

OrgChange. AI

FIRST CONTACT

THE PLAYBOOK FOR AI-DRIVEN CHANGE



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OCM Models: An Overview

Traditional organizational change management (OCM) models—Kotter’s Eight Steps, Lewin’s Three-Step Model, and Prosci’s ADKAR—require adaptation to remain effective in the context of AI-driven transformation. This chapter examines how these frameworks intersect with the evolving demands of AI across the dimensions of People, Process, and Technology, using the OrgChange.AI Nine-Square Grid as a guiding structure. By aligning each model with AI’s capabilities, leaders can accelerate adoption, overcome resistance, and embed lasting change with greater precision and impact.

The OrgChange.AI Nine-Square Grid

The OrgChange.AI Nine-Square Grid offers a structured approach for applying established change management models—Kotter’s Eight Steps, Lewin’s Three-Step Model, and Prosci’s ADKAR—across the core dimensions of People, Process, and Technology. This framework enables leaders to assess organizational readiness, align interventions with AI capabilities, and drive transformation with clarity and precision. By visualizing change stages against operational dimensions, the Grid helps organizations move beyond theory to actionable strategy, ensuring AI adoption is both effective and sustainable.

The OrgChange.AI framework integrates three proven models to guide transformation:

- **Kotter’s Eight-Step Model:** Focuses on execution, emphasizing urgency, coalition-building, and clear communication. Without these, change efforts risk stagnation or confusion.
- **Lewin’s Three-Stage Model:** Offers a simple yet effective structure—unfreeze current behaviors, implement change, and refreeze to embed new norms. It reinforces that change is a process, not a one-time event.
- **ADKAR Model:** Centers on individual adoption through five stages—Awareness, Desire, Knowledge, Ability, and Reinforcement. It ensures people are not just informed but equipped and motivated to change.

The OrgChange.AI Nine-Square Grid: A Strategic Map

The OrgChange.AI Nine-Square Grid framework is where these foundational models meet the three essential dimensions of any organization: People, Process, and Technology. Each cell represents a specific, actionable focus area for your change initiatives. This isn’t about managing change generically; it’s about understanding precisely *where* and *how* to intervene.

		DIMENSIONS		
		People	Process	Technology
MODELS	Kotter	1 Urgency & Awareness	2 Coalition Building & Process Design	3 Vision Communication & Technical Infrastructure
	Lewin	4 Unfreezing & People Engagement	5 Changing & Process Transformation	6 Refreezing & Technical Integration
	ADKAR	7 Awareness & Knowledge Sharing	8 Desire & Process Optimization	9 Ability & Technical Enablement

OrgChange.AI Nine-Square Grid: Strategic Map

Each cell is named to reflect the intersection of a change model's core idea with a critical organizational dimension. This naming convention provides immediate clarity. For example, Cell 1, "Urgency & Awareness," directly links Kotter's imperative to establish urgency with the foundational need to make people aware of the change's necessity. Similarly, Cell 5, "Changing & Process Transformation," highlights Lewin's active change phase and its direct application to overhauling existing business processes.

Let's briefly illuminate what each of these nine cells represents:

Kotter:

- **Square 1 – People (Urgency & Awareness):** Establish urgency by clearly communicating why change is critical. Link external pressures and internal opportunities to personal relevance, driving awareness and engagement.
- **Square 2 – Process (Coalition & Design):** Build a guiding coalition to shape and redesign core processes. Ensure the right stakeholders are involved to drive alignment and execution.
- **Square 3 – Technology (Vision & Infrastructure):** Define and communicate a compelling future state enabled by technology. Identify and invest in the foundational infrastructure required to realize the vision.

Lewin:

- ❑ **Square 4 – People (Unfreezing & Engagement):** Prepare the workforce by breaking down resistance and fostering readiness. Use empathy and open dialogue to build understanding that current methods are no longer sufficient.
- ❑ **Square 5 – Process (Changing & Transformation):** Implement new workflows and revise procedures to align with desired outcomes. Focus on redesigning how work gets done to support the change.
- ❑ **Square 6 – Technology (Refreezing & Integration):** Ensure new systems are fully embedded into daily operations. Solidify technology adoption to establish a stable, sustainable new norm.

ADKAR:

- ❑ **Square 7 – People (Awareness & Knowledge Sharing):** Ensure individuals understand the change and have access to essential information. Prioritize targeted communication and foundational knowledge to build clarity and readiness.
- ❑ **Square 8 – Process (Desire & Process Optimization):** Drive buy-in by optimizing workflows to be more intuitive and beneficial. Streamlined processes increase appeal and support voluntary adoption.
- ❑ **Square 9 – Technology (Ability & Technical Enablement):** Deploy technology that empowers users to perform new tasks confidently. Focus on intuitive design, accessibility, and support tools that build practical capability.

Stakeholder Mapping

Without a clear grasp of who is impacted and how they feel, even the most brilliant technological leap can falter. You need to understand our audience, not just as employees, but as individuals with distinct interests, concerns, and expectations. This understanding is the bedrock upon which you build any effective stakeholder engagement strategy, particularly as you welcome AI into our workplaces.

Our first order of business is **Stakeholder Mapping**. Think of it as creating a strategic blueprint of your organizational landscape. It's a powerful method to systematically identify and analyze the key individuals and groups affected by this impending change. By visualizing stakeholders based on their influence and their level of interest in the organizational shift and AI integration, you can craft precise plans for engaging each group effectively.

To achieve this, you can adapt a useful framework – a Nine-Square Grid. This structure considers three critical dimensions: People, Process, and Technology.

- **People:** Who are the individuals and groups involved? What are their individual stakes – their hopes, their worries, their desires for this new direction?
- **Process:** What are the specific steps involved in implementing this change? How will these changes ripple through existing workflows and impact daily operations?
- **Technology:** How will AI integration alter the way you work? What are the potential gains, and what are the likely hurdles?

Plotting your stakeholders on this grid, considering their power and their engagement on each of these dimensions, allows you to categorize them. This provides a clear picture of who needs what kind of attention.

Beyond simply knowing who is involved, you must also assess **AI Reception and Readiness**. How will different groups actually react to AI? Are there natural advocates ready to champion its adoption, or are there those who will likely express reservations? Understanding each group's current comfort level, their existing knowledge, and their preparedness for AI technologies is vital. Are they excited by the prospect of AI as a partner, or do they view it with suspicion?

Armed with this insight – understanding influence, interest, AI reception, and readiness – you can then develop Tailored Communication Strategies. This isn't about a one-size-fits-all announcement. It's about crafting specific plans that address the unique concerns of each group, clearly articulate the relevant benefits for them, and speak directly to their individual needs.

This mapping exercise will help you pinpoint Key AI Champions – those influential individuals who can become strong advocates. Their support can drive momentum and inspire confidence throughout the organization. Simultaneously, you must plan for **AI Resistance Mitigation**. By anticipating potential roadblocks from hesitant stakeholders, you can proactively develop strategies to address their concerns, transforming potential friction points into opportunities for constructive engagement.

Your Stakeholder Mapping Action Plan

- *Build Your Map:* Develop a clear stakeholder map using the People, Process, Technology grid, considering influence and interest.
- *Gauge the Mood:* Assess how each stakeholder group is likely to receive AI and their current readiness to engage with it.
- *Speak Their Language:* Create specific communication plans addressing unique concerns and highlighting benefits relevant to each group.
- *Find Your Allies:* Identify influential individuals who can champion AI adoption.
- *Anticipate Challenges:* Proactively plan how to address and overcome potential resistance.

By taking these steps, you lay the groundwork for a smooth and supportive transition, ensuring your stakeholders are informed, engaged, and ready to embrace AI as a powerful partner in shaping your organization's future.

OrgChange. AI

FIELD GUIDE



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Benchmarks & Case Studies: AI in Action

From Tools to Transformation

OrgChange.AI: First Contact explored AI tools and utilities. But tools alone don't tell the full story. This chapter takes you behind the scenes, showing how companies across industries are embedding AI into governance, customer engagement, workforce enablement, process optimization, and culture. Think of it as moving from "first contact" with AI to everyday practice.

Governance and Risk Management

AI adoption succeeds when it's disciplined.

- **Societe Generale** demonstrated this by collecting 700 AI use-case submissions across the enterprise. This intake and triage process reduced duplication, prioritized pilots, and created urgency through visible wins.
- **Cisco's AI Control Hub** reinforced governance by embedding oversight into daily workflows, aligning HR and tech leaders in a shared accountability model.
- **PwC's CEO Survey** revealed optimism tempered by trust gaps, reminding us that adoption is as much about human confidence as technical readiness.
- **Accenture** mapped frameworks for scaling responsibly, blending augmentation with risk management.

With governance in place, organizations can safely experiment and scale.

Customer and Market Engagement

AI shines when customers feel the impact.

- **Cresta** boosted sales performance with real-time coaching, delivering measurable uplifts across teams.
- **Lemonade** automated half of its claims, freeing human adjusters for complex cases and demonstrating efficiency gains that build momentum.

Industry Benchmarks Index

Accenture – Scaling frameworks, agentic AI, governance.

Airbus – AI for design and proposals.

Cisco – AI Control Hub – Governance platform for responsible AI.

Cresta – Real-time sales coaching with measurable uplifts.

Gap / Old Navy – North Star vision, RFID deployment.

GE – Predix – Predictive maintenance and optimization.

Goldman Sachs – Deal AI – Market research and risk assessment.

Home Depot – AI for customer engagement/workflows.

iGrafx – Process360 Live – Process mining, simulation, digital twins.

Lemonade – Claims triage and automation (~50% auto-handled).

Lilly (AI Assistant) – Meeting assistant, adoption reinforcement.

McKinsey – Lilli knowledge platform; 17,000 AI agents co-created.

Microsoft – Copilot, Copilot Studio, Viva Suite for productivity/adoption.

Morgan Stanley – 98% adoption of AI assistants.

New Era Technology – Copilot rollout with peer-to-peer communities.

PwC – CEO survey: AI adoption in tech/process.

Qualtrics – Cross-functional AI integration case study.

Singtel – AI Acceleration Academy (10,000 employees trained).

Societe Generale – Governance via 700 AI use-case submissions.

The Conference Board – AI for workforce planning and cultural transformation.

Unilever – Autonomous procurement agent saving \$250M annually.

Walmart – AI supply chain forecasting.

AI Governance Action Map

Establish Governance Structure

Activity: Designate AI Champions & Oversight Committee

Description: Identify and charter AI Champions and a cross-functional Oversight Committee.

Owner: IT, HR, Legal, Business Units

Output: Charter document

KPI: % projects with champions assigned

Governance Control: Role-based approvals

Risk: Lack of role clarity

Mitigation: Publish RACI and comms

AI Utility/Tool: Microsoft Viva; Microsoft Copilot; SharePoint Syntex / Confluence AI

Notes: Use Viva polls to ratify roles; publish charter to Syntex.

Standardize Intake

Activity: AI Project Proposal Workflow

Description: Create structured proposal template and approval workflow including ethics & privacy checks.

Owner: IT, Finance, Legal, Ethics

Output: Proposal template + workflow

KPI: % proposals with completed DPIA

Governance Control: Ethics & Privacy review

Risk: Shadow projects

Mitigation: Route all requests via intake portal

AI Utility/Tool: ServiceNow Now Assist; OneTrust; Microsoft Purview; Microsoft Copilot

Notes: Automate gates in ServiceNow; store DPIA in OneTrust; data maps in Purview.

AI Governance AI Prompt Library for AI Assistants

Purpose: Define roles, workflows, and oversight for AI initiatives.

- Prompt: “Draft an AI governance charter for [organization], ensuring compliance with privacy and fairness principles.”
- Prompt: “Create a proposal template for AI projects that includes objectives, risks, and HITL checkpoints.”
- Prompt: “Generate a communication plan for introducing AI governance roles to [stakeholder group].”

Field Notes

SAMPLE

Leadership Alignment

Leadership alignment is the cornerstone of successful AI integration. This chapter explores how executive sponsorship, governance rituals, and coaching strategies empower teams and anchor change in culture.

The successful integration of Artificial Intelligence into an organization is not merely a technical undertaking; it is a deeply human one. As we shift our focus to the people affected by this change, we acknowledge that technology's impact is felt most acutely in the daily experiences of individuals. This section examines how AI directly influences this human experience throughout the entire change process. It underscores the absolute necessity for leaders to actively guide this transformation. From clearly articulating a vision that inspires action to using intelligent tools to better understand and support those impacted, leadership's proactive involvement is essential. We will see how intelligent systems can enhance the identification and engagement of those crucial to adoption, and how strong leadership sponsorship acts as the foundation for overcoming hesitations and building confidence. The insights generated by AI can also inform how we communicate and offer support, ensuring that individual concerns are heard and addressed. Ultimately, success hinges on how well leadership's vision for change connects with the true potential of AI capabilities to reshape our workplaces.

Field Notes

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Leadership Alignment Action Map

Change Leadership Charter

Activity: Define purpose and scope of AI-assisted change initiative; establish success criteria and AI guardrails.

Data Needed: Charter scope, stakeholder roles, compliance policies, KPIs.

AI Utility/Tool: Microsoft 365 Copilot, Power BI, Purview.

Why This Tool: Ensures ethical AI use and clarity of objectives with measurable outcomes.

Owner: Change Governance Lead

Output: Approved charter document; KPI dashboard; guardrail summary.

KPI: Charter sign-off within 2 weeks; 100% guardrail coverage; KPI baseline set.

Sponsor Alignment Rituals

Activity: Schedule regular sponsor check-ins; define roles and accountability metrics.

Data Needed: Meeting cadence, sponsor role definitions, engagement metrics.

AI Utility/Tool: Motion/Reclaim, Copilot, Power BI Copilot.

Why This Tool: Maintains leadership commitment and visibility throughout the initiative.

Owner: Executive Sponsor Liaison

Output: Sponsor engagement dashboard; meeting summaries; accountability reports.

KPI: Attendance $\geq 90\%$; decision turnaround ≤ 3 days; blockers resolved weekly.

Leadership Coaching

Activity: Deploy AI-driven simulations and personalized coaching modules for executives and frontline leaders.

Data Needed: Simulation scenarios, coaching feedback, readiness scores.

AI Utility/Tool: Talespin, Strivr, Axonify, Copilot.

Why This Tool: Builds confidence and equips leaders to communicate AI impact effectively.

Owner: Leadership Development Manager

Output: Simulation completion reports; coaching plans; readiness dashboards.

KPI: Simulation completion $\geq 95\%$; readiness score +20%; comms clarity index improved.

Stakeholder Engagement Playcard

<i>Purpose</i>	Communicate vision, engage stakeholders, personalize support, and monitor sentiment.
<i>Tools/AI Utilities</i>	<ul style="list-style-type: none">• Microsoft Viva• Qualtrics• Copilot• Jasper• Slack AI• Beekeeper• Canva
<i>Process</i>	<ol style="list-style-type: none">1. Segment audiences and baseline sentiment (Viva/Qualtrics)2. Generate tailored comms (Copilot/Jasper)3. Publish across channels (Slack AI/Beekeeper) with visuals (Canva)4. Capture Q&A and track sentiment (Culture Amp/Power BI)
<i>Prompt</i>	"Create three versions of the AI vision email for execs, frontline, and union reps"
<i>KPIs</i>	<ul style="list-style-type: none">• Message reach/recall• Stakeholder trust index

Field Notes

Sponsor Alignment Playcard

<i>Purpose</i>	Define cadence, expectations, contribution metrics, and feedback loops for sponsors.
<i>Tools/AI Utilities</i>	<ul style="list-style-type: none">• Motion; Reclaim• Copilot• Zoom AI• PMI Infinity• ServiceNow• Power BI Copilot
<i>Process</i>	<ol style="list-style-type: none">1. Auto-schedule forums (Motion/Reclaim)2. Capture decisions and actions (Copilot/Zoom AI)3. Track tasks (PMI Infinity/ServiceNow)4. Publish engagement dashboard (Power BI Copilot)
<i>Prompt</i>	"Summarize sponsor meeting and draft tailored follow-up emails."
<i>KPIs</i>	<ul style="list-style-type: none">• Sponsor attendance rate• Decision turnaround SLA

Field Notes

Leadership Alignment AI Prompt Library for AI Assistants

Stakeholder Engagement

- Copilot: Draft segmented vision emails ensuring inclusive language and transparency.
- Jasper: Generate empathetic responses for FAQs about AI impact on jobs.
- Qualtrics: Design a pulse survey to measure trust in AI rollout; anonymize responses.
- Copilot: Create a script for townhall explaining AI safeguards and human oversight.
- ThoughtSpot: Query sentiment data for early warning signs of resistance; confirm bias-free analysis.

Sponsor Alignment

- Copilot: Summarize sponsor meeting decisions with clear accountability markers.
- Copilot: Draft follow-up emails reinforcing ethical AI commitments.
- Power BI Copilot: Generate engagement scorecards without exposing personal identifiers.
- ThoughtSpot: Identify patterns in sponsor engagement linked to milestone success; validate fairness.
- Copilot: Create a briefing for sponsors on compliance and governance updates.

Field Notes
