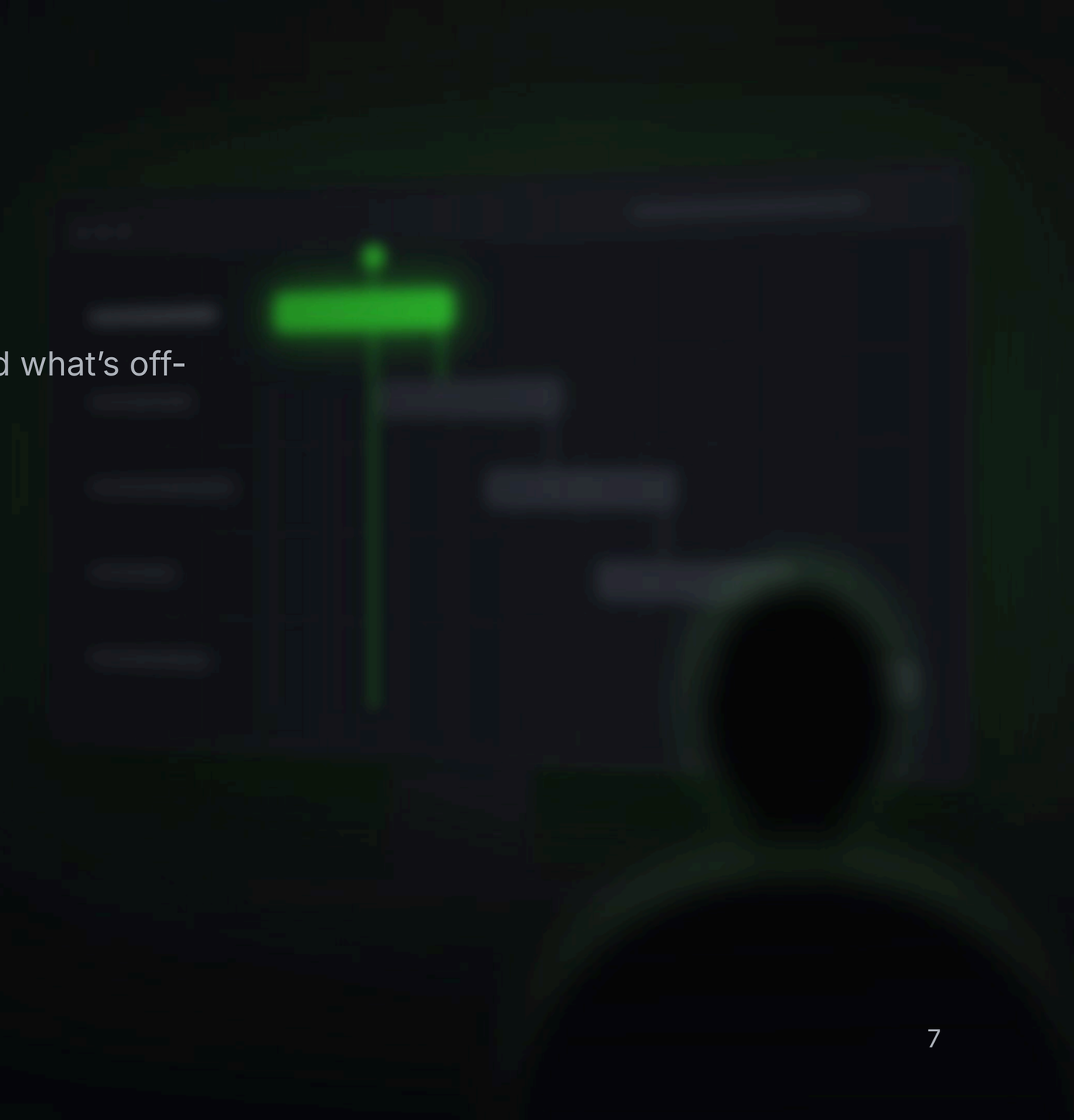
Test use cases first, then train and support the colleagues around them.

In a 100-person firm one person may hold two roles. Name them anyway.
Work nobody owns doesn’t get done.

STAGE 01 · WEEKS 0–2

Orient

Be clear on why you’re doing this, who owns it and what’s off-limits, before anyone opens a tool.



1. Agree the business case
2. Name your sponsor, lead and champions
3. Set the guardrails

STAGE 01 · ORIENT

Agree the business case

Start with problems you can name and measure, not with a tool.

Questions for the leadership team

- Where does time leak each week: reports, proposals, admin, chasing?
- What work do we turn away because we lack capacity?
- Which knowledge leaves the building when a key person does?
- What would success look like in six months, in numbers?

3×

AI high performers are three times as likely as their peers to say senior leaders visibly own and champion AI.

McKinsey, The State of AI 2025

STAGE 01 · ORIENT

Name Sponsor, Lead and Champions

Sponsor

Look for

- Authority over budget and priorities
- Credibility across every team
- Willing to use AI visibly themselves

Ask yourself

Who can clear a blocker in one conversation?

AI lead

Look for

- A firm grip on operations and process
- Trusted by leaders and teams alike
- A day a week freed up, or a fractional CAIO

Ask yourself

Who already runs cross-team change well?

Champions

Look for

- Curiosity and early-adopter habits
- Respect from peers, whatever their grade
- Patience to help others learn

Ask yourself

Who do colleagues already go to for help with tools?

Avoid Choosing by seniority alone, or naming a lead who has no time freed up to do the job.

STAGE 01 · ORIENT

Set the guardrails first

Area	What to decide	Why it matters
Data	What may go into AI tools, and what never does (client, HR, financial).	Clear rules build trust and prevent leaks.
Personal data	Whether a Data Protection Impact Assessment is needed under UK GDPR or other regions.	The ICO expects risks to be assessed before processing starts.
Agent permissions	What agents do alone, what they ask first and what they never do.	People stay accountable for anything that leaves the business.
Shadow AI	Audit all free accounts staff are already using. Choose an approved tool to replace these.	Bans push use underground. A better option brings it into the open.

Odokai Our AI governance health check covers all four areas in a single working session.

STAGE 02 · WEEKS 2–4

Prove

Show a real, measured gain on real work quickly, with a small group who want it to succeed.

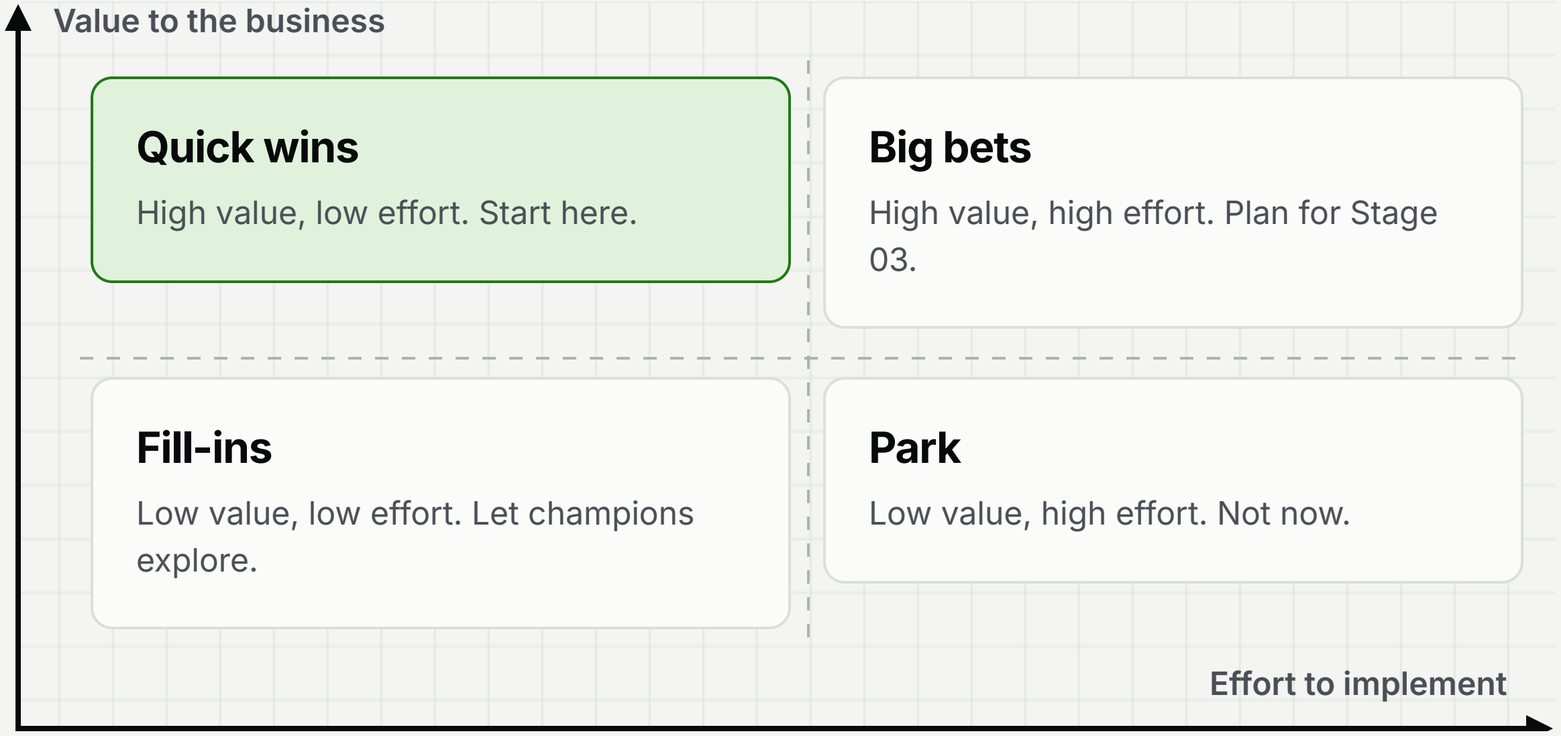


4. Pick three workflows, not thirty
5. Build one working agent on your own documents
6. Measure before and after

STAGE 02 · PROVE

Pick three workflows, not thirty

Ask champions to list the repetitive tasks in their team, then plot them.



Strong first picks for SMEs

- Proposals and tender responses
- Weekly and month-end reporting
- Contract and document review
- Market and prospect research
- Inbox triage and customer replies

STAGE 02 · PROVE

Prove it on your own work

One real agent on your real documents beats any demo.
Record the baseline first so you can show the gain.

Workflow	Before	With an agent
Proposals and tenders	4 hours	20 minutes
Friday report	Half a day	15 minutes
Contract and file review	All morning	Minutes
Research	Two days	One hour

Example time savings from Odokai use cases. Your own baseline is the number that counts.

STAGE 02 · PROVE

Run the pilot as an experiment

Permission to fail

Reward what people learn, not only what works. A failed test is still a finding.

One feedback channel

Open #ai-pilot in Teams or Slack for wins, questions and prompts that worked.

Weekly office hours

Thirty minutes to share, unblock and log new use cases as they appear.

Before and after

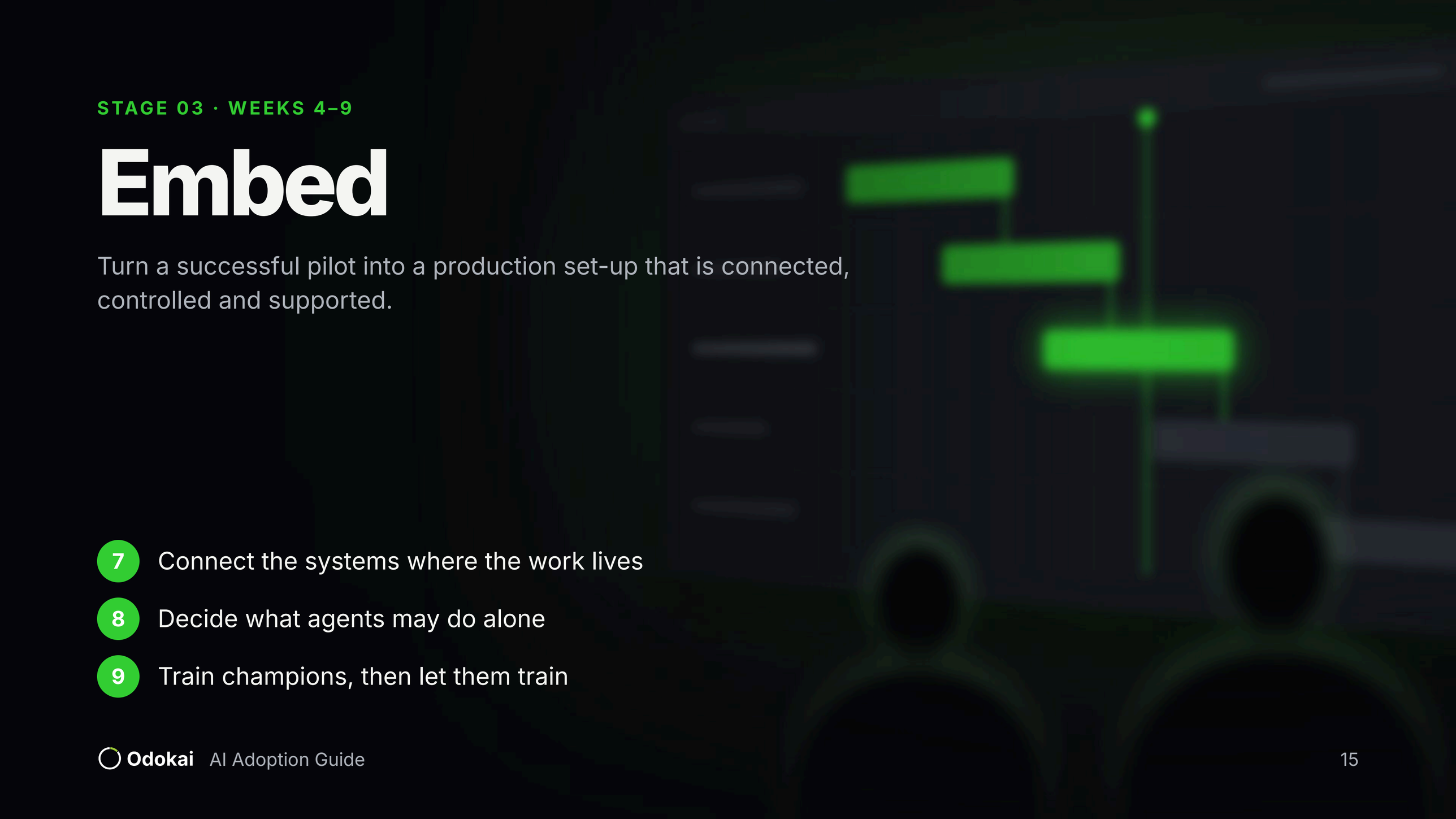
Time each target task before the pilot starts and again when it ends.

Exit test At least one workflow with a measured gain, and champions who want to keep going.

STAGE 03 · WEEKS 4–9

Embed

Turn a successful pilot into a production set-up that is connected, controlled and supported.



7. Connect the systems where the work lives
8. Decide what agents may do alone
9. Train champions, then let them train

STAGE 03 · EMBED

Connect where the work lives

An agent is only as useful as the context it can reach. Connect in this order.

1	**Email and calendar**	Outlook, Gmail
2	**Documents and knowledge**	SharePoint, Drive
3	**Customers**	HubSpot, Salesforce
4	**Money**	Xero, Stripe
5	**Delivery**	Jira, Asana

Check the data first

Messy folders and stale records produce confident, wrong answers. Tidy the sources an agent will read before you connect them.

Odokai connects to 600+ tools, so most SMEs never need a custom build.

STAGE 03 · EMBED

Decide what agents may do alone

Write the rules down and show them on every agent.

Does alone

Drafts, summarises, researches, sorts the inbox and updates internal trackers.

Asks first

Sends anything to a client, changes a record, commits spend or publishes.

Never does

Signs contracts, makes hiring or credit decisions, or deletes data.

McKinsey found that firms getting the most from AI set clear rules on when a person must check its work.
In Odokai, every agent step is logged in an audit trail.

STAGE 03 · EMBED

Train champions, then let them train

Colleagues who know the work persuade better than any outside trainer.

Pick for curiosity

One per team, roughly one for every 15 to 25 people. The keenest, not the most senior.

Give them time

Protect half a day a week during rollout. A champion role on top of a full job burns out fast.

Make it visible

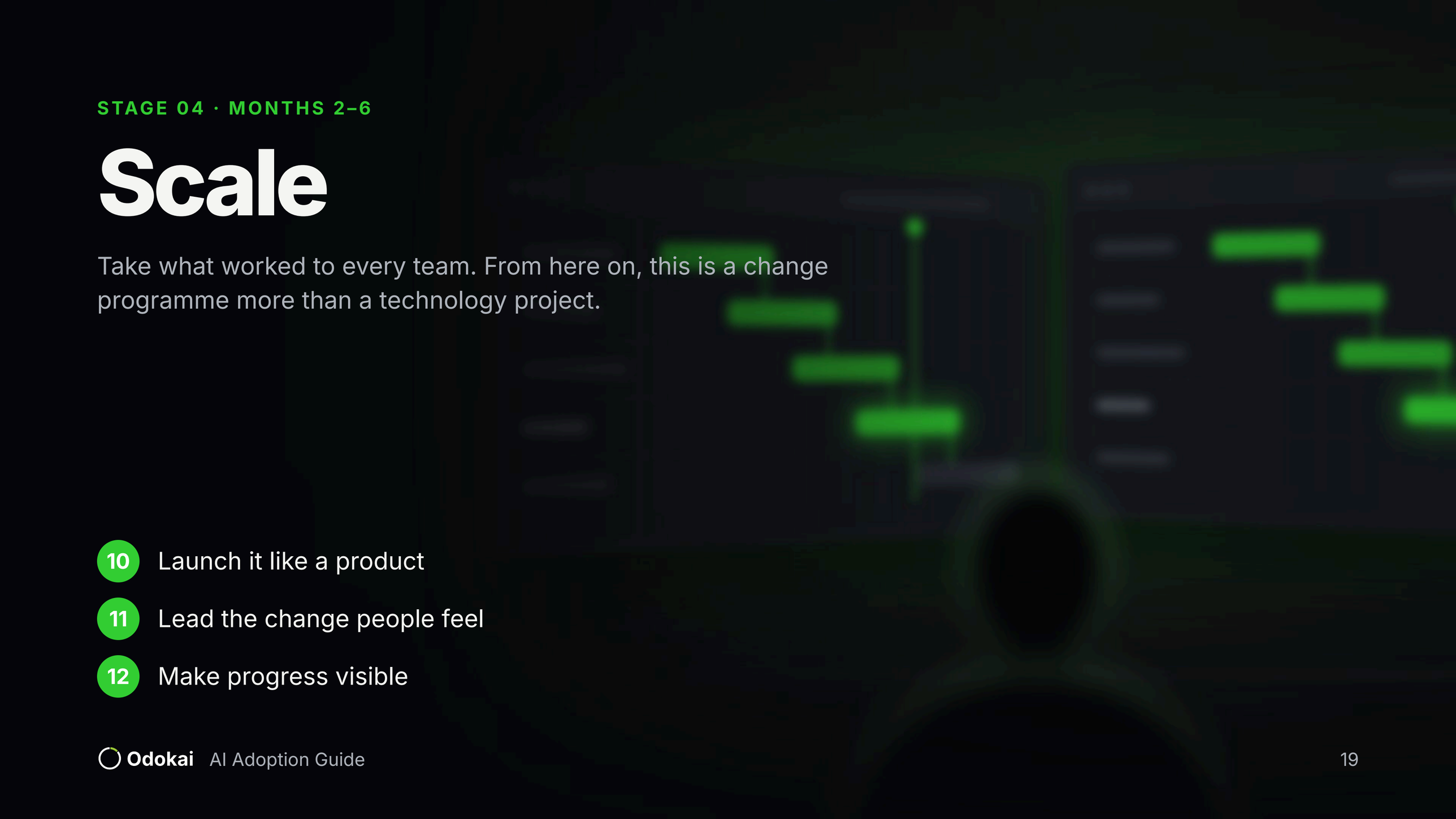
Credit their wins in leadership updates. Treat the role as a real career step.

Tip Make each champion the owner of the agents their team relies on, responsible for keeping them accurate and current.

STAGE 04 · MONTHS 2–6

Scale

Take what worked to every team. From here on, this is a change programme more than a technology project.



10 Launch it like a product

11 Lead the change people feel

12 Make progress visible

STAGE 04 · SCALE

Launch it like a product

A name, a starter kit and an early win are what bring people back.

Give it a name

“The Ops Desk” or “Ask Ada” lands better than “the AI rollout”.

Ship a starter kit

Ready-made agents and prompt templates from the pilot, so day one starts with a win.

Onboard in week one

Every new joiner sees the tools in their first week, not their third month.

Run old and new together

Keep any legacy tool briefly, point it to the new one, then switch it off.

STAGE 04 · SCALE

Lead the change people feel

Resistance is rarely about the technology. It’s about feeling unheard or left behind.

Say what’s in it for them

- Show the tedious tasks AI takes away
- Frame AI skills as career capital
- Be honest about how roles will change

Take concerns seriously

- Run an anonymous pulse survey each quarter
- Answer the hard questions in open sessions
- Accept that people adopt at different speeds

48% of UK SME leaders already using AI worry it could weaken staff critical thinking (YouGov). Address it openly.

STAGE 04 · SCALE

Make progress visible

Shared moments lower the barrier faster than any memo.

AI hack day

Teams build a real use case in a day, then show it off. Finish with a prize.

Monthly AI café

An informal 30–60 mins where people share how they really use AI.

30-day challenge

One small task a day and a team leaderboard. Habits form quickly.

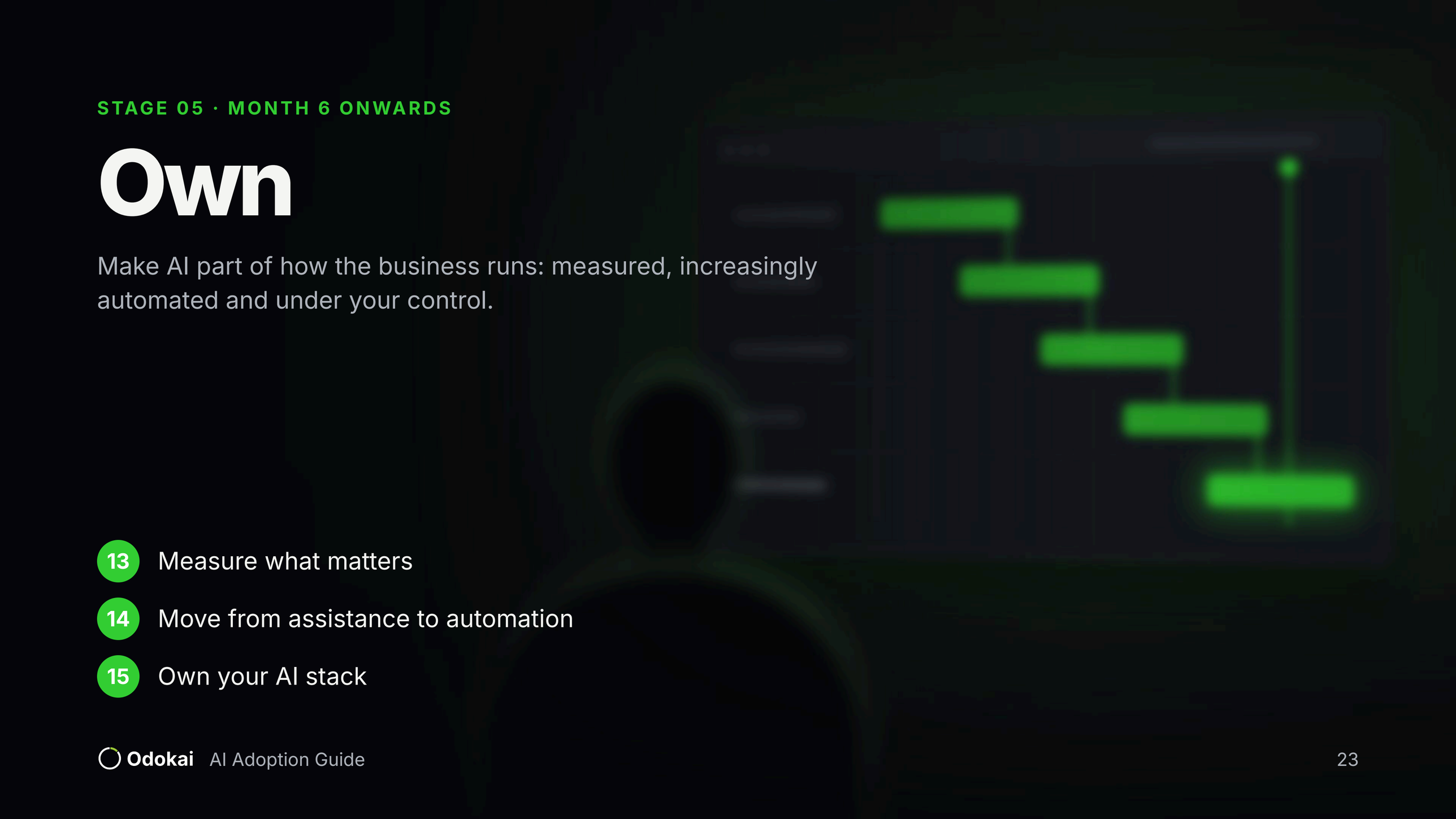
Win of the month

One concrete result shared company-wide, with the person’s name on it.

STAGE 05 · MONTH 6 ONWARDS

Own

Make AI part of how the business runs: measured, increasingly automated and under your control.



13 Measure what matters

14 Move from assistance to automation

15 Own your AI stack

STAGE 05 · OWN

Measure what matters

Logins show reach. Value shows up in depth and outcomes.

Signal	What to track	What good looks like
Reach	Weekly active users as a share of seats	A steady rise, then a stable plateau
Depth	Agents and workflows in regular use, by team	Every team running at least one
Outcomes	Time, turnaround and error rate on target workflows	Clear gains against the pilot baseline
Confidence	Quarterly survey: “How confident are you using AI?”	Fewer people in the beginner group
Cost	Model spend per active user	Falling as tasks move to right-sized models

STAGE 05 · OWN

Move from assistance to automation

Value grows as AI moves from helping one person to running a whole process, with people supervising.

STEP 1
Ask
One-off questions, drafts and summaries.

→

STEP 2
Assist
Reusable agents for a team's regular tasks.

→

STEP 3
Act
Agents use your tools, with approval gates.

→

STEP 4
Automate
Scheduled, multi-step workflows, logged end to end.

McKinsey found that redesigning workflows, not just adding tools, is one of the strongest drivers of business impact from AI.

STAGE 05 · OWN

Own your AI stack

The more you rely on AI, the more control is worth.

Keep data at home

Documents, search index and audit trail stay inside your environment.

Match model to task

Right-sized models for each job cost far less than one top-tier model for everything.

Hold the contracts

Contract with model providers directly, set to zero retention and no training.

Avoid lock-in

Shared platform, dedicated instance or your own AWS account: move up as you grow.

WHAT SEPARATES SUCCESS FROM STALLING

Do’s and don’ts

Do’s

- Keep people at the centre, with a human in the loop
- Start with quick wins and broadcast them
- Bring IT or your MSP in from day one
- Budget for six months of active support

Don’t

- Start with your most complex integration
- Ban AI and hope shadow use disappears
- Switch tools or default models mid-rollout without warning
- Count logins and call it adoption

CHECKLIST

Your first 90 days

When	Milestone	Owner
Weeks 0–2	Business case agreed, roles named, guardrails written	Sponsor
Weeks 2–4	Three workflows chosen, first agent live, baseline recorded	AI lead
Weeks 4–9	Systems connected, approval rules set, champions trained	AI lead and IT
Weeks 9–13	Company-wide launch, first hack day, first metrics review	Sponsor and champions

Then review every quarter. Choose what to scale, what to automate next and what to stop.

WORKING WITH ODOKAI

How we can help

01 · Free

Discovery call

About 45 mins. We collect info and present back to you a plan of recommendations.

02 · Fixed fee

Production rollout

2–12 weeks, covering integration, logging, access control and training for your team.

03 · From £500 a month

Your instance

Shared or dedicated, with model usage included up to a fair-use volume.

Also available:

An AI governance health check and wider AI consultancy for your leadership team.

REFERENCES

Sources

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- Odokai, *odok.ai: process, pricing, platform and example time savings*

Figures are as published by each source. Odokai time savings are illustrative examples, not guarantees.

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START THE CONVERSATION

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