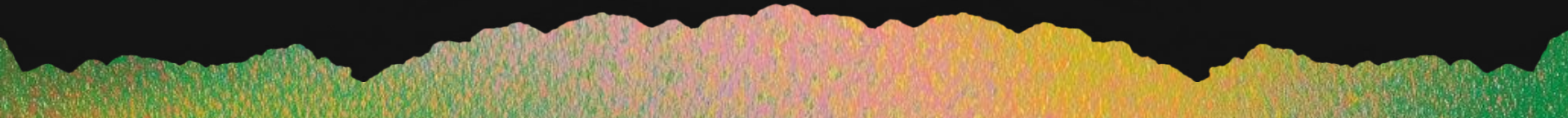


section

# Sample AI Transformation Plan

What you can expect from our 8-week sprint



# Today: Scattered, grassroots AI experimentation

11% AI proficiency with most employees using AI in a curious, but unstandardized, low-impact way

Gap	Evidence	Consequence
Vision & Strategy	74% report no AI strategy	AI efforts stay tactical, fragmented, and disconnected from business objectives
Ownership & Implementation	54% report no approach to AI implementation	Pilots are scattered and resources are misallocated or lacking
Culture & Enablement	18% report AI use is expected	AI is seen as a nice-to-have and valuable use is concentrated among proactive enthusiasts
Application	24% are getting value from AI	AI is stuck at low-value tasks and is not integrated into team-wide workflows

# To drive progress, you need a strong central team and focus on 2-3 business units

- [CLIENT] is a massive, federated organization with vastly different business objectives, ways of working, and leadership styles
- In 2026, [CLIENT] should focus on two big things:
  - Set up central enablement infrastructure critical to AI scaling and build overall workforce AI capability
  - Pick 2-3 business units to become AI-powered — go all in with investment and focus, and as a result get models for the rest of the organization

# AI Enablement Foundation

## Goal

Set the **enterprise foundations** that make AI safe, accessible, and easy to adopt across [CLIENT], enabling **workforce adoption** and **scalable business impact**.



## Why now

Without a **shared foundation**, [CLIENT] faces **uneven adoption**, tool sprawl, higher risk exposure, and **isolated wins that don't scale**.

## Dedicated workstreams needed over next 12 months

### AI Manifesto & Launch

Get people excited about AI and using enterprise-grade tools

### Core Employee Enablement

Provide access to foundational, current AI training on latest capabilities and tools

### Team Operating Model

Set central and BU roles and responsibilities for alignment and progress

### Executive Cadence

Set recurring forum to review progress on AI metrics and initiatives, and knowledge share

## Results in 12 months

**80%** certified in ProfAI | **50%** LLM DAU | Executives meeting 2-4x per year

# ChatGPT launch is the make-or-break moment for adoption

This is the first time most employees will decide whether AI is a tool they trust and use because they buy the value, or just another central message they tune out.

## Setting up a successful ChatGPT launch

### Mobilize Leaders

**Goal**

Executive ownership to drive AI adoption locally day one

**What it looks like**

Executive 30-60-90 plan to drive DAU on their teams

### Launch GPT to Employees

**Goal**

Clarity, excitement, and trusted entryway to AI

**What it looks like**

Live, practitioner-led launch that are practical and human

### Kickstart Valuable AI Use

**Goal**

Fast time-to-value for every employee

**What it looks like**

3 thought partner AI use cases to try immediately

# Federated AI only works with clear ownership

## AI Transformation Office

### Executive Sponsor – NAME

*Set vision and hold leaders accountable*

### Executive Owner — NAME

*Own company-wide tech/adoption enablement*

### Advisory Council — IT, HR, Legal

*Guide on risk, security, compliance*

### AI Enablement Lead — New Role

*Drive company-wide adoption outcomes*

### AI Enablement Analyst — New Role

*Build change management asset for BUs*

### AI Product & Engineering — New Role

*Build org-wide AI apps and support BUs*

### AI Operations — New Role

*Support execution and tracking*

## Network, Region, and/or Business Unit

### Executive Sponsor

*Own vision and strategy for their domain*

### AI Lead

*Own execution of AI adoption and roadmap*

### AI Champions

*Share knowledge and coach peers*

### AI Operators - New Role

*Track progress against AI goals/projects*

## What's at risk with unclear ownership:

Stalled progress without accountability

Duplicative, multiplying efforts

Adoption stays optional

AI workflows don't happen at scale

Talent frustration and credibility loss

# Executive operating rhythm that demands accountability and coordination

This is the mechanism that turns roles/ownership into follow-through and prevents stalled progress.

## Executive Reporting Model

### Daily Active Usage

*% across enterprise LLMs*

### AI Proficiency

*% ProfAI certification*

### Top 3 AI Initiatives

*What is in flight and the status*

### AI Win

*Success and learnings*

### AI Loss

*Failure and learnings*

### AI Solution/Agent Spotlight

*Problem solved, type of solution, learnings*

### Blockers and Asks

*What's needed from other leaders or central team for progress*

# [CLIENT] action plan

## AI Manifesto & LLM Launch

- Craft messaging for 3 audiences (executives, managers, and employees)
- Local leadership customize the AI Manifesto based on business goals, impact of AI, and ways of working
- Define ideal Day 1, Week 1, Month 1 employee experience with formally using AI with approved tools
- Define launch success metrics and timeframe for initial measurement
- Set cadence to track and prepare interventions depending on progress
- Create 1-month communications campaign for 3 audiences based on ideal onboarding journey (teaser, launch, reminders, weekly use case)
- Write communications assets for email and Teams
- Create localization guidance with messaging, templates, and FAQs
- Build employee onboarding one-pager with practical instructions to login and set up LLMs, as well as 2-4 thought partner prompts
- Build leadership onboarding and kickoff plan prior to employee rollout with guidance on how to lead this transformation and practical to-dos
- Run 3 leadership kickoff sessions live
- Build plan for broadcast launch events (agenda, speakers, demos, Q&A)
- Identify and practice 3 employee-led AI demos for the broadcast launch event
- Run 6 employee broadcast launch events live

## Team Operating Model

- Discuss and agree on overarching AI transformation approach (i.e., Central team owns enablement and BU owns business outcomes) acknowledging there will be gray moments)
- Decide how to segment the organization and which leaders are accountable for reporting up on progress (e.g., Is it a combination of Network and Regional leadership?)
- Define and document central and BU roles and responsibilities, as well as decision rights
- Review with executive leadership team and get buy-in on the operating mode, role playing scenarios for understanding and pressure testing
- Build hiring plan and job descriptions for 2026 roles on central AI team
- Communicate approach and practical ways of working with the organization

## Core Employee Enablement

- Maintain Section Coach as core training platform and certification to unlock LLM access
- Define required v. optional learning paths in ProfAI or other formats for priority roles like managers or builders
- Craft messaging about Coach use coach tailored to champions, managers, and leaders
- Develop a comms campaign to drive continued awareness around ProfAI use case coach
- Business units run workshops: 2x for leaders, 2x for champions, 2x for all employees
- Delivered target workshops to accelerate adoption and advanced, valuable use
- Create central AI newsletter approach (AI use case, employee spotlight, resources/upcoming events)
- Write 12x AI newsletter
- Provide enablement kits for BUs to run training (templates, facilitation guides, exercises)
- Establish a feedback channel for enablement needs
- Refresh enablement resources quarterly based on new capabilities and leadership/employee feedback

## Executive Cadence

- Define enterprise and BU milestones and KPIs to track and report out on
- Decide on the appropriate forum, level, and frequency
- Stand up standard preparation process with a standard reporting template for consistency
- Build meeting plan (agenda, speakers, small group sharing/discussion)
- Document actions/owners and track follow-through between meetings
- Tie AI progress to leadership MBOs, even if initially all qualitative
- Publish quarterly AI progress/priorities update to organization following session

# What it takes to deliver this plan

## Big rocks

- Launch AI with a clear “why and how we use AI at [CLIENT]” narrative
- Stand up AI Transformation Office and make the case for resources
- Determine how to segment the org and assign accountable leaders
- Pick select business units for accelerated transformation
- Establish the executive operating rhythm

## Why you need to get this right

***If you get this wrong, AI becomes another central rollout with uneven adoption, duplicated effort, and no scalable path to impact.***

# AI First Workforce

## Goal

Make **AI the standard** for how employees work day-to-day by building the skills and habits to **improve productivity/quality** and **quickly adopt new AI capabilities**.



## Why now

Without building workforce skills and habits, [CLIENT] will see uneven capability that limits value even when AI is embedded into core workflows.

## Dedicated workstreams needed over next 12 months

### Leadership Activation

Equip leaders/managers to set expectations, model use, and reinforce AI day-to-day

### Role-Based Activation

Ensure every role has personalized use cases delivered through ProfAI/targeted workshops

### AI Champion Program

Establish peer network responsible for accelerating adoption, coaching, and sharing

### AI Operators Program

Create an execution network responsible for tracking, escalating, and liaising

## Results in 12 months

**50%** DAU | **50%** proficient | **1** self-built GPT/agent per proficient employee

# Don't wait for organic adoption only: accelerate adoption in high-impact roles

## What it is

- Targeted activation for small set of high impact roles
  - E.g., Pick three roles in one of the flagship business units
- Each role gets ready-to-implement intermediate AI use cases with supporting materials
- Delivered with resources and live, hands-on workshops
- Designed to complement ProfAI

## What it achieves

- Accelerate valuable adoption
- Build momentum with early, quick wins
- Create pockets of excellence

## Real Client Example

Section built custom five AI use cases for nine functions in their tool suite:

### Example #1

- **AI Superpower:** Strategize
- **Tool:** Claude with Projects
- **Use Case:** Create a Partner Hub in Claude Projects with all contracts and meeting notes

### Example #2

- **AI Superpower:** Automate
- **Tool:** Claude Cowork
- **Use Case:** Synthesize meeting notes to create an executive summary and KPI dashboard

# Champions are the local adoption engine make AI consistent and relevant

## Target Profile

- ✓ AI power user and high performer
- ✓ Functional expertise and technical skillset (no-code, agentic automation, agents)
- ✓ Builder and experimenter mindset
- ✓ Engaging, clear communicator
- ✓ Strong leadership and peer influence

## Monthly Responsibilities

- Run **1 Lunch & Learn** with an AI demo
- Run **1 Office Hours** to troubleshoot peer questions
- Offer **6 1x1 Coaching** slots
- Spend **~15 minutes in Teams** talking about AI
- Contribute to **1 AI Workflow Pilot**
- Do **1 Feedback Call** with the central team

## Leadership Support

It's on executive leadership and managers to ensure champions have bandwidth and public support to work with peers. Central and BU leadership should collaborate on incentives and celebrating contributions.

# Champions network is only as strong as the enablement behind it

## Sample AI Champion Toolkit

### Teams Moderation

**Goal:** Foster active, ongoing AI conversations to surface new use cases, strengthen the team's AI skills, and keep AI top-of-mind

#### Your Task

1. Post discussion prompt weekly on Tuesdays
2. Dedicate ~10 minutes daily to replying and answering questions
3. Tag peers into conversations

#### Example Prompts

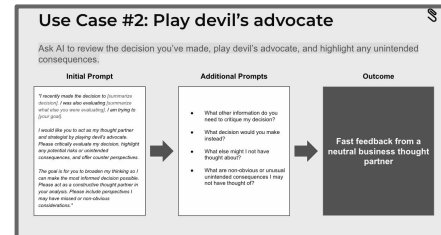
Share an AI rose and thorn — one use case that worked well and one that flopped. What were you trying to do, and what was your take on the process and outcome?

### Lunch & Learn

**Goal:** Help your team learn a new AI as thought partner use case in a safe environment open to experimentation and questions

#### Your Task

1. Prepare your demo with an example
2. Schedule 30-minute Lunch & Learn
3. Explain use case and demo it in ChatGPT
4. Answer questions and invite discussion
5. Share takeaways in Teams afterwards



# Sustained AI use requires consistent reinforcement, and space to test and learn

Week 1	Week 2	Week 3	Week 4
<i>What central team does</i>			
<b>AI Newsletter</b>		<b>AI for Managers Workshop</b>	
<i>What leadership, operators, and champions do</i>			
<b>AI Demo in Team Town Hall</b>	<b>AI Lunch &amp; Learn</b>	<b>AI Challenge in teams</b>	<b>AI Office Hours</b>
<i>What is always on</i>			
Find ready-to-use prompts in the <b>AI Use Case Library</b> , get tips and discuss in <b>AI Teams Channels</b> , ask <b>AI Champions</b> for support, contribute to active <b>AI Pilots</b>			

# [CLIENT] action plan

## Leadership Activation

- Define region/BU leadership/manager expectations, and communicate it to them
- Build an executive enablement kit with messaging, comms templates, and resources
- Run AI for Executives Workshop 6x per year with supplementary ProfAI follow up resources
- Build a manager enablement kit with messaging, comms templates, and resources
- Run AI for Managers Workshop 6x per year with supplementary ProfAI follow up resources
- Build a comms campaign for both audiences
- Identify executive/manager exemplars to gather lessons learned from and celebrate

## Role-Based Activation

- Central team does higher touch role-based activation in Year 1
- Pick 3 roles per quarter in the select business units and define five custom use cases tied to real workflows
- Design and deliver 3 live, hands-on workshops per quarter for learning and practicing these use cases
- Provide an actionable resource packet for each role
- Build a custom communications campaign pushing employees to role-based use cases and programs in ProfAI

## AI Champion Program

- Define champion archetypes (coach v. builder) and expectations (time commitment, responsibilities, success measures)
- Identify inspirational, hands-on AI leader to run the program
- Recruit and onboard ~100 champions across regions/BUs
- Set operating cadence: run 12 meetings per year with standard agenda and establish an always-on Teams channel
- Build programming for 12 meetings (e.g., Teach an advanced AI feature or use case every meeting, prepare attendee to share case study, bring in external speakers)
- Build monthly champion toolkit with calendar, to-dos, resources, templates to implement on the ground consistently
- Require champions to contribute learnings and reusable assets to shared repository
- Create recognition and reinforcement to keep the network active

## AI Operators Program

- Define operator role and scope (coordination, action tracking, risk/issue management, metric tracking) focusing this role on core adoption activities and AI pilots
- Recruit operators by region/BU to ensure organization-wide coverage
- Identify operations leader to run the program
- Set operating cadence and run 12 meetings per year with a standard agenda
- Implement an action tracking system and escalation path for major blockers

# What it takes to deliver this plan

## Big rocks

- Build workforce AI proficiency as a required baseline via ProfAI
- Prioritize 2-3 roles in business units for role-based accelerators
- Activate leaders/managers to reinforce AI use
- Stand up champions network to drive local, customized adoption
- Stand up operators to coordinate execution and keep momentum

## Why you need to get this right

***If you get this wrong, capability stays low an AI remains optional, so adoption stalls after launch and workflow automations underdeliver without skilled workforce.***

# Select AI Powered Business Units

## Goal

**Drive measurable business outcomes** at the BU level by embedding AI into core workflows and services, **improving margin/speed** while **enabling new growth**.



## Why now

Without BU-level workflow execution, [CLIENT] will see adoption without measurable, step-change business outcomes hindering AI from translating into margin or growth gains.

**Dedicated workstreams needed over next 12 months**

### Central AI Pilot Playbook

Provide a recommended process and template to prioritize, build, run, and evaluate AI pilots

### Select Shared Tools

Build [CLIENT]-wide AI apps for cross-org, high-impact use cases

### AI Roadmapping

Brainstorm, map, and score potential workflows to augment with AI at the region/business unit level

### AI Pilot Execution

Build, test, and evaluate 1-3 AI-augmented workflows quarterly

## Results in 12 months

5 [CLIENT]-wide agents | 1-3 agents per business unit in consistent use

# Pilot process to build and test augmenting workflows with AI



## Example: Pitch Credentials Preparation

Run discovery on Growth to surface opportunities, then focus on pitch preparation as a priority use case

Assess viability and ROI of building an AI agent on top of existing content hub, map old/new process, and write case

Build and pilot AI agent for 2-3 pitches with varying needs to evaluate speed, output quality, and adoption

Decide whether to scale (or not) to all teams, plan for more development, and support users with training

### Illustrative ROI Framework

**Today:** 1 person spends 16 hours (converted to \$) to create credential materials per pitch

**Business Value:** 80% reduction in time spent available to focus on more new business

**Future:** 1 person spends 1-2 hours checking and honing automatically generated materials

**Financial Impact:** \$X saved per pitch

# [CLIENT] action plan

## Central AI Pilot Playbook

- Define the end-to-end AI workflow pilot lifecycle: discovery, business case, test in live work, scale/stop decision, and rollout
- Create prioritization criteria and scoring rubric (e.g., value, viability, velocity)
- Build core templates and best practice guidance: workflow brief, business case, pilot plan, scale/stop criteria
- Publish “how to run a pilot” in a continuously updated document
- Run 6x per year training for champions, leaders, and relevant employees on how to run a pilot
- Create reusable document standard so pilots can be shared
- Require executives to maintain a running list of pilots and scale/stop decisions to avoid duplicative work or lost knowledge

## Central AI Tools

- Identify 3-5 cross-organization use cases with clear value and measurable impact
- Run discovery process
- Define build v. buy v. configure decision criteria (time to value, maintenance, integration needs, risk)
- Set product requirement for each tool
- Build MVPs and test with 2-3 pilot BUs with feedback loop
- Plan rollout and enablement

## AI Roadmapping

- Run Cut v. Create session with executives/leaders to identify high impact AI opportunities
- Run workflow discovery sessions with employees to unpack pain points
- Create workflow opportunity maps
- Score and prioritize a quarterly shortlist using central rubric and select 1-3 to execute
- Build business case and pilot plan for selected pilots
- Maintain a roadmap document with all ideas prioritized

## AI Pilot Execution

- Define the pilot team for each workflow (owner, builder, operator, champion)
- Build the no-code, agentic automation, or agentic solutions with a speed-oriented mindset
- Run the pilot in live work with a defined user cohort and timeline to capture data and feedback
- Evaluate outcomes using agreed upon measures documenting wins, losses, lessons learned
- Decide whether to scale, iterate, or stop
- If expanding, make a plan to do additional development and create enablement materials
- Contribute the AI augmented workflow to the shared library for other BUs to reuse

# What it takes to deliver this plan

## Big rocks

- Get leadership clear on why and how behind AI pilots
- Appoint AI Lead and task with owning AI pilots
- Establish a repeatable method to prioritize, test, evaluate AI pilots
- Build execution capacity via trained builders and delivery pods
- Create shared library of reusable automations/patterns to enable reuse

## Why you need to get this right

***If you get this wrong, usage never translates into business results, and AI value stays anecdotal and individual, instead of improving margin and growth.***