01 / INTRODUCTION

AI Transformation Coherence Check

A practical leadership workbook connecting AI initiatives to organizational purpose, work, people, and evidence.

YOUR OUTPUT

An initiative review, a cross-initiative comparison, and a documented leadership decision with a date to revisit it.

The executive problem

AI initiatives can advance in separate functions, each with its own objectives, assumptions, sponsors, and success measures. Individual pilots may generate value while creating duplication, resource conflicts, unresolved workflow dependencies, or difficult workforce transitions.

This workbook helps leaders examine whether proposed and active initiatives form a coherent set of organizational decisions. It supports a structured conversation; it does not produce an automated score or certification.

Five connected questions

01 **STRATEGIC ALIGNMENT**
What organizational result should improve?

02 **PORTFOLIO COHERENCE**
How does this effort relate to the other investments?

03 **WORK REDESIGN**
What changes about workflows, human judgment, and accountability?

04 **HUMAN TRANSFORMATION**
What changes for people, and what support will they need?

05 **LEARNING & ADAPTATION**
What evidence will change the next decision?

Explore JenMayo Group's AI Transformation Governance advisory

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02 / GUIDE

How to use the workbook

Choose one initiative for a detailed review, then compare initiatives before making portfolio-level decisions.

01 **PREPARE**
Gather the objective, sponsor, baseline, case or pilot evidence, process maps, employee feedback, and constraints.

02 **ASSESS**
Complete pages 3–5 for one initiative. For another initiative, save a separate PDF copy or duplicate those pages in a PDF editor.

03 **COMPARE**
Use page 6 to compare up to three initiatives. Look for shared capabilities, dependencies, workforce effects, funding constraints, and decision rights.

04 **DISCUSS**
Use the facilitation guide on page 7. Include operational, technical, HR/OD, and affected workforce perspectives as appropriate.

05 **DECIDE & REVISIT**
Complete page 8. Record a provisional action, decision authority, evidence required, affected stakeholders, and a date or trigger for review.

How to interpret the two choices

Evidence quality: Strong = credible evidence supports a preliminary conclusion; Some = partial evidence with unresolved assumptions; Missing = evidence has not been demonstrated or provided.

Finding: Indicate whether the evidence supports proceeding, raises a concern, or remains inconclusive. Strong evidence can demonstrate a problem.

Interpretation and confidentiality: Treat responses as provisional. Do not add evidence categories into a score. This document stores information locally in your saved copy; it does not transmit responses to JenMayo Group. Avoid entering personal, confidential, security-sensitive, or privileged information unless your organization has approved that use.

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03 / ASSESS

Strategy and portfolio coherence

Use one copy of pages 3–5 per initiative. A useful review records contrary evidence as well as favorable evidence.

INITIATIVE NAME

EXECUTIVE SPONSOR / OWNER

BUSINESS UNIT

REVIEW DATE / STAGE

01 STRATEGIC ALIGNMENT

What business or organizational outcome is this initiative intended to improve?

Look for: A defined outcome, baseline, expected benefit, business sponsor, intended measure, and plausible causal link to the organizational objective.

EVIDENCE QUALITY

- ◉ Not assessed
- ○ Strong
- ○ Some
- ○ Missing

WHAT THE EVIDENCE SUGGESTS

- ◉ Not assessed
- ○ Supports proceeding
- ○ Concern identified
- ○ Inconclusive

DOCUMENTED EVIDENCE / FINDING

02 PORTFOLIO COHERENCE

How does this initiative relate to other AI investments and organizational priorities?

Look for: Overlapping capabilities, connected workflows, dependencies, scarce resources, opportunity costs, shared ownership, and portfolio decision rights.

EVIDENCE QUALITY

- ◉ Not assessed
- ○ Strong
- ○ Some
- ○ Missing

WHAT THE EVIDENCE SUGGESTS

- ◉ Not assessed
- ○ Supports proceeding
- ○ Concern identified
- ○ Inconclusive

DOCUMENTED EVIDENCE / FINDING

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04 / ASSESS

Work design and human transformation

Examine how work will actually be performed and how employees may experience the proposed changes.

03 WORK REDESIGN

How will this initiative alter workflows, handoffs, human judgment, roles, and accountability?

Look for: Before/after workflow, roles and exceptions, human-AI responsibilities, escalation paths, oversight, quality checks, and training or process dependencies.

EVIDENCE QUALITY

- ○ Not assessed
- ○ Strong
- ○ Some
- ○ Missing

WHAT THE EVIDENCE SUGGESTS

- ○ Not assessed
- ○ Supports proceeding
- ○ Concern identified
- ○ Inconclusive

DOCUMENTED EVIDENCE / FINDING

NEXT INQUIRY / STAKEHOLDER PERSPECTIVE

04 HUMAN TRANSFORMATION

What changes for affected people, and which organizational supports will they need?

Look for: Expertise and professional identity; competence and confidence; discretion and autonomy; trust and psychological safety; participation, fairness, relatedness, and leadership behaviors.

EVIDENCE QUALITY

- ○ Not assessed
- ○ Strong
- ○ Some
- ○ Missing

WHAT THE EVIDENCE SUGGESTS

- ○ Not assessed
- ○ Supports proceeding
- ○ Concern identified
- ○ Inconclusive

DOCUMENTED EVIDENCE / FINDING

NEXT INQUIRY / STAKEHOLDER PERSPECTIVE

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05 / ASSESS

How will we know whether this is working?

Use observable business results, employee experience, and safeguards to guide the next decision.

05 LEARNING AND ADAPTATION

What evidence would tell us to continue, expand, redesign, consolidate, defer, or stop?

Look for: Operational results and starting conditions; quality and errors; employee experience and capability; safeguards, unintended consequences, and specific review triggers.

EVIDENCE QUALITY

- (•) Not assessed
- ( ) Strong
- ( ) Some
- ( ) Missing

WHAT THE EVIDENCE SUGGESTS

- (•) Not assessed
- ( ) Supports proceeding
- ( ) Concern identified
- ( ) Inconclusive

DOCUMENTED EVIDENCE / FINDING

What to measure and when to reconsider

Choose a few signals you can actually observe. Compare results with the starting point and agree in advance what would require another decision.

Example: Requests take 12 minutes today; target 8 minutes. Monitor employee confidence and correction rates. Review the decision if errors increase.

CURRENT SITUATION / BASELINE (WHAT HAPPENS TODAY?)

DESIRED OPERATIONAL RESULT (WHAT SHOULD IMPROVE?)

EMPLOYEE EXPERIENCE / CAPABILITY (WHAT WILL YOU CHECK?)

QUALITY OR RISK WARNING SIGN (WHAT COULD GO WRONG?)

REASSESSMENT TRIGGER (WHEN SHOULD LEADERS RECONSIDER?)

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06 / COMPARE

From initiatives to portfolio decisions

Copy the evidence from each initiative review. The comparison is for discussion, not mechanical ranking.

	INITIATIVE LABELS		
Business or organizational outcome			
Evidence gaps / key assumptions			
Shared capability / duplication			
Work, judgment, and people effects			
Dependencies / competing capacity			
Suggested next action / rationale			

Compare relationships: Which opportunities could share data, workflows, infrastructure, or governance? Where could one initiative undermine another? Which projects place competing demands on the same employees or leaders?

PORTFOLIO-LEVEL OBSERVATION / UNRESOLVED TENSION

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07 / APPLY

Facilitated discussion and worked example

A focused 25-minute review, following advance assessment and preparation, can produce one consequential decision.

5 MIN	**SET THE CONTEXT** Select 3–5 pre-assessed initiatives. Confirm objectives, sponsors, and major evidence gaps.
5 MIN	**EXAMINE RELATIONSHIPS** Identify overlaps, interdependencies, shared capabilities, and effects on workflows and employees.
10 MIN	**DISCUSS THE CHOICE** Identify one consequential issue and discuss options. Distinguish decision facts from assumptions.
5 MIN	**ASSIGN FOLLOW-THROUGH** Record the accountable decision owner, next action, missing evidence, and review trigger.

Worked example | Customer-insights assistants

Situation. Sales and Customer Service separately propose AI assistants using much of the same customer data. Their desired outcomes differ, but both require similar data access, analytical services, and technical support.

Finding. Strong evidence of overlap indicates a portfolio-coherence concern. It does not establish that either proposal should automatically be approved, merged, or rejected.

Next inquiry. Compare capability requirements, intended outcomes, decision ownership, employee handoffs, privacy/security responsibilities, and the cost of a shared capability before choosing a path.

THE LEADERSHIP QUESTION

If we were allocating these AI resources today, knowing what we now know, would we fund this same portfolio?

Read the related Agentic Human research and perspectives

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08 / DECIDE

Decision record and follow-through

Document the decision and why it is reasonable on the current evidence. Reassess when circumstances change.

INITIATIVE OR PORTFOLIO DECISION

PROVISIONAL NEXT ACTION

- (•) Undecided
- ( ) Advance
- ( ) Consolidate
- ( ) Redesign
- ( ) Defer
- ( ) Discontinue

DECISION RATIONALE AND SIGNIFICANT TRADE-OFFS

NEXT ACTION AND EVIDENCE STILL REQUIRED

AFFECTED FUNCTIONS, STAKEHOLDERS, DEPENDENCIES, AND SAFEGUARDS

ACCOUNTABLE DECISION OWNER / DECISION AUTHORITY

REVIEW DATE OR EVIDENCE TRIGGER

WHAT NEW INFORMATION WOULD CHANGE THIS DECISION?

For enterprise-wide changes, route decisions to the appropriate executive or investment authority. Required legal, security, privacy, model-risk, and workforce processes continue to apply.

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09 / FOUNDATIONS

Methodology, boundaries, and next steps

An original JenMayo Group synthesis grounded in established organizational theory and selected contemporary guidance.

The five questions draw on organizational congruence, sociotechnical systems thinking, human motivation and team learning, benefits-realization and portfolio principles, and AI governance. Each informs an area of inquiry; no cited framework validates this instrument.

01 Strategic alignment	Nadler & Tushman; PMI benefits realization
02 Portfolio coherence	PMI portfolio principles; WEF transformation
03 Work redesign	Trist & Bamforth; Nadler & Tushman; NIST
04 Human transformation	Deci & Ryan; Edmondson; Hermann et al.
05 Learning & adaptation	NIST AI RMF; WEF transformation; Edmondson

Limitations: This workbook is a discussion and decision-support resource, not a validated psychometric assessment, an AI model evaluation, or a substitute for legal, financial, security, privacy, workforce, or regulatory review. It yields provisional judgments that should be tested against organizational evidence.

Selected and verified references

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CONTINUE THE INQUIRY WITH JENMAYO GROUP

If the exercise exposes unresolved governance, workflow, or workforce challenges, explore a facilitated review or a human-centered AI transformation advisory conversation.

Explore advisory services Start a conversation