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The AI Transformation Playbook

2026 EDITION



Three stages from first use to redesigned processes

Growth without matching headcount

For a long time, growing a business meant hiring. More revenue or a new market called for a bigger team, and the limit was how fast you could recruit, train and lead new people. AI loosens that limit. Software that can analyze, summarize and carry out work at machine speed lets a company grow faster than its payroll.

This is less about replacing people than about changing how work is organized: who does what, and how quickly an insight turns into a decision. This playbook describes the three building blocks of an AI-powered company and the three stages that lead there, each with its own checklist.

Three building blocks

01

An AI-fluent workforce

Every employee works with a capable, approved AI tool and uses it for substantial tasks every day. The goal is a habit across the company, not a few enthusiasts.

02

Automated workflows

The focus moves from personal productivity to repeatable processes. Agents take over well-defined steps, such as preparing quotes, checking contracts or sorting service requests.

03

Redesigned core processes

At the top, a small number of business-critical processes are rebuilt around agents. People set direction, handle exceptions and own the relationships, while agents carry out the routine work continuously.

JOURNEY

Three stages, in order

The building blocks are reached in three stages: optimize, accelerate and reinvent. They work best in sequence. A company that tries to rebuild core processes before its people are comfortable with AI usually stalls, because the skills and the trust are not there yet.

Each stage carries more risk and offers fewer, larger opportunities than the one before.

1. **Optimize: augment the workforce**
   Low risk and plenty of openings: get everyone using AI well in their own work.
2. **Accelerate: automate workflows**
   Moderate risk: turn repeatable, text-heavy work into automated steps.
3. **Reinvent: rebuild core processes**
   High risk and few openings: redesign the processes that drive the business.

OPTIMIZE

Stage 1: lay the foundation

The first stage is done when using AI is normal everywhere. Everyone has access to a strong tool, managers use it visibly and expect their teams to do the same, and custom assistants spread across departments. Individual work shifts from producing drafts to judging them, and each team can name the handful of repeatable, text-heavy workflows worth automating later.

Without a clear strategy, a sponsor and simple rules, adoption stays patchy.

1. **Decide who gets access**
   Choose the access model and the groups of employees who are eligible first.
2. **Write down your why**
   State the specific, urgent reason AI matters to your business. Efficiency alone is not one.
3. **Name two sponsors**
   One on the business side, ideally the CEO, and one on the technical side, often the CTO.
4. **Appoint an AI lead**
   One person owns AI for the company. Larger business units get a lead of their own.
5. **Publish rules for responsible use**
   Practical guardrails on what is allowed, what needs review and what is off limits.
6. **Set up the operating model**
   How tools, pilots and custom assistants get approved, and what managers are expected to do.
7. **Measure the starting point**
   Capture current AI use and skill levels across the workforce before the rollout.
8. **Connect usage and HR data**
   Within data protection rules, link platform and HR data to see adoption by team.
9. **Plan a company-wide launch**
   A kickoff where leadership explains the reason for AI and what it expects from people.
10. **Build a communication calendar**
    Plan the messages for the launch and the weeks after it in advance.

WHY THE WHY MATTERS

People adopt AI faster when they see why it matters for the company and for their own job. Compare two statements. Weak: we want to become more efficient with AI. Stronger: with AI we answer customer inquiries on the same day, which wins us orders that slower competitors lose.

OPTIMIZE

Turn access into a daily habit

Handing out licenses does not change behavior, and most transformations stall in the gap between access and habit. This part of the stage is about activation: first getting people to try AI, then to use it well, and finally to use it every day for work that matters.

Managers decide whether AI sticks in their teams.

1. **Roll out the tools**
   Give access to the eligible groups defined in the foundation.
2. **Certify basic skills broadly**
   Bring nearly the whole workforce to a verified, basic level of AI proficiency.
3. **Coach by role**
   Give every employee access to use case coaching tailored to their job.
4. **Build AI into onboarding**
   New hires learn the rules, the tools and the expectations from their first week.
5. **Start with senior leaders**
   Executives use AI themselves and hold the managers below them accountable.
6. **Activate line managers**
   Managers with direct reports use AI in their own work and bring their teams along.
7. **Let champions show the way**
   Enthusiasts in each department show colleagues what works in their daily tasks.
8. **Create recurring formats**
   Hackathons, short lunch sessions and regular AI days turn trying into a habit.
9. **Offer a place for questions**
   Office hours or a Teams or Slack channel where people share tips and solve problems.
10. **Raise the skill level**
    Move most employees from occasional use to meaningful, consistent use cases.
11. **Keep a use case library**
    Collect proven use cases in one place and keep the collection current.

MANAGERS SET THE TONE

Teams tend to follow their manager's lead. When a manager expects AI to be part of everyday work, people practice and get better. When a manager is skeptical, they stop trying. That is why activating managers cannot be optional.

ACCELERATE

Stage 2: build a pilot engine

The second stage is reached when working agents are commonplace and most employees rely on at least one. People who can build automations sit in every function and have an agent platform to work with. AI can draw on company data and know-how, and automations run inside the tools people already use, from Teams to the CRM and the ticket system. Key figures such as close rate, churn or delivery speed improve in ways you can trace to specific workflows.

This stage builds an engine that produces, tests and scales automations.

1. **Decide who owns agents**
   Central team, department heads or a mix: settle roles and responsibilities first.
2. **Pick where to start**
   Choose the functions or business units with the highest priority.
3. **Map the workflows**
   Draw up a map of automation opportunities for each function or division.
4. **Rank with three questions**
   Score every workflow on value, speed and feasibility before anyone builds.
5. **Choose an agent platform**
   Select and deploy one platform for building and running automations.
6. **Turn champions into builders**
   Train champions step by step until they can automate work for their teams.
7. **Plan pilots every quarter**
   Each function sets out its automation pilots for the coming quarter.
8. **Run pilots in parallel**
   Each function tests more than one automation at a time, so learning never hangs on one bet.
9. **Decide with clear criteria**
   Scale or stop each pilot against success criteria agreed before it started.

THREE QUESTIONS FOR RANKING WORKFLOWS

Value: what does it change for the business, in revenue, cost, customer satisfaction or time to market? Speed: can we build and test it in weeks, or will it take months? Feasibility: can today's tools and data handle it? Start with workflows that score well on at least two questions, and drop those that score poorly on all three.

ACCELERATE

Make the wins stick

A successful pilot does not become standard practice on its own. This part of the stage is about turning experiments into routines that hold across the organization, and about cleaning up what did not work.

An automation is done only when it has an owner, trained users and an off switch.

1. **Document what works**
   Turn successful pilots into procedures, workflow descriptions and playbooks.
2. **Put automations where work happens**
   Wherever possible, build them into existing tools such as Teams, the CRM or the ERP.
3. **Keep an automation catalog**
   A company-wide list of the automations that work and who owns each one.
4. **Roll out systematically**
   Extend approved pilots to every relevant user, step by step.
5. **Train the users**
   Everyone who works with a new agent learns what it does and where its limits are.
6. **Plan for failure**
   Write down for each automation what happens, and who acts, when it breaks.
7. **Retire what does not work**
   Switch off outdated or failed automations before they pile up.

REINVENT

Stage 3: choose the few big bets

The third stage is reached when a small number of business-critical processes have been rebuilt end to end around agents. Agents work continuously, read company data and act in core systems under clear permissions and audit trails. People set goals and limits, handle exceptions, review quality and make the decisions that depend on relationships. Cycles that took weeks shrink to days or hours, and the organization chart starts to change.

The aim is not to automate everything, but to redesign the few processes that matter most.

1. **List the candidates**
   Identify core processes that directly drive revenue, growth or margin.
2. **Measure today's process**
   Record cycle time, operating cost and the main KPIs from start to finish.
3. **Define the target**
   Spell out in concrete numbers what a step change in performance would mean.
4. **Choose a few processes**
   Weigh business impact, data readiness, executive ownership and appetite for risk.
5. **Design the new operating model**
   What agents decide, which data they read, where they act and where people step in.
6. **Name one business owner**
   A single accountable owner from the business, not from IT, answers for the result.

REINVENT

Let agents act safely

Here strategy meets operations. Agents get permission to act in the systems a company depends on most, and that calls for unusual care. In the EU the care has a legal side too: depending on the use case, the AI Act sets duties for human oversight, documentation and transparency.

Every agent in a core system needs limits, a human checkpoint and a failure plan.

1. **Build or buy**
   Build on an agent platform with internal teams, or buy a ready-made solution.
2. **Develop or source the system**
   Create or procure the agent system for the chosen process.
3. **Connect with clear permissions**
   Integrate agents into CRM, ERP and HR systems with explicitly defined rights.
4. **Keep people in control**
   Set approval thresholds and other points where a person has to sign off.
5. **Prepare for incidents**
   Write detailed procedures for what happens when an agent fails.
6. **Pilot with a small group**
   Run the redesigned process with a limited, controlled set of users first.
7. **Expect to iterate**
   Adjust based on pilot results. The first version is rarely the right one.
8. **Update procedures and roles**
   Rewrite process descriptions and job profiles to match the new way of working.
9. **Retrain managers and operators**
   Prepare the people who run the process for their new responsibilities.
10. **Measure continuously**
    Track the process KPIs daily or weekly from the day it goes live.

Becoming an AI-powered company is not a project with an end date. It is a change in how the business runs that takes several years. The three stages give an order, not a timetable, and every company moves through them at its own pace. The real gain lies in work that was out of reach before, not only in lower costs.

Inspired by Section's Building AI-Powered Organizations: A Strategic Playbook for Enterprise Transformation (February 2026). Text rewritten by Proveo.