

# AI Transformation Playbook

## STAGE II: AI PROCESS TRANSFORMATION

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



## You've Started Hearing a Different Question.

*"Why are we still doing this manually at all?"*

*"Could we automate this entire workflow?"*

*"What if AI just handled all of this?"*

# You've Heard It. You Just Didn't Have a Name for It.

## Sales

*"Why aren't we automatically updating Salesforce from call summaries and triggering next steps?"*

## Marketing

*"Why are we manually repurposing every post? Could one piece of content automatically become five?"*

## Finance

*"Why are we pulling data from three systems manually? Could the whole report build itself?"*



# It Means You Are Approaching Stage 2!

Stage 1	Stage 2 - You are Here!	Stage 3
Knowledge Worker AI Enablement	<b>AI Process Transformation</b>  <b>Builds on Stage 1 ▶</b>	Embedded AI Product Functionality
We started here		Builds on Stage 2

# Stage 1

- Automated Reporting & Insights
- AI Meeting Summaries
- Intelligent Process
- Predictive Analytics Engine
- AI Customer Experience
- AI Competitive Research



## Stage 1: Review

#	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	Quarterly Showcase	CEO

 Stage 1 sets the foundation for Stage 2

# Six Questions That Tell You Are Stage 2 Ready

- ✓ Tools provisioned + basic policy in place?
- ✓ **CEO + leadership** using AI daily and visibly?
- ✓ Departmental AI champion in every function?
- ✓ Concrete AI win story from every department?
- ✓ Data digitally accessible in most functions?
- ✓ Leaderboard surfacing process-level wins?

📄 6/6 – move fast. 4/5 – proceed and note gaps. Below 4 – invest more in Stage 1 first.



# Stage 1 Can Create a False Sense of Progress.

Individual AI wins  $\neq$  Process transformation

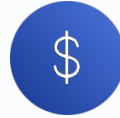
Running faster on a broken process is still a broken process.

# Stage 2 Is Where the Real Money Is.



## Revenue Acceleration

Faster pipelines, better conversion



## Cost Reduction

Fewer manual hours, lower cost per output



## Capacity Creation

Same team doing dramatically more



# Every Function. Every Process. Scored.



❏ *Plus Finance and Executive & Leadership – Stage 2 scans all 8 functions.*

# Four Steps- From Scan to Impact Reporting

## AI Process Transformation – 4 Steps



First pilots launch within 30 days. First results on the board table within 60 days.

# Step 1 — The Top-Down Value Scan

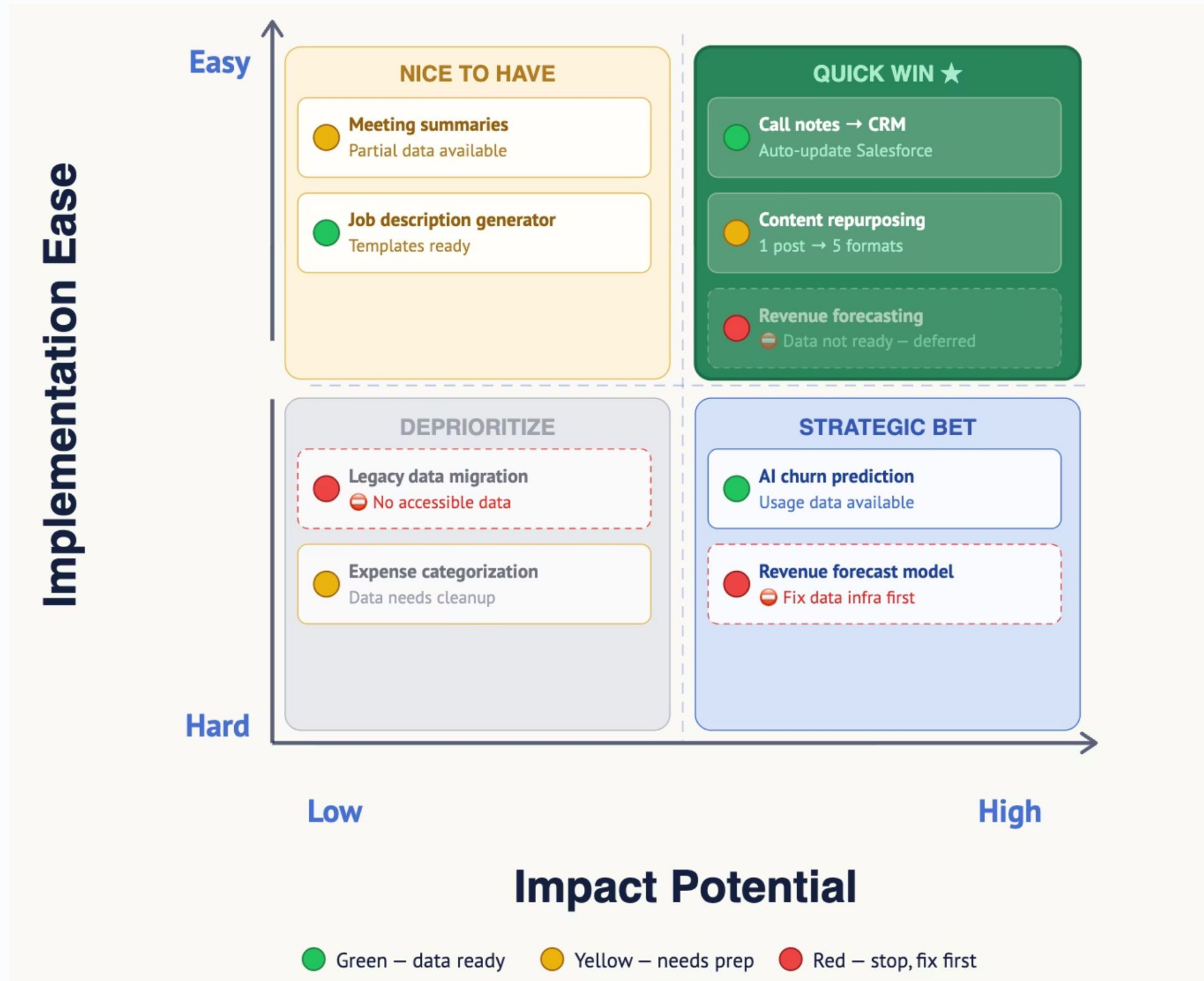


- 2-hour facilitated session
  - CEO + ELT + Stage 1 AI Champion
  - Assign Homework Prior
- • Cross Org Value Scan:
  - The Pyramid of Suck
  - Headcount Heat Map
  - Most hour-intensive work
- Score with Relative Impact and Difficulty Ratings
- Identify Consensus Top 10
- • Apply Data Readiness modifier
- • Output: AI Opportunity Heat Map

# One Framework. Relative Scoring.



# Not All Quick Wins Can Launch Immediately.



# Step 2 — The Bottom-Up Value Audit



- CEO distributes structured workbook to every functional leader
- Each leader maps sub-processes and scores independently
- Every initiative requires a pre-committed value hypothesis
- **Output:** Ranked Opportunity Backlog

# Don't Just Measure the Task. Measure the Impact.



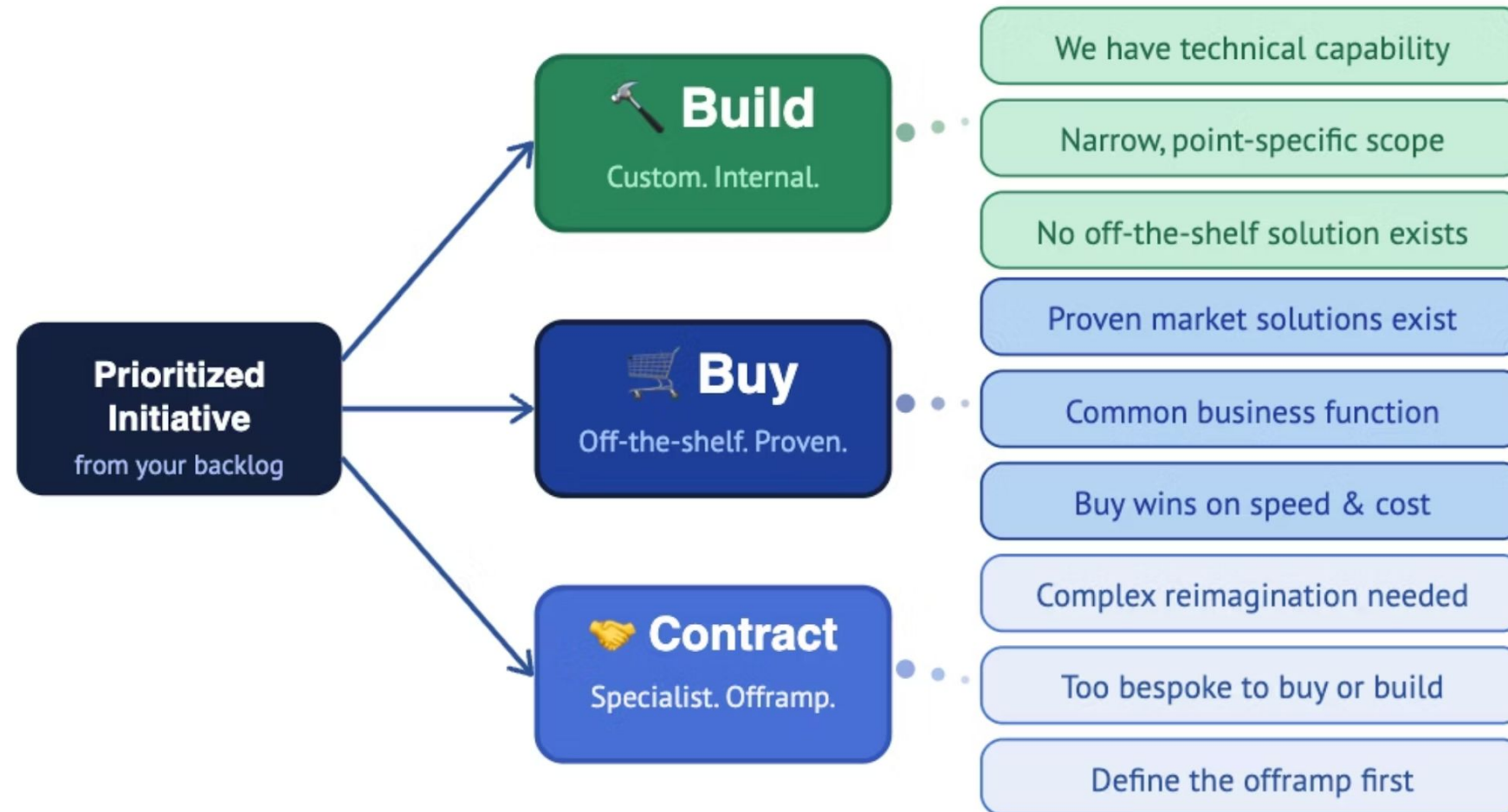
**✗** "How many hours does this save?"  
Measures task efficiency → **\$30K**

**✓** "Does this have a revenue benefit beyond time savings?"  
Measures real business impact → **\$584K**

The workbook specifically prompts leaders to ask the second question. The difference in answer changes a nice-to-have into a board-level priority.

# Step 3 — Build / Buy / Contract

## Build / Buy / Contract — Decision Framework



Most real-world initiatives are a hybrid – apply the framework component by component.

# IMPORTANT FOR CONTRACTING

*- Every Contract Has an Exit Plan- Non-Negotiable*

1. Train your team in real time — not at the end

2. Documentation is a deliverable — not an afterthought

3. Own the data — never let a vendor be the only one who holds it

4. Define success metrics before signing — not after

5. Build the internal capability to replace the vendor if needed



## Step 4 — Reporting to the Board

Two-page board package  
Delivered monthly, every month

Page 1: Status  
By department and initiative

Page 2: Impact  
Baseline, target, actual, annualized \$

# Page 1 — Status Report

## AI Value Creation Initiatives — Board Report

Department	AI Initiative	Status	Target Date
<b>Sales &amp; Revenue Generation</b>			
Sales	Call notes → CRM auto-update & next-step triggers	On Track	Apr 30
	AI-powered lead scoring & outreach personalization	At Risk	May 31
<b>Customer Support</b>			
Support	AI tier-1 ticket resolution – automated response & routing	On Track	May 15
	Proactive churn detection & intervention signals	At Risk	Jun 30
<b>Product &amp; Engineering</b>			
Engineering	AI-assisted coding velocity – Copilot / Cursor / Claude Code	On Track	Ongoing
	Automated QA & regression testing pipeline	On Track	Jul 31

# Page 2 — Impact Report

AI Value Creation Initiatives — Impact Report							
Department	AI Initiative	Value Metric	Baseline	Target	Actual	Score	Annual \$
<b>Sales &amp; Revenue Generation</b>							
Sales	Call notes → CRM auto-update	🕒 Hrs saved per rep/wk 📈 Close rate impact	4 hrs	0.8 hrs	0.7 hrs	Exceeding	\$584K
Sales	Lead scoring & personalization	📊 Close rate improvement on \$10M pipeline	18%	24%	19%	Improving	\$600K
<b>Customer Support</b>							
Support	AI tier-1 ticket resolution	🔄 % tickets auto-resolved + 💰 labor savings	0%	40%	38%	On Target	\$1.2M
Support	Proactive churn detection	📈 ARR retained from at-risk accounts	\$0	\$750K	\$310K	Improving	\$843K
<b>Product &amp; Engineering</b>							
Engineering	AI-assisted coding velocity	🕒 Developer capacity gained (FTE equivalent)	0 FTE	6 FTE	7 FTE	Exceeding	\$1.76M
Engineering	Automated QA & regression testing	% regression tests automated	0%	60%	55%	On Target	\$743K
<b>Total Annualized Impact — 3 Departments, 6 Initiatives</b>							<b>\$5.73M</b>
Conservative estimates on target improvement. Based on 30-person teams, \$30M ARR.							
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 10px;">Exceeding</span> Better than target         </div> <div> <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 10px;">On Target</span> ≥80% of improvement gap         </div> <div> <span style="background-color: #ffc107; color: white; padding: 2px 5px; border-radius: 10px;">Improving</span> Better than baseline, &lt;80%         </div> <div> <span style="background-color: #dc3545; color: white; padding: 2px 5px; border-radius: 10px;">Below Target</span> At baseline         </div> </div>							



# Ready For Lift-off - Lets Go!!

## **1 Schedule Value Scan**

2 hours. CEO + ELT. Everything else follows.

## **2 Rank Top 10 Ideas - 2x2**

2x2 Matrix - Impact x Ease x Data Readiness

## **3 Organize Departmental Scans**

Bottom's up ideas from each functional department

## **4 Launch Top 3 Initiatives**

Build/Buy/Hire

## **5 Set up Board Reporting Now!**

Progress Report / Impact Report

*The Cost of Waiting is Compounding!!*

# 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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