

CI-Led AI (Part 2)

An A3 Approach to Working with Copilot

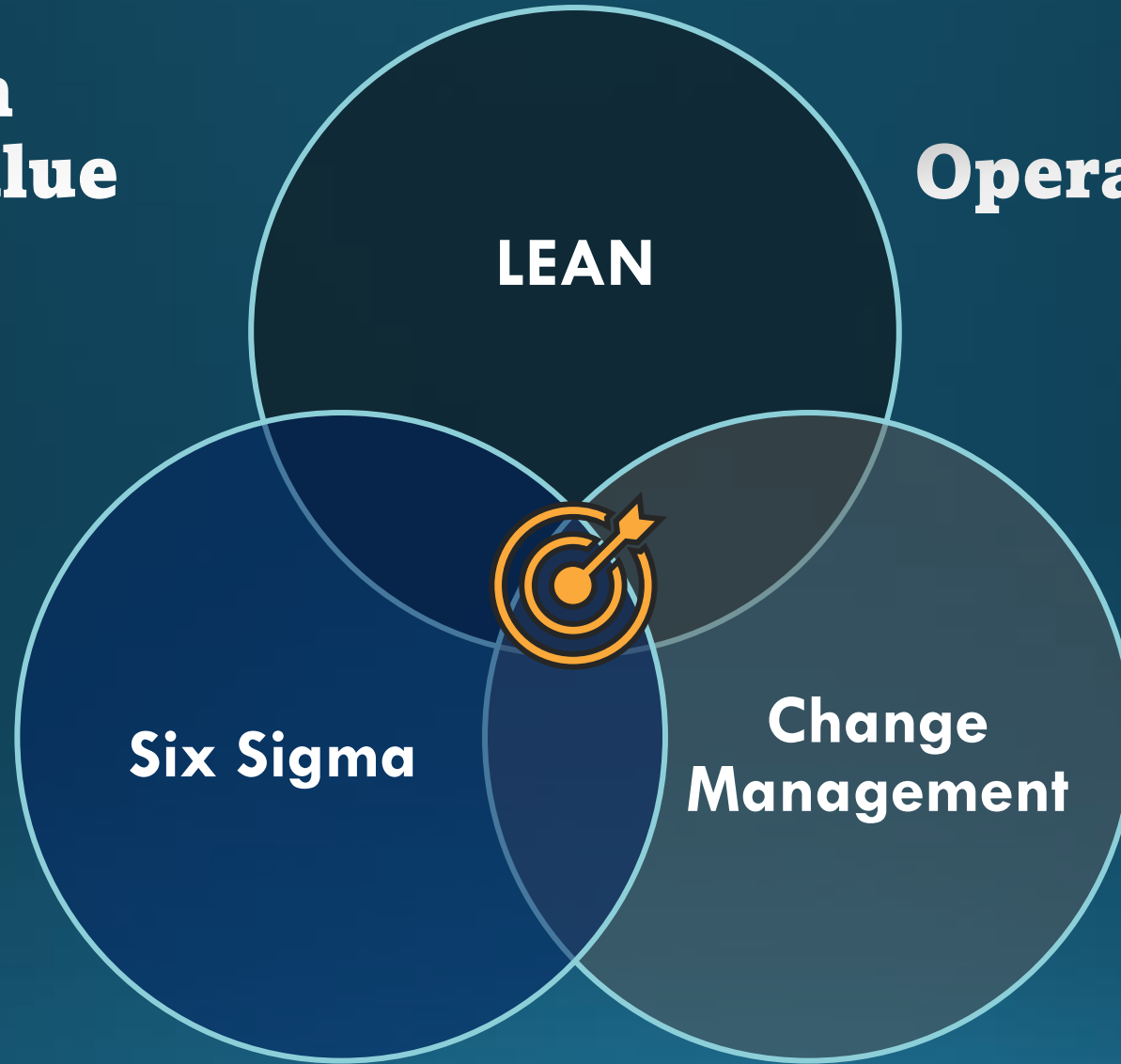
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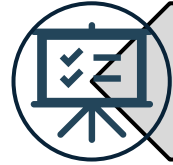


**Maximum
Customer Value**

**Maximum
Operational Stability**



Objectives



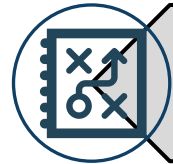
1. Reflect on Key Points & Data from Part 1



2. Take a Deep(ish) Dive into Microsoft AI



3. Learn Questions to Help Identify Good AI Pilots



4. Discuss the A3 in the AI Context



5. Review Concrete Steps to Get Started



6. Leave Time for Q&A Discussion



Key Points from Part 1 of “CI-Led AI”

Full Power Point is accessible in the online digital handouts.

You are the right people to lead AI.

- CI Professionals have the tools & skills
- “Toyota Way” has always guided us by focusing on people
- You do not need to be a “Techy” to confidently lead AI implementations

AI is a tool, not a strategy.

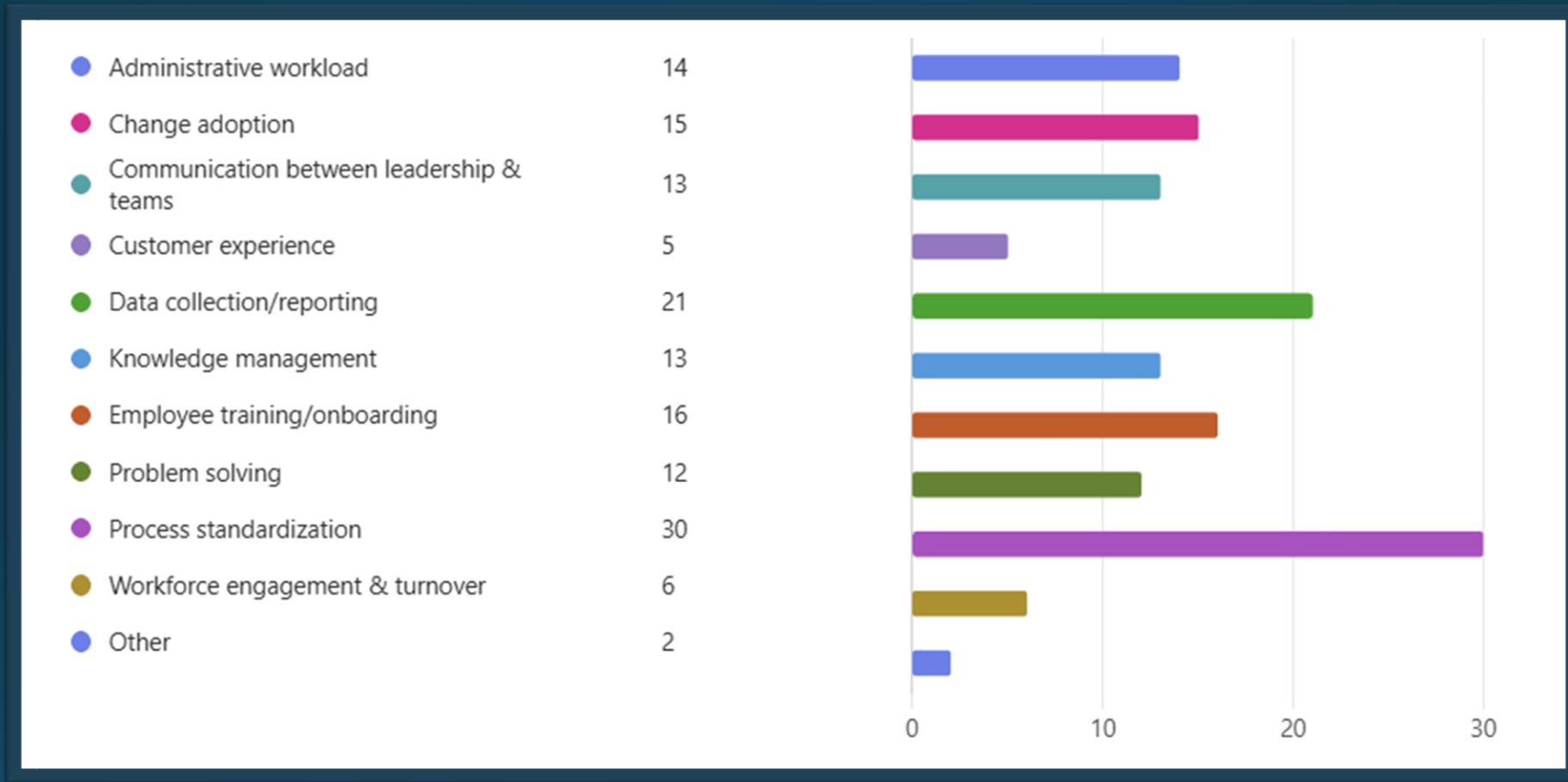
- AI implementations fail for the same reasons any IT implementation fails
- You must create an environment that is both psychologically and technically safe
- Beware of “AI Washing”

There are 3 important questions to ask when identifying an AI Pilot:

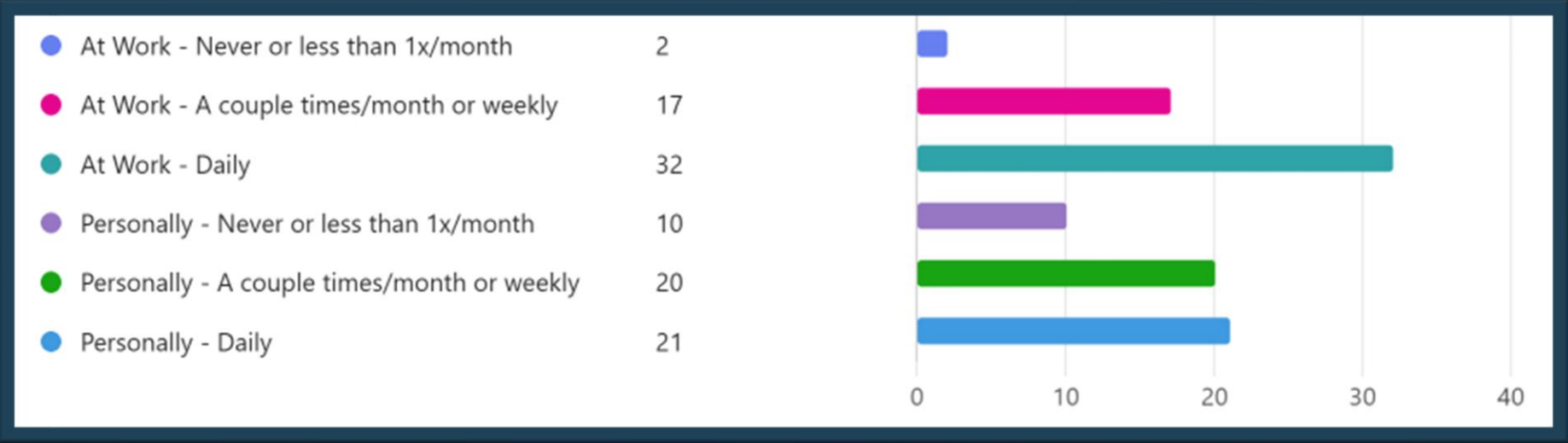
- Is the process stable?
- Is the work repetitive?
- What happens when it's wrong?



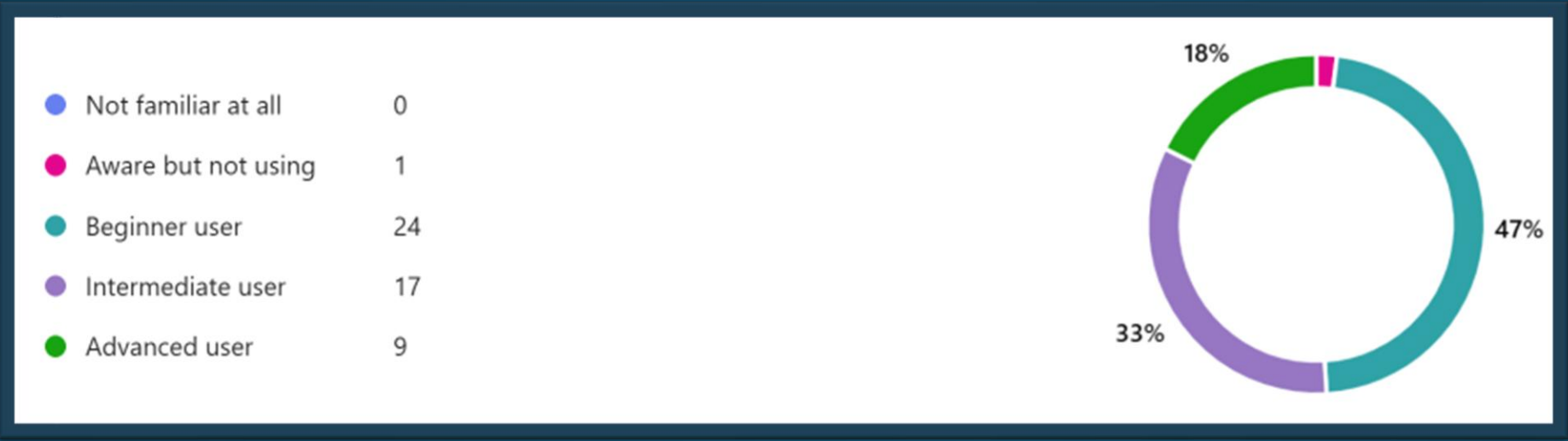
*What are the biggest operational challenges you are currently trying to improve?
(Select up to 3)*



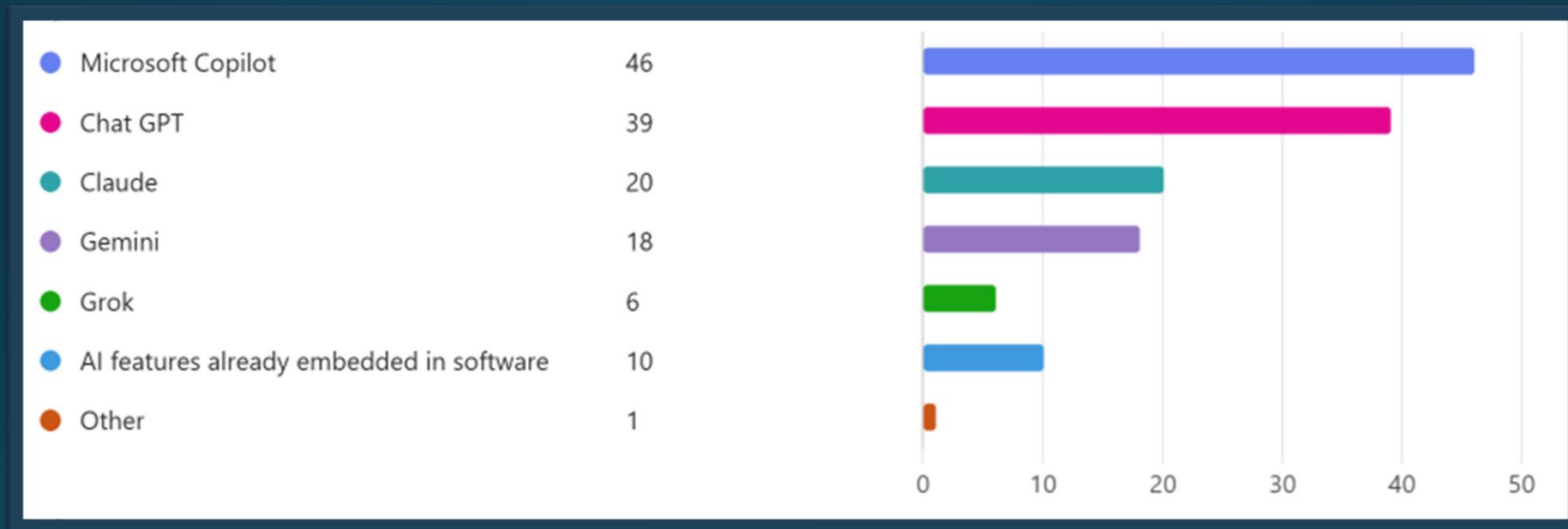
How often do you currently use AI tools? (select up to 2)



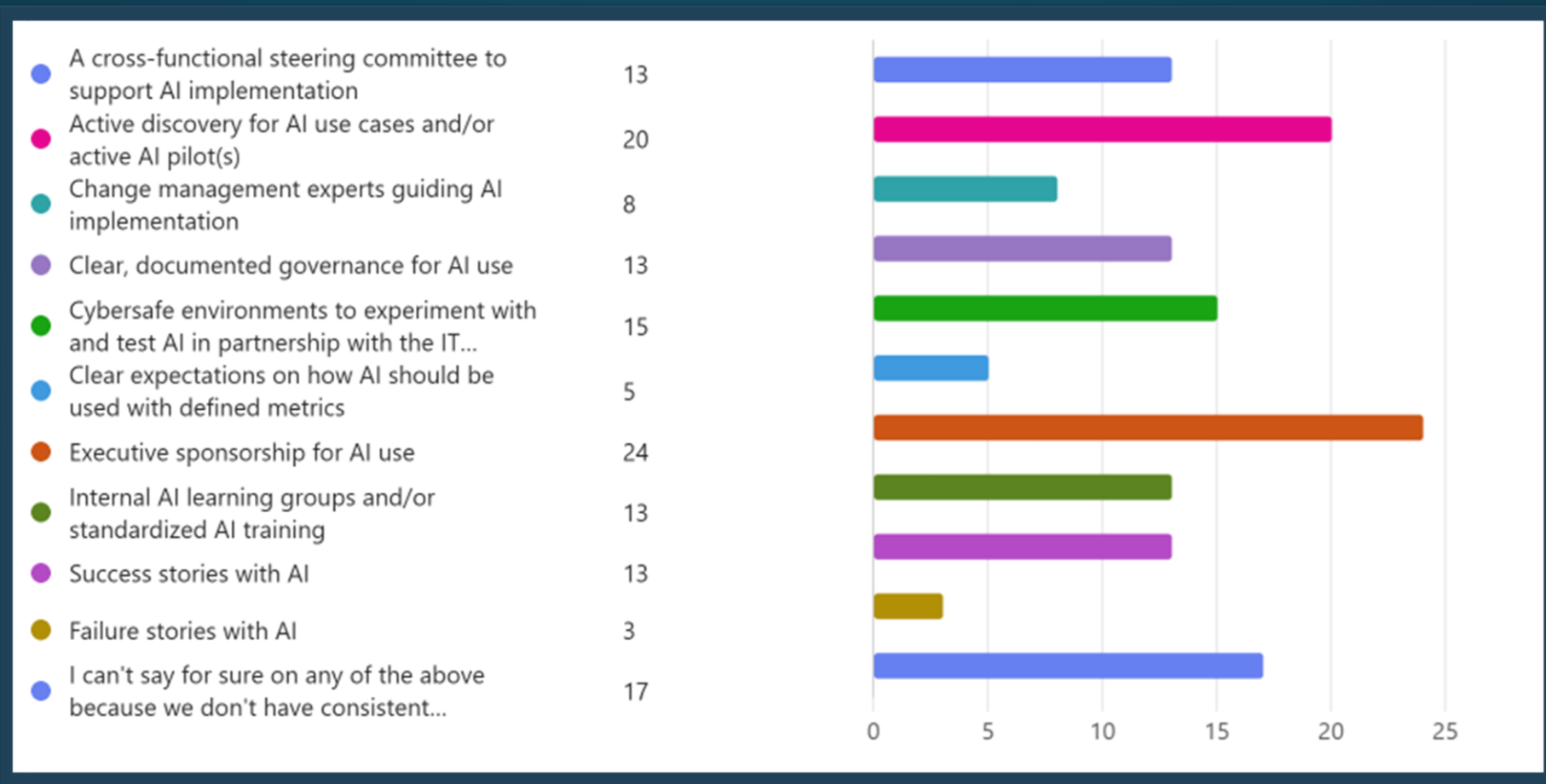
How familiar are you with generative AI tools (e.g., Copilot, ChatGPT, Claude, Gemini, Grok)?



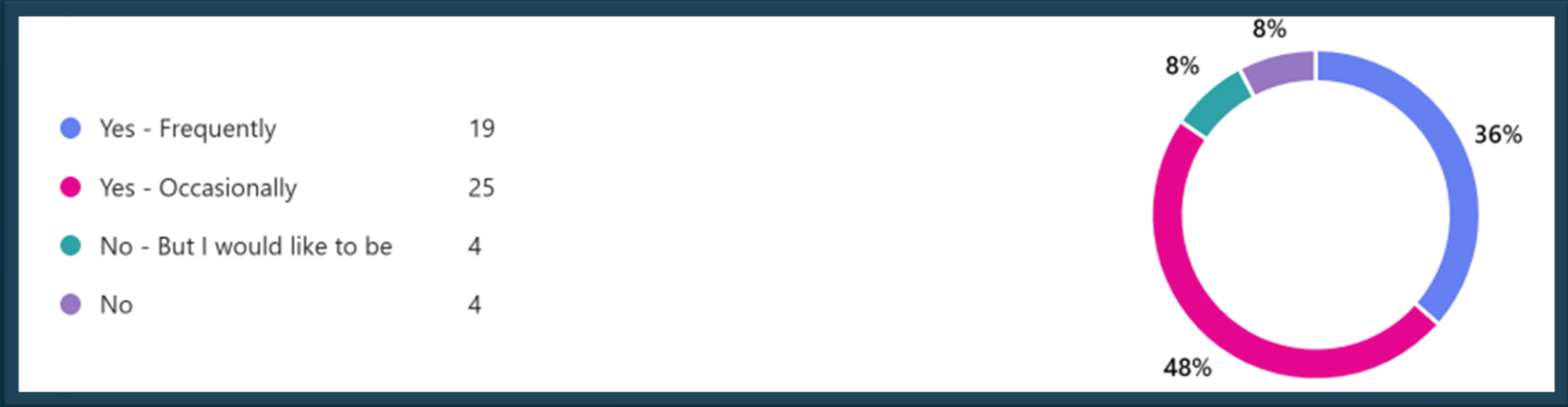
Which AI tools have you used? (Select all that apply.)



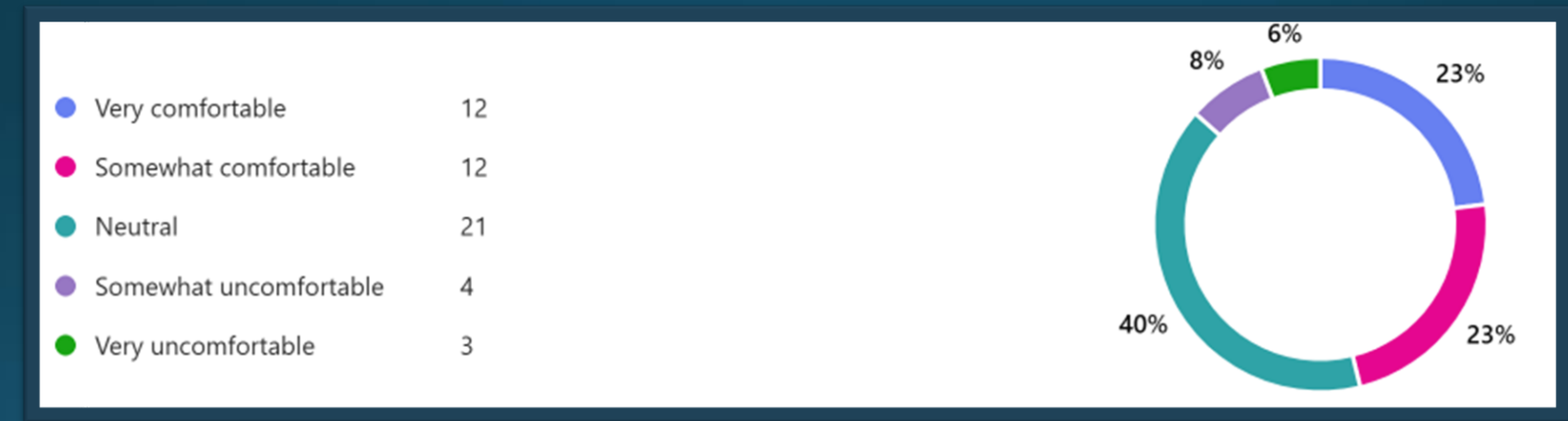
Does your organization currently have any of the following? (Check all that apply)



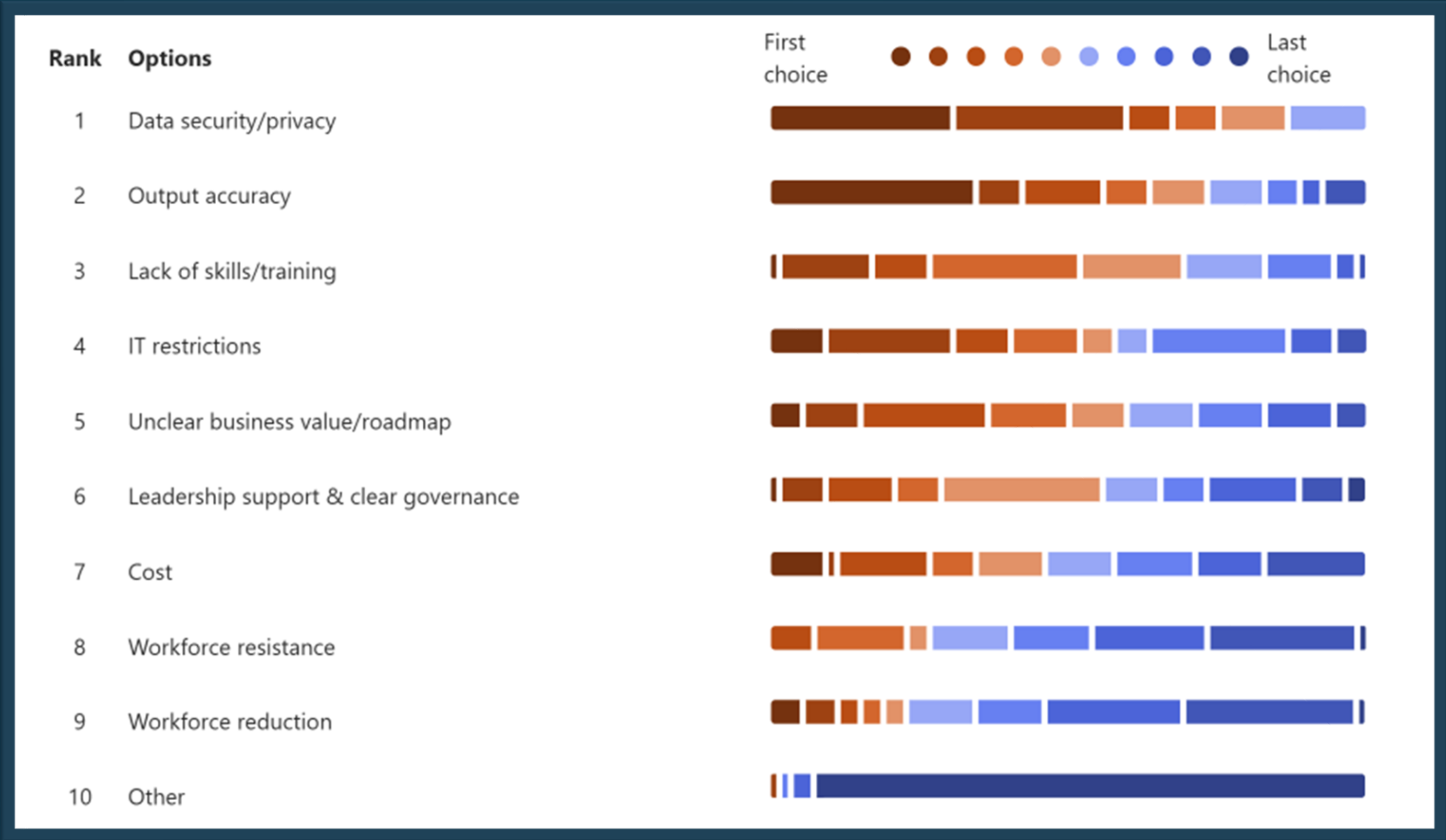
Have you been involved in evaluating, piloting, or implementing new technology solutions (not just AI) in your organization?



How comfortable do you feel evaluating AI opportunities for your team or organization?



Rank your concerns around AI adoption in your organization from highest to lowest.



Microsoft AI Options

- | | | |
|----|-------------------------------------|--|
| 01 | <i>Copilot Chat</i> | Answers and brainstorming |
| 02 | <i>Microsoft 365 Copilot</i> | AI inside Outlook, Teams, Word, Excel, PowerPoint |
| 03 | <i>Agent Builder</i> | Creates simple AI agents for internal needs |
| 04 | <i>Copilot Studio</i> | Workflows and automation for external-facing needs |
| 05 | <i>Microsoft Foundry</i> | Custom enterprise AI development |





MICROSOFT TOUR



What are important considerations when identifying a good AI pilot?



Personal use or for a client/employer?



What systems will you need to integrate with?



What are short and long-term costs for setup, experimentation, and ongoing use?



What legal, professional, and social obligations could be impacted?



What cyber security risks exist?



Will you need a sustainability plan, and what does that look like?



How will others interact with the output from your AI use?



How will you train others, communicate changes and receive feedback (if applicable)?



Applying the A3 to AI

1. Background: What are you talking about and why?

- Define the issue, opportunity, or decision
- Explain why it matters now
- Identify who is affected

2. Current Conditions: Where do things stand now?

- Show the current process and baseline
- Use data to reveal gaps or pain points
- Separate facts from assumptions

3. Goal: What specific outcome is required?

- Define the outcome and success metric
- Set a clear target and timing
- Link it to a customer or business need

4. Analysis: Why does the problem or need exist?

- Identify root causes—not symptoms
- Use evidence and process analysis
- Clarify where AI can—and cannot—help

5. Recommendations: What do you propose and why?

- Propose the simplest effective countermeasure
- Compare options, risks, and trade-offs
- Explain why the recommendation fits the need

6. Plan: How will you implement? (4Ws, 1H)

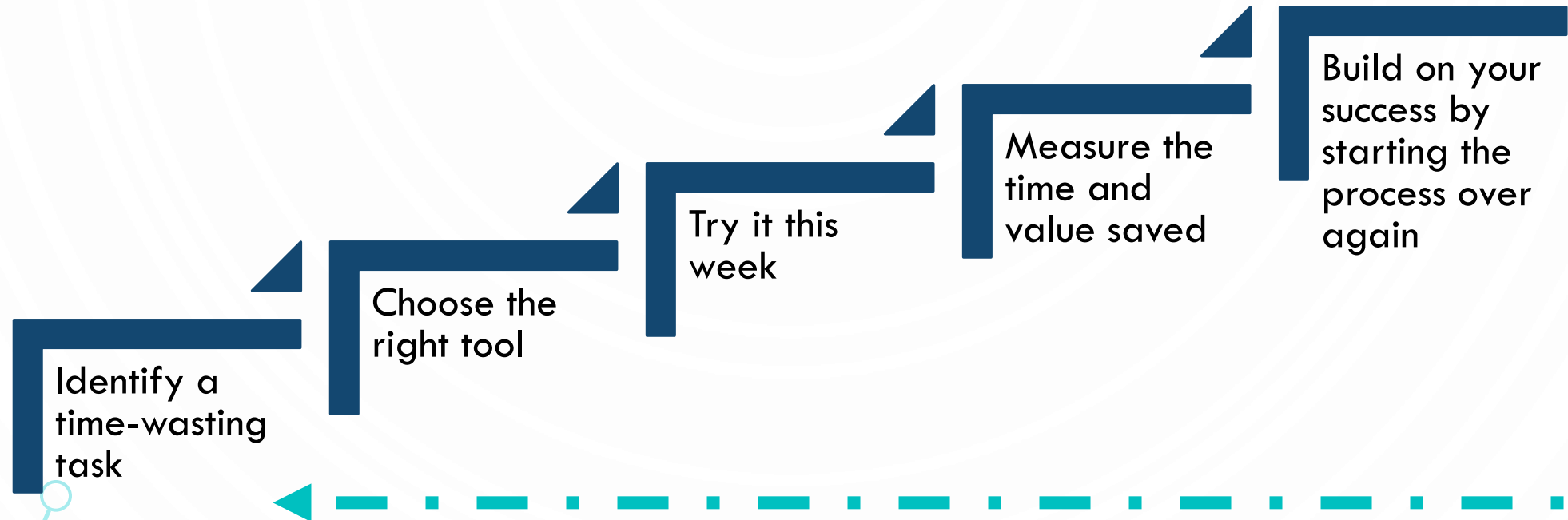
- Define what, who, when, where, and how
- Specify required data, tools, and support
- Pilot, measure, learn, and adjust

7. Follow-up: How will you ensure ongoing PDCA?

- Track results against the goal
- Set the review cadence and ownership
- Standardize wins; correct gaps and repeat PDCA



Moving “Up and to the Right”



*Again, the most successful AI users aren't the most technical.
They're the clearest about their processes, people and purpose.*





Getting Started as an Organization

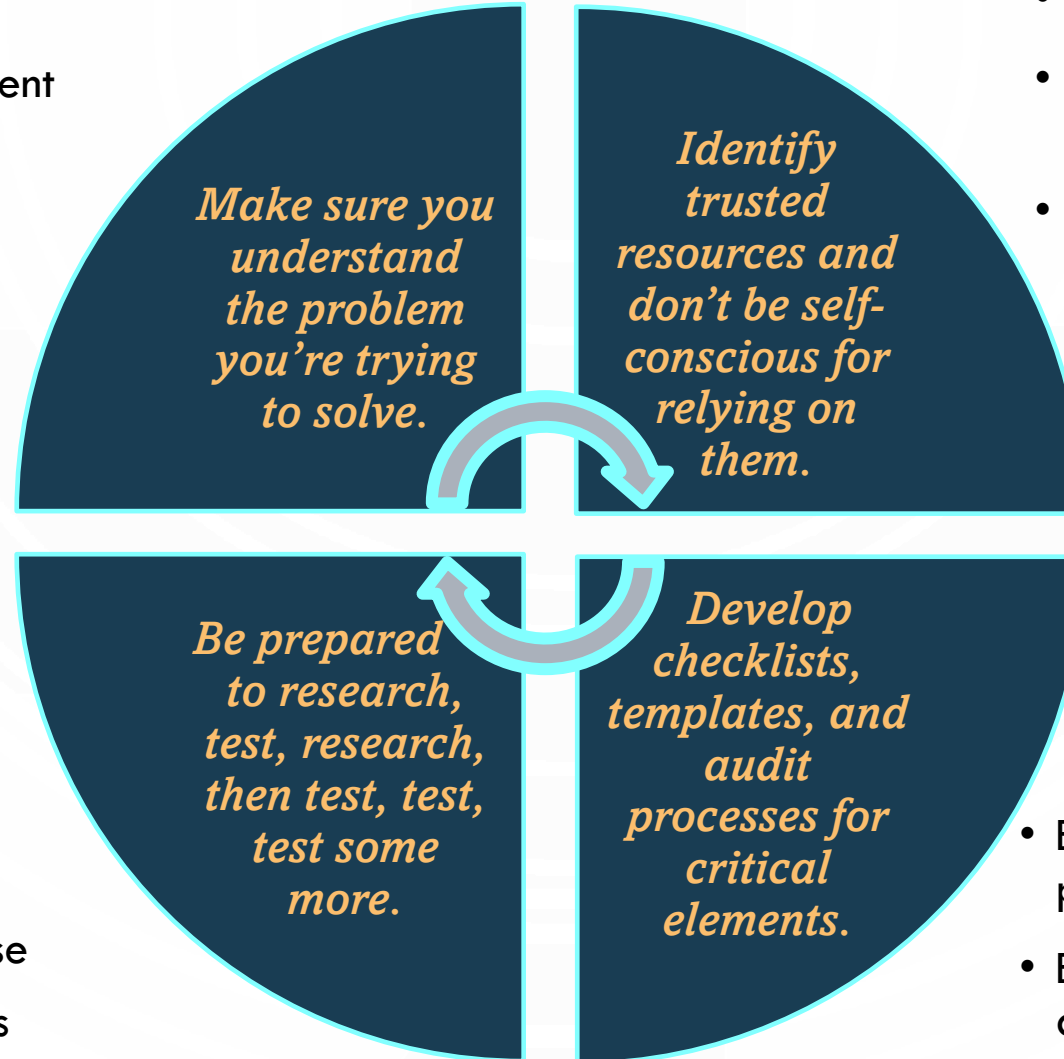
- **Establish governance right NOW and assign Change Management leadership in partnership with HR and IT Departments**
- Identify where AI is needed and what platforms are approved to meet cyber security requirements
- Create explicit ethical and accountability standards
- Clearly define goals that align with processes
- Determine how you will measure outputs, outcomes and overall productivity
- **Create an evolving training roadmap and establish guided learning groups**



Key Points for Working with AI Tools

- Identify stakeholders
- Fully research the current state
- Define the ideal state

- Avoid jumping into subscriptions
- Talk to the individuals impacted by your AI use
- Continually review risks



- Join AI learning groups
- Find key content creators that fit your learning style
- Certifications and professional organizations are role-dependent
- Establish safety and training protocols
- Evaluate AI outputs for accuracy
- Track productivity gains



“Do not undervalue what comes easy to you.”



Thanks for your participation in this workshop!

We value your feedback, and would appreciate insight to your experience through the 4 question survey above.

