



Empowering Craigs Investment Partners

Accelerating AI Adoption with Microsoft 365 Copilot

CASE STUDY PREPARED BY
Kambium Consulting

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Introduction

When Craigs Investment Partners set out to empower their people with AI, they knew success would depend on more than just technology, it would require a **true partnership**.



As one of New Zealand's largest and most respected wealth management firms, Craigs serves over 70,000 clients with a team of 650+ professionals across more than 20 locations. Renowned for research-driven insights and comprehensive advisory services, Craigs is committed to delivering a personalised client experience and maintaining its leadership in a rapidly evolving financial landscape.

Responding to Change with Vision and Speed

The Need

Craigs Investment Partners issued a nationwide Request for Proposal (RFP) seeking a partner to deliver Microsoft 365 Copilot training to nearly 500 licensed users across its network. With a vision of "AI at your Side" the objective was clear:



From the very first conversation, Craigs' team brought clarity, energy, and a willingness to collaborate that made every milestone achievable. Kambium responded with a comprehensive, tailored proposal drawing on deep experience in regulated industries and a proven track record in AI adoption. Following a competitive process, Kambium was selected as Craigs' training partner.

A Collaborative, Tailored Training Programme

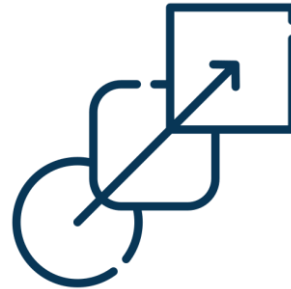
The Solution

Together, we designed a programme that was practical, people-centred, and built for real-world impact.



Deep Customisation

Training content was adapted to reflect Craigs' advisory and private wealth assistant workflows, ensuring relevance and immediate applicability.



Blended Delivery

Training was made accessible to all Microsoft 365 users, ensuring broad reach and inclusivity, with in-depth, tailored sessions for licensed users.



Behavioural Change Integration

Sessions addressed not just the "how" but the "why" and fostering the mindset shifts needed to work effectively alongside AI.



Sustainable Enablement

Post-training resources including digital assessments, and on-demand materials supported ongoing adoption.

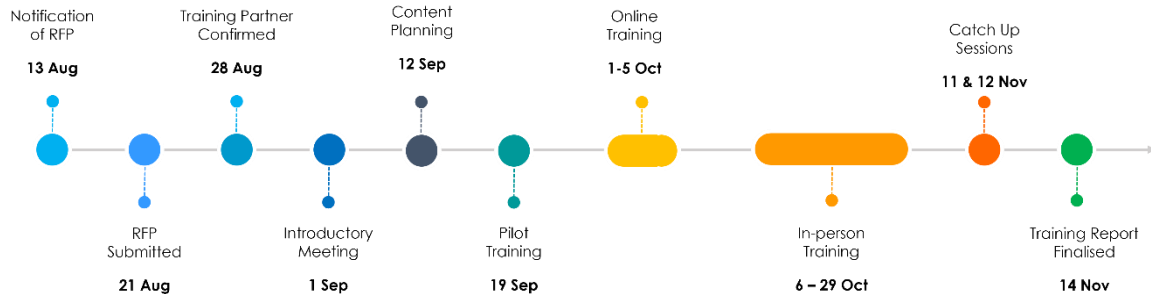
"Our engagement with Kambium during the Copilot 365 rollout was exceptional. What stood out most was their deep subject matter expertise, outstanding facilitation skills and adaptability to scope and schedule changes. Their collaborative approach and professionalism made the entire process seamless and enjoyable. We are confident in recommending Kambium as a trusted partner for any organisation."

Regardt Klopper

Head of Business Change, Craigs Investment Partners

Real Results & Impact

Key Milestones in the Copilot Training Journey



National Training Coverage & Metrics Snapshot



650+

Total Staff

20+

Locations across NZ

50+

Onsite Training sessions

80%

In-person training attendance

90%

Active Copilot users post-training

Engagement, Agility, and Shared Learning

Partnership in Action

What truly set this engagement apart was Craigs' proactive, collaborative approach. Their leadership and project teams were highly engaged, providing clear direction, rapid feedback, and decisive action. This partnership enabled:



Accelerated Timelines

Key milestones, from RFP to rollout, were achieved at pace, with Craigs' readiness to make decisions quickly ensuring momentum was maintained.



Seamless Coordination

The involvement of Craigs' Change Manager and a national Change Agent network streamlined logistics and communications, minimising disruption and maximising participation.



Culture of Openness

Craigs' willingness to share insights and co-design solutions fostered a sense of shared ownership and trust, making the process both efficient and enjoyable for all involved.

As the project wrapped up, the insights gathered first-hand from training sessions and on-the-ground observations combined with Kambium's experience in digital transformation helped Craigs identify practical next steps and shape a clear roadmap for sustaining their AI journey. This collaborative learning approach ensured recommendations were grounded in real user needs and organisational context.

"Working alongside the Craigs Investment Partners team was a genuine pleasure. The pace and quality of decision-making, combined with a clear focus on outcomes, meant we could achieve real momentum together. It's rare to encounter a partner so invested in both the process and the people involved. Craigs' approach made this project not only successful, but truly rewarding for everyone at Kambium."

Rhys Kerrigan

Head of Professional Services, Kambium Consulting

The partnership between Craigs Investment Partners and Kambium demonstrates what's possible when organisations combine vision, engagement, and practical expertise. As Craigs continues its journey with AI, the lessons learned here offer a roadmap for others seeking to drive meaningful change.

Key Elements for Success

Our experience partnering with Craigs Investment Partners surfaced several key elements that can inform other organisations embarking on AI adoption and digital transformation:

1. Engaged Leadership Accelerates Change

We observed that visible, committed leadership was essential to driving momentum and overcoming barriers. When leaders are accessible, empower decision-makers, and communicate a clear vision, projects move faster and teams are more engaged.

Recommendation: For any organisation, ensure leadership is actively involved and sets the tone for change from the outset.

2. Customisation Drives Adoption

Tailoring training and enablement to real-world workflows and business scenarios made the learning immediately relevant and valuable for participants. Investing time to understand the unique needs of different roles led to practical outcomes and higher adoption rates.

Recommendation: Prioritise user-centric design, listen to your people, adapt content to their context, and keep feedback loops open.

3. Ongoing Support Sustains Momentum

The journey with AI and digital tools doesn't end at rollout. Ongoing support, refresher sessions, and advanced workshops are vital to embed new ways of working and adapt to evolving technology.

Recommendation: Establish champions, provide accessible resources, and create opportunities for peer learning to maintain engagement and foster a culture of continuous improvement.

4. Leverage Insights for Strategic Road mapping

First-hand observations from training, combined with participant feedback, provided actionable insights for Craigs' next steps. Using these insights to inform a clear roadmap ensures future investments in AI are targeted and aligned with business goals.

Recommendation: Capture and analyse feedback throughout your project and use it to shape your ongoing digital strategy.

5. Foster a Culture of Openness and Experimentation

Craigs' willingness to share feedback, ask questions, and explore new ideas was instrumental in shaping the program's success.

Recommendation: Encourage curiosity and create safe spaces for experimentation. This will help sustain innovation and keep your organisation at the forefront of digital transformation.

Are you ready to accelerate your own digital transformation?

Contact Kambium to discuss how we can help your organisation unlock the value of AI and empower your people for the future.



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