



From a proven pilot to the team running it

Transition is the controlled move from a four-week pilot to Greystone's own team running the three agreed skills day to day. The pilot met every success criterion and the COO approved the rollout, so this plan sets out the eight-day handover, the readiness checklist, the first-month ramp and how support continues afterwards.

CLIENT	MOVE	PILOT
Greystone FM Group	Pilot to team rollout	23 Feb to 20 Mar 2026
GO-LIVE	REFERENCE	STAGE
1 April 2026 · 3 packs	BT0-GFM-STP-001	04 of 4 · Transition

Illustrative example: fictional project and parties.

47

Pilot outputs, 3 packs, 4 weeks

86%

Pilot quality, target 80%

8.2

Reviewer feedback, out of 10

8

Working days, pilot to go-live

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PILOT OUTCOMES

What the pilot proved

Over four weeks in the pilot, Greystone's analysts prepared 47 outputs across Commercial Control Kit, Margin Cockpit and the Dispatch Desk. First-pass approval quality averaged 86% against an 80% target, reviewer feedback scored 8.2 out of 10, and there were no governance breaches and no data incidents. D. Farrow approved the rollout on 24 March with a go-live date of 1 April 2026.

CRITERION	TARGET	ACTUAL	STATUS
Output quality, first-pass approval	80% or better	86%	Exceeded
Turnaround time	3 days or less	2.6 days	Met
Governance compliance	Zero breaches	0	Met
Data handling	Zero incidents	0	Met
Reviewer feedback	7 of 10 or better	8.2 of 10	Exceeded
COO approval to proceed	Required	Given, 24 Mar	Approved

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TIMELINE & RACI

Eight working days, with clear ownership

Five phases move the engagement from pilot close-out to steady state over eight working days. The Skills Lead is responsible throughout, the COO is accountable for acceptance and targets, and the IT Manager owns the environment and access.

PHASE	WHEN	FOCUS
1. Close-out	23 to 24 Mar	Compile pilot results, present to the COO, record lessons and template refinements
2. Acceptance	25 to 26 Mar	Accept the skills against the Statement of Work, confirm targets, issue the onboarding pack
3. Environment	27 and 30 Mar	Set up the workspace and Claude environment with L. Osei, test a full run, switch on input checks
4. Training	31 Mar	Train analysts and reviewers, walk the weekly cycle, run a dry run on pilot data
5. Go-live	1 April	First live records filed, Week 1 cycle runs, first summary issued Friday 3 April

ACTIVITY	RESPONSIBLE	ACCOUNTABLE	CONSULTED
Pilot close-out report	S. Okoro	D. Farrow	J. Whitmore
Skills acceptance sign-off	S. Okoro	D. Farrow	K. Rhodes, T. Brennan
Workspace and access setup	S. Okoro	L. Osei	J. Whitmore
Training and dry run	J. Whitmore	K. Rhodes, T. Brennan	L. Osei
Go-live, Week 1	S. Okoro	K. Rhodes, T. Brennan	L. Osei

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READINESS

Ready before Week 1 begins

A pre-go-live checklist confirms the environment, the data and the governance are all in place. Every item is completed before the first live cycle runs.

AREA	CONFIRMED BEFORE GO-LIVE
Technical setup	Workspace created, Claude environment configured and tested, input checks on, users set up
Access	Reviewer and owner access set for K. Rhodes, T. Brennan and L. Osei; a full test run completed
Skills and templates	CCK templates at V2.0 from the pilot; Cockpit and Dispatch templates at V1.0
Registers loaded	Contract register, 14 contracts; site register, 42 sites with SLA matrices
Governance	Onboarding pack issued, targets agreed, escalation matrix and Q2 calendar confirmed

A DELIBERATE RAMP

Weeks 1 and 2 run at lower volume so the analysts and reviewers can validate the records-to-approval loop before full steady-state volume from Week 3.

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FIRST MONTH & SUPPORT

The first month, and how support continues

The first month ramps volume gradually while the rhythm settles, ending with the Month 1 Governance Review on 4 May. The 90-day success criteria are measured at the Q2 QBR: on-time 95% or better, quality 90% or better by Month 3, reviewer satisfaction 7 of 10 or better, zero breaches and incidents, and evidenced commercial recovery.

WEEK	FOCUS	PLANNED OUTPUTS
Week 1, 1 to 3 Apr	Establish the rhythm, first live cycle	CCK 4, Cockpit 2, Dispatch 8
Week 2, 6 to 10 Apr	Increase volume, start the variation backlog	CCK 6, Cockpit 2, Dispatch 10
Week 3, 13 to 17 Apr	Steady-state target volume across all packs	CCK 7, Cockpit 3, Dispatch 10
Week 4, 20 to 24 Apr	Steady state, prepare Month 1 report	CCK 8, Cockpit 3, Dispatch 12

HOW IT CONTINUES

Greystone runs the skills day to day from go-live, reviewed each quarter at the QBR. New skills, scope changes and any continuing BuiltAI support are agreed separately with COO approval, and nothing is added without a written quote. The build is a one-off package that runs in Greystone's own environment, and every approved output stays in its workspace.