

Lesson 6.1

Facilitating The AI-Native Value Workshop: Value Proposal



AINOM® Course - Attending this course gives learners access to related course materials.



Learning Objectives

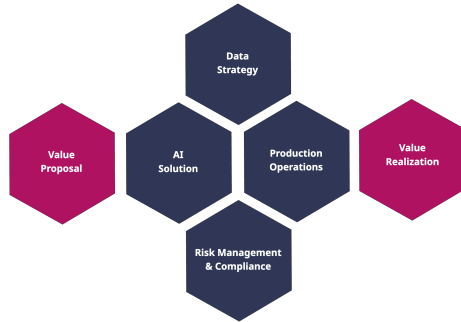
By the end of this lesson, you will:

- ▶ Define the core business challenge or opportunity and quantify its current impact or cost of inaction.
- ▶ Identify primary beneficiaries and key stakeholders, capturing their interests, influence, and potential resistance points.
- ▶ Set SMART success metrics—baseline and target values—covering both leading and lagging indicators that will demonstrate business value.
- ▶ Explain the sustainable competitive advantage or differentiation that the AI solution will create once the problem is solved.

WIIFM: Connect your AI idea to real business value and learn to define success in numbers that leadership understands.

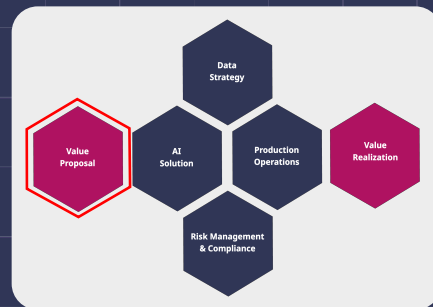
The AI-Native Value Blueprint

The Big Picture Overview



The Editable Form

Section 1: Value Proposal



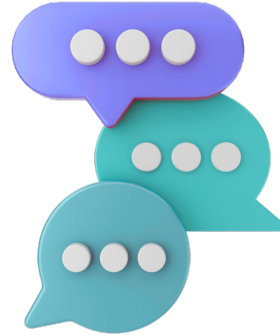


What Makes an AI Project Fail?

5 min

Group Discussion

- ▶ Let's use a quick case study. A company spent one year and \$2 million building a flawless mobile app to help its sales team access product information with a chatbot while on the road. The project came in under budget and earlier than expected. It was a success. Six months after launch, 90% of the sales team was still using their old, messy binders.
- ▶ At your table, discuss: What questions did the project team fail to ask the sales team before they started building?



Value Proposal Sub-Sections

Value Proposal

1. Value Proposal	
Challenge or Opportunity	Define the specific challenge or opportunity this AI solution addresses. Include quantifiable impact and cost of inaction. <div></div>
Stakeholders	Identify primary users, decision-makers, and all affected parties. Include their interests and potential resistance points. <div></div>
Success Metrics	Define specific, measurable outcomes with baseline and target values. Include both leading and lagging indicators. <div></div>
Value Capture	Explain how this AI solution creates sustainable advantage and what makes it defensible. Define how organizational outcomes are achieved and measured. <div></div>

What Goes Into Each Section

► Challenge or Opportunity

- **Input:** Discovery findings, quantified pain points, Potential Opportunities
- **Output:** Specific problem statement with the cost of inaction
- **Verify:** "What happens if we do nothing?"

► Stakeholders

- **Input:** Charter list + discovery insights
- **Output:** Interests and resistance points mapped
- **Verify:** "Who has to change behavior for success?"

► Success Metrics

- **Input:** Current baselines, business KPIs
- **Output:** SMART goals with timelines
- **Verify:** "How do we measure success?"

► Value Capture

- **Input:** Competitive landscape, strategic priorities
- **Output:** Sustainable advantage definition
- **Verify:** "What becomes possible that isn't today?"

Value Proposal: Not Linear, But Iterative

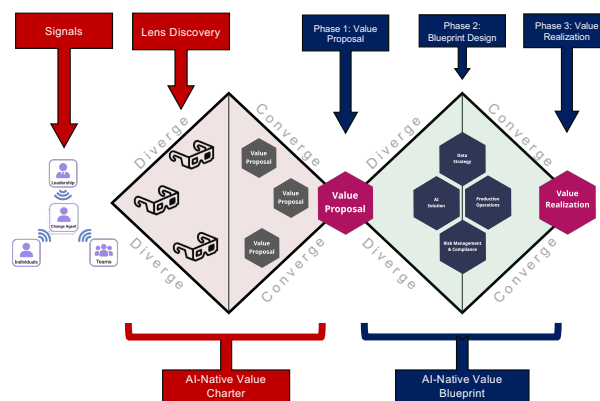
► First: Divergent Thinking (Explore)

- Surface all perspectives on the challenge
- Capture different definitions of success
- Let creative tension emerge

► Then: Convergent Thinking (Align)

- Find common ground between viewpoints
- Synthesize into a unified direction
- Commit to a specific, measurable thesis

► Expect 2-3 rounds before full alignment.



Getting Clear on the Real Problem

- ▶ Ask: "What's the specific business problem to be solved or opportunity to be seized today?" ...not "What AI could we build?"
- ▶ Use the "5 Whys" technique to dig past surface symptoms and observations
- ▶ Capture the exact words stakeholders use - it matters later (use AI notetakers if possible)
- ▶ Push for numbers: time lost, money spent, opportunities missed
- ▶ REMEMBER: Success Factor 1 - Anchor AI to Business Value starts here

Challenge or Opportunity	<i>Define the specific challenge or opportunity this AI solution addresses. Include quantifiable impact and cost of inaction.</i> <div></div>
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Mapping Who's Involved

- ▶ Question: "Who wins if this works? Who might resist? Who must change behavior?"
- ▶ Capture interests, not just titles: "What does success look like for you personally?"
- ▶ Find hidden stakeholders: "Who else touches this process?"
- ▶ Write down resistance points clearly - they become your change management focus

Stakeholders	<i>Identify primary users, decision-makers, and all affected parties. Include their interests and potential resistance points.</i> <div></div>
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Setting Success Metrics That Matter

- ▶ Lead with: "How will we know this worked?" not "What metrics should we track?"
- ▶ Separate activity metrics from outcome metrics - push for outcomes
- ▶ Use SMART goals but focus on business relevance
- ▶ Test each metric: "If this improved but nothing else changed, would you call it success?"

Success Metrics	<i>Define specific, measurable outcomes with baseline and target values. Include both leading and lagging indicators.</i> <div></div>
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Creating Lasting Competitive Advantage

- ▶ Ask: "What becomes possible that isn't today?" not just "What gets easier?"
- ▶ Explore transformation: "How might this change your business model?"
- ▶ Push beyond efficiency: "Where's the sustainable advantage?"
- ▶ Document the moat: "Why couldn't competitors just copy this?"
- ▶ REMEMBER: Success Factor 6 - Embed AI into the Everyday means finding lasting value

Value Capture	<i>Explain how this AI solution creates sustainable advantage and what makes it defensible. Define how organizational outcomes are achieved and measured.</i> <div></div>
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Facilitating the value proposal Section

Common Challenges	What You Hear	Your Response
Solution Creep	<i>"We need an AI chatbot."</i>	<i>"That's a great idea we can come back to. First, help me understand the problem it solves."</i>
Vague Metrics	<i>"We want to improve efficiency."</i>	<i>"Let's get specific. How many hours/dollars are we losing today?"</i>
Stakeholder Overload	<i>"This impacts everyone."</i>	<i>"Who are the core people who must change their behavior for success?"</i>
Fuzzy Value Statements	<i>"We'll have a competitive advantage"</i>	<i>"What specifically will we be able to do that competitors can't?"</i>

Aligning Cross-Functional Priorities

- ▶ **Pattern:** Finance wants ROI, Operations wants simplicity, IT wants security
 - Use "Both/and" not "either/or" thinking: "How might we achieve both?"
 - When visions clash: Find the shared pain point underneath
 - Write down tensions clearly - they'll resurface in later sections
- ▶ **Capturing Decisions for Later**
 - Write down exact language - "customer happiness" vs "satisfaction" matters
 - Note areas of strong agreement AND creative tension
 - Document assumptions: "We believe customers will..." needs validation
 - Create your "true north" reference point for trade-offs

Pro Tips

- ▶ Start where the energy is highest - if they're excited about metrics, start there
- ▶ Write directly into the Blueprint as you go - visible progress builds momentum
- ▶ Use discovery quotes: "In our conversation, you said [X]. Let's explore that..."
- ▶ When stuck, return to the cost of inaction: "What happens if we do nothing?"
- ▶ **Remember:** You're facilitating alignment, not providing answers. The best value proposal comes from the group, not from you.



Expertise

Ready for Next Phase?

- ▶ **Confirm:** Everyone aligned on the problem, stakeholders, metrics, and value?
- ▶ **Preview:** Next section is based on your discovery insights (which Entry Point?)
- ▶ **Set expectations:** All sections connect back to this foundation



VERIDIAN FLUX

Opening Brief - Rescuing Project Cygnus

- ▶ We are shifting from theory to practice. Think of this as an AI-Native Blueprint Simulator for facilitation. You've learned the principles; now it's time to get in the cockpit.
- ▶ **The Scenario:** Rescuing Project Cygnus
 - A project team at "**Veridian Flux**" created an initial AI Value Blueprint for a renewal proposal assistant.
 - The first draft has critical gaps, and the project is at risk.
 - You are an AI-Native Change Agent brought in to empower the original team, not take over.
- ▶ **Your Materials:** For each section, you'll receive:
 - The team's flawed blueprint.
 - Key quotes ("voices from the meeting") revealing their thinking.
- ▶ **Your Immediate Job:** Review these materials and craft the powerful questions you will use to guide the team in your first workshop with them.

Your Mission & Rhythm

- ▶ **The Flow:** Our 15-Minute Rhythm
- ▶ We will tackle the blueprint in six, 15-minute "prep sessions." Each block follows this rhythm:
 - **(1 min) Facilitation Principle:** I will introduce the core concept.
 - **(1 min) Role Assignment:** Your table assigns a Lead Facilitator, Scribe, & Clarifier.
 - **Lead Facilitator:** This person guides the group's conversation, manages time, and keeps everyone focused on the core mission of crafting powerful questions rather than solving the problem.
 - **Scribe:** This person actively captures the group's brainstormed ideas and is responsible for documenting the final, agreed-upon questions and their strategic rationale (remember AI notetakers can help).
 - **Clarifier:** Pressure-tests the group's questions for clarity and impact, challenging ambiguous language, and ensuring each question is framed effectively from the stakeholder's point of view.
 - **(10 mins) Group Discussion:** Analyze the scenario and brainstorm powerful questions.
 - **(3 mins) Synthesize & Document:** Choose your top questions and the "why" behind them.

Your Mission & Rhythm

- ▶ **WHAT TO DO:** Your goal is to analyze the materials and craft insightful, well-reasoned questions. The "product" of your work is the questions, not a corrected blueprint.
- ▶ **WHAT NOT TO DO:** Resist the urge to solve the problem yourself. Do not say, "The success metric should be X." Do not rewrite the section. If you are dictating the answer, you have stepped out of the facilitator role.
- ▶ **Why This Matters:** In the real world, preparation is everything. We are building the core competency of having the right question ready at the right time to unlock a group's potential.
- ▶ Let's begin our first prep session, focusing on the Value Proposal.



6.1 Value Proposal – Facilitation Challenge

15 min 

Group Activity



- ▶ **Facilitation Principle:** The best metrics are co-created with stakeholders, not written for them.
- ▶ **Assign Your Roles:** Your table designates a Lead Facilitator, Scribe, and Clarifier.
- ▶ **In the Companion App, you will:**
 - **Analyze the following:**
 - The Scenario
 - The team's flawed sub-section
 - Voices from the Meeting
 - **Brainstorm** powerful questions based on your analysis.
 - **Record** your top questions and **explain** the 'why' behind them.

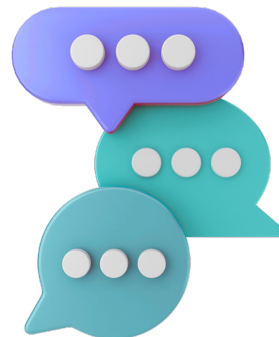


Value Proposal Debrief

5 min 

Class Discussion:

- ▶ Our Objective Was to reinforce the idea that the best metrics are co-created by surfacing each stakeholder's specific needs and language.
- ▶ "Let's share the strategic thinking behind the questions you prepared. We'll hear from a couple of groups, and I'm particularly interested in any different questions or approaches you took."



You Can:

- ▶ Define the core business challenge or opportunity and quantify its current impact or cost of inaction.
- ▶ Identify primary beneficiaries and key stakeholders, capturing their interests, influence, and potential resistance points.
- ▶ Set SMART success metrics—baseline and target values—covering both leading and lagging indicators that will demonstrate business value.
- ▶ Explain the sustainable competitive advantage or differentiation that the AI solution will create once the problem is solved.



Insights & Action

Post-Class 



Reflect

Think about a past project that struggled because its goals were vague or misaligned. Write about how using the Value Proposal, specifically quantifying the cost of inaction and defining clear, measurable success metrics, could have provided the clarity and direction needed for success.



Apply

Ask AI: "I'm drafting a Value Proposal for an AI initiative to [describe your project goal]. You are my business strategy coach. Ask me five probing 'why' questions to ensure I've identified the true root problem. Then, help me brainstorm three SMART success metrics, ensuring at least one is a leading and one is a lagging indicator."



Explore

["Value Proposition Design" by Alex Osterwalder](#)

["Feel Behind on AI? Here Are 8 Practical Ways to Catch Up in 2025" - Xyonix](#)

["Measure AI Performance" - Neontri](#)