AI Transformation Assessment

Locate one workflow using evidence and agree on one next move.

For: Function leaders and working teams | Use when: At the start of a planning discussion | Suggested time: 15 minutes

Version 1.0 | October 5, 2026

Use synthetic or authorized information. Keep sensitive work in approved tools. A named person owns each decision. These tools support discussion and planning; they are not validated assessments.

1. Select the stage supported by evidence

Different workflows can be at different stages. This is a discussion aid, not a validated maturity score.

1. Individual experimentation

People independently use AI to improve personal work.

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2. Pilot programs

A named owner tests a scoped use case with guardrails.

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3. Embedded workflows

AI is part of the standard process with measured results and ownership.

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4. Integrated intelligence

Connected information supports decisions across workflows and teams.

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5. Transformed function

Roles and the operating model change how the function delivers outcomes.

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2. Record a next move

Choose a stage for the named workflow, document what happens today, and commit to a next action.

Workflow and stage

Which part of the work are you assessing?

Evidence

What observed behavior supports the stage?

Next move

What capability or decision comes next?

Owner and review date

Who carries the action and when do you revisit it?

Completed companion example

All organizations, workflows, numbers, and results in these examples are fictional and provided for learning. Targets are proposed decision criteria, not validated standards or promised outcomes.

1. Individual experimentation

Analysts try approved tools separately; no shared workflow owner yet.

2. Pilot programs

A lead runs synthetic policy-answer tests with a review plan.

3. Embedded workflows

A supported drafting step is used routinely with named reviewers and measured outcomes.

4. Integrated intelligence

Approved information supports multiple service workflows with reliable handoffs.

5. Transformed function

Responsibilities and capacity planning change based on sustained evidence, rather than one pilot.

Workflow and stage

Routine policy answers; stage 2 during the synthetic pilot.

Evidence

Named owner, bounded test cases, approved test corpus, draft-only behavior.

Next move

Prove citation support and escalation before considering standard use.

Owner and review date

Service-desk lead; two weeks after kickoff.

Original guide: https://builtinto.work/resources/transformation-assessment