

# Executive Action Follow-Up Guide

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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.

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## 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.

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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.

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## 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.

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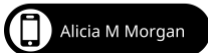
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# Your 90-Day Action Plan

Notes / Priorities:

Access the Full Playbook

 Scan the QR Code



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

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

 Contact: [alicia@aliciammorgan.com](mailto: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