

Executive Action Follow-Up Guide

For attendees of “**A Playbook for Leading Technology and Innovation in Traditional Environments**”

Presented by: Alicia M. Morgan, PMP®, AM-MC® – Innovation Strategist

Theme: Unite • Empower • Elevate

How to Use This Guide

This follow-up guide helps you apply what you learned. Complete each section's readiness check to assess your organization's current state. Then use the 90-Day Action Plan to identify specific steps that strengthen structure, capability, and leadership alignment. For deeper exploration, access the complete Playbook on GitHub for templates, examples, and implementation tools.

Leadership and Governance Readiness

Purpose: Clarify roles and decision-making authority for technology oversight.

Question: Are leadership roles clearly defined for policy and accountability?

- A formal role exists to manage and approve policy updates
- That role has clear authority to set project priorities
- A designated person monitors external rules and updates internal policies
- Both positions have measurable performance outcomes
- These roles are built into project approval and funding decisions

Score: ____ /5

 If 0–2: Clarify leadership roles and authority immediately

Next Step: Identify and appoint leaders responsible for policy and oversight with written charters and success criteria.

Notes:

Notes:

Scaling Readiness

Purpose: Ensure pilots can move safely and effectively into full implementation.

Question: Can new technology projects move confidently from pilot to production?

- Compliance and review steps are documented and consistently followed
- A privacy and risk review is required before any system expansion
- Threats and unintended impacts are reviewed before scaling
- Ethical impact questions are part of approval discussions
- Plans exist to pause or roll back systems if needed

Score: ___ /5

 If 0–2: Projects may not be ready to scale safely

Next Step: Begin a privacy and risk review for upcoming projects and document the process for all teams to follow.

Notes:

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Team Capability Readiness

Purpose: Equip teams with the knowledge and structure to manage technology responsibly.

Question: Are your teams prepared and trained for responsible technology oversight?

- Policy and legal teams are trained on data and technology principles
- Operations staff understand how to monitor and report on system performance
- A cross-functional review team exists for ongoing oversight (policy, technology, ethics)
- Leadership supports training and accountability across teams
- Funding is set aside for ongoing learning and skill development

Score: ___ /5

 If 0–2: Teams need structured training and oversight planning

Next Step: Form a cross-functional governance group and plan targeted team training sessions.

Notes:

Notes:

Ethical Review Checklist

Use this before any major technology deployment:

- Purpose Alignment: Does this system serve a clear mission or service need?
- Data Quality: Are data sources verified and appropriate for use?
- Human Oversight: Can people review, question, or intervene in automated outcomes?
- De-escalation Plan: Can the system be paused or corrected quickly if needed?
- Transparency: Can outcomes be explained and traced back to their inputs?

Reminder: This checklist should be completed before full deployment.

Notes:

Your 90-Day Action Plan

Notes / Priorities:

Access the Full Playbook

 Scan the QR Code



Alicia M Morgan

 Visit: <https://github.com/AliciaMMorgan/cross-industry-pm-playbook-ai-transformation>

 Connect: <https://www.linkedin.com/in/aliciammorgan1/>

 Contact: alicia@aliciammorgan.com

Key Takeaways:

- “We don’t stop risk; we structure our way through it.”
- “Know your risk attitude and those of your team and stakeholders (risk-averse, risk-seeking, neutral, or risk-tolerant). They shape how everyone structures decisions.” ([Learn more in my PM World Journal article on risk attitudes.](#))

Governance should enable, not restrict, innovation. This playbook provides the structure to accomplish both.

| Focus Area | Key Action | Responsible Person | Timeline |
|-------------------------|---|--------------------|----------|
| Leadership & Governance | Appoint policy and oversight leads | _____ | 30 days |
| Scaling | Launch privacy and risk review process | _____ | 45 days |
| Team Capability | Establish cross-functional review group | _____ | 60 days |