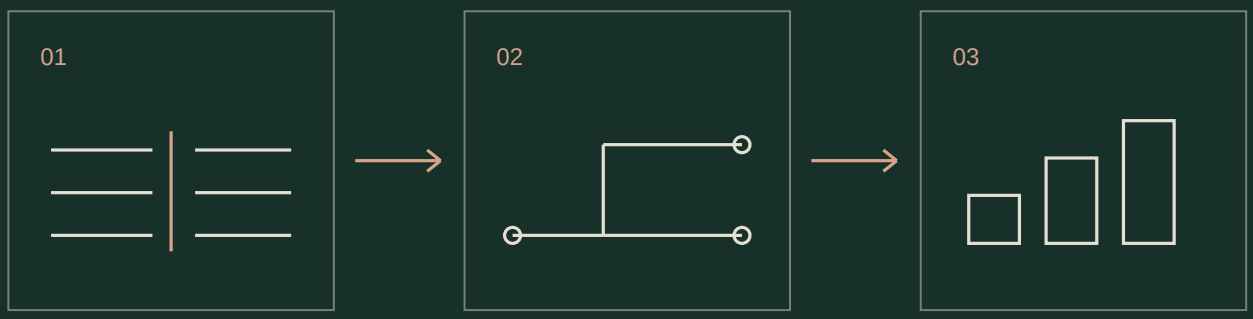
A PRACTICAL GUIDE FOR TEAMS

Workflow Transformation Offsite Guide

One focused day. A clearer workflow.
An owned plan for what happens next.



Find the pain.

Redesign the work.

Put it to work.

Vic Akosile

The Architecture of AI Adoption

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Built Into Work · HR Tech field guide

Find the pain. Redesign the work. Put it to work.

A practical guide to a workflow-transformation offsite.

Use a focused day to turn a difficult workflow into a shared design, resolved decisions and an owned implementation plan. The result might be a simpler process, a configuration change, a purchased capability or a custom build. AI is one possible part of the answer.

> **The output:** one bounded workflow, a clear outcome, a tested future-state design, and a named owner for the next implementation step.

What this guide includes

1. Prepare the work and protect the capacity.

2. Facilitate a one-day offsite.

3. Map value and requirements.

4. Simulate the redesigned workflow.

5. Commit to a 30-day implementation plan.

Built from Vic Akosile's HR Tech keynote: *The Architecture of AI Adoption.* The agenda and worksheets translate the talk's method into a reusable facilitation guide. Timings and checkpoints are suggested starting points, not a guarantee of delivery.

01 / Before the offsite

Find the pain. Make room to act.

Choose a workflow with a boundary

Start with a trigger and an observable outcome: “accepted offer > employee ready for day one” is more useful than “fix onboarding.” Narrow it further if the owners cannot influence the full journey.

1. Listen to both sides. Interview people doing the work and people receiving it. Ask for a recent normal case and a case that went wrong.

2. Bring evidence. Collect anonymized examples of waiting, re-entry, missing information, corrections and exceptions. Separate measured facts from assumptions.

3. Name the outcome owner. Include a person who can make decisions about the process, plus the people who understand its handoffs.

4. Bring delivery and control expertise. Invite technical support and relevant data, security, policy or legal owners where the workflow needs them. Use a facilitator and a decision recorder.

5. Protect implementation time. Agree what existing work will stop, what coverage is needed, or which delivery capacity will be added. Reserve time after the offsite.

> **Readiness gate:** if there is no decision owner, no access to evidence, or no follow-through capacity, use the session for discovery and resolve those gaps before promising implementation.

Our workflow: trigger > outcome

Example: accepted offer > role-specific day-one readiness

People, decisions and capacity required

Who owns the outcome? Who does or receives the work? Who can approve changes? What time is protected?

02 / Suggested one-day agenda

Redesign backward from the outcome.

Time	Work together	Leave with
09:00-09:30	Agree on the outcome, boundary and evidence.	Definition of done and baseline.
09:30-10:15	Walk through a recent case. Mark waits, handoffs and rework.	A current-state map with facts and assumptions distinguished.
10:15-10:30	Break.	
10:30-11:30	Ask what actually has to be true. Separate requirements, deliberate experience choices and inherited habits.	Requirements and decisions to challenge.
11:30-12:15	Design backward from the desired outcome.	A first future-state map.
12:15-13:00	Lunch.	
13:00-14:00	Simulate a normal case, missing information, a changed decision and an exception.	Failure points, revised handoffs and owners.
14:00-14:45	Choose the first improvement and delivery model.	Bounded scope, dependencies and operating owner.
14:45-15:00	Break.	
15:00-16:00	Agree tests, evidence, approvals and implementation capacity.	A 30-day plan with names and dates.
16:00-16:30	Read back decisions. Resolve ownership. Book the review.	An explicit commitment or a clear blocked decision.

Facilitator prompts

“What outcome does this step protect?” “What would break if we removed it?” “Is this a requirement, an intentional choice, or a habit?” “Who decides?” “When someone says ‘then somebody checks it,’ who checks what, and how do they know it is their turn?”

03 / Working template

Define value and what must be true.

Desired outcome and definition of done

Who benefits? What can they do when this workflow is complete? What observable evidence proves it?

Baseline > target > evidence owner > review date

Choose 1-3 useful measures. Record the current evidence, the proposed target and how you will collect results.

Use the seven value dimensions: efficiency, scale, quality, experience, risk, capability and financial impact. Do not treat hours saved as cash savings unless the capacity is actually redeployed or costs change.

Requirements we must preserve

Policy, permissions, data access, approvals, quality thresholds. Name the person who can confirm each requirement.

Experience choices and inherited practices to reconsider

What is intentional? What exists because of a past constraint? What evidence or decision would let us change it?

Transformation capacity

What stops or simplifies? Who provides coverage? Who supplies delivery support? How much protected time is available?

04 / Working template

Make the future workflow testable.

For each step, specify the input, action, owner, output and exception. Draw the map on a shared board or repeat the row below.

Trigger / input	Action / decision	Owner	Output / handoff	Exception / escalation
Step 1:	Step 2:		Step 3:	

Where can the four A’s help?

Assistants support a person. **Applications** provide a purpose-built interface. **Automations** execute defined steps. **Agents** can pursue tasks within explicit boundaries. Name the human owner, permitted actions and escalation path for each.

Scenario	What to test
Normal case	Does every handoff reach a named owner? Is completion visible?
Missing information	Who requests it? Can the case safely pause? Who sees the delay?
Changed decision	Which downstream steps must stop or be updated? Who confirms the change?
Exception or failure	Who takes over? What is the fallback? What evidence is retained?

What failed in simulation? What changed?

Record the scenario, gap, revised design and owner. Retest the affected step.

05 / Working template

Put it to work.

Choose delivery capacity appropriate to the problem: self-serve builders, embedded engineers, a central build team, borrowed engineers or a vendor. This is a portfolio of options, not a ladder. The operating owner remains accountable after the builder moves on.

First bounded improvement and delivery route

What will change first? What is excluded? Which delivery model fits? What dependencies and approvals are needed?

Accountable owner · delivery partner · operating owner

Names, responsibilities and handover expectations

Checkpoint	Commitment
Within 48 hours	Share the map and decision log. Confirm owners, capacity and the first review.
Week 1	Resolve dependencies; validate requirements and baseline; agree acceptance tests.
Weeks 2-3	Implement the bounded change. Test permissions, normal cases, exceptions and fallback. Secure the required approvals.
By day 30	Review evidence with the process owner. Continue, revise or stop. Confirm ongoing maintenance and the next scope.

Acceptance tests, release decision and fallback

What must pass? Who approves release? When do we pause or revert? Who maintains it?

Review date and next decision

Date · evidence to review · decision owner

Print these worksheets to record your decisions. Keep employee and confidential information out of shared notes.