Enterprise AI Adoption

Transforming Workflows for the AI-Native Organization

A 5-Day Intensive Course

Course Overview

WHAT YOU'LL LEARN

- Identify AI opportunities in your workflows
- Redesign processes for human-AI collaboration
- Build governance frameworks that enable scale
- Create actionable AI playbooks
- Plan and execute AI rollouts

5-DAY JOURNEY

- **Day 1:** Foundations & Mindset Shift
- **Day 2:** Mapping & Redesigning Workflows
- **Day 3:** Governance & Human-in-the-Loop
- **Day 4:** Building the AI Playbook
- **Day 5:** Capstone & Rollout

The AI Adoption Challenge

> *"Start with pain, not platforms. AI strategy begins where work is broken."*

THE PROBLEM

70% of AI initiatives fail to deliver expected value

THE CAUSE

Technology-first thinking instead of workflow-first design

THE SOLUTION

Human-centered AI adoption with clear governance

DAY 1

Foundations & Mindset Shift

Reframing AI adoption as workflow transformation

Day 1 Learning Objectives

By the end of today, you will be able to:

- Distinguish between automation and AI-native design
- Identify workflow friction points in your organization
- Complete an AI Readiness assessment
- Formulate a focused AI Design Challenge

Automation vs. AI-Native Design

TRADITIONAL AUTOMATION

- Rule-based, deterministic
- Replaces specific tasks
- Requires structured inputs
- No learning or adaptation
- "If X, then Y"

  Example: Auto-filing emails by sender

AI-NATIVE DESIGN

- Probabilistic, adaptive
- Augments human judgment
- Handles unstructured data
- Learns from feedback
- "Given context, suggest action"

  Example: Drafting email responses based on context

The Workflow Autopsy

Identify where work is broken before introducing AI

COMMON FRICTION POINTS

Manual Handoffs	Email chains, waiting for approvals
Duplicate Data Entry	Same info in multiple systems
Information Hunting	Searching across tools/docs
Format Translation	Converting between formats
Review Bottlenecks	Work queued for expert review
Rework Loops	Frequent corrections/revisions

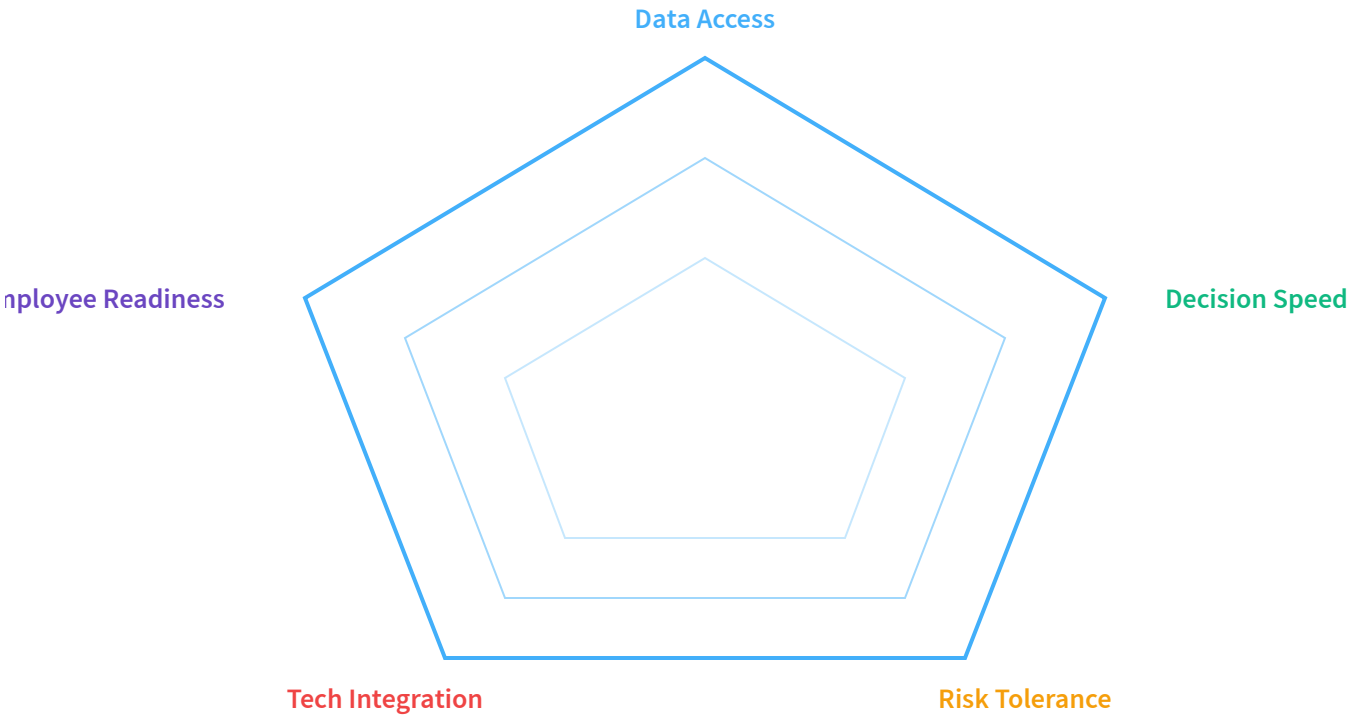
LAB EXERCISE 1.1

Map a workflow you do weekly:

1. List every step from trigger to completion
2. Mark friction points with a red flag
3. Note time spent on each step
4. Identify "why does this exist?" moments

The AI Readiness Canvas

Evaluate your organization across five dimensions



Rate each dimension 1-5 to visualize your readiness profile

Five Readiness Dimensions

Data Access	Can AI reach the data it needs?	Siloed systems, manual exports, no APIs
Decision Speed	How fast are decisions made today?	Multi-week approvals, committee decisions
Risk Tolerance	Appetite for AI-assisted decisions?	Zero-error culture, heavy regulation
Tech Integration	Can you connect AI to existing tools?	Legacy systems, no IT support, vendor lock-in
Employee Readiness	Are people prepared and willing?	Fear of replacement, no training, skepticism

Culture: The Real Bottleneck

> *"Culture is the real bottleneck. Fear slows AI adoption more than technology."*

SIGNS OF FEAR-BASED CULTURE

- "AI will take my job"
- "We've always done it this way"
- "What if it makes a mistake?"
- "I don't trust the outputs"
- "IT said no"

SIGNS OF AI-READY CULTURE

- "How can AI help me do better work?"
- "What if we tried a new approach?"
- "Humans verify, AI accelerates"
- "Let's pilot and learn"

- "What guardrails do we need?"

The AI Design Challenge Template

> **How might we _____**
> **using AI to achieve _____**
> **without creating new risks in _____?**

EXAMPLE CHALLENGE

"How might we using AI to achieve without creating new risks in ?"

> ### LAB EXERCISE 1.2
>
> Write YOUR AI Design Challenge based on the workflow you mapped earlier.
> Be specific about the outcome and the risks.

Day 1 Deliverables

1. WORKFLOW AUTOPSY

Documented current-state process with friction points identified and time estimates

2. READINESS CANVAS

5-dimension assessment of your team/org's AI adoption readiness

3. DESIGN CHALLENGE

Focused problem statement using the HMW template

Tomorrow: We'll transform your design challenge into a redesigned workflow with clear human-AI collaboration points.

DAY 2

Mapping & Redesigning Workflows

From pain points to AI-augmented processes

Day 2 Learning Objectives

By the end of today, you will be able to:

- Apply outcome-backward design to workflow problems
- Create before/after workflow maps
- Identify optimal AI insertion points
- Produce an AI-Augmented Process Blueprint

Outcome-Backward Design

> *"Most broken processes stay broken because we start from the first step and work forward."*

FORWARD DESIGN (COMMON)

1. Receive request
2. Check eligibility
3. Gather information
4. Create draft
5. Review and revise
6. Get approval
7. Deliver output

Focuses on existing steps

BACKWARD DESIGN (BETTER)

1. Define: What does "done" look like?
2. Identify: What decisions are required?
3. Determine: What information is needed?
4. Design: Minimum steps to get there

> *Focuses on outcomes*

The Outcome Brief

Before redesigning, define what success looks like

Outcome	What's the final deliverable?	Approved customer proposal
Time Target	How fast should it be?	Same-day for standard requests
Quality Standard	What defines "good enough"?	Zero compliance errors, 90% customer acceptance
Cost Constraint	What resources are available?	Max 30 min human time per proposal
Risk Boundaries	What can't go wrong?	No pricing errors, no data leaks

Workflow Mapping Legend

Use consistent color coding for clarity

HUMAN

Actions requiring human judgment, creativity, or accountability

AI / AUTO

Tasks AI or automation can handle with minimal oversight

DECISION

Branch points where outcomes depend on conditions

AI Role Types in Workflows

Analyzer	Extracts insights from data	Summarize customer history, flag anomalies
Generator	Creates draft content	Write first draft of proposal, generate options
Recommender	Suggests actions based on patterns	Recommend pricing tier, suggest next steps
Validator	Checks work against rules	Verify compliance, check for errors
Router	Directs work to right destination	Triage support tickets, assign to specialist

Before/After Mapping Example

BEFORE (CURRENT STATE)

HUMAN Receive request via email
HUMAN Search for customer history
HUMAN Check eligibility manually
HUMAN Draft proposal from scratch
HUMAN Calculate pricing
HUMAN Send for review
DECISION Approved?
HUMAN Make revisions
HUMAN Send to customer

Time: 4-6 hours

AFTER (AI-AUGMENTED)

AI Parse request & extract requirements
AI Retrieve & summarize customer history
AI Check eligibility against rules
DECISION Standard or custom?
AI Generate proposal draft
AI Calculate pricing options
HUMAN Review & personalize
AI Validate compliance
HUMAN Final approval & send

Time: 30-45 minutes

Identifying AI Insertion Points

Ask these questions at each step:

GOOD CANDIDATES FOR AI

- Repetitive with slight variations
- Time-consuming but low-judgment
- Data gathering and summarization
- First drafts that need human polish
- Pattern matching and classification
- Quality checks against known rules

KEEP HUMAN FOR NOW

- Final accountability decisions
- Novel/unprecedented situations
- Relationship-critical moments
- Ethical or legal gray areas
- Creative strategy
- Exception handling

The Process Blueprint Template

Your blueprint should include:

Process Overview	1-2 sentence summary of what this workflow does
Trigger	What initiates this workflow?
Inputs	Data/information required to start
Outputs	Deliverable when complete
Workflow Steps	Numbered steps with Human/AI/Decision tags
Guardrails	Rules and limits for AI actions
Success Metrics	How you'll measure improvement

Lab Exercise 2.1: Before/After Map

INSTRUCTIONS

1. Take the workflow from your Day 1 Autopsy
2. Create a "Before" column with current steps
3. Tag each step: HUMAN, AI, or DECISION
4. Create an "After" column with redesigned steps
5. For each AI step, identify the AI role type
6. Estimate time savings

Key Principle: "AI-native workflows start with clarity, not technology."

Day 2 Deliverables

1. OUTCOME BRIEF

Clear definition of success with measurable targets

2. BEFORE/AFTER MAP

Visual workflow comparison with color-coded roles

3. PROCESS BLUEPRINT

1-2 page document ready for stakeholder review

Tomorrow: We'll add governance, safety controls, and human-in-the-loop design to make your workflow enterprise-ready.

DAY 3

Governance, Safety & Human-in-the-Loop

Making AI workflows enterprise-ready

Day 3 Learning Objectives

By the end of today, you will be able to:

- Classify AI risks across five dimensions
- Select appropriate oversight models (HITL/HOTL/HOOTL)
- Design escalation paths and verification steps
- Complete a Governance Canvas for your workflow

> *"Governance isn't a blocker — it enables scale."*

The Five AI Risk Dimensions

Data Risk	Privacy, exposure, lineage, integrity, retention	What data does AI access? Where does it go?
Model Risk	Hallucinations, bias, drift, confidence gaps	How might AI outputs be wrong?
Operational Risk	Workflow failures, poor handoffs, monitoring gaps	What if the AI is unavailable?
Security Risk	Prompt injection, unauthorized access, data leakage	How could this be exploited?
Reputational Risk	Harmful outputs, customer confusion, fairness issues	What would the headline be if this fails?

Risk Classification Matrix

IMPACT ASSESSMENT

Low	Minor inconvenience, easily corrected
Medium	Customer impact, requires intervention
High	Regulatory, legal, or significant financial

LIKELIHOOD ASSESSMENT

Rare	Edge case, unlikely to occur
Possible	May occur occasionally
Likely	Expected to occur regularly

Three Oversight Archetypes

HUMAN-IN-THE-LOOP (HITL)

AI drafts → Human approves

- Every AI output reviewed
- Human has final say
- Slower but safer

Use for: Medium-risk decisions, learning phases

HUMAN-ON-THE-LOOP (HOTL)

AI executes → Human monitors

- AI acts autonomously
- Human reviews exceptions
- Faster with oversight

Use for: High-volume, low-risk tasks

HUMAN-OUT-OF-LOOP (HOOTL)

AI executes autonomously

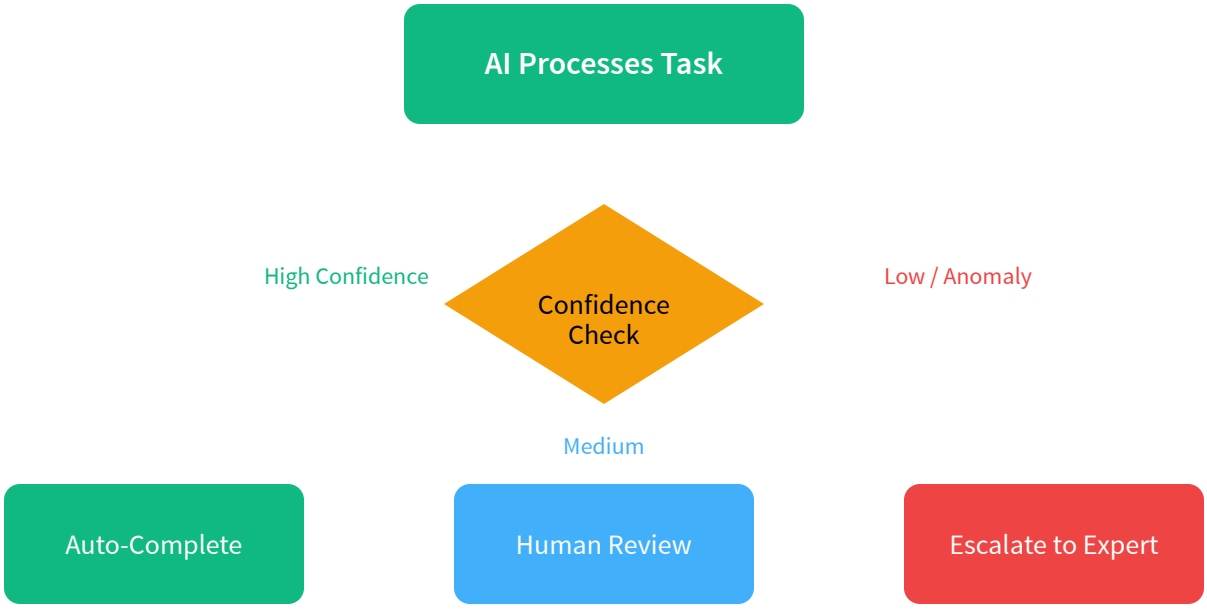
- No human intervention
- Pre-approved rules only
- Fastest execution

Use for: Structured, rule-based, low-risk only

Choosing the Right Oversight Model

Decision reversibility	Irreversible	Somewhat reversible	Fully reversible
Stakes	High stakes	Medium stakes	Low stakes
Volume	Low volume	Medium-high volume	Very high volume
Pattern clarity	Novel/unclear patterns	Known patterns + exceptions	Fully defined rules
Error tolerance	Near-zero errors required	Some errors acceptable	Errors have minimal impact

Designing Escalation Paths



Verification Steps

Build checkpoints into your workflow

TYPES OF VERIFICATION

Format Check	Output structure correct?
Rule Check	Business rules followed?
Completeness	All required fields present?
Consistency	Data matches across sources?
Confidence	AI certainty above threshold?
Sampling	Random human review %

EXAMPLE: PROPOSAL WORKFLOW

- **After AI draft:** Check pricing within approved ranges
- **Before send:** Verify customer name/details correct
- **Weekly:** Sample 10% for quality review
- **Monthly:** Compare AI vs. human accuracy

The Governance Canvas

One-page compliance document for your workflow

Workflow Name & ID
[Name, version, owner]

Scope & Boundaries
[What this does/doesn't cover]

AI Capabilities Used
[Models, tools, integrations]

Human Roles & Responsibilities
[Who does what, when]

Risk Assessment
[Key risks and mitigations]

Oversight Model
[HITL/HOTL/HOOTL and why]

Logging & Audit Trail
[What gets recorded]

Success Metrics & Review Cadence
[KPIs and review schedule]

Lab Exercise 3.1: Risk Annotation

INSTRUCTIONS

1. Take your Before/After workflow map from Day 2
2. For each AI step, identify risks using the 5 dimensions
3. Rate each risk: Low / Medium / High
4. Determine oversight model for each AI step
5. Add verification checkpoints
6. Design escalation paths for exceptions

Day 3 Deliverables

1. RISK-ANNOTATED MAP

Workflow with risks identified and color-coded by severity

2. OVERSIGHT ARCHITECTURE

Diagram showing human checkpoints and escalation paths

3. GOVERNANCE CANVAS

Single-page compliance document ready for leadership review

> **Tomorrow:** We'll turn everything into a practical playbook that others can follow.

DAY 4

Building the Internal AI Playbook

Creating documentation that teaches and enables

Day 4 Learning Objectives

By the end of today, you will be able to:

- Write clear, actionable process documentation
- Create effective prompt templates and examples
- Design verification checklists
- Produce a working AI Playbook draft

> *"Tools come and go. A well-written playbook survives tools."*

What Makes a Good Playbook?

EFFECTIVE PLAYBOOKS

- Written for someone with no context
- Uses plain language, not jargon
- Shows examples, not just instructions
- Includes "what if" scenarios
- Has clear success criteria
- Tells you when NOT to use it

INEFFECTIVE PLAYBOOKS

- Assumes reader knows the context
- Full of acronyms and insider terms
- Only describes happy path
- No examples or templates
- Unclear ownership
- Never updated after creation

Playbook Structure

Overview	What this playbook helps you do	2-3 sentences
When to Use	Triggers and conditions	Bullet list
When NOT to Use	Exceptions and escalations	Bullet list
Step-by-Step Process	Detailed instructions with AI/Human tags	1-2 pages
Prompts & Templates	Copy-paste ready examples	As needed
Verification Checklist	How to check AI outputs	Checklist format
Troubleshooting	Common problems and solutions	FAQ format
Contacts & Escalation	Who to ask for help	Names/roles

Writing Effective Prompts

Include ready-to-use prompt templates in your playbook

PROMPT STRUCTURE

> **Role:** You are a [role] helping with [task]
> **Context:** Here is the relevant information: [data]
> **Task:** Please [specific action]
> **Format:** Provide your response as [format]
> **Constraints:** Make sure to [rules/limits]

EXAMPLE PROMPT

```
You are a proposal specialist helping prepare customer
quotes.

Context: Customer ABC Corp requested pricing for
[PRODUCT]. Their history shows [HISTORY SUMMARY].

Task: Draft a proposal email including pricing options
and next steps.

Format: Professional email, 3 paragraphs max.

Constraints: Use only approved pricing from the rate
card. Do not promise delivery dates.
```

Verification Checklists

Create checklists for humans reviewing AI outputs

EXAMPLE: PROPOSAL REVIEW CHECKLIST

- ☐ Customer name spelled correctly
- ☐ Pricing matches rate card
- ☐ No unauthorized discounts
- ☐ Terms & conditions included
- ☐ Expiration date set correctly
- ☐ No confidential info exposed
- ☐ Tone appropriate for customer
- ☐ Call-to-action is clear

CHECKLIST DESIGN PRINCIPLES

- **Binary:** Yes/No questions only
- **Observable:** Can be verified objectively
- **Ordered:** Critical items first
- **Actionable:** Clear what to do if fails
- **Brief:** 5-10 items maximum

Documenting AI + Human Handoffs

Be explicit about who does what

1	AI	Parse incoming request and extract requirements	Structured requirement list
2	AI	Generate proposal draft using template	Draft document
3	HUMAN	Review draft against checklist	Approved or revised draft
4	DECISION	Is value > $50K?	Route to manager or proceed
5	HUMAN	Send to customer with personal note	Sent proposal + logged

Troubleshooting Section

Anticipate problems and provide solutions

EXAMPLE TROUBLESHOOTING GUIDE

AI generates nonsense	Input data malformed	Check source data format; re-run
Wrong customer info	CRM sync delay	Manually verify in CRM; wait 10 min
Pricing seems wrong	Rate card outdated	Check rate card version; escalate to manager
AI tool unavailable	Service outage	Use manual process; check status page
Customer data exposed	Prompt included PII	STOP. Report to security. Do not send.

Lab Exercise 4.1: Peer Testing

INSTRUCTIONS

1. Draft your playbook (3-5 pages) using the template
2. Exchange playbooks with a partner
3. Attempt to follow your partner's playbook step-by-step
4. Note every point of confusion or ambiguity
5. Provide feedback:
   - What was unclear?
   - What was missing?
   - Where did you get stuck?
6. Revise your playbook based on feedback

Key Test: Can someone unfamiliar with the process follow it successfully?

Day 4 Deliverables

1. COMPLETE PLAYBOOK DRAFT

3-5 page document with all sections filled in

2. PROMPT TEMPLATES

Ready-to-use prompts with variable placeholders

3. VERIFICATION CHECKLIST

Binary checklist for reviewing AI outputs

> **Tomorrow:** Capstone presentations, governance defense, and 30-60-90 day rollout planning.

DAY 5

Capstone & Rollout

From pilot to sustainable practice

Day 5 Learning Objectives

By the end of today, you will be able to:

- Present your AI workflow to stakeholders
- Defend your governance and design decisions
- Create a 30-60-90 day rollout plan
- Establish maintenance and improvement processes

> *"AI doesn't replace workflows; it refactors them."*

Capstone Presentation Structure

8-10 minute presentation covering:

The Problem	1 min	Pain points from workflow autopsy
The Solution	2 min	Before/After workflow with AI roles
Governance	2 min	Risks, oversight model, verification
Demo	2 min	Walk through the workflow with real/simulated data
Rollout Plan	2 min	30-60-90 day implementation plan
Ask	1 min	What you need to move forward

Common Failure Points

Issues discovered during capstone testing

TECHNICAL FAILURES

- Unclear verification steps
- Missing data assumptions
- Poorly defined handoffs
- No fallback for AI unavailability
- Ambiguous prompt templates

PROCESS FAILURES

- Unclear ownership
- No escalation path
- Missing edge cases
- Untested with real data
- No success metrics defined

Defending Your Design Decisions

Be prepared to answer "Why?"

COMMON CHALLENGES

- "Why does a human need to review this?"
- "Why can't AI do this step too?"
- "What if the AI makes a mistake?"
- "Is this compliant with [regulation]?"
- "How do we know this is working?"
- "What happens when the tool changes?"

STRONG ANSWERS INCLUDE

- Reference to risk assessment
- Clear accountability chain
- Specific verification steps
- Measurable success criteria
- Escalation procedures
- Maintenance ownership

The 30-60-90 Day Rollout Plan

DAYS 1-30: STABILIZE

Focus: Small group pilot

- 2-3 users only
- Daily check-ins
- Log every issue
- Refine playbook
- Establish baseline metrics

Exit Criteria: No critical issues for 1 week

DAYS 31-60: EXPAND

Focus: Add teams

- 10-20 users
- Weekly check-ins
- Train new users
- Document patterns
- Collect feedback

Exit Criteria: Positive user feedback, metrics improving

DAYS 61-90: OPERATIONALIZE

Focus: Full integration

- All target users
- Standard process
- Upstream/downstream integration
- Reporting automated
- Continuous improvement

Exit Criteria: Process is the new normal

Rollout Plan Template

Pilot (1-30)	Alice, Bob, Carol	Daily use, feedback sessions	No critical errors, 50% time savings	Data access issues
Expand (31-60)	Sales Team West	Training, playbook updates	80% adoption, positive NPS	Resistance to change
Scale (61-90)	All Sales Teams	Full rollout, monitoring	Process time down 60%	Volume stress testing

Living Systems, Not Static Solutions

> *"Treat AI systems as living systems — with owners, updates, and accountability."*

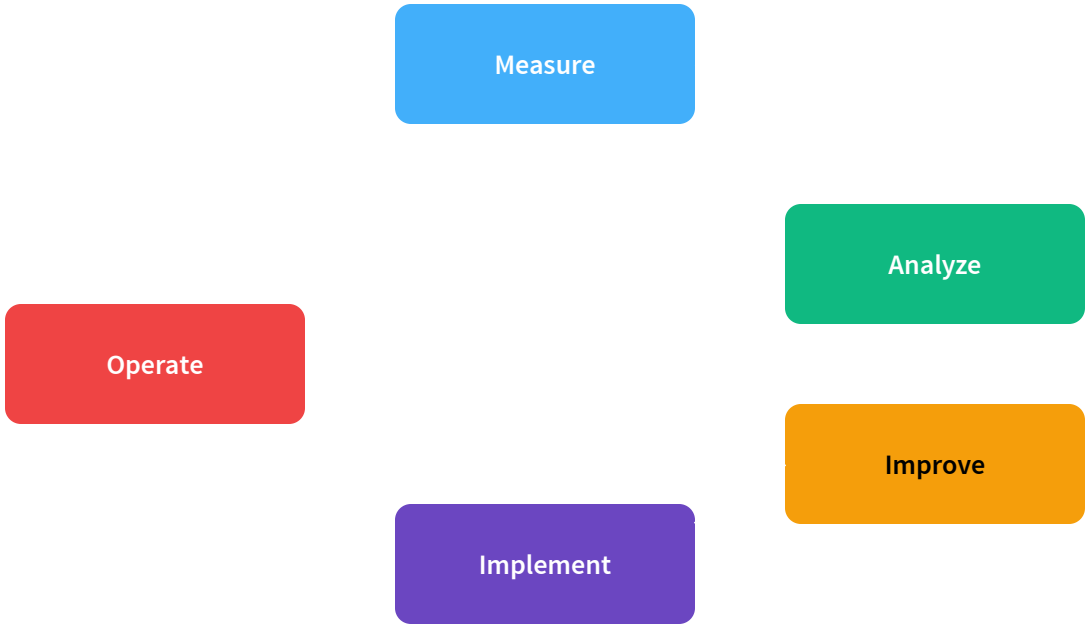
MAINTENANCE REQUIREMENTS

- **Weekly:** Review exception logs
- **Monthly:** Analyze success metrics
- **Quarterly:** Update prompts and playbook
- **As Needed:** Respond to tool changes
- **Annually:** Full governance review

OWNERSHIP CLARITY

- **Process Owner:** Accountable for outcomes
- **Technical Owner:** Maintains integrations
- **Governance Owner:** Ensures compliance
- **Training Owner:** Onboards new users

Continuous Improvement Loop



Final Deliverables

1. CAPSTONE PRESENTATION

8-10 minute presentation with demo ready for stakeholders

2. COMPLETE PLAYBOOK

Polished, peer-tested documentation

3. ROLLOUT PLAN

30-60-90 day plan with owners and metrics

Key Takeaways

> *"Start with pain, not platforms."*
> *"Culture is the real bottleneck."*
> *"Governance isn't a blocker — it enables scale."*
> *"Tools come and go. A well-written playbook survives tools."*
> *"AI doesn't replace workflows; it refactors them."*
> *"Organizational change ultimately depends on people, not technology alone."*

Congratulations!

You've completed the Enterprise AI Adoption course

What's Next?

Execute your 30-60-90 day plan

Share your playbook with your team

Measure and iterate

Help others adopt AI responsibly

Speaker notes