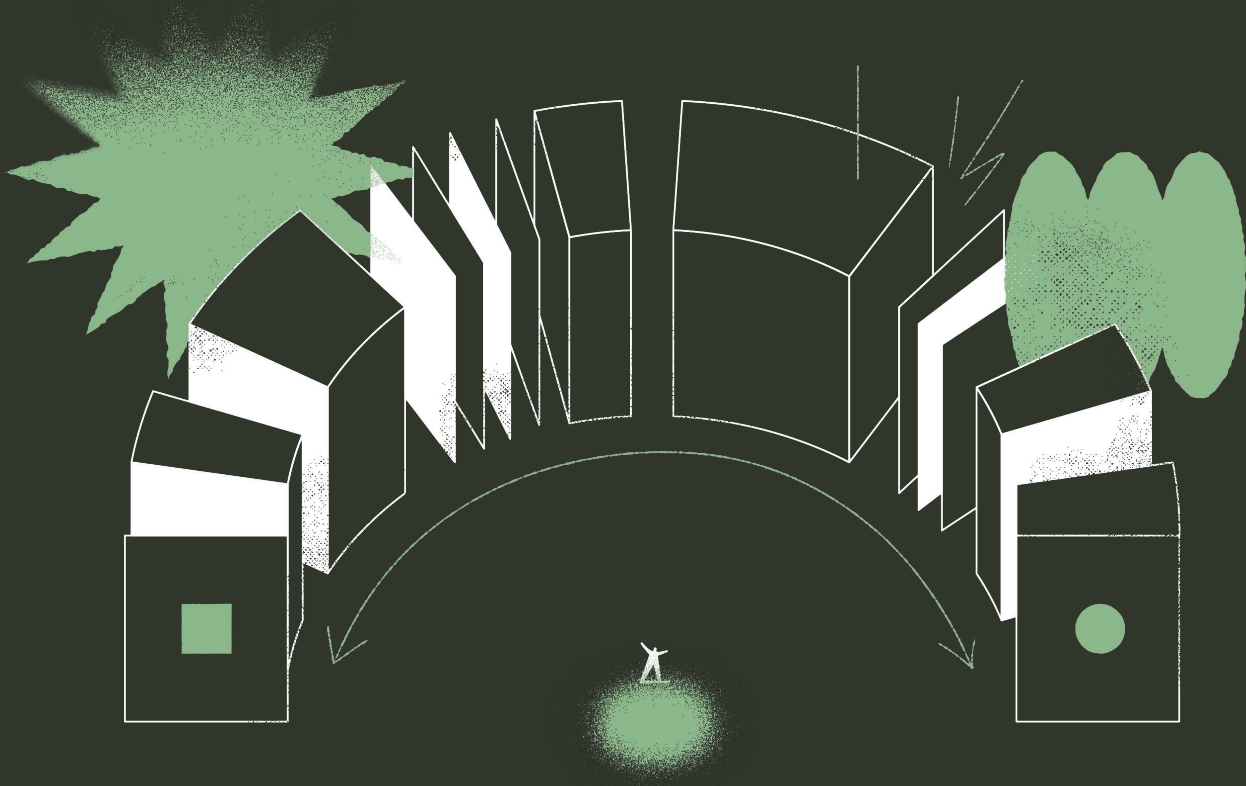


Phil's AI Transformation Playbook

From AI experiments
to repeatable
business results



 zapier

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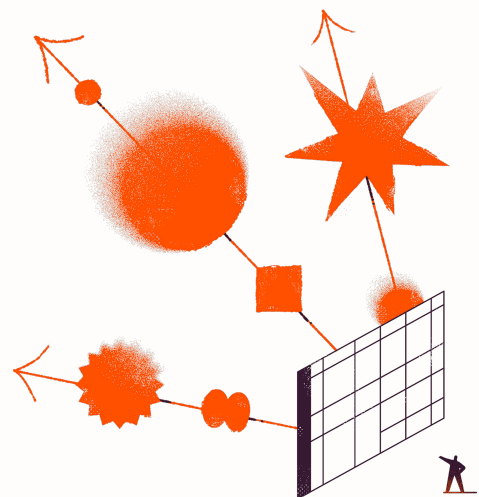
The real reason AI investments fail to deliver

Every company is investing in AI. They purchase licenses, run pilots, and set up experiments across teams.

But very few leadership teams can answer this clearly: Has how work gets done fundamentally changed? If AI disappeared tomorrow, would your operating model still look different?

This playbook is not about tools. It's not about prompts. It's not about experimentation.

It's about building a system that permanently expands capacity, the measurable output per role without linear headcount growth. If output per role does not change, nothing has changed.



AI transformation is not tool rollout

Buying tools, running pilots, and measuring adoption are all activity. Tool rollout optimizes tasks, but true transformation redesigns workflows.

Transformation changes how work flows across teams, systems, and decisions.

AI is an amplifier.

Your operating model determines what gets amplified.

The core belief

The goal is not AI usage. The goal is redesigning how work gets:

- Discovered
- Designed
- Delivered
- Governed
- Measured

If output per role does not change, nothing has changed.

For example: If a support rep handled 20 tickets per day before AI and still handles 20 after AI, you adopted tools. You did not transform work.

Real transformation multiplies output or eliminates the need for linear hiring.

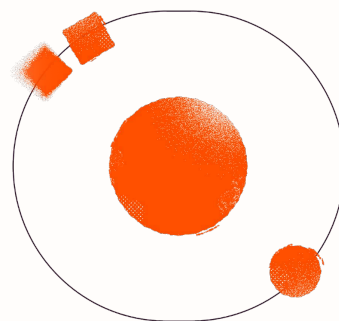
Transformation starts with everyone

Transformation does not begin with a small innovation team. It begins with shared belief.

Every level of the organization goes through the same door:

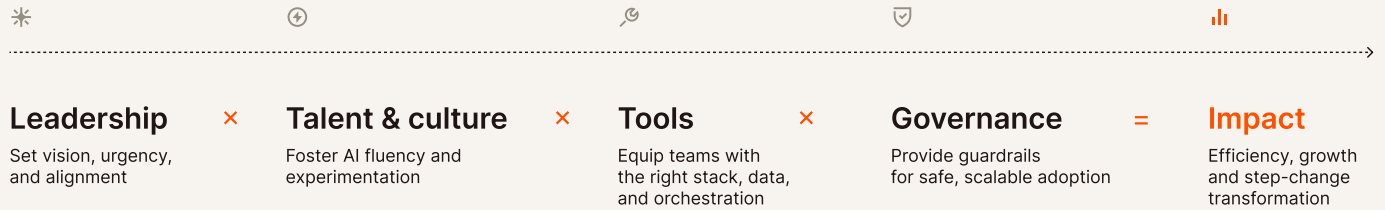
- 90-minute hands-on bootcamp
- Intern to executive
- Small groups
- Everyone builds something
- The objective is not technical depth but perspective shift.

When people see how work can be redesigned, they begin to see friction everywhere. The result is shared language and a structured friction inventory.

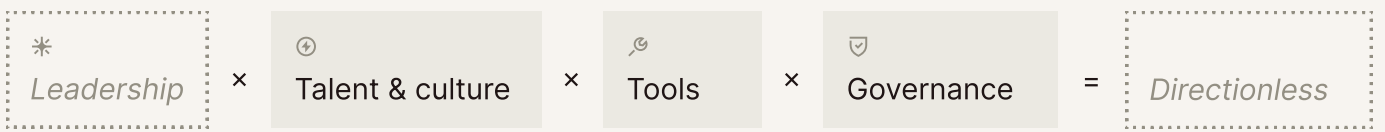


The AI transformation equation

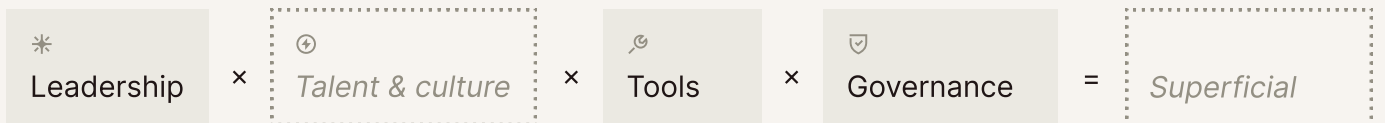
Most enterprises have rolled out AI tools, run promising pilots, and generated enthusiasm. But progress stalls when scaling that momentum across the organization. AI transformation at scale isn't magic—it's math. These four pillars build upon one another to create real results.



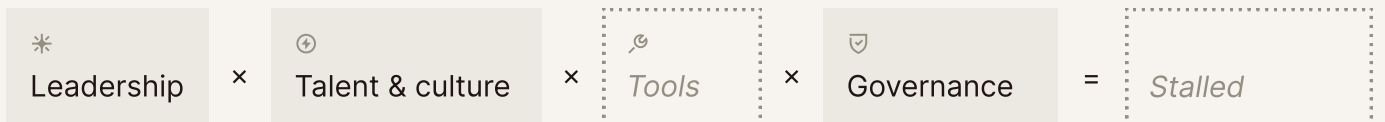
WITHOUT LEADERSHIP: DIRECTIONLESS



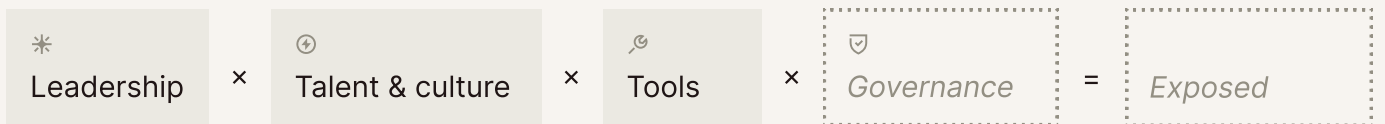
WITHOUT TALENT & CULTURE: SUPERFICIAL



WITHOUT TOOLS: STALLED



WITHOUT GOVERNANCE: EXPOSED



AI transformation vs. tool rollout

| Transformation | Tool rollout |
|--|---------------------------|
| Redesigns workflows end-to-end | Buys seats |
| Builds organizational capability | Runs training |
| Ships governed systems | Launches scattered pilots |
| Measures capacity expansion with baselines | Measures adoption |
| Produces an executive ROI narrative | Struggles to scale safely |

The center of excellence drives scale

The COE isn't meant to be a bureaucratic blocker. Instead, it's the operating system for deciding what gets built, in what order, and under what guardrails.

A functioning COE will:

- Intake and prioritize opportunities
- Score impact and risk
- Sequence delivery
- Support builders
- Embed governance
- Report outcomes against executive KPIs

Without a COE, AI stays experimental. With one, AI becomes operational.

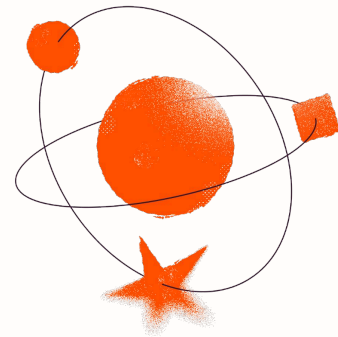
Align bottom-up energy with top-down direction

Front line teams understand friction. Leadership understands strategic direction and financial targets.

Transformation happens when:

- Signals flow up
- Priorities flow down
- The COE aligns both

Bottom-up creativity without direction creates noise. Top-down mandates without engagement create resistance. Alignment creates velocity.



Measure capacity, not activity

Most AI programs track the wrong metrics: Time saved, adoption rates, and prompt counts.

But those are all activity metrics. Transformation metrics include:

- Revenue impact
- Output multiplied per role
- Cost avoidance from non linear hiring

If a team produces twice the output with the same headcount, that is transformation. Extra capacity must be intentionally redeployed into higher value work. Otherwise, the impact fades.

In short, executives don't fund experimentation. They fund capacity expansion.

The 90-minute AI bootcamp

Design principles

1. Everyone builds.

No spectators. Every participant clicks, types, and ships something. Belief comes from doing.

2. One shared workflow first.

Build the same simple pattern together:
Intake → Summarize → Decide → Route.
Variation comes later.

3. Start at zero.

Assume no prior knowledge.
Clear inputs produce clear outputs.
Break work into explicit steps.
An AI step in a workflow is simply the automation using ChatGPT on your behalf.

4. Teach patterns, not tools.

Triggers. Decisions. Handoffs. Approvals.
These patterns exist in every stack.

5. Make friction visible.

As people build, capture what is slow, manual, or broken. For example, "We manually copy CRM notes into three systems every week." Turn each area of friction into a structured item tied to impact and effort.

6. Expect two outcomes.

Detectors identify inefficiencies across the organization. Builders convert high value signals into shipped systems.

Most leave as detectors who see friction and speak up. Some self-select as builders who want to keep shipping.

7. End with a backlog.

The output isn't a perfect demo. It's a prioritized opportunity backlog that feeds delivery.

Install the operating system in 90 days

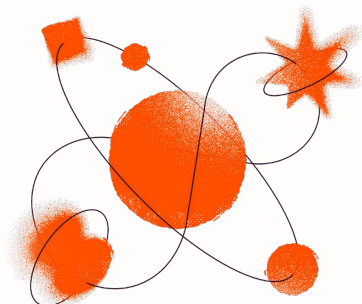
Transformation is multi-year. Momentum is immediate.

In the first 90 days, you should:

- Appoint an accountable AI Transformation Lead
- Define executive KPIs and establish baselines
- Run universal bootcamps
- Stand up a minimum viable COE
- Ship 1 to 3 live production workflows
- Begin reporting against revenue, capacity, and cost

"Live" means embedded in real work.
Not prototypes.

The first 90 days are not a pilot phase. They're for operating system installation.



Governance enables speed

Without governance, AI either sprawls or stalls.
Effective governance includes:

- Least privilege permissions
- Clear review lanes
- Human oversight where required
- Full auditability
- Clear guardrails increase speed because builders know what is safe to ship.

Governance isn't friction; it's confidence at scale.

What success looks like

If transformation is real, you can show:

- Measurable output per role baselines
- A ranked and actively managed opportunity backlog
- A documented scoring rubric
- A functioning COE with decision rights
- Shipped workflows in production
- Regular executive reporting tied to financial outcomes

At that point, AI is no longer an initiative. It's how work gets done.

A practical 90-day blueprint

DAYS 0-30



Alignment and baseline

- Run 90-minute bootcamp
- Define opportunities and measurement plan
- Launch enablement and capture friction

DAYS 31-60



Build and ship

- Activate detector/builder system
- Ship first production workflows
- Stand up center of excellence (COE) with intake and standards
- Deploy guardrails

DAYS 61-90



Orchestrate and scale

- Expand across teams
- Instrument reporting
- Standardize delivery and governance
- Refresh exec narrative with measured progress



START YOUR TRANSFORMATION NOW

Ready to move from AI pilots to real results?

Let's talk

If you're serious about expanding capacity across your org—rather than just experimenting with tools—let's talk.

I work directly with leadership teams to design and install the operating model that turns AI into measurable revenue and capacity gains and cost savings.

Book time at zapier.com/phil to build the system that makes your 100 workflows possible.

