A Playbook for Leading Technology and Innovation in Traditional Environments

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Theme: Unite, Empower, Elevate!

Evolution in Leadership

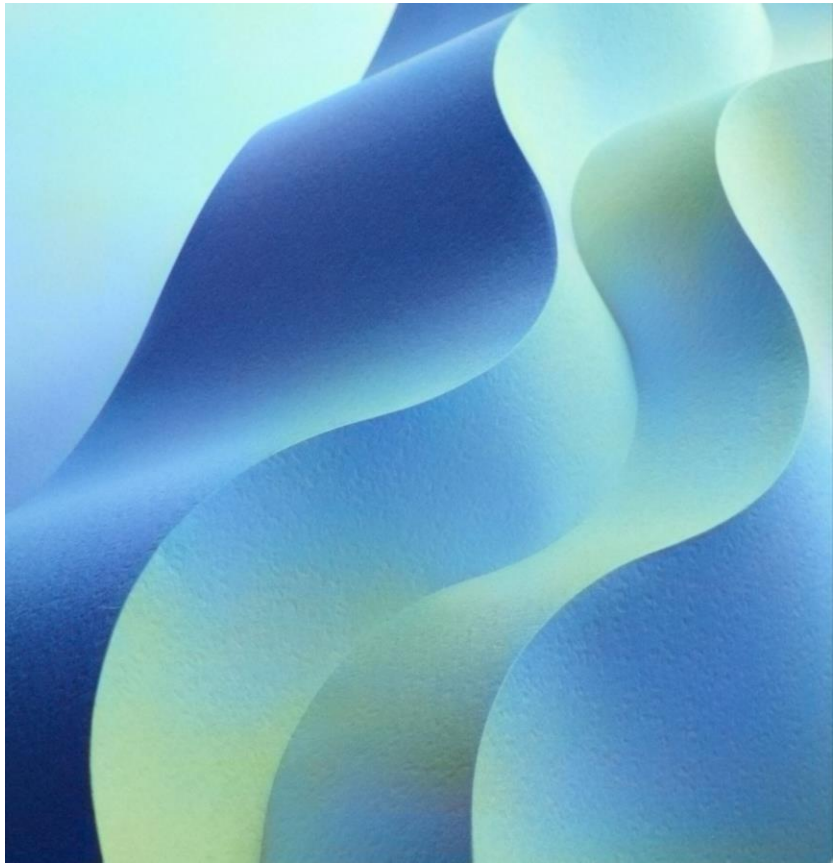
- 2017 EWTG Conference "**Leading with Executive Presence**" focus was executive presence for personal influence and advancement.
- 2025 Applying Executive Leadership to **Strategic Execution Excellence** in regulated environments.
- **Opening Insight:** How do we transition from managing crisis and compliance failures to **Thinking Capital** that drives Strategic Execution Excellence?

Learning Objectives

Lead	Empower	Navigate
Lead technology advancement using project management practices tailored for traditional, high-compliance sectors.	Empower cross-functional teams to adopt emerging tools (AI, data platforms, systems) with agility and structure.	Navigate governance, ethics and data risks when delivering innovation and technology advancement at scale.

The Execution Challenge

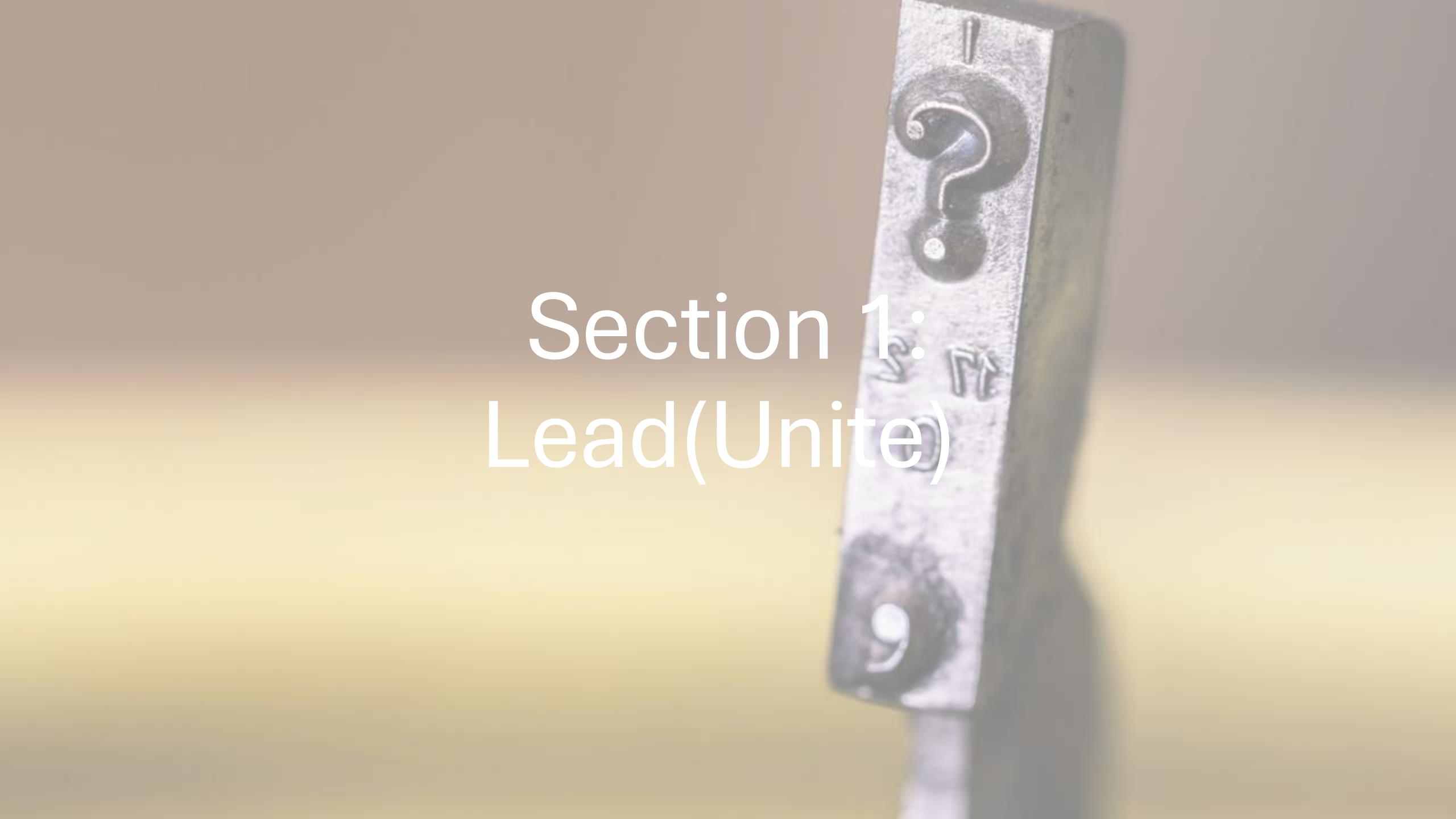
- Rapid GenAI adoption vs. legacy system limitations
- AI-powered cyber threats vs. compliance gaps
- Solution: Auditable structure for risk-managed deployment



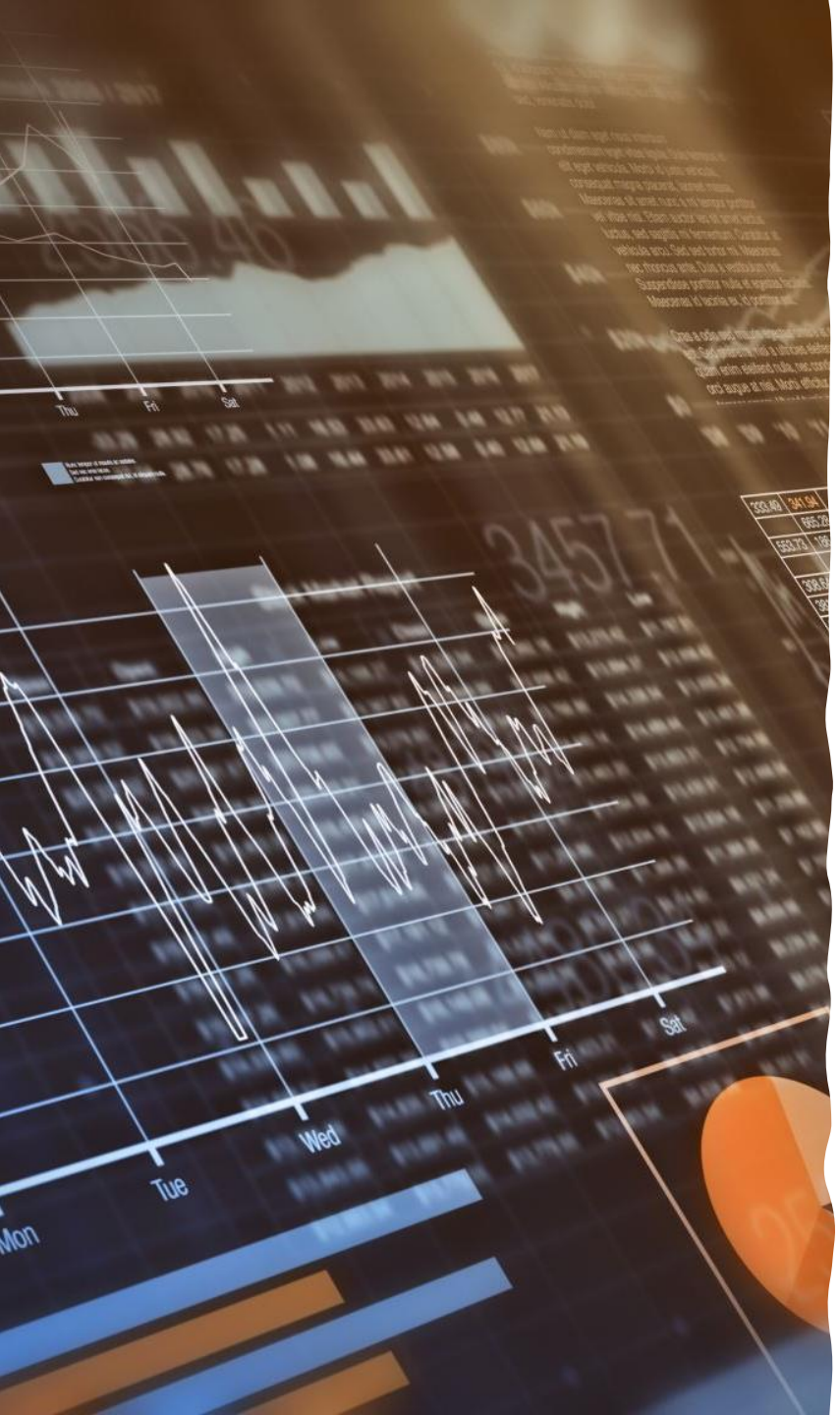
Governing Technology and Innovation

Technology: Playbook mandates, auditable structure for all emerging tools, transforming risk into compliant capability.

Innovation: We ensure governance enables - not restricts - the scaling of breakthrough initiatives across the enterprise, advancing our mission with discipline and speed.



Section 1: Lead(Unite)



Governance Must Win

- Accelerating AI adoption creates a structural gap between technology speed and existing governance controls.
- Existing processes fail to guarantee reliable data inventory or consistent project oversight, creating critical compliance gaps.
- Leadership must mandate a redesign of PM practices to close execution and audit gaps before scaling technology.

Accountability is Key

- Legal & Policy Vetting: Mandatory sign-off for statutory alignment
- Security & Data Vetting: National Institute of Standards and Technology(NIST) Framework compliance
- Executive Sponsor: Final authorization and risk acceptance

Structure Sets Control

The Legislative Liaison: Tracks and monitors legislative changes relevant to the technology portfolio.

Policy Product Owner: Owns the project backlog, acting as the critical bridge between vision and compliance.

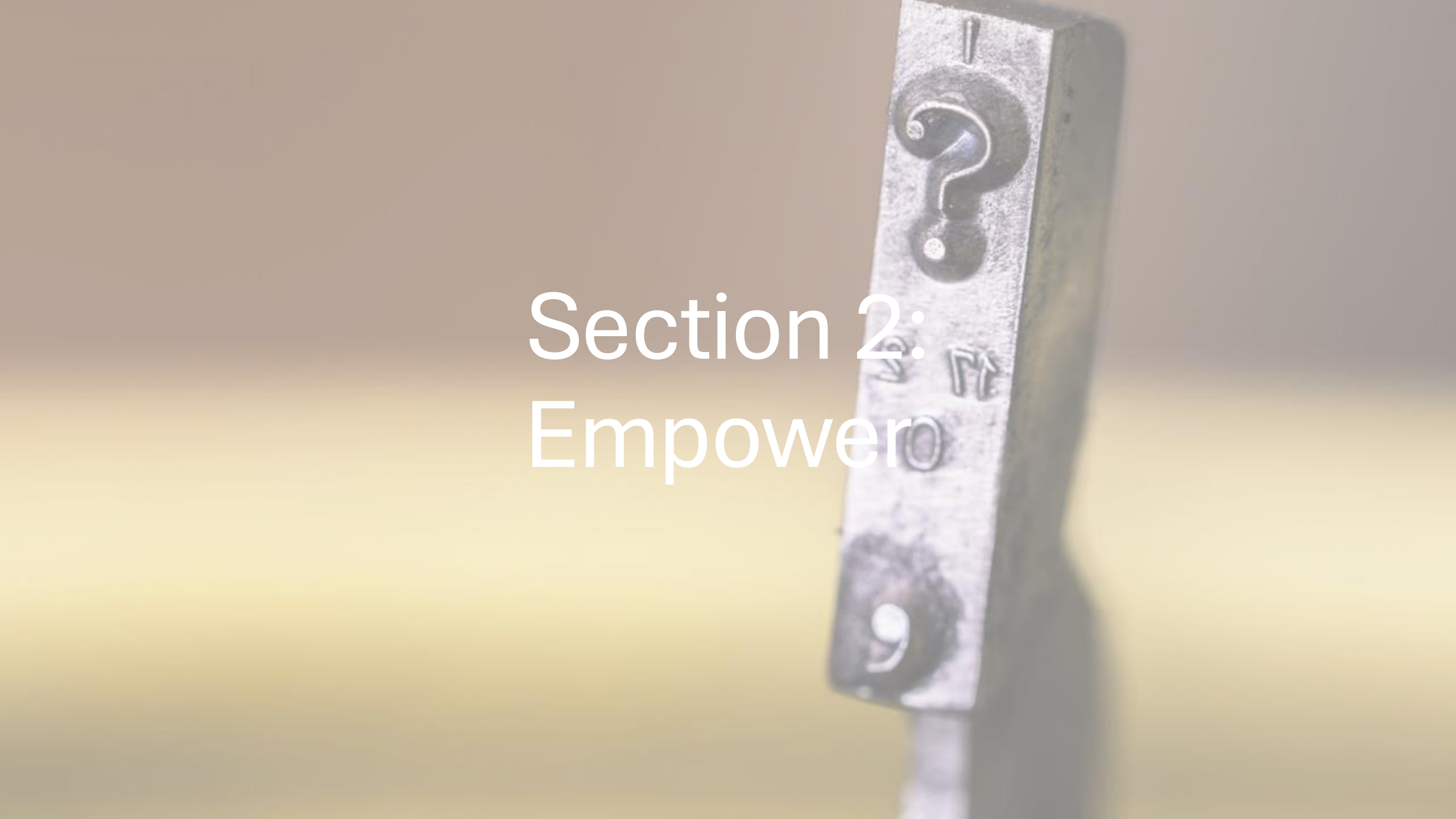
The Cross-Functional Compliance Team: Executes the mandatory policy, security, and ethics vetting checks.

TEXAS HB 5195: MANDATORY

- Mandate: Modernize all state digital services and websites to meet new statewide standards.
- Challenge: Upgrade legacy systems while preserving trust, security, and seamless service delivery.
- Playbook Solution: Embed governance, compliance, and security in every modernization milestone to deliver validated, high-quality outcomes.

Lead Playbook Actions

Appoint	Appoint Legislative Liaison & Policy Product Owner (PPO) by [30 days]
Activate	Activate Compliance Gate controls on 3 high-priority initiatives
Initiate	Initiate Agency Data Audit to close Government Accountability Office(GAO) gaps
Mandate	All three actions before technology deployment



Section 2: Empower

Scaling Barrier

Key Barrier: The inability to scale innovation stops high-value initiatives (e.g., AI policy-answering tools and enterprise data dashboards) from reaching full adoption.

Focus: Frameworks must unlock productivity by demanding enterprise-grade governance from the start.

Mantra: Structure risk, don't stop innovation.

Empower Your Teams

- **Human Capital:** The collaborative knowledge, skill, and expertise of the workforce, focused on achieving AI/Data literacy for governance and legal roles.
- **Social Capital:** The internal network of mutual trust that facilitates rapid, cross-functional compliance and risk decisions.
- **Innovation Capital:** The credibility and reputation earned by consistently linking compliant execution to high-priority business value.

Structured For Adoption

1

Phase 1: Phase 1: Controlled Pilot (30-60 days)

2

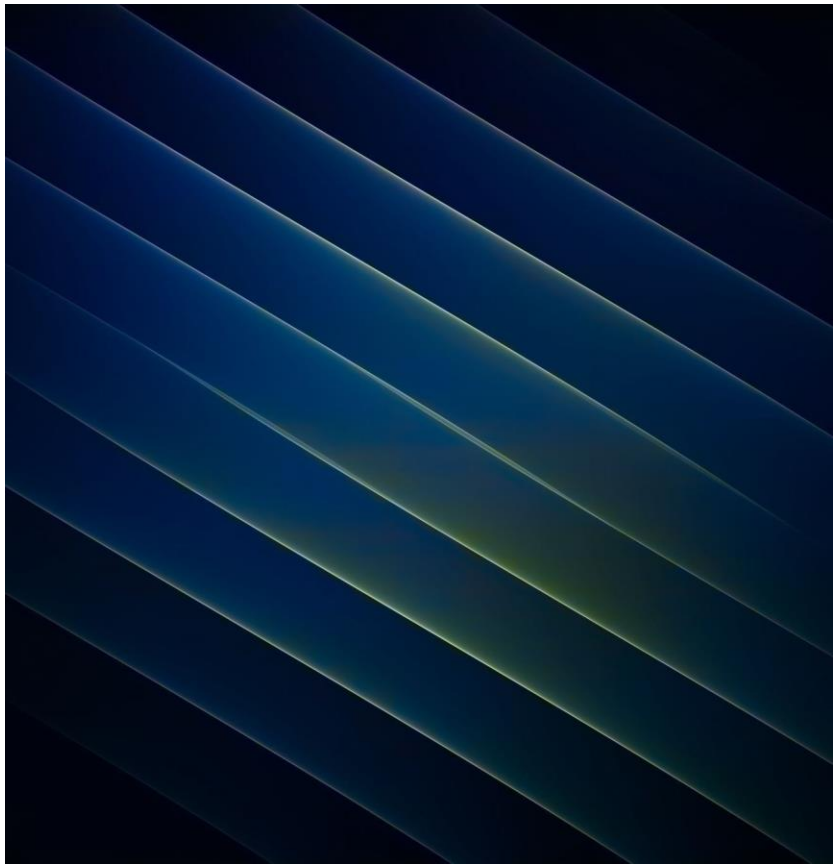
Phase 2: Review & Adjust
Review & Adjust - Threat Modeling + PIA (60-90 days)

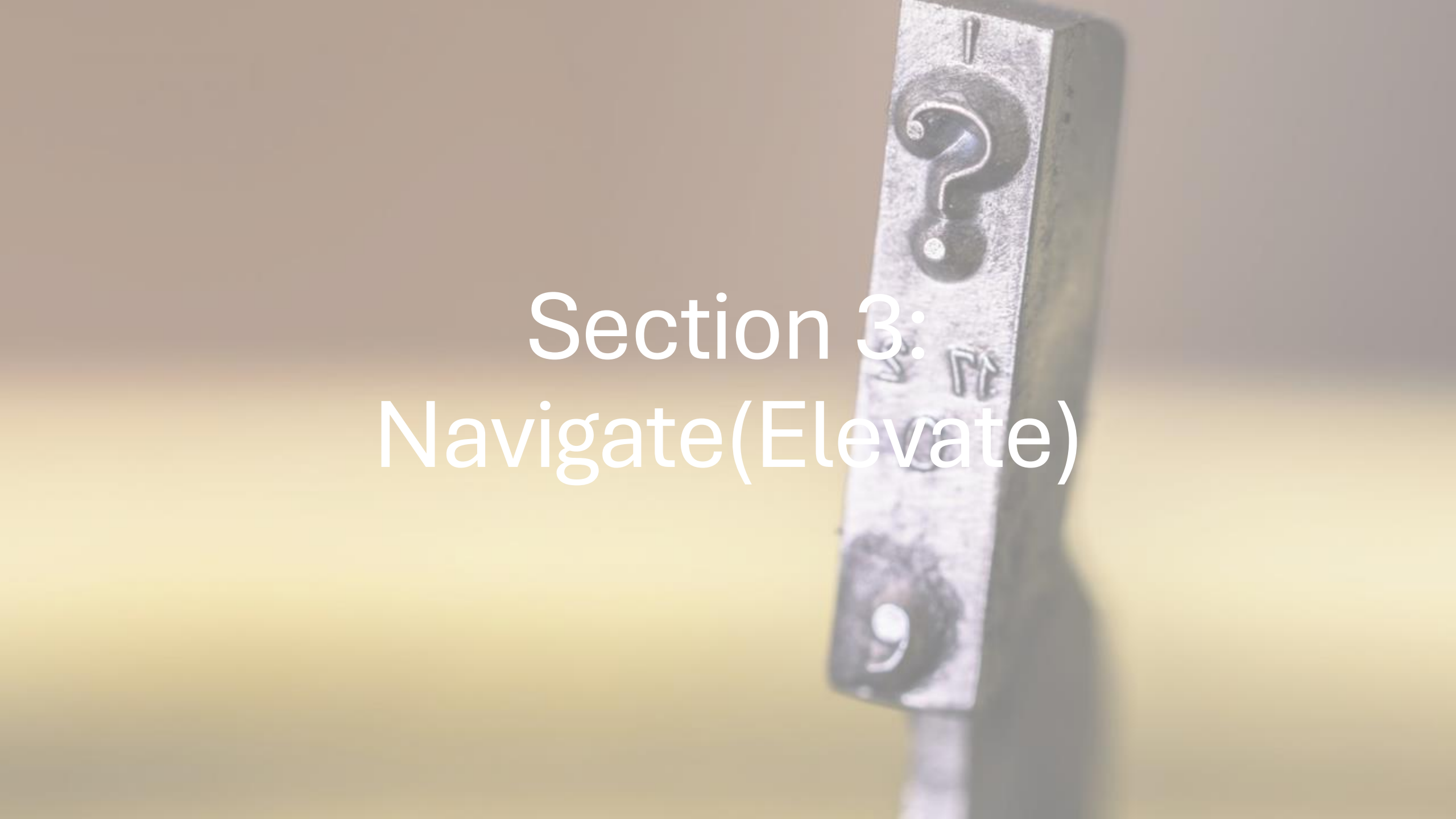
3

Phase 3: Scale & Train
Scale & Train - Enterprise deployment (90+ days)

Empower Playbook Actions

Establish	AI Governance Task Force (Legal, IT, Ethics)
Require	Privacy Impact Assessment (PIA) for all Phase 2 pilots
Allocate	Training budget for Policy & Legal teams
Mandate	Task Force charter signed within 45 days





Section 3: Navigate(Elevate)

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Navigate Governance

- Proactively add ethical and governance checks to preserve public trust in all major deployments.
- New Risk: Trust fails due to lack of algorithmic transparency, embedded bias, or data breaches.
- Solution: The NIST Risk Management Framework transforms risk into a predictable, design constraint by providing a verifiable standard.

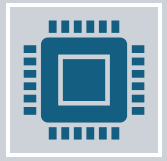
The Three Pillars of Trust

- **Pillar 1:** Consistency & Neutrality: Protect against unintended outputs and ensure decision making is standardized across all data sets
- **Pillar 2:** Data Integrity & Resilience: Implement Secure by Design principles to guarantee data validity and system continuity
- **Pillar 3:** Human Oversight & Vetting: Guarantee clear human involvement, explanation, and final authorization for all automated decisions.

Texas Legislative Context:

Data Security Gate: SB 765 (Security of personal identifying information)

Application: The Project must demonstrate pre-deployment compliance with SB 765.



AI Governance Gate: HB 149 (Monitored concerning the use of artificial intelligence)

Application: The Project must pass an internal review against the spirit of this bill.

Executive Ethics Pre-Review Checklist

- ✅ Use Case Alignment
- ✅ Data Governance & Quality
- ✅ Human in the Loop
- ✅ De-escalation Plan
- ✅ Explainability & Technical Transparency

Navigate Playbook Actions

Executive review: Ethics Pre-Review Checklist for next major deployment

Audit compliance against Three Pillars of Trust

Transform modernization into validated, compliant public services

Mandate: Ethics review required before any production release

Integration & Closing

Recap: Playbook

Lead: We close the Execution Gap for mandating Compliance Gate controls and establishing PPO roles across all major initiatives

Empower: We break the Scaling Barrier by formalizing the Adoption Engine and investing in the AI Governance Task Force

Navigate: We achieve Strategic Execution Excellence by mandating verifiable compliance with the Three Pillars of Trust and Ethics Oversight

Your Executive Execution Strategy

IMMEDIATE: Self-Assessment

- Governance Gap: Do you have PPO & Legislative Liaison roles?
- Scaling Gap: Can pilots move to production with current gates?
- Capability Gap: Are teams trained for AI governance duties?

STRATEGIC FOLLOW-ON (Next 90 Days)

- Initiate PPO appointment
- Commission Privacy Impact Assessment
- Schedule first Compliance Gate Review

Resources & Q&A

GITHUB PLAYBOOK ACCESS

- Scan or Visit:
- https://github.com/AliciaMMorgan/cross-industry-pm-playbook-ai-transformation

Can't scan?

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