

AI Transformation Playbook

STAGE I: KNOWLEDGE WORKER AI ENABLEMENT

Presented by **Julian Castelli**, Board Chair and Operating Partner



The Gap Is Already Growing.

AI-Native Competitors

Building Huge Leads

Traditional Companies

Catching Up or **Falling Behind**

The Window

Closing Fast





"Why are you running?"



Three Stages

Stage 1

Knowledge Worker AI Enablement

WE START HERE ▶

Stage 2

AI Process Transformation

Builds on Stage 1

Stage 3

Embedded AI Product Functionality

Builds on Stage 2



**Growth Scaling
Partners**



The AI Charter: Six Rules. One Page. Everyone Signs.

Rule	Principle
Approved Tools Only	Use only vetted AI platforms
What Data Never Enters	Clear Company Rules
Human Owns Output	You are accountable for all output
Be Transparent	Disclose AI use to stakeholders
Verify Everything	Never publish unverified AI output
Review Every 6 Months	Charter revisited twice yearly



Name Your AI Champion Today.

The AI Champion IS

Senior leader

Disciplined executor

Has authority

Runs the program

The AI Champion IS NOT

Your IT lead

A technical expert

A committee

Optional



Operator. Not technologist.

CEO must be ultimate Champion!



Launch in 30 Days.

Week	Action	Owner
Week 1	Appoint AI Champion	CEO
Week 1	Publish AI Charter	AI Champion
Week 2	Provision Tools	IT + AI Champion
Week 2	Build Working Groups	AI Champion
Week 3	CEO Delivers Mandate ★	CEO
Week 3-4	Launch Working Groups	AI Champion
Day 30	Set Showcase Date	CEO

Step 5 is the one CEOs skip. Don't. Must be CEO's top priority!



CEO Mandate:

2 Hours AI Usage. Minimum. Every Day. Not Optional.

	Hour 1	Hour 2
Source	From Workday	Extra Hour
Activity	Work Group + AI practice	Independent exploration
Type	Structured/ Your work flows	Self-directed
Total	9-hour day during Stage I	<i>Yes - we are asking you to work more!</i>

9hr Day Expectation*

Temporary Investment → Permanent Capability

CEO - Lead by Example!!

*Or +1 of your current expectations

You Will Get Push Back

...from your best people

... because they are already the most busy

... because they are Running

... they are running...with a Bicycle!!!!



Villager:

"Friend — why don't you ride?"

Traveler:

"I don't have time to learn. I'm already behind."





The busyness IS the problem AI is designed to fix.

*"Don't negotiate with the reluctance.
Hold the expectation."*



AI Working Groups: How It Works.

	Group 1 – Departmental	Group 2 – Cross-Functional
Size	5-10 people	5-10 people
Frequency	1 hour/week	1 hour/week
Format	3 presenters × 15 min	3 presenters × 15 min
Cadence	Present every 3 weeks	Present every 3 weeks
Output	4–6 AI wins/week	4–6 AI wins/week

❏ Every session logged. In both groups = 2 meetings/week.



Log It. Share It. Use It Tomorrow.

The Log

Every win documented. Visible to all employees.

The Library

Prompts, projects, agents, and workflows. One click away.

The Flywheel

One person builds it. Everyone uses it. Today.



Every Quarter: Celebrate the Best.

Step	What Happens	Why It Matters
Top Innovations	Best use cases from all groups submitted	Surfaces real ROI
Company Votes	All employees rank the best	Creates buy-in & Accelerates Learning!
Prizes Awarded	Winners publicly recognized	Builds culture

This is not compliance. This builds AI culture.



You Didn't Notice — But Stage 2 Already Started.

Stage	Status	What's Happening
Stage 1 – Knowledge Worker Enablement	◆ ACTIVE	Fully lit. Running now.
Stage 2 – AI Process Transformation	→ EMERGING	Activating through Stage 1
Stage 3 – Embedded AI Functionality	○ Horizon	Building toward

- Your Working Groups = Stage 2 R&D engine.
- Your Innovation Log = opportunity backlog.
- Your Showcase = prioritization meeting.

Stage 1 done right pulls Stage 2 toward you.



Before You Leave: Seven Commitments.

#	Commitment	Owner
1	Name your AI Champion	CEO
2	Publish the Charter	AI Champion
3	Provision company tools	IT + AI Champion
4	Build your Working Groups	AI Champion
5	Deliver the mandate personally	CEO
6	Launch – first session in 30 days	AI Champion
7	Set the Showcase date today	CEO

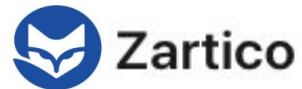
 **The companies that learn fastest win. Start today.**

Who I Help

Experienced Venture/Operating Partner:



Board Chair, Lead Independent Board Director:



Founder/ CEO / Executive / Operator:



Professional Business Foundation:



How I Help



Julian Castelli

OPERATING PARTNER

EXPERTISE:

Board Leadership, Value Creation, AI Strategy, GTM Execution, Team Building, Strategic Finance, Funding & Exits.



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