

Bring People With You: The AI Adoption and Change Management Playbook

A WORKPLACEAI STRATEGY PLAYBOOK

The Tool Is Deployed. Now Get People to Change How They Work

Most AI programs are launched as technology projects and stall as people projects. Access is not adoption, and adoption is not value. Here is how to move a workforce from a license to a changed way of working.

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Key Takeaways

- Access is not adoption. PwC's 2026 survey of 49,364 workers found 64% used AI at work in the past year, yet only 51% said they had the learning resources they need, down from 59% a year earlier.
- Managers decide whether AI sticks. Gallup found workers whose manager actively supports AI use were far more likely to rate its productivity impact at the top level (33% versus 9%) than workers without that support.
- Start with the work, not the tool. Name the workflow, the people in it, what changes, and what stays the same, before anyone is told to "use AI."
- Say the deal out loud. People adopt faster when they know what happens to their roles, what is expected of them, and what is off limits. Silence gets filled with fear.
- Train inside the job. Short, role-specific practice on real tasks beats a generic course, and it has to be funded. Grant Thornton found 34% of finance leaders call training the most underfunded part of AI investment.
- Fix incentives before blaming people. If saving time earns more work, or using AI is risky for a career, resistance is a rational response.
- Measure the quality of adoption, not just logins. Depth of use, task coverage, and outcomes show whether behavior changed.

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Buying the tool is the easy part. Getting several hundred people to change how they do their jobs is the hard part, and it is the one most AI programs underfund.

This playbook treats AI rollout as what it is: A change management problem with a technology attached. It is written for the leader who owns the outcome, whether that sits in operations, HR, IT, or a business unit.

It pairs with the [AI ROI Measurement Playbook](#). That one proves whether the change paid off. This one makes the change happen.

The Adoption Gap

Use is rising everywhere. Support for the people doing the using is not keeping pace. Several recent studies show the same gap from different angles.

Source	What it found
PwC Global Workforce Hopes and Fears Survey 2026, 49,364 workers in 48 countries, fielded May and June 2026	64% used AI at work in the past 12 months, up 10 points. Daily generative AI use rose from 14% to 22%. But 51% said they have access to the learning resources they need, down from 59%. Among daily users, 68% felt confident about job security, versus 57% of infrequent users.

Gallup, U.S. workers, 43,262 responses, February and May 2026	Where the employer has a clear plan for AI, 43% of workers were engaged, versus 28% where there is none. Where the manager actively supports AI use, 48% were engaged, versus 30%. Frequent users were far more likely to rate AI's productivity impact at the top level than infrequent users (24% versus 5%).
BCG AI at Work 2025, more than 10,600 employees in 11 countries and regions	Over three-quarters of leaders and managers use generative AI several times a week, but regular frontline use has stalled at 51%. Only about one-third of employees say they have been properly trained. Positive sentiment toward generative AI rises from 15% to 55% with strong leadership support, which only about a quarter of frontline employees report.
Grant Thornton 2026 AI Impact Survey, 950 business leaders, February and March 2026	34% of finance leaders say training is the most underfunded AI investment area. Only 6% of executives rate change leadership and workforce enablement as an essential skill. Frontline employees and middle managers are named as the groups needing the most support.
WRITER and Workplace Intelligence, 2,400 respondents (vendor-published)	29% of employees admit to undermining their company's AI strategy, and 35% say their manager is an AI champion. These are self-reported figures from an AI vendor's own survey, so treat them as directional.

Two things stand out. The workers closest to the work get the least support, and the factors that predict good outcomes are mostly managerial: A clear plan, an engaged manager, and time to learn. None of them is a software feature.

The Principle: Change the Work, Then the Tool

Most rollouts begin with the tool. A license is purchased, an announcement goes out, and a training session is scheduled. Adoption is then judged by logins.

This works backward. People do not change behavior because a tool exists. They change when a specific piece of their work becomes easier, safer, or more rewarding to do a new way, and when the people around them make that safe.

The playbook rests on three questions, asked in order.

What changes?

Which tasks, handoffs, and decisions will be different, for whom, and by when.

What do people need?

Skills, time, permission, clear rules, and a manager who backs them.

What would make it stick?

Incentives, feedback, and measures that reward the new way of working.

Skip the first question and training becomes generic. Skip the second and people stall. Skip the third and the old habits return within a quarter.

The Adoption Stack

The eight stages below build on each other. Each one answers a question that, left unanswered, will surface later as resistance.

Define the Work → Segment → Communicate the Deal → Train for the Job → Equip Managers → Build Champions → Redesign Incentives → Measure and Sustain

You do not need to run them as a strict sequence. You do need all eight, and the first three before anything is announced.

Stage 1: Define the Work Change

Begin with one workflow, not the whole company. Write down what it looks like today and what it should look like after AI is in place.

What to write down

- **The workflow.** The specific process, such as drafting customer replies, reconciling invoices, or preparing sales call briefs.
- **The people.** Who does it, how many, in which teams and locations.
- **The change.** Which steps AI will draft, which a person will review, and which stay entirely human.
- **The rules.** What data may be used, what must be checked, and who is accountable for the result.
- **The reason.** The problem it solves for the people doing the work, not only for the company.

The last item matters more than it looks. A change framed only as a cost saving tends to be received as a threat. A change that also removes a tedious task is easier to adopt.

If you cannot fill in that list, the rollout is not ready. Vague instructions to “use AI more” produce scattered, shallow use that is hard to measure and easy to abandon.

Stage 2: Segment the Workforce

A workforce does not adopt as one body. Different groups need different handling, and treating them identically wastes effort on the eager and loses the cautious.

Group	What they are like	What they need
Early adopters	Already experimenting, often on their own. Quick to find uses.	Official channels, recognition, and a role in helping others. Left alone, they build unmanaged workarounds.
Pragmatists	Willing if it clearly helps with a real task. The largest group.	Role-specific examples, protected practice time, and proof that colleagues use it well.
Skeptics	Doubt the quality, the point, or the intent. Often experienced and respected.	Honest answers about limits, a say in the review rules, and evidence from their own work.
Exposed roles	Worry the work they do is the work being automated.	A clear statement about the future of the role, a path to new skills, and no surprises.
Managers	Responsible for outcomes but often not trained or briefed first.	Preparation ahead of their teams, a script for hard questions, and clarity on what to measure.

Frontline staff and middle managers deserve extra attention. Grant Thornton’s survey named both as the groups needing the most support, and BCG found frontline regular use stuck at 51% while most leaders used AI weekly. Leaders often judge adoption by their own experience, which is not their team’s.

Stage 3: Communicate the Deal

Every change carries an implied deal between the company and its people. If you do not state it, employees will write their own version, usually a worse one.

A good message is specific, repeated, and consistent from the top to the team lead. It answers the questions people are asking quietly.

- **Why are we doing this?** The business reason and the benefit to the work itself.
- **What does it mean for my role?** Be honest about what is known and what is not. “We have no plans to reduce headcount” is only worth saying if it is true and you will stand by it.

- **What is expected of me?** Which tasks, how often, with what checks.
- **What is off limits?** Data, tools, and uses that are not allowed, in plain language.
- **Who do I ask, and what happens if it goes wrong?** A named contact, and a clear statement that reporting a mistake is safe.

Do not promise what you cannot guarantee. PwC's survey found that daily AI users were more confident about job security than infrequent users, 68% versus 57%. Familiarity appears to reduce fear. But that is a reason to give people hands-on experience, not a reason to dismiss concerns before they have it.

Back the message with a short written policy. The [Agent Governance Playbook](#) covers ownership and boundaries for the agent side of this.

Stage 4: Train for the Job, Not the Tool

Generic tool training teaches where the buttons are. People need to learn how their own work changes. Those are different lessons.

PwC's result is a warning: Use grew while access to learning resources fell from 59% to 51%. BCG found only about a third of employees say they have been properly trained, and that regular use was sharply higher among those who received at least five hours of training plus coaching. Grant Thornton found training is the area finance leaders most often call underfunded.

What good training looks like

- **Role-based.** Separate tracks for support, finance, sales, operations, and managers, each using that function's real tasks.
- **Hands-on.** People practice on their own work, with their own data where policy allows, not on invented examples.
- **Spaced.** Several short sessions over weeks, with time to apply between them, rather than one long day.
- **Honest about limits.** How the output fails, how to check it, and when not to use it.
- **Paid for in time.** Learning hours are protected on the calendar, not squeezed in after the day's work.

Include the review skill. Using AI well means knowing how to spot a confident wrong answer. Teach the checks, and show real examples of errors in your own domain.

Then keep teaching. A tool will change within months. A one-time course is out of date before the next quarter ends, so plan a light recurring rhythm, such as a monthly show-and-tell of what worked.

Stage 5: Equip Managers First

Of all the levers here, the manager is the strongest. Gallup's 2026 data shows it plainly.

Among AI users in organizations that have adopted it, 33% of those whose manager actively supports AI use gave the top productivity rating, compared with 9% of those without that support. A clear organizational plan mattered too, 21% versus 12%. When frequent use, a clear plan, and manager support all came together, half gave the top rating.

Gallup's tables carry some labeling inconsistencies, so read the exact percentages as indicative. The direction is unmistakable.

What managers need before their teams do

- **Their own practice.** A manager who has never used the tool cannot coach anyone on it.
- **A short briefing.** The why, the deal, the rules, and the plan, delivered a week before the team hears it.
- **Answers to hard questions.** A one-page guide on job security, quality, privacy, and what to do when someone refuses.
- **A role in the rollout.** Time in team meetings, a named point person, and a way to escalate problems.
- **Targets they can influence.** Measures tied to the work, not to raw usage numbers.

Middle managers sit between a leadership mandate and a team that feels it. Give them the information and cover to translate one to the other, or they become the place where the program quietly stalls.

Stage 6: Build Champions and Feedback Loops

Peers persuade better than announcements. A small group of respected practitioners, drawn from each team, can show what works and report what does not.

How to run a champion network

- **Pick credibility over enthusiasm.** Include a few skeptics who have been convinced. Their endorsement carries weight.
- **Give them time.** A few protected hours a week, written into their goals.
- **Give them a job.** Collect use cases, run short demos, answer questions, and gather problems.
- **Connect them.** A shared channel and a monthly meeting where patterns and fixes are shared across teams.
- **Close the loop.** When a champion reports a problem, show what changed because of it.

The feedback matters as much as the advocacy. Champions are your early warning. They hear the complaints and see the workarounds before the dashboards do.

Treat what they bring back as data. If three teams report the same failure, that is a defect in the rollout, not a flaw in the people.

Stage 7: Redesign Roles, Incentives, and Performance

If people respond to incentives, a rollout that ignores them is asking the workforce to act against its own interests. Check these four before blaming resistance.

Question	Why it matters
Does saving time earn more work, or recognition?	If efficiency is rewarded with a bigger queue, people learn not to be efficient. Decide where freed time goes and say so.
Is it safe to use AI and make a mistake?	If an AI-assisted error is punished more than an unaided one, people avoid the tool or hide their use.
Is it safe to admit you use it?	If staff fear being seen as replaceable, they will use it quietly, outside the rules, or not at all.
Do performance reviews reflect the new way of working?	If goals and reviews stay unchanged, the new behavior is optional, and optional things lose.

Be careful with coercion. The WRITER survey, which is vendor-published, reports that most executives plan layoffs for people who will not adopt and warns that those who are not AI proficient will not be promoted. Whatever you think of those intentions, threats alone tend to produce compliance theater: Visible usage, shallow results, and hidden workarounds.

A better approach pairs a clear expectation with real support. Set what is expected by when, provide the training and time to meet it, and recognize people whose work improves.

Also revisit job design where AI genuinely changes the work. Update descriptions, skills expectations, and career paths, and make sure the people affected see the plan. Surprises do more harm than bad news delivered early.

Stage 8: Measure Adoption Quality and Sustain It

Logins show access. They do not show change. A useful adoption measure asks whether the work is actually done differently, and whether it is done better.

Measure	What it tells you
Active use by team	Where adoption is real and where it is thin. Look at weekly users, not accounts.
Depth of use	Whether people use it for substantive tasks or only simple ones.
Task coverage	What share of the target workflow is now done the new way.
Quality and rework	Whether the output is good enough, and how much correction it needs.
Sentiment and confidence	Whether people feel equipped, and whether the picture differs by manager or team.
Outcomes	Cycle time, error rate, cost, or customer measures, tied back to the baseline.

Take the outcome measures from the [AI ROI Measurement Playbook](#), so adoption and value are tracked from the same baseline. Adoption without outcomes is activity. Outcomes without adoption data cannot be explained.

Sustaining the change

Adoption decays. After the launch energy fades, people drift back to old habits, new hires miss the training, and the tool changes underneath them.

- Schedule quarterly refreshers and update the training as tools change.
- Build AI practice into onboarding for new hires.
- Review the segments and the sentiment each quarter, and adjust.
- Retire use cases that are not working, and say so openly.

Reading Resistance

Resistance is information. Before treating it as a problem to overcome, find out what it is telling you.

What you hear	What may be behind it	A useful response
"It gets things wrong."	A fair concern about quality, or a bad early experience.	Share known failure patterns, teach the checks, and let skeptics shape the review rules.
"I don't have time to learn it."	Workload, with no protected time for learning.	Block time on the calendar and remove something else.
"This is going to replace me."	Real fear, often unaddressed by leadership.	Give an honest, specific statement about the role, and a path to new skills.
"I already do this faster."	Expertise that the generic training did not respect.	Pair them with a champion role, and use their method to improve the guidance.
Silence, and quiet non-use.	Unclear expectations, or fear of looking incompetent.	Ask managers to hold one-to-one conversations and offer private practice.
Heavy use outside approved tools.	Official tools are too limited, or the rules are unclear.	Learn why, offer a safe alternative, and fix the policy gap.

Some resistance is justified. If a team says the tool produces unreliable output for a task, investigate before pushing harder. They may have found a limit you should know about.

An Illustrative Walkthrough

The following example uses invented figures to show how the stages fit together. It is not drawn from a real company.

A 180-person customer support organization licenses an AI drafting assistant. Leadership sends an announcement and a recorded training video. After eight weeks, 70% of agents have logged in, but only 22% use it weekly. Edits to the drafts are heavy, and two team leads say privately that they do not trust it.

What the team changes

- **Stage 1.** The work is narrowed to two ticket types, order status and billing questions, with a written rule that agents review every draft before sending.

- **Stage 2.** They segment: Twelve early adopters, a large pragmatist group, a handful of senior skeptics, and the new hires who are most worried.
- **Stage 3.** The director states plainly that the goal is shorter queues, not fewer agents, and commits to that for twelve months.
- **Stage 4.** Training is replaced by three 45-minute practice sessions on real tickets, with time protected on the schedule.
- **Stage 5.** Team leads attend a briefing a week ahead and practice with the tool first.
- **Stage 6.** Eight champions, including two senior skeptics who helped write the review rules, meet monthly.
- **Stage 7.** Handle-time targets are adjusted so faster work does not simply raise the queue, and quality scores get more weight.
- **Stage 8.** The team tracks weekly active use, share of tickets drafted with the tool, edit rates, and resolution quality.

Twelve weeks later, weekly use is 64% and the edit rate has fallen as agents learn which tickets suit the tool and which do not. Two ticket types turned out to be poor candidates and were removed from the plan.

The numbers are made up, but the sequence is realistic. The tool did not change. The surrounding conditions did.

Where This Breaks

Failure	What it looks like	Fix
The announcement is the plan	A launch email and a video, then a login report.	Define the work change and train inside the job.
Training is generic	Everyone gets the same course, and no one changes a task.	Build role-based practice on real work.
Managers are briefed after their teams	Leads face questions they cannot answer.	Brief and equip managers a week ahead.
Usage is the only metric	A dashboard shows logins while the work stays the same.	Track depth, coverage, quality, and outcomes.
Efficiency is punished	Faster work brings a bigger queue.	Decide where freed time goes, and say it.

Fear is ignored	Rumors fill the silence, and strong people leave.	State the deal honestly and give a path to new skills.
Champions are volunteers without time	The network fades within a quarter.	Give them protected hours and a defined role.
The rollout is declared done	Use decays, and new hires are missed.	Plan refreshers, onboarding, and quarterly reviews.

The Pre-Rollout Scorecard

Before announcing a rollout, check that each item is in place. A gap here is a risk you can still fix cheaply.

- A named owner for the change, separate from the owner of the technology.
- One workflow defined, with the people, the change, the rules, and the reason written down.
- The workforce segmented, with a plan for each group.
- A written message that states the deal, and a plan to repeat it.
- Role-based training with protected time and budget.
- Managers briefed and practiced a week before their teams.
- A champion network with named members, time, and a channel.
- A decision on where freed time goes, and how performance goals reflect it.
- Adoption and outcome measures tied to a baseline.
- A schedule for refreshers, onboarding, and quarterly review.

A 90-Day Roadmap

DAYS 1 TO 30: PREPARE

- Choose one workflow, name the owner, and write the work change.
- Segment the workforce, and talk to managers and skeptics.
- Draft the message, the policy, and the manager briefing.
- Set the baseline and the adoption measures.

DAYS 31 TO 60: LAUNCH AND LEARN

- Brief managers, then announce to the teams.
- Run role-based practice sessions with protected time.
- Stand up the champion network, and collect problems weekly.
- Adjust incentives and targets so efficiency is not penalized.

DAYS 61 TO 90: MEASURE AND EXTEND

- Review adoption depth, coverage, quality, and sentiment by team.
- Fix what the feedback shows, and drop use cases that do not work.
- Report adoption and outcomes together, and decide whether to extend.
- Write down what worked as a template for the next workflow.

Resist the urge to extend too early. A rollout that works for one workflow and one team is a pattern you can copy. One that has not been proven in a single place cannot be scaled safely.

Conclusion: Adoption Is a Management Job

The surveys point in one direction. Companies are buying and deploying AI faster than they are preparing people to use it, and the gap shows up in thin results and uneasy workforces.

That is a leadership problem with a practical answer. Define the work, tell people the truth, train them in context, prepare their managers, reward the new behavior, and measure whether the work changed.

Define the Work → Segment → Communicate the Deal → Train → Equip Managers → Build Champions → Redesign Incentives → Measure and Sustain

Start with one workflow and do it properly. The people who see it work will carry the next one.

A license gives people access. Management gives them a reason, the skills, and the safety to change.

Where to Go From Here

The ROI Measurement Playbook shows how to prove the change paid off, and the Agent Governance Playbook covers ownership and controls. Our CIO survey report covers why leaders feel the pressure.

[AI ROI Measurement Playbook →](#)[Agent Governance Playbook →](#)[CIO Survey Report →](#)[Employee Lifecycle Playbook →](#)[Automation ROI Estimator →](#)

Sources: PwC, *Global Workforce Hopes and Fears Survey 2026* (49,364 workers, 48 countries, fielded May and June 2026), as reported by The Gleaner on October 14, 2026. Gallup, *Employee Engagement Remains Flat as AI Adoption Accelerates* (43,262 U.S. workers, February and May 2026). BCG, *AI at Work 2025: Momentum Builds, but Gaps Remain* (more than 10,600 employees, 11 countries and regions, June 2025). Grant Thornton, *2026 AI Impact Survey* (950 business leaders, February 23 to March 18, 2026). WRITER and Workplace Intelligence, 2026 enterprise AI adoption survey (2,400 respondents), published by WRITER, an AI vendor; figures are self-reported and the field dates are not stated. The walkthrough uses invented figures for illustration only. Survey figures are as published by each source and were not independently verified.

Unvarnished Reviews

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