



Pella's Copilot Rollout: Driving Adoption and Impact

Curt Winegar

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AI as a Capability

- Time is the one resource we can't get back
- AI is not a tool you plug in—it's a capability you build
- When we build AI capability, we compress time across decisions, product cycles, and customer impact



Data & AI literacy is the foundation. The results we are achieving are directly tied to the effort to help people change how they think, act, and engage with AI.



Who We Are: My Role & Analytics at Pella

About Me

Curt Winegar

- Sr. Data Analytics Strategist
- 25+ years helping solve business problems with data
- Lead Data & AI Literacy Program
- Focus: Turning analytics & AI into everyday problem-solving tools

Let's Connect!

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Analytics Team

DataOps:

Architects, Engineers, and Modelers building AI-ready data foundations

AI & Advanced Analytics:

AI Engineers and Data Scientists delivering intelligent solutions





Pella Corporation at a Glance

100+ years of innovation

10,000+ team members across North America

An Industry Leader in Residential Windows & Doors





Why AI? Why Now? Leading with AI-Literacy



People-First Philosophy

AI amplifies people — it doesn't *replace* them. We integrate AI into everyday workflows so teams can focus on what matters most



Alignment With Our Values

Training reflects our values, with role- and department-based Copilot learning

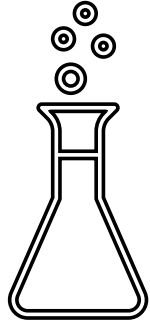


Data & Analytics Vision

We're building an AI-first organization with AI-ready data and an AI-capable workforce



The Turning Point: From Technology-first to People-first



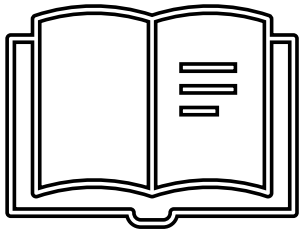
Initial Pilot Program

Pilot engagement under 50% due to minimal training and early-stage Copilot integration.
We learned the organization needed stronger AI readiness



Scaling to 1000+ Licenses (May 2025)

Adding 1,000 licenses shifted focus from “new tech” to **AI literacy** with role-specific training
This became the turning point for adoption



Leading With AI Literacy

AI literacy became the foundation for an AI-capable workforce
Trust, confidence, and storytelling sparked a movement rather than a mandate

What is Data & AI Literacy?

The ability to read, write, and communicate with data & AI in context — in both work and life

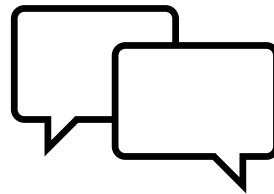
Mindset

Being in the right state of mind.
Being open, willing, and curious
to explore new ways of working



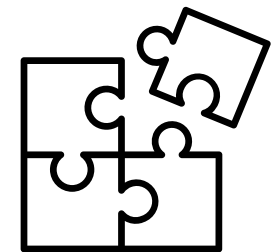
Language

The joining of business
terminology with data,
analytics, and AI acumen.
“Speaking Data” as a shared
language



Skills

Thinking critically, engaging
others, and applying data & AI
constructively to solve problems





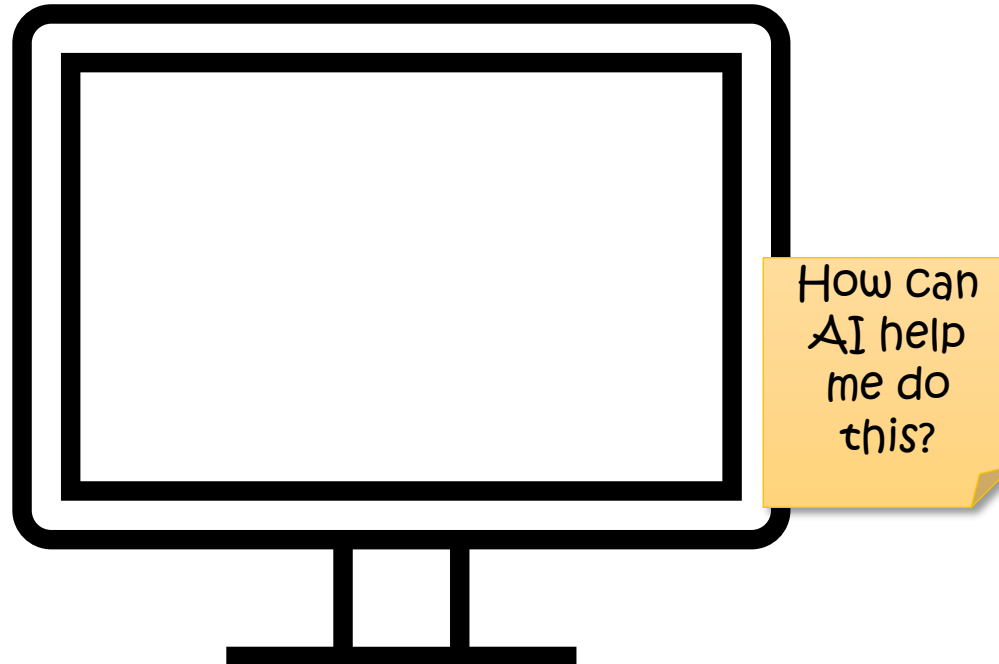
Shifting Your Mindset:

How can I do this?



Shifting Your Mindset:

How can *AI help me* do this?



Copilot Example Prompt:

Write a thank you to Curt for the presentation about AI at Pella. Write in a tone that is friendly but sounds like a pirate, and use the meeting invite for the meeting regarding Copilot 365 training scheduled for Brandon's sales meeting on 2/3.

Thank you message (pirate style):

Curt, ye gave a fine talk on AI at Pella. The crew walked away sharper and ready to sail with Copilot 365 at Brandon's sales meetin on 2/3. The way ye laid it out made the whole voyage feel clear. Appreciate the time and the steady hand at the helm.

If ye have more charts or maps to share for the next run, the crew will follow.



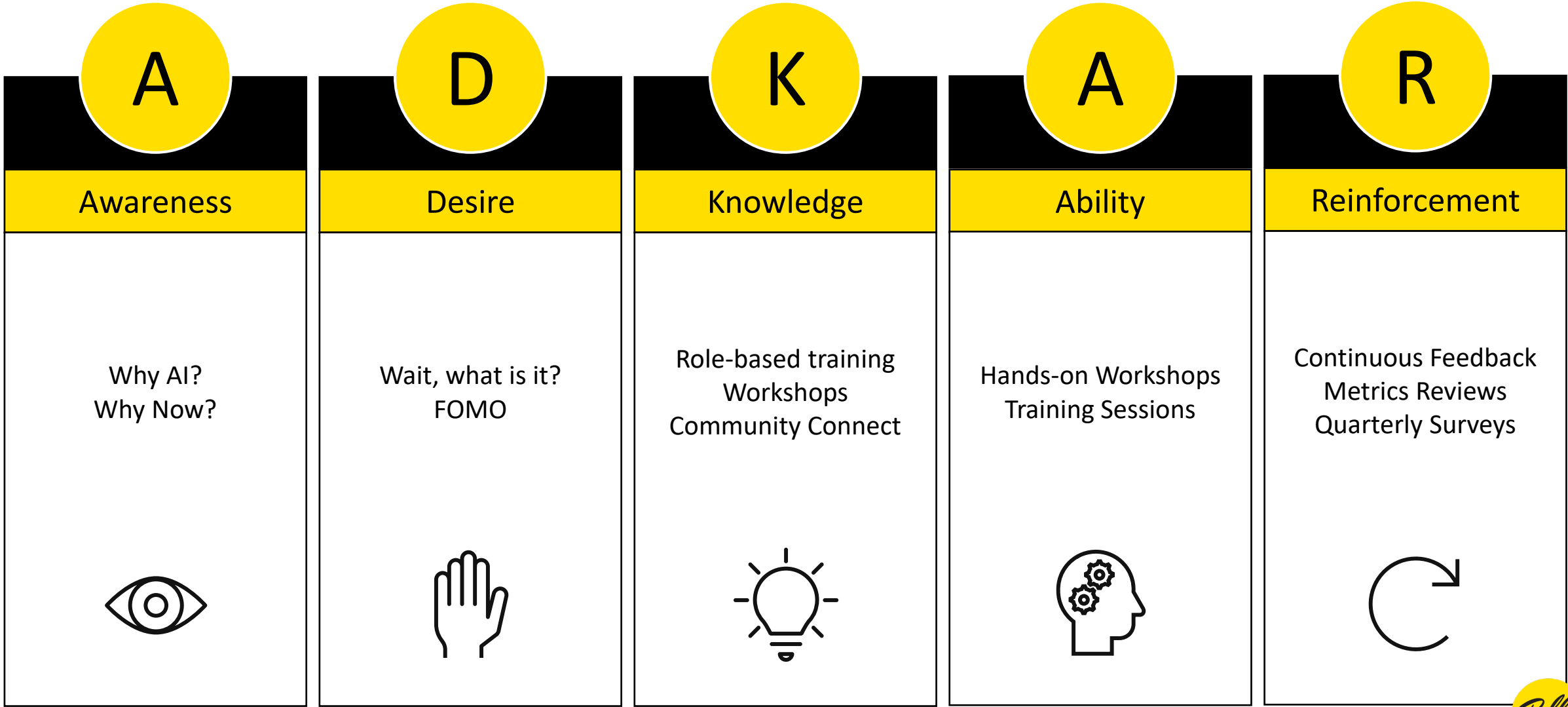


Copilot Prompt Example: Ask Copilot to Act as a Consultant

Hey you're an AI expert. I would love your help and a consultation with you to help me figure out where I can best leverage AI in my role supporting [product, problem, or initiative] at a [manufacturing company]. As an AI expert, would you please ask me 3-5 questions, one question at a time until you have enough context about my workflows, responsibilities, KPIs and objectives that you could make two obvious recommendations and two non-obvious recommendations for how I could leverage AI in my work? At the end, summarize our conversations as a question & answer session, and include your recommendations.



Our Change Blueprint: ADKAR in Action

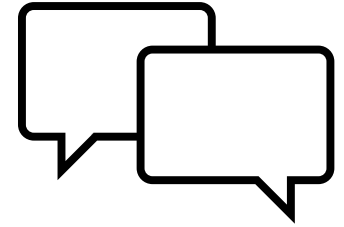




How We Drove Engagement and Buy-In

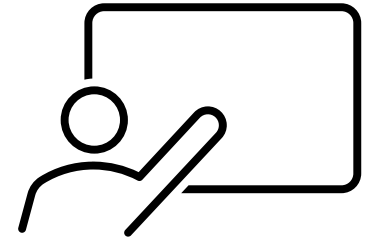
Tailored Communication

Team-specific communication plans for clarity, relevance, and alignment



Targeted Training Sessions

Role-based training at the right time to build confidence and capability



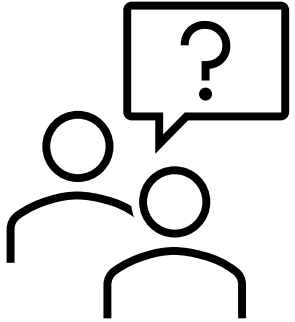
Leadership Involvement

Visible, active leaders who modeled usage and supported adoption within their teams



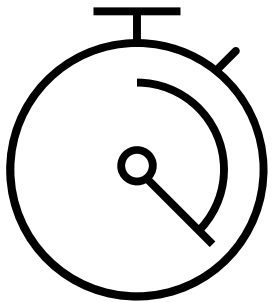


Accelerating Adoption and Reducing Resistance



Proactive User Engagement

Actively addressing user questions and concerns to build trust and reduce resistance



Clear Productivity Benefits

Showing tangible productivity gains to motivate users to try new techniques and adopt change

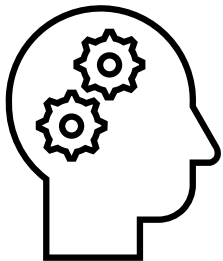


3 C's: Behaviors That Deliver Our Best AI-enabled Results

Curiosity

How do we think?

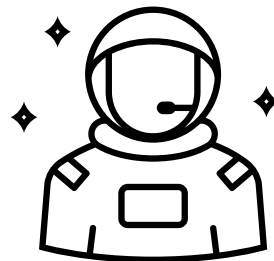
Curiosity drives better questions, intentional experimentation, and continuous learning



Courage

How do we act?

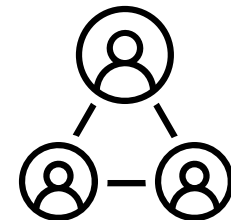
Courage requires action, challenging existing workflows and embracing change



Collaboration

How do we scale?

Collaboration accelerates adoption by aligning people, systems, and decisions across the enterprise



Curiosity challenges the question. Courage changes the work. Collaboration makes results stick.





Creating a Community to Accelerate Copilot Adoption

Community Formation

A focused Copilot Community created a space for shared learning among peers

Sharing Best Practices

Members exchange best practices to improve Copilot's effectiveness and efficiency

Troubleshooting Challenges

The community collaborates to solve issues and support one another





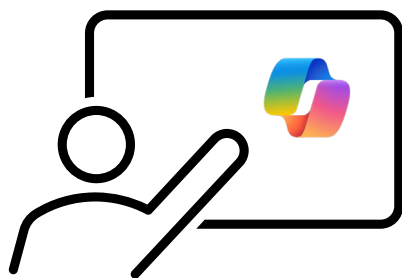
Copilot Engagement & Learning Plan:

Our core channels spark learning, confidence, and forward momentum

Workshops

Skill Development

Hands-on sessions that build practical Copilot skills and accelerate real-world usage



Webinars

Intentional Education

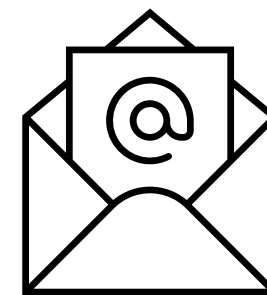
Expert-led webinars with live demos that deepen understanding of Copilot capabilities



Blog Posts

Weekly Cadence

Weekly posts that reinforce Data, AI, and Copilot literacy across our user communities



This isn't about learning Copilot. It's about building the capability to work with AI.





Improving Adoption Through Continuous Feedback Loops

Iterative Training

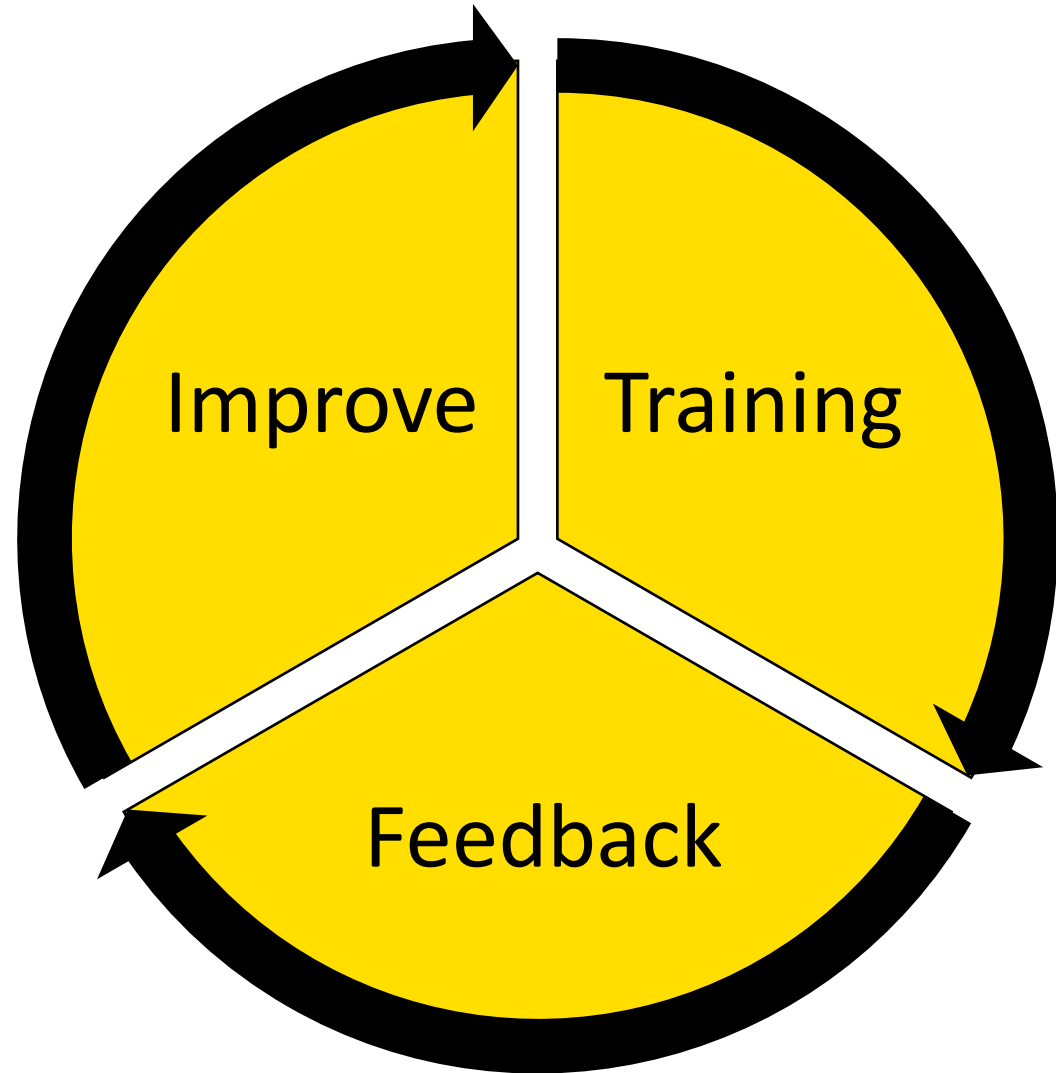
Adjusted training based on real user input to keep content relevant and effective

Feedback Collection

Regularly gathered user feedback to identify pain points and opportunities for improvement

Improve User Experience

Continuous refinement that improved user satisfaction and supported stronger adoption





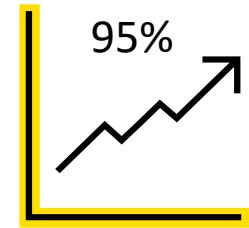
Measuring Success: Adoption, Impact, and ROI



Sustaining >95% Adoption After 7 Months

High User Engagement

95%+ of licensed users engage with Copilot monthly



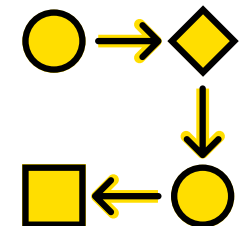
Strong User Acceptance

High adoption signals trust and perceived value



Workflow Integration

Copilot is embedded in everyday workflows, not just early experimentation

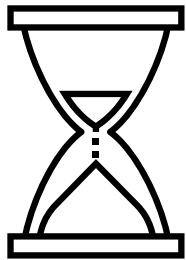




How Copilot is Transforming Productivity and Workflows

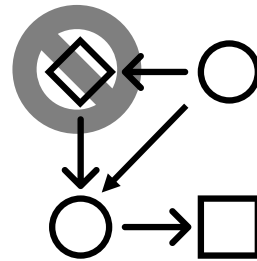
Productivity

Teams report measurable time savings and throughput gains



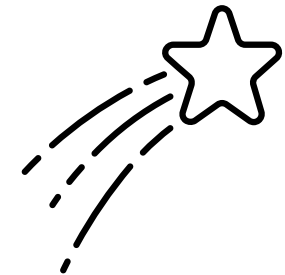
Streamline

Automated & optimized process workflows reduce manual steps and complexity



Empowerment

AI empowers employees to work smarter, faster, and with greater impact





Looking Forward: Lessons Learned and Future Directions



Two Moves That Would Accelerate Adoption

Secure Early Leadership Sponsorship

Align leaders early to speed decisions and establish a clear strategic direction



Engage AI Influencers Early

Activate influencers early to accelerate adoption & shape real-world use from day one

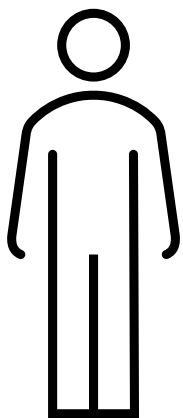


Scaling Productivity: Individual → Team → Enterprise

Individual

Unlocking New Value

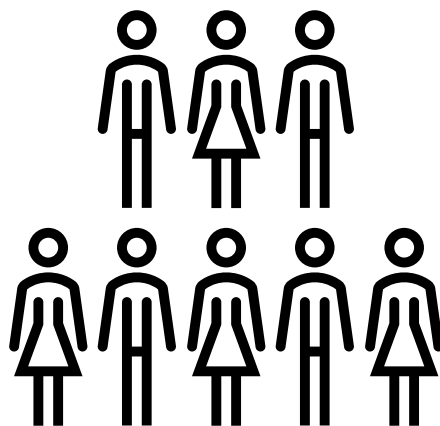
AI augments individual productivity by simplifying day-to-day tasks and revealing new opportunities



Team

Transforming Workflows

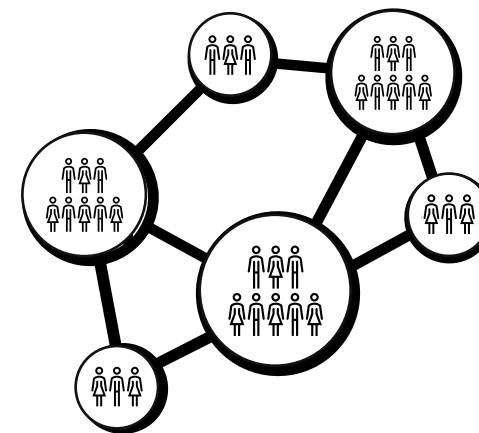
AI will reshape workflows to remove friction, automate routine steps, and accelerate output



Enterprise

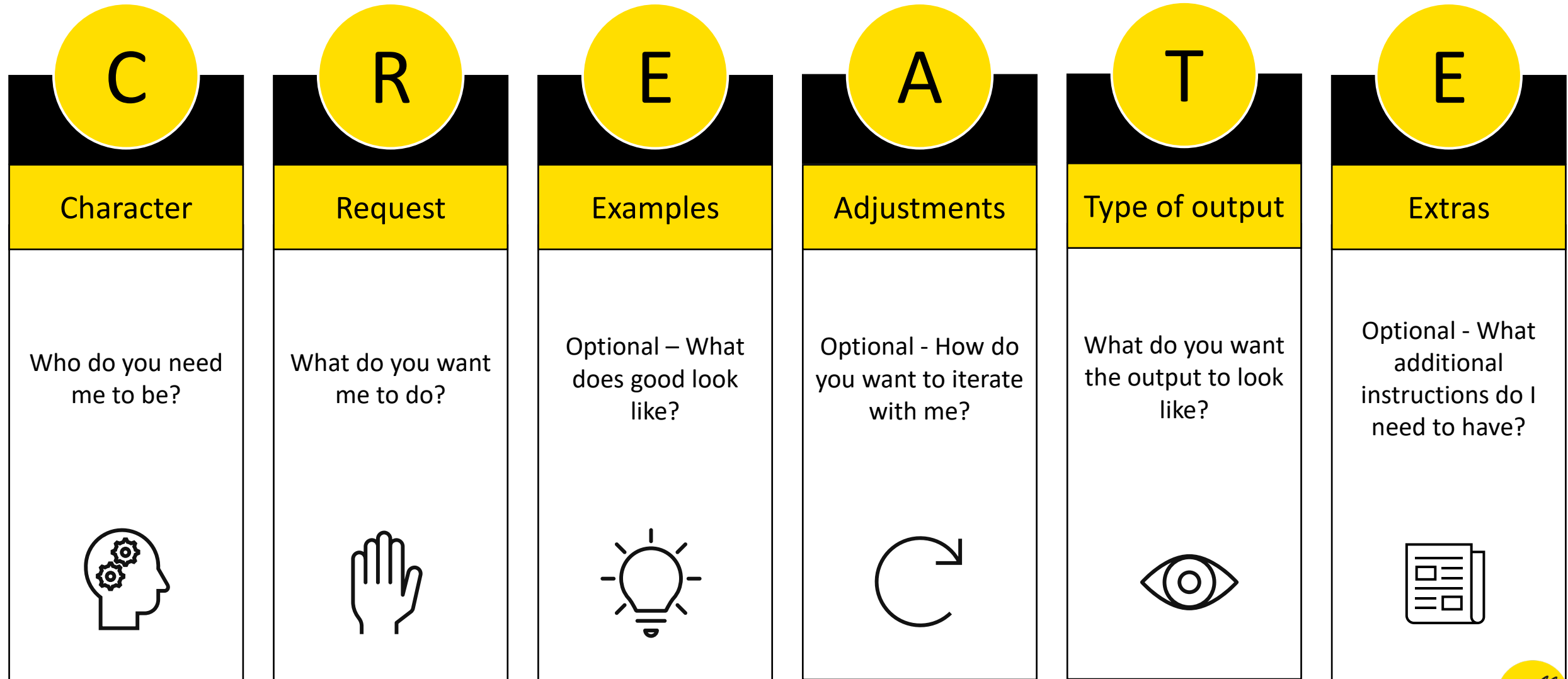
Agentic AI Integration

AI agents scale efficiency across functions, enabling enterprise-level collaboration and efficiency





Introduction to C.R.E.A.T.E. Framework





Recommended AI & Data Resources



The Data Lodge

A leading source for Data & AI Literacy training, tools, and hands-on support



IIA – International Institute for Analytics

Expert guidance on AI & Data strategy, best practices, and accelerating analytics & AI maturity



Ai-Driven Leader Podcast – Geoff Woods

Insightful conversations on how AI reshapes leadership, work, and human-machine collaboration



Closing Insights: How to Lead AI Adoption

People-First AI Adoption

Putting people at the center ensures smoother AI integration, stronger engagement, and faster adoption

Driving Business Transformation

Thoughtful, high-value use cases accelerate transformation and deliver measurable business impact

Lessons to Embrace AI

Effective change management empowers organizations to confidently adopt AI and sustain long-term success

Connect with me



Curtis Winegar

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Do the work you're
most proud of at Pella.

