A GUIDE FOR LEADERS

AI adoption begins with leadership

Understanding the organization comes first.

You do not need to understand every AI platform to begin. You can start with the questions you already hold as a leader: What are we trying to accomplish? Where are people getting stuck? What deserves more of our attention?

The pressure to adopt AI can make choosing a tool feel urgent. But a tool cannot tell you whether a process still serves its purpose, why your team relies on a particular conversation, or what someone stands to lose when their work changes.

Without that understanding, you can end up making broken processes move faster, or removing the parts of a role that create meaning and value.

People's questions belong in the planning.

What will this mean for my job? Will my experience still matter? Who will make decisions about my work? These are reasonable questions. You may not have every answer yet. You can still make room for people to shape what comes next.

What kind of work are we trying to create?

Use this guide to explore one recurring piece of work with the people who know it. The next pages offer five questions, an example, and space to decide what to do next.

MAKE SENSE OF THE OPPORTUNITY

Start with what you know

Choose a specific activity, such as responding to customer questions or preparing a recurring report. Walk through what actually happens, including the informal steps that keep things working.

01 / What work is really happening?

Where does the work begin and end? Where do people repeat effort, wait for information, or work around a problem? Ask what causes the friction before deciding what to automate.

02 / What do we want to make possible?

What would improve for the people doing or receiving this work? Perhaps it is more reliable answers, fewer interruptions, or more time for relationships. If you save time, decide what that time should make room for.

03 / What will this mean for people?

Who knows this work best, and who depends on it? Ask what they would welcome help with and what they would worry about losing. Be clear about what is open for input, what has been decided, and what remains uncertain.

04 / Where does human judgment matter?

Which steps require context, discretion, trust, or responsibility for another person? Name who will check the work, make decisions, and respond when something goes wrong. Consider what learning opportunities people still need.

05 / What could we try and learn from?

Choose one small change. It might involve clearer ownership, a simpler process, conventional automation, or AI assistance. Agree on what improvement would look like and when you will decide whether to continue.

You do not need to decide your organization's entire AI strategy to take one thoughtful next step.

What if the questions reveal something bigger?

You may find that the opportunity involves unclear roles, stretched capacity, or processes your team has outgrown. The Roadmap gives you dedicated support to understand how those pieces fit together and decide what needs attention first.

Explore the Roadmap | Book a Call

The same question, asked again and again

Imagine a team that spends hours answering recurring customer questions. An AI tool that drafts replies sounds promising. Before introducing it, the leader asks the team to walk through the work.

What they discover

Some questions repeat because customers cannot find clear guidance. Others look routine but involve a past promise, an unusual situation, or a relationship that needs care. Experienced staff know the difference; that knowledge is not fully documented.

What they want to improve

Customers should get useful, consistent answers. Staff should spend less time rewriting basic information and have more room for situations that need their attention. The team also wants newer colleagues to keep learning how to recognize exceptions.

What they choose to try

First, they clarify who maintains customer guidance. Then they test AI-assisted drafts for one narrow category of routine questions, using approved guidance and fictional examples. A team member checks each draft for accuracy, tone, and missing context. Exceptions stay with a person.

What they look for

They compare the time spent drafting, reviewing, and correcting with their current approach. They also ask whether the answers are useful and whether staff feel better supported. A quick draft that takes longer to fix is not an improvement.

The starting point was a question about capacity. Understanding the work revealed where technology might help and what the team needed to preserve.

A CONVERSATION WITH YOUR TEAM

Explore one piece of work

Invite the people who do and depend on this work. Capture different perspectives; disagreement can show you where more understanding is needed.

The work we are exploring

Name the activity and the people contributing to this conversation.

01 / What happens today?

Where does effort get lost? What is causing the friction?

02 / What would better make possible?

What should improve, and what is valuable about the work as it is?

03 / What are people telling us?

What help would they welcome? What concerns or unanswered questions remain?

04 / What needs human judgment?

What must people decide, check, or handle personally? Who will own that responsibility?

TURN UNDERSTANDING INTO A NEXT STEP

Choose what to try

A useful next step may be a process change, an AI experiment, or another conversation. Choose the step that addresses what you have learned.

Our next step

What will we change, and what do we hope it will make possible?

The people and boundaries

Who will shape and own it? What stays with people? If using AI, what tools and information are appropriate?

How we will learn

What will we compare with today: quality, total effort, people's experience? Who reviews the results, and when?

When we will reconsider

What would tell us to continue, revise, or stop? What do we still need to understand?

Let's make a plan for what comes next.

You don't need every answer before asking for help. Whether you are exploring possibilities or already making changes, our Roadmap helps you clarify your priorities, involve your people, and develop practical next steps for your organization.

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