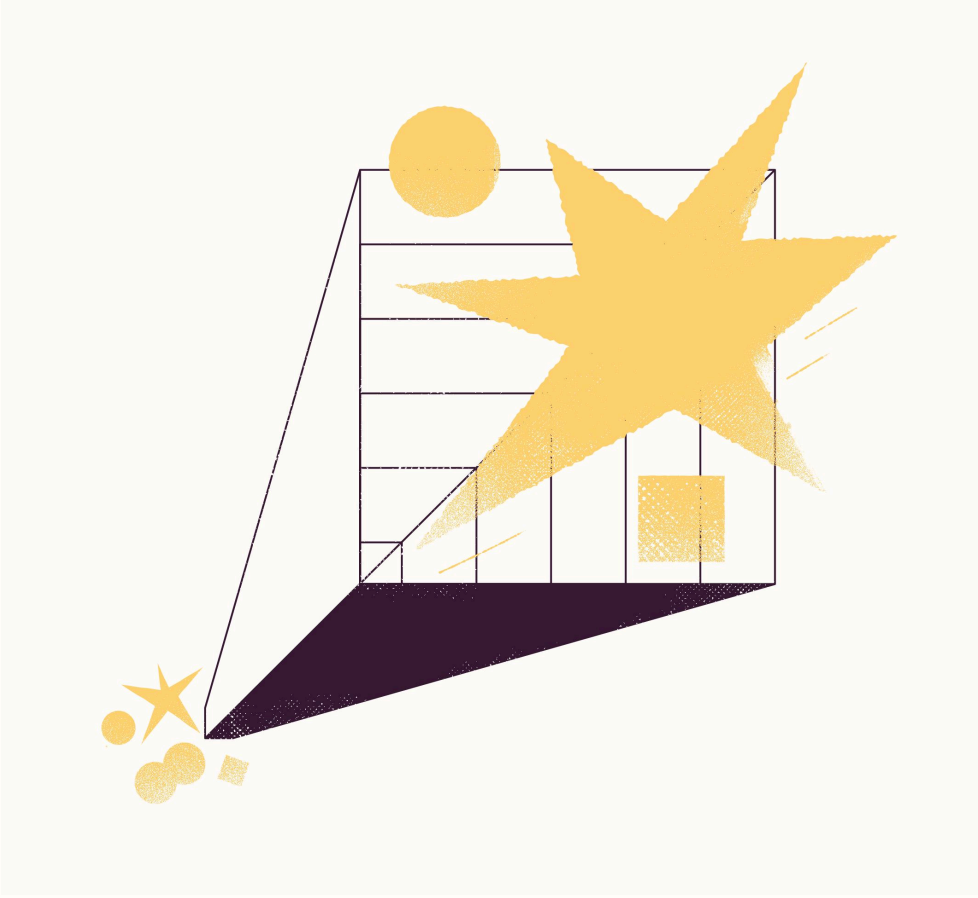
How to build an AI transformation team

ROLES AND ROADMAPS TO SCALE WITH CONFIDENCE



zapier

From experimentation to embedded orchestration

Introduction

To maximize AI ROI, enterprise leaders have to bridge the gap between AI experimentation and scaled deployment. Almost 80% of companies have deployed generative AI in some form, but about the same number said it had no material impact on their earnings—yet.

The big blocker? AI transformation isn't just a tooling problem—it's a people problem. Scaling AI across your organization requires a culture shift. An AI transformation team can address the people, structure, and governance you need at each stage of AI adoption. These in-house champions educate teams on AI's power, provide ongoing training, and dispel myths, all while guiding you through this evolution.

In this guide, you'll get:

1. **A hiring plan for your AI transformation team based on your maturity stage**
2. **A rubric to determine AI fluency for new hires and current employees**
3. **A list of triggers that indicate it's time to scale to the next AI maturity stage**

Stage 1
LLM exploration

In the earliest stage of AI adoption, experimentation is informal, invisible, and unsupported. Individual contributors explore tools like GPT in isolated ways, without oversight, strategy, or budget—creating a proliferation of shadow AI that introduces risk. AI efforts live in DMs, Slack threads, and side projects but are not currently measured or optimized for success.

There's no formal orchestration or transformation effort, and AI usage is limited to basic prompts or disconnected workflows.

Often, a curious internal advocate—your unofficial "Chief AI Officer" like a Director of IT, Head of IT Ops, CTO, or Senior IT Manager—champions early AI efforts on their own time. But without dedicated headcount or alignment to broader goals, these initiatives remain scattered and unsustainable.

Governance

No approval workflows or guardrails in place	High security and data privacy risks due to unmanaged shadow AI usage.	Establish basic visibility into AI tools in use and identify where sensitive data may be exposed.

Signs you're ready for the next stage

- Shadow AI poses a potential security risk via an audit.
- Early AI experiments help teams save time and effort, signaling potential for AI strategy growth.
- AI tool sprawl and usage becomes increasingly difficult to manage, and the need for an overarching AI strategy emerges.

Company-wide AI fluency: **Capable**

- **Fluency is isolated and experimental**
- **AI is used to explore ideas, not run processes**
- **Focus on identifying and supporting early adopters**

Ways AI is used at this stage:

- Drafting email copy or summarizing meeting notes with ChatGPT
- Rewording job descriptions or polishing internal documentation with AI
- Generating one-off creative image requests with Midjourney
- Researching competitors or prepping a presentation with an AI tool

SIDEBAR

Zapier's AI fluency rubric

As part of Zapier's shift from AI-friendly to AI-first, we developed AI fluency levels to assess where everyone stands when it comes to AI adoption.

Unacceptable

Resistant to AI tools or skeptical of value

What this looks like:

- **Can't name any AI tool they've used in a meaningful way**
- **Skeptical about how AI can improve productivity**

Capable

Early user of AI tools, primarily in isolated workflows

What this looks like:

- **Has used one or more AI tools with purpose for personal or professional goals**
- **They can articulate why they used a particular tool**
- **Shows enthusiasm about using AI in deeper ways**

Adoptive

Builds and iterates with AI to augment daily work

What this looks like:

- **Can discuss how AI improves their work outcomes or productivity**
- **Continuously improves how they use AI through experiments and refinements**
- **Leverages multiple tools outside of Claude/ChatGPT**

Transformative

Leads AI strategy, scales enablement, and rethinks workflows

What this looks like:

- **Prioritizes AI-first solutions when addressing issues**
- **Leverages multiple tools and thinks strategically about using them—for example, how those tools impact the bigger picture**
- **Moves quickly and brings others along with them**

Stage 2
AI-powered workflows

In the second stage of AI maturity, companies begin seeing value from a few key workflows but need clearer ownership and accountability to scale. AI use is typically concentrated in Operations or IT, where teams connect tools like Zapier, ChatGPT, or Claude to streamline processes.

This is often when organizations make their first AI-focused hire—an **AI Automation Manager**—and begin upskilling existing employees. It's a smart move: after all, workers with AI skills earn 56% more than their peers without AI expertise, and teams become better equipped to build and maintain more complex automations.

Success metrics

- AI adoption is starting to be measured across your organization (monthly pulse surveys, IT systems logs, etc.)
- AI workflow KPIs focus on business impact, including hours saved, tickets closed, and error reduction

Reporting structure

An **AI Automation Manager** is hired as a single owner for AI initiatives. The AI Automation Manager sits in Ops or IT to start, then increases AI exposure for other lines of business leaders.

Governance

The AI Automation Manager is actively creating the plans and an AI usage policy to scale AI.	Security, Legal, and Data are looped into ongoing AI projects and become key stakeholders in your company's AI transformation.	You've implemented good data hygiene practices across the org, like access controls, automated data retention and deletion, and document data lineage.

Stage 2
AI-powered workflows

Signs you're ready for the next stage

- Multiple teams are making repetitive requests for more access to AI tooling/workflows.
- Your AI Automation Manager is building workflows for more than two functions/departments at a time.

Company-wide AI fluency: **High-capable to low adoptive**

- **AI delivers measurable value (for example, task offload and faster response times)**
- **AI strategy lives with the builder, not the business unit**

Ways AI is used at this stage:

- Chaining tools like Zapier, Notion AI, and ChatGPT together to auto-summarize and tag incoming support tickets
- Using Claude or Perplexity for research and integrating results into a structured content outline
- Experimenting with different prompt structures to fine-tune output quality for blog posts or marketing copy
- Using GitHub Copilot for daily coding tasks and configuring workflows to auto-test and deploy code

ZONOS

> Scaling automation isn't just about scaling the automation itself; it's about scaling people—helping them focus on what they're meant to do. By approaching it from the perspective of, 'I'm here to help you, and I want your automations and systems to do everything they can for you,' it made people more comfortable with the idea of automating parts of their job.

— Connor Sheffield
Head of Business Automation at Zonos

AI Automation Manager

Overview

The AI Automation Manager ensures the effective operation, governance, and strategic alignment of AI systems within an enterprise organization. This role focuses on optimizing AI performance, managing cross-functional AI initiatives, and establishing operational excellence frameworks that drive business value while maintaining compliance and risk management standards.

Duties and responsibilities

- Develop and implement AI operations strategy aligned with business objectives
- Monitor AI system performance, reliability, and effectiveness across the organization
- Establish governance frameworks for AI model deployment, monitoring, and maintenance
- Collaborate with IT, data science, and business units to ensure seamless AI integration
- Manage AI vendor relationships and evaluate new AI technologies and platforms
- Create and maintain AI performance metrics, KPIs, and reporting dashboards
- Lead cross-functional teams to deliver AI-powered business solutions
- Ensure compliance with data privacy, security, and regulatory requirements
- Develop change management strategies for AI adoption across business units
- Manage AI operations budget and resource allocation
- Drive continuous improvement initiatives for AI processes and workflows

Qualifications

- Bachelor's degree in Computer Science, Engineering, Business, or related field; MBA preferred
- 5+ years of experience in operations management, preferably in technology or AI/ML environments
- Strong understanding of AI/ML technologies, deployment practices, and operational challenges
- Experience with project management methodologies (Agile, Scrum, Lean)
- Proven track record of managing cross-functional teams and complex technical projects
- Knowledge of data governance, privacy regulations (GDPR, CCPA), and compliance frameworks
- Strong analytical and problem-solving skills with data-driven decision-making approach
- Excellent communication and stakeholder management skills
- Experience with vendor management and technology procurement processes

Stage 3
Agentic workflows + MCP

As organizations mature in their AI journey, teams begin launching agentic workflows using tools like Zapier Agents and LLM APIs, while dashboards emerge to track impact and ROI. To scale securely and sustainably, businesses hire an **AI Platform Engineer** to oversee the infrastructure that enables repeatable, governed AI deployment.

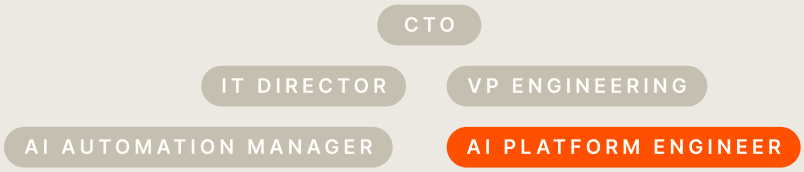
This role supports and works collaboratively with the AI Automation Manager so that the org can confidently expand AI use *across teams*.

Success metrics

- AI adoption continues to be measured across your organization
- In addition to time savings and general efficiency gains, analytics dashboards now measure workflow coverage, agent performance, and ROI benchmarks on AI tools

Reporting structure

An **AI Platform Engineer** is hired to focus on building and maintaining the technical infrastructure that supports AI applications, model deployment, and data pipelines.



Governance

Tiered approval flows are built based on risk class	MCP (Model Context Protocol) is being used to standardize communication between agents and tools

93%

of all Zapier automations are created by roles outside of IT

*based on internal Zapier data sourced August 2025

Stage 3
Agentic workflows + MCP

Signs you're ready for the next stage

- Your small, two-person AI transformation team is at capacity when it comes to scaling AI orchestration across the organization.
- Your team is fielding an increasing number of requests from GTM, HR, and/or Support, signaling a need for department-specific assistance.
- New AI use cases require shared logic or access control.
- Executives are asking for platform-level reporting.

> "We're hiring this role because having someone on the team who owns the experience of using AI tools—like Claude, ChatGPT, Cursor, and Copilot—makes a huge difference. There are AI experts across Zapier, but this role is about giving our team a clear, embedded point person: someone who can shape internal best practices, contribute to engineering documentation, and help teammates get started with confidence. It's not just about support—it's about providing direction, clarity, and a strong foundation for scaling AI.
>
> — **Jess Winters**
> Team Lead, Engineering at Zapier

Company-wide AI fluency: **Early- to mid-transformative**

- Orchestration platforms (for example, Zapier with LLM steps or Agents) are used to solve complex, multi-system problems
- Builders have support, standardization, and time to iterate

Ways AI is used at this stage:

- Using MCP to connect an LLM-based lead routing agent to a CRM, enrichment tools, and internal Slack alerts, standardizing how the agent gathers and processes context
- Building departmental dashboards (in, for example, Mode or Looker) to visualize AI agent performance—time saved, confident scores, fallback rates—then using this data to refine workflows
- Collaborating with Engineering to adjust access permissions on shared AI workflows, ensuring Sales and Support can build while adhering to governance standards

AI Platform Engineer

Overview

The AI Platform Engineer builds and maintains the technical infrastructure that supports AI applications, model deployment, and data pipelines. This role ensures scalable, reliable, and secure AI platform operations while collaborating with data science and engineering teams to operationalize machine learning models at enterprise scale.

Duties and responsibilities

- Establish AI best practices, guidelines, and golden paths for engineering teams, including comprehensive documentation and developer support
- Design, build, and maintain scalable frontend and backend infrastructure, including React/Next.js interfaces and Python or Node.js services
- Develop and optimize data pipelines and AI model context protocols, leveraging tools like LangChain and semantic search
- Implement robust CI/CD pipelines, managing deployments, automation, and systematically improving the software development and deployment experience using tools such as Docker, Kubernetes, GitLab CI, and Terraform
- Build and enhance AI tooling integrations using APIs like OpenAI and Anthropic
- Ensure high availability, performance, and security of AI platform services
- Collaborate with engineering teams to continuously improve developer experience, tooling, and workflows
- Contribute to platform extensibility through thoughtful API design, SDK authoring, and comprehensive documentation
- Provide technical support, troubleshooting, developer experience enhancement, and post-launch maintenance for AI platform components
- Foster a culture of experimentation, learning, and continuous improvement

Qualifications

- Bachelor's degree in Computer Science, Engineering, or related technical field
- 4+ years of experience in full-stack platform engineering, DevOps, or infrastructure roles
- Proficiency in frontend development (React, TypeScript, Next.js) and backend services (Python/FastAPI or Node.js)
- Experience with AI tooling and frameworks, such as OpenAI API, Anthropic API, LangChain, semantic search, and vector databases
- Familiarity with database modeling and management (Postgres, Redis)
- Strong understanding of CI/CD practices using GitLab CI, Docker, Kubernetes, and Terraform
- Knowledge of AI/ML model deployment practices, including model context protocols and agent frameworks
- Demonstrated ability to create clear documentation, APIs, and SDKs focused on developer experience
- Exceptional problem-solving, troubleshooting, and performance optimization skills
- Strong communication skills with a proactive, ownership-oriented mindset, comfortable navigating ambiguity and driving solutions independently

SIDEBAR

Building an AI automation team

remote

The Challenge

After Remote experienced rapid growth, its three-person IT team was tackling 1,000+ tickets each month—risking both burnout and delayed support. Instead of adding headcount, the team adopted an AI-first strategy focused on scaling internal IT operations.

The Solution

Marcus, Head of IT and AI Automation, **created an IT Integrations Engineer role** and **built a dedicated automation team of three** to support and scale automation across departments.

Using Zapier as their all-in-one enterprise platform, Remote automated their entire IT help desk process using Zapier Agents, Okta, ChatGPT, Notion, and Slack. This approach allows their small team of three to handle over 1,000 requests a month.

Results

$500,000
Saved annually by consolidating legacy tools

10
Three-person IT team performs like team of 10

28%
% of tickets resolved in minutes automatically

> “When individuals make requests, Zapier Agents can look at our tables with all of our tickets and knowledge base and generate responses. Within a few minutes, it automatically triggers suggested resolutions for the end user, as well as for the members of IT Operations, who might not have encountered this.

— **Marcus Saito**
Head of IT and AI Automation

READ THE FULL CASE STUDY

Stage 4
Scaled orchestration

In the final stage of AI maturity, **AI orchestration is fully embedded** across the organization. Workflows are productized, governed, and measured, with a centralized AI transformation team driving strategy and oversight. This team sets the vision for orchestration, while embedded specialists execute within departments to scale automation effectively.

To support this, companies hire multiple **AI Automation Specialists** to work under the **AI Automation Manager,** helping to operationalize and maintain workflows.

As orchestration demand grows, these Specialists are embedded into key functions like RevOps, GTM, and Customer Support—ensuring each team can implement automation tailored to their needs while adhering to centralized governance.

Success metrics

- AI KPIs reflect orchestration maturity, and you're tracking volume and adoption in addition to the full picture:
  - Speed (time-to-deploy for new workflows)
  - Risk (error rates, adherence, data access control)
  - ROI (cost savings, time reclaimed, business impact)
- The embedded Automation Specialists drive onboarding, builder certification, and continuous learning
- Analytics dashboards now track prompt logic, performance, and audit logs

Reporting structure

AI Automation Specialists are hired to support key business functions—like RevOps, GTM, and Customer Support—and lead AI orchestration efforts tailored to each team's needs.

Governance

A tiered risk matrix, model approval process, and audit trails are created to operate across functions	Internal usage policies mirror customer-facing AI compliance frameworks	MCP-standard tooling drives low-lift adoption and rapid experimentation

Stage 4
Scaled orchestration

Signs you're ready to keep scaling

- Executive planning now includes AI orchestration goals, capabilities, and constraints—making it a core part of resource and roadmap decisions.
- AI Automation Specialists are helping teams launch workflows faster and with less reliance on engineering. Orchestration is becoming second nature.
- AI expectations are embedded in hiring, onboarding, and reviews. Business teams identify automation opportunities and actively partner with the AI transformation team to deliver them.

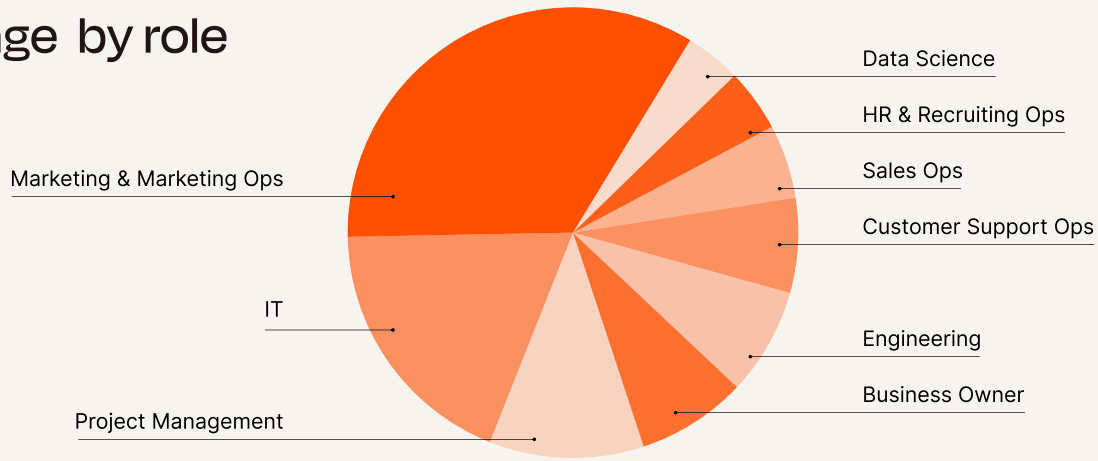
Company-wide AI fluency: **Transformative across leadership and builders**

- **AI orchestration is a foundational business capability, not a feature**
- **You build for scale, developing frameworks, templates and governance patterns that enable others**
- **AI-first thinking is the norm in team strategy, planning cycles, and tooling decisions.**
- **Best practices for AI are operationalized via onboarding, certification, and ongoing learning programs**

Ways AI is used at this stage:

- Creating tiered risk matrices and audit trail protocols, mapping internal usage policies to customer-facing compliance frameworks like SOC 2 and GDPR
- Partnering with executes to forecast AI resourcing needs and embedding orchestration milestones into quarterly and annual planning
- Using orchestration analytics dashboards to track prompt effectiveness, workflow reuse, audit compliance, and team-specific ROI benchmarks, then sharing insights org-wide to drive iteration and adoption

AI usage by role



*based on internal Zapier data sourced August 2025. AI usage is defined as Zaps created by automation (Copilot). Data limited to companies above 250+ employees.

AI Automation Specialist

Overview

The Automation Specialist designs, implements, and maintains automated systems and processes to streamline business operations. This role focuses on identifying automation opportunities, developing workflow solutions using various automation platforms, and ensuring optimal performance of automated systems across the enterprise. As the AI transformation team scales, Automation Specialists work within specific business functions (Sales, Marketing, Support, HR, etc.) to implement AI-driven automation solutions.

Duties and responsibilities

- Analyze business processes to identify automation opportunities and efficiency improvements
- Design and develop automated workflows using tools like Zapier, Microsoft Power Automate, or custom solutions
- Collaborate with business stakeholders to gather requirements and define automation scope
- Configure and maintain robotic process automation (RPA) solutions
- Test automated systems to ensure accuracy, reliability, and performance standards
- Create documentation for automated processes, including user guides and technical specifications
- Monitor automated workflow performance and troubleshoot issues as they arise
- Train end users on new automated systems and processes
- Evaluate and recommend new automation technologies and platforms
- Ensure automation solutions comply with security and data governance policies
- Provide ongoing support and maintenance for existing automation infrastructure

Qualifications

- Bachelor's degree in Computer Science, Information Technology, Engineering, or related field
- 3+ years of experience in process automation, business analysis, or related technical role
- Proficiency with automation platforms (Zapier, Microsoft Power Platform, UiPath, etc.)
- Experience with scripting languages (Python, JavaScript, PowerShell)
- Strong understanding of business processes and workflow optimization
- Knowledge of API integrations and data transformation techniques
- Experience with database systems and SQL
- Familiarity with cloud platforms and SaaS applications
- Strong analytical and problem-solving abilities
- Excellent communication skills with ability to translate technical concepts to business users
- Project management experience preferred

Scale your AI ROI without scaling your risk

Ready to turn AI into a powerful competitive advantage at scale? Zapier's AI orchestration platform gives you everything you need to maximize your AI adoption by connecting tools, deploying agents, and scaling intelligent systems across your business.

Connect every app, AI model, and workflow. Securely integrate with thousands of tools using advanced authentication and data handling.

Automate complex workflows easily. Build, test, and scale AI-driven systems using no-code, low-code, or full-code—whatever your teams need.

Deploy intelligent systems across the org. Connect AI to the workflows your teams rely on—sales, support, IT, ops, marketing, and more.

Control AI at scale with IT-grade governance. Prevent shadow AI, enforce permissions, and keep AI use auditable, visible, and compliant.

Identify your AI talent gaps to move forward with company-wide transformation. Learn why the world's leading businesses trust Zapier.

airbnb ActiveCampaign okta betterhelp Dropbox

hudl Sysco Ruggable THE HOME DEPOT VOXMEDIA grammarly

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Talk to an expert today to assess your AI maturity and start your AI staffing journey.