

Lesson 4

Defining The Workshop Scope & Stakeholders



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



Learning Objectives

By the end of this lesson, you will:

- ▶ Identify and prioritize the critical stakeholders so every required voice is in the room
- ▶ Craft a Workshop Charter, scope, agenda, and timeline that stakeholders approve
- ▶ Prime workshop participants for the workshop by suggesting options
- ▶ Facilitate a shared commitment to the ultimate business goal and success metrics before the workshop begins
- ▶ Build a time-boxed agenda that tailors the AI-Native Value Workshop flow

WIIFM: Set your workshop up for success by getting the right people in the room, focused on the right problem.

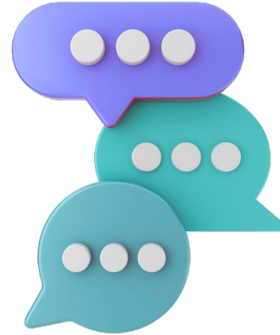


The Missing Person Problem

5 min

Group Discussion:

- ▶ Describe a time when a project was derailed or needed major rework because a key person was excluded from planning.
- ▶ What was the impact? (e.g., rework, political drama, delays, blown budget)



Right People = Right Solution

- ▶ **Missing Voices = Missing Requirements:** Each stakeholder contributes a vital piece of the puzzle. Without them, the solution is flawed.
- ▶ **Stakeholder alignment is risk mitigation:** proactively identifying stakeholders and addressing their concerns is the most cost-effective way to de-risk an AI initiative.
- ▶ **The Goal:** Is to move beyond the "POC Graveyard" by ensuring that the people who will build, use, fund, and support the solution are involved from the beginning.

The AI-Native Workshop Charter

- ▶ **A Living Document:** It's not a one-and-done form. It evolves through conversations with your sponsor and core team.
- ▶ **Two Key Sections [Holistic Approach]:**
 - **Workshop Scope & Stakeholders (Lesson 4 Focus):** This lesson defines the 'who' and 'what' of the workshop. Covered in this lesson.
 - **Discovery & Entry Point (Lesson 5 Focus):** Defines the 'why' and 'how' you'll start the workshop. Covered in the next lesson.
- ▶ This charter format is a recommendation; you are free to use any tool if you are actively capturing these elements.

The diagram illustrates the two key sections of the AI-Native Workshop Charter. The 'Who & What' section (Lesson 4) includes fields for Workshop Objectives, Core Team, and Stakeholder Availability Matrix. The 'Why & How' section (Lesson 5) includes fields for Workshop Logistics, Workshop Objectives, and Business Objectives. A curved arrow points from the 'Who & What' section to the 'Why & How' section, and another curved arrow points from the 'Why & How' section back to the 'Who & What' section, indicating a continuous, evolving process.

Securing Executive Sponsorship

- ▶ Problems and opportunities can surface anywhere, but a sponsor grants you the permission and resources to solve them
- ▶ **Sponsorship defines Your Scope:** The sponsor's level in the organization often sets the boundaries for your potential impact. A VP can sponsor a departmental solution; a C-Suite executive can sponsor an enterprise transformation.
- ▶ **Capturing Their View:** In the "Workshop Objective" section of the Charter, document the sponsor's initial perspective. This is your starting point for discovery, and the actual problem becomes clear through discovery.
- ▶ **REMEMBER:** Success Factor 1 - Anchor AI to Business Value begins with sponsors who control budgets and define value.

1. Workshop Scope & Stakeholders (Lesson 4)	
Workshop Objective	<p>Clear, one-sentence statement of what this workshop will accomplish</p> <p>e.g., Design an AI solution to reduce customer support response time from 48 hours to 4 hours</p>

Assemble the Core Team

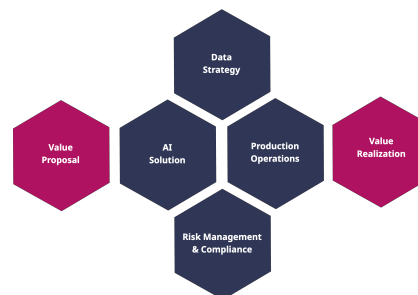
- ▶ For any AI initiative to succeed, three critical sets of responsibilities must be covered. These are non-negotiable
- ▶ **The Sponsor** (the "Why") owns the business value and budget and has the authority to approve the initiative and unlock resources.
- ▶ **The Decision Maker** (the "yes") owns the implementation capacity and has the authority to allocate the people and teams needed to build and operate the solution.
- ▶ **The Change Agent** (the "How") owns the process, facilitates the journey, manages stakeholder alignment, and drives momentum.

Core Team	Three essential roles required for workshop success		
	The Sponsor Name <input type="text"/> Title <input type="text"/> Email <input type="text"/>	Decision Maker Name <input type="text"/> Title <input type="text"/> Email <input type="text"/>	Change Agent Name <input type="text"/> Title <input type="text"/> Email <input type="text"/>

Map Stakeholders by Blueprint Section

To know whom to invite, you must know what you'll discuss.

- ▶ **Value Proposal:** Sponsors, Finance, Strategy, End Users
- ▶ **AI Solution:** Product, Engineering, UX, SMEs, IT Architecture
- ▶ **Data Strategy:** CDO, Data Engineers, Security, Privacy, Data Owners
- ▶ **Production Ops:** DevOps, Platform, SREs, Operations, Support
- ▶ **Risk Management:** Legal, Compliance, Ethics, IP, Audit
- ▶ **Value Realization:** Finance, Change Management, Training, Marketing



Action: Use this map to fill out the Stakeholder Availability Matrix in your charter. For each section, ask: 'Who must we hear from to make a credible decision here?'

The Power of Asynchronous Participation

- ▶ Everyone's Input, Not Everyone's Time
- ▶ **Practical Reality:** Key experts, such as Legal team members or senior VPs, have limited availability. Expecting them to participate in a day or multi-day workshop is unrealistic.
- ▶ **Your Strategy:** Socialize the Blueprint: Use the charter and blueprint artifacts as tools for asynchronous review. Send specific sections to the appropriate people for their input before or after the main workshop.
- ▶ **Document Their Role:** You plan this using the stakeholder availability matrix. Mark who needs to be there live versus those who will provide asynchronous input.

Building Your Stakeholder Availability Matrix

- ▶ **Name & Role:** List the actual person and their specific role in this initiative.
- ▶ **Check the Blueprint Sections:** For each person, check the boxes for every Blueprint section where their input is vital.
- ▶ **Identify Dependencies:** The completed matrix instantly reveals your critical path. If the CISO is needed for Data Strategy and can't make it, you know you have a major scheduling risk to solve *before* the workshop.

Stakeholder Availability Matrix		Map people to roles and indicate if they will participate live (in the workshop) or async (reviewing outputs). Check all blueprint sections they should be involved in.							
Name	Role/Type	Participation		Blueprint Section Involvement					
		Live	Async	Value Proposal	AI Solution	Data Strategy	Production Ops	Risk Mgmt	Value Real.
Full Name	e.g., Product Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	e.g., Data Scientist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	e.g., Engineering Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	e.g., Security Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	Role/Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		+ Add Stakeholder							

Prime Participants for Success

- ▶ **(Best) The AI-Native Foundations Course:** Creates a deep, shared understanding and vocabulary for the core team.
- ▶ **(Ideal) Half-Day Briefing:** A condensed overview of key concepts for critical stakeholders.
- ▶ **(Least Effective) One-Pager Summary:** A digestible brief for busy executives or peripheral stakeholders.

Participant Preparation	Assign preparation approach and list participants for each option		
	Preparation Option	Description	Participants
	AI Foundations Course	Full course for deep understanding of AI concepts and methodology	List participants who will take the full AI Foundations course (names, roles)
	Half-Day Briefing	Condensed overview with key concepts and workshop context	List participants who will receive the half-day briefing (names, roles)
	One-Pager Summary	Essential concepts in digestible format for quick preparation	List participants who will receive the one-pager summary (names, roles)

The Reality of Sponsorship: It's Rarely a Straight Line

- ▶ The ideal path starts with a sponsor, but reality is often more complex. Opportunity can start anywhere. Your job is to connect the catalyst to a sponsor.
 - **Operational Pain:** An engineering team is struggling with manual processes.
 - **Competitive Pressure:** A manager sees a competitor's AI capability and wants to respond.
 - **Untapped Value:** A valuable discovery or impressive POC has no clear path to production.
 - **Strategic Inquiry:** A board member asks about the company's AI strategy, creating a top-down mandate.
- ▶ **Your Process: From Catalyst to Charter**
 - **Start with the Catalyst:** Acknowledge the initial problem or opportunity.
 - **Ascend to Sponsorship:** Climb the hierarchy to find the right leader with the appropriate scope, authority, and budget.
 - **Capture in the Charter:** Document initial findings in section 2 of the charter; this will be an iterative process requiring you to move between section 1 and section 2 as you continue discovery.

Designing a practical, time-boxed agenda

- ▶ Our agenda is the workshop's roadmap. Structure it logically around the six AI-Native Value Blueprint sections and document it in the "Workshop Logistics" section of your charter.
- ▶ **Core Principles:**
 - **Dovetail with the Blueprint:** Allocate specific time blocks for each of the six sections to ensure a complete discussion from Idea to production.
 - **Respect the Boundaries:** Use the "Workshop Boundaries" you defined to keep each session focused and prevent scope creep.
 - **Be Realistic:** Acknowledge complex topics that require more time. Use breaks to maintain energy and focus.
 - **Best Practice:** Keep it as short as needed to get the actionable levels of detail.

Workshop Logistics	<i>Practical details for workshop execution</i> <small>e.g., Location: Conference Room A, Duration: 2 days, Dates: March 15-16, Facilitator (Name), Materials needed: Laptops, whiteboards, sticky notes</small>
Workshop Boundaries	<i>What's in scope and out of scope for this workshop</i> <small>In Scope: Customer support automation for Tier 1 inquiries, English language only, web chat integration. Out of Scope: Phone support, complex technical issues, other languages</small>



4.1 The Stakeholder Scramble

15 min 

Group Activity



- ▶ Read the business scenario in the companion app and answer these questions.
 - Who are the three most critical stakeholders who have been overlooked?
 - Who is the single best person to secure as the Executive Sponsor for this initiative to succeed long-term?
- ▶ In your groups, compare your individual findings.
 - Discuss the potential consequences of not including the stakeholders you identified. Your goal is to discuss and agree on a final list of the top three overlooked stakeholders and the single most effective Executive Sponsor.
 - Be prepared to explain your choice of sponsor and explain why including your chosen stakeholders is essential to keep this AI project out of the POC graveyard.

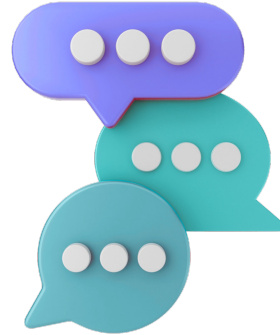


From Stakeholder Map to Strategic Asset

5 min

Class Discussion:

- ▶ In the exercise, you identified critical stakeholders who were left in the dark. As a Change Agent, your next step isn't just to add them to a list; it's to engage them effectively.
- ▶ Imagine your first conversation with the overlooked Head of Customer Service. What is the single most powerful, open-ended question you could ask them to understand their perspective and begin turning them into a contributor?



Lesson Review

You can:

- ▶ Identify and prioritize the critical stakeholders so every required voice is in the room
- ▶ Craft a Workshop Charter, scope, agenda, and timeline that stakeholders approve
- ▶ Prime workshop participants for the workshop by suggesting options
- ▶ Facilitate a shared commitment to the ultimate business goal and success metrics before the workshop begins
- ▶ Build a time-boxed agenda that dovetails with the AI-Native Value Workshop flow



Insights & Action

Post-Class



Reflect

Consider a recent project where an important stakeholder was excluded from planning. Describe how a stakeholder mapping exercise could have prevented the issues that occurred. What specific questions would you have asked to identify missing voices early on?



Make notes
in your journal



Apply

Ask AI: "I'm planning a workshop for [describe your upcoming project or initiative]. Help me create a stakeholder map by 1) Listing all potential stakeholder categories, 2) Suggesting specific roles within each category, 3) Identifying which stakeholders are critical versus nice-to-have, and 4) Recommending preparation strategies for each stakeholder type."



Explore

["Relationships Matter: The Art of Stakeholder Management"](#) – Product Coalition

["Navigating the Human Side of AI: A Guide to Stakeholder Collaboration"](#) – TD.org

[Sponsorship Theater Is Killing AI Transformation](#) - Medium.com