TEMPLATE P20 · ADOPTION AND CAPACITY PLAN

Adoption and capacity plan

Plans how people will adopt the AI system, what training they need and what will be done with the released capacity, and allows it to be monitored with indicators.

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01

Instructions for use

Aspect	Guidance
When it is used	It is prepared in phase 4 (G4 evidence), executed in phase 5, monitored in phase 6 and evaluated in phase 7.
Who completes it	AI Product Owner, with the user area and the people function.
Who verifies it	AI Office under Lite; AI Auditor under Enterprise.
At which *gate* it is reviewed	G4 (plan), G5 (adoption in the pilot), R6 (monitoring) and G7 (capacity materialised or reallocated).

Aspect	Guidance
Lite versus Enterprise	Lite may omit the fields marked **(Enterprise)**. Augment and Transform use cases must have an adoption and people plan (01 §3, principle 10).
Tool	T20 Adoption and capacity plan.
Relationship	P17 Human oversight · P22 Pilot results · P28 Value realisation monitoring · P31 Use case record · documents 23 (Adoption and change) and 50 (People and organisation).

Rules:

- **Released capacity does not count as savings** until it materialises as a lower actual cost or is explicitly reallocated (measurement rule 3, 00 §6). This plan sets its destination; P28 records what actually happens.
- Training for those who operate or oversee the system forms part of the AI literacy that the company must ensure (document 34).

02

Identification

Field	Content	Guidance
Use case code		IA-AAAA-NNN (T01).
Use case name		
Ambition level		Optimise · Augment · Transform.
Intensity		Lite · Enterprise.
User area or areas		
Document version		
Author		Role and name.
Date		DD-MM-AAAA.
Document status		Draft · Submitted for verification · Verified · Approved · Superseded.

03

Affected people and change in their work

Change in work: No change · Automated tasks · New tasks · Change of role · Change of organisational position.

Group	No. of people	Change in work	Description of the change	Expected impact (Low · Medium · High)	Contact person
Claims handlers *(illustrative example)*	40	Automated tasks and new tasks	They no longer classify and draft the first response; they review proposals and handle complex cases	Medium	Head of claims

Field	Content	Guidance
Information to employee representatives		Yes · No · Not applicable. Date, form and reference to P46. Mandatory in the same way in Lite and Enterprise where applicable (23 §13.2). Where the system affects working conditions, check with employment law advisers the applicable information and consultation obligations (within the scope of the EU AI Act and national employment legislation).
Organisational risks identified		Reference to the ORG category risks in P12.

04

Adoption targets

Indicator	Definition	Baseline	Target	Time frame	Source
Effective use	People who use the system at least once a week ÷ expected people				
Process coverage	Cases handled with the system ÷ total cases				
Human override rate	Proposals rejected or corrected ÷ reviewed				P25
User satisfaction (Enterprise)	Pulse survey with a declared scale (P44)				

Indicator	Definition	Baseline	Target	Time frame	Source

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Training and AI literacy

Group	Content	Format	Hours per person	Planned date	Evidence of completion
Designated overseers (P17)	Capabilities and limitations of the system; risk of over-reliance; how to correct, override and interrupt	In person with practical cases			Attendance record and test
Users	Use, limits and what must not be entered into the system				
Managers and supervisors	Indicators, aggregate oversight and escalation				

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Communication

Message	Audience	Channel	Date	Owner
What the system is, what it is for and what does not change *(illustrative example)*	User area	Team meeting and internal note	Two weeks before the pilot	AI Product Owner

07

Released capacity and its destination

Planned destination (50 §6.4): PER-D1 Materialise as lower actual cost · PER-D2 Reassign to a defined activity · PER-D3 Absorb growth · PER-D4 Reinvest in quality, service or compliance · PER-D5 No decision. **Status of the estimate:** Validated · Declared · Estimated.

Group or activity	Hours released per period	Formula	Status	Planned destination	Destination activity or cost item that is reduced	Decision owner	Planned date
Claims handlers *(illustrative example)*	1,100 h/month	5,500 cases/month × 12 min saved per case ÷ 60	Estimated	Explicit reallocation	Proactive service to customers with repeat claims	Area management	Month 3 after go-live

Notes:

- Absorption of volume growth only counts as value if the cost that would have been incurred without the system is documented (P08).
- PER-D4 does not add up unless translated into money with a formula (rule 7). "No decision" (PER-D5) is a valid answer in the plan, does not add up and is reported separately, but it must be resolved before G7; in Optimise, G7 requires materialised savings and in Augment, reassigned capacity (01 §7.6).

08

Monitoring

Period	Indicator	Actual	Target	Deviation	Action and owner

Field	Content	Guidance
Monitoring frequency		Monthly during the first six months; thereafter, at each R6.
Who receives the monitoring		AI Sponsor and, under Enterprise, the AI Committee.
Adoption threshold that triggers a review		For example, effective use below target for two periods; links to the stop reason *No adoption*.

09

Quality criteria

Formal G4, G5 and G7 criteria in document 21.

#	Check	Status (Met · Not met · Not applicable · Pending)
1	All affected groups are identified with their change in work.	
2	Adoption targets are measurable, with a baseline, time frame and source.	
3	The overseers designated in P17 have planned and recorded training.	
4	Released capacity has a formula, status and planned destination, and is not presented as savings.	
5	There is monitoring with a threshold that triggers a review.	
6	In Augment and Transform, the plan includes the effect on roles and responsibilities.	

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Approval and verification

Function	Role	Name	Date	Signature or reference
Author	AI Product Owner			
Commitment on the destination of capacity	Management of the user area			
Verifier	AI Office (Lite) · AI Auditor (Enterprise)			
***Gate* decision-maker**	According to 01 §7.5 (recorded in P29)			

Segregation of duties: the verifier is not part of the team that builds.

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Version control

Version	Date	Changes
0.1	16-09-2026	First version of the template.

External sources cited

Links to the official or primary source, checked before publication. Always verify the version in force on the date of use.

Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence (Artificial Intelligence Act) · https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng · Parlamento Europeo y Consejo de la UE · 13-06-2024