The OrgChange.AI Dispatch – April 2026

Introduction

This month's Dispatch makes one point with unusual clarity: AI does not change an organization by itself; leaders change the operating system around it. The case studies show where momentum is actually coming from—pilots tied to workflow reality, governance embedded early, data made usable, and capability built alongside technology. The leadership quotes sharpen the signal: winning organizations are not automating yesterday's work faster; they are redesigning accountability, judgment, and value creation for an AI-enabled enterprise. The Nine-Square Grid then turns those lessons into an execution map across people, process, and technology. The takeaway is simple and urgent: scale depends less on the brilliance of the tool than on the discipline of the transformation.

Case Studies

Accurate

- **AI Tools:** Unified actuarial and IT platform; workflow automation; model deployment tools; transparent data and model management
- **How AI is augmenting organizational change:** Accurate is using AI-enabled actuarial tooling as a single source of truth for pricing and reserving models. The platform helps translate technical work across actuarial, IT, and leadership teams, reduces rework, and speeds deployment. This augments change management by improving cross-functional trust, clarifying accountability, and making model-driven changes easier to explain, govern, and sustain.
- **Source:** AI in Business Podcast, "Moving from AI Experimentation to Enterprise Deployment in Insurance."

Advocate Health

- **AI Tools:** Dragon Copilot for Nurses; pilot and feedback processes; workflow validation mechanisms
- **How AI is augmenting organizational change:** Advocate Health partnered with Microsoft to pilot and refine Dragon Copilot in real clinical environments. The organization used collaborative testing and continuous feedback to validate fit across different care settings before scaling. This augments change management by de-risking implementation, creating early wins, and ensuring the technology aligns with frontline reality before broader rollout.
- **Source:** AI in Business Podcast, "Applying AI in Organizational Change Management for Healthcare."

Bristol Myers Squibb (BMS)

- **AI Tools:** AI survey summarization tools; custom ChatGPT agents; unified HR dashboards; AI coaching tools
- **How AI is augmenting organizational change:** BMS is applying AI to summarize employee feedback, accelerate information gathering, and consolidate fragmented HR data into more usable dashboards. The company is also piloting AI-enabled coaching and skill development. This augments change management by helping HR leaders make faster, more informed decisions, target capability building, and support a more agile, customer-centered workforce.
- **Source:** AI in Business Podcast interview with Raoul Munroig (Bristol Myers Squibb), covering AI summarization, custom agents, unified HR data, and skills development.

Capital One

- **AI Tools:** ThoughtSpot Agentic Analytics Platform; code-free analytics for business users; code-first tools for data teams
- **How AI is augmenting organizational change:** Capital One is using AI-enabled analytics to give business users easier access to insight while preserving deeper technical capability for data teams. This dual operating model helps the organization scale data-driven decision-making without slowing innovation. It augments change management by supporting broader adoption, lowering barriers to use, and creating a more inclusive path to analytics maturity.
- **Source:** ThoughtSpot / Sapio Research, "The New Operating Model for Analytics – 2026 Report."

Coca-Cola

- **AI Tools:** ThoughtSpot Agentic Analytics Platform; natural-language analytics; AI agents
- **How AI is augmenting organizational change:** Coca-Cola is using AI-powered analytics to democratize access to data and speed decision-making. The platform allows users to query information in natural language and get actionable insights quickly. This augments change management by reducing dependence on specialized analysts, supporting faster action at the edges of the business, and helping employees adopt more data-driven behaviors.
- **Source:** ThoughtSpot / Sapio Research, "The New Operating Model for Analytics – 2026 Report."

EY

- **AI Tools:** Generative AI; process automation; predictive analytics; agentic AI; AI-powered platforms for workshops and experimentation
- **How AI is augmenting organizational change:** EY is advocating a shift from tactical automation to AI-enabled business model reinvention. The firm emphasizes CEO-led transformation, hands-on workshops that help leaders experience AI directly, and reinvestment of efficiency gains into workforce capability rather than headcount reduction. This augments organizational change by reframing AI from a cost tool into a leadership, mindset, and operating model transformation agenda.
- **Source:** Emerj AI and Business podcast, "Enterprise AI Adoption: Shifting from Workforce Strategy to Business Model Reinvention," featuring Dan DiDio and referencing EY's AI Pulse Survey.

Gallagher

- **AI Tools:** Generative AI; agentic AI; ThoughtSpot analytics platform; sentiment analysis; workflow automation
- **How AI is augmenting organizational change:** Gallagher is applying AI to analytics, employee communications, and change management workflows. The company uses AI to draft and summarize content, generate manager toolkits, analyze feedback, and predict issues such as burnout or disengagement. This augments change management by enabling more personalized communication, reducing overload, and helping leaders monitor how change is landing across the organization.
- **Source:** Arthur J. Gallagher & Co., Employee Communications Report 2026 / State of the Sector 2025/26.

Humana

- **AI Tools:** Centralized governance, risk, and compliance (GRC) platforms; AI-enabled risk analytics; automation for policy mapping, audit, and control testing
- **How AI is augmenting organizational change:** Humana is using AI to connect audit, risk, business continuity, third-party risk, and model governance into a unified operating model. The company is applying AI to analyze risk and control inventories, benchmark against external data, surface interdependencies, and enable more continuous assurance. This augments organizational change by replacing siloed oversight with a shared risk language, clearer ownership, and faster adoption of new control processes.

- **Source:** Harvard Business Review Analytic Services, "The Resilient Enterprise: Using AI to Connect Governance, Risk, and Compliance."

Intel

- **AI Tools:** AI chips; computer vision; analytics and automation platforms; venture-style funding and governance mechanisms
- **How AI is augmenting organizational change:** Intel is using a venture-style approach to incubate AI initiatives, funding projects through milestones and focusing first on practical automation and core data readiness. The company also uses cross-functional centers of excellence to support AI integration. This augments change management by reducing innovation theater, building iterative learning into deployment, and helping the business absorb AI in manageable stages.
- **Source:** AI in Business Podcast interview with Stacey Shulman (Intel), on venture-style funding, data readiness, and cross-functional AI enablement.

Microsoft (Dragon Copilot for Nurses)

- **AI Tools:** Dragon Copilot for Nurses; Dragon Admin Center; ambient AI scribing; adoption analytics dashboards
- **How AI is augmenting organizational change:** Microsoft is using ambient AI to convert nurse-patient conversations into EHR documentation while tracking adoption through analytics dashboards. The solution has been co-created with nurses and embedded into existing clinical workflows. This augments organizational change by reducing documentation burden, lowering cognitive load, using real adoption data to manage rollout, and reinforcing new behaviors with training and feedback loops.
- **Source:** AI in Business Podcast, "Applying AI in Organizational Change Management for Healthcare."

Mercy

- **AI Tools:** Dragon Copilot for Nurses; peer reinforcement and adoption support mechanisms
- **How AI is augmenting organizational change:** As an early adopter of Dragon Copilot for Nurses, Mercy is using AI-assisted documentation to capture more of the "invisible care" nurses provide while improving documentation quality. Mercy's rollout emphasizes peer success stories and frontline reinforcement. This augments change management by increasing confidence in the new workflow, making benefits visible to staff, and building stronger social proof for adoption.
- **Source:** AI in Business Podcast, "Applying AI in Organizational Change Management for Healthcare."

Navan

- **AI Tools:** AI-driven GRC platform; intelligent agents for risk assessment; workflow automation; AI-generated audit work papers
- **How AI is augmenting organizational change:** Navan is building a connected risk ecosystem from the ground up. AI centralizes and analyzes risk data, automates workflows, standardizes reporting, and helps identify compliance issues and operational bottlenecks earlier. This augments change management by pushing risk ownership closer to business teams, giving leaders a shared source of truth, and making it easier to embed new governance behaviors across functions.
- **Source:** Harvard Business Review Analytic Services, "The Resilient Enterprise: Using AI to Connect Governance, Risk, and Compliance."

Procter & Gamble (P&G)

- **AI Tools:** AI coaching companion

- **How AI is augmenting organizational change:** P&G has piloted an AI coaching companion to support employee skill and career development. The effort is explicitly people-centric and focused on measurable improvements in delivery, engagement, and well-being. This augments organizational change by making coaching more scalable, personalized, and continuous while reinforcing the behaviors needed for transformation.
- **Source:** AI in Business Podcast / BMS discussion citing Procter & Gamble's multi-year AI coaching companion pilot.

SAP

- **AI Tools:** SAP HANA AI platform; AI Ambassador Network; machine learning for invoice matching; resume matching AI; form-field recommendation tools
- **How AI is augmenting organizational change:** SAP is pairing AI deployment with an internal ambassador network that helps spread practices, increase fluency, and support peer-to-peer learning. AI is also automating finance and HR tasks such as invoice and resume matching. This augments change management by involving stakeholders early, positioning AI as augmentation rather than replacement, and using internal champions to reduce resistance and accelerate new ways of working.
- **Source:** AI in Business Podcast interview with Andreas Welsh (SAP), covering SAP's AI Ambassador network and AI-enabled finance/HR automation.

Toyota

- **AI Tools:** ThoughtSpot Agentic Analytics Platform; generative AI; agentic AI for workflow automation
- **How AI is augmenting organizational change:** Toyota is using agentic analytics to automate analytics workflows and broaden access to actionable insights. The organization is embedding AI into how teams interact with data rather than treating analytics as a specialist function. This augments change management by supporting productivity gains, encouraging self-service decision-making, and helping new data-enabled habits take hold at scale.
- **Source:** ThoughtSpot / Sapio Research, "The New Operating Model for Analytics – 2026 Report."

Anonymized Pharmaceutical Company

- **AI Tools:** AI for drug discovery; generative AI; process mining and simulation tools
- **How AI is augmenting organizational change:** An anonymized pharmaceutical company used AI to dramatically accelerate molecular exploration in drug discovery, only to find that downstream clinical development remained a bottleneck. Leadership concluded that isolated AI wins were not enough and began shifting toward end-to-end process reinvention. This augments change management by turning a successful pilot into a catalyst for redesigning the broader operating model.
- **Source:** Emerj AI and Business / EY podcast example used to illustrate AI-enabled reinvention beyond isolated pilots.

Read together, the case studies suggest that the real differentiator is not who bought AI first, but who is learning how to operationalize it fastest. The common pattern is pragmatic: start where work is visible, prove value in context, build trust through governance and feedback, and then expand with clearer ownership.

That is precisely why we are hearing with people in the trenches off organizational change are saying. The following quotes from enterprise leaders do more than inspire—they reveal the management logic underneath adoption: AI lifts capacity, but leaders still have to lift judgment, coordination, and ambition.

Leadership Quotes

EY (Consulting)

Dan DiDio, Global AI Consulting Leader and Americas Consulting CTO
"AI lifts the floor. But it's human ingenuity and people that lift the ceiling."

"You don't become an AI first organization by automating what you do today. That is essentially building and automating yesterday, not building for the future."

"For every one company cutting and reducing their headcount, more than twice as many are reinvesting in their people."

Source: Emerj AI & Business podcast summary in April Dispatch Sources.pdf (recording dated 2026-03-30; "Enterprise AI Adoption: Shifting from Workforce Strategy to Business Model Reinvention").

Humana (Health Insurance)

Erin Banet, Chief Audit and Risk Officer
"We decided that it made sense to bring the front end of risk identification all the way through assurance into one area, because that breaks down so many silos."

"With any AI or emerging technology, we can't underscore enough the importance of clean data. If you put in garbage, it comes out garbage."

"Governance over AI—having the right tollgates in process, the right guardrails, training, and monitoring—all those things are extremely important. There always has to be a human in the loop."

Source: HBR Analytic Services, "The Resilient Enterprise: Using AI to Connect Governance, Risk, and Compliance".

Navan (Travel, Payments, and Expense Management)

Erin Dempsey Heuwetter, Head of Audit, Risk, and Compliance
"The goal isn't to centralize control; it's to distribute risk intelligence. When business owners can access the same risk data we do, they make better decisions without waiting for us. That's the unlock—GRC as an enabler, not a bottleneck."

"We can start to see risk signals early, which helps us redirect resources before an issue becomes an incident. This [foresight] changes the entire value proposition of GRC—we become the early warning system, not the post-mortem."

"AI can accelerate our work, but it doesn't absolve us from judgment. If anything, it raises the bar for human accountability."

Source: HBR Analytic Services, "The Resilient Enterprise: Using AI to Connect Governance, Risk, and Compliance".

Microsoft (Healthcare AI / Dragon for Nursing)

Umesh Rastogi, Executive leading Microsoft's Dragon for Nursing Initiative
"Organizations that see strong adoption, they treat AI as a change management journey, not just a one time thing."

"The next chapter will basically be defined by this agent and humans working together, teaming up..."

Source: Emerj Podcast.

Relias (Healthcare Technology / Workforce Learning)

Cara Lunsford, RN, VP Healthcare Policy & Clinical Solutions
"AI can enhance our capabilities, but must be used cautiously to assist, not replace, critical judgment and compassionate care."

Felicia Sadler, MJ, BSN, CPHQ, LSSBB, VP Quality & Clinical Workforce Development
"With the emergence of AI, healthcare organizations should consider a proactive governance framework that promotes ethical and responsible use, safeguards data privacy, strengthens security, mitigates bias in decision-making, and enhances the patient experience."

Maria Samot and John Harrington, SVP Content Development and VP Clinical Solutions
"We've leaned into this mission by using AI not to replace instruction, but to enhance it—delivering smarter personalization and scenario-based learning that drives improvement and supports high reliability."

Source: Relias 2025 Technology in Healthcare Report.

These statements also make clear that today's AI agenda is no longer a tooling conversation; it is a leadership and operating-model conversation. Human ingenuity, clean data, shared risk intelligence, governance guardrails, and adoption as a change journey all point to the same conclusion: transformation succeeds when executives align workforce readiness, process redesign, and technical enablement.

The Nine-Square Grid takes those executive signals and translates them into a practical diagnostic—showing where urgency is high, where capability is lagging, and where leaders should intervene first.

The OrgChange.AI Nine-Square Grid

People, Process, and Technology are analyzed against Kotter, Lewin, and ADKAR.

Square 1 — People × Kotter (Urgency & Awareness)

- Clear people-readiness urgency: 51% of leaders cite skills as a top need for AI readiness, while only 38% say their organizations are prepared with the staff skills and training required for AI. (Source: Drexel LeBow/Precisely)
- In banking, awareness of AI-driven governance change is rising quickly: 67% of surveyed banks already use AI/ML models, and 71% have analyzed at least some impact of the EU AI Act on their model risk management framework. (Source: Deloitte 2025 EMEA MRM Survey)

Square 2 — People × Lewin (Unfreezing & People Management)

- The "unfreezing" challenge is explicit in the skills data: 28% cite skills and resource shortages as a key challenge for data programs, and organizations with weak AI/business alignment are more likely to say they need stronger leadership direction to move change forward. (Drexel LeBow/Precisely)
- Banks are changing accountability structures to manage AI and model risk more deliberately: 48% separate the model owner role from the model developer role, reinforcing new responsibilities as AI/ML governance matures. (Source: Deloitte 2025 EMEA MRM Survey)

Square 3 — People × ADKAR (Awareness & Knowledge Sharing)

- Specific knowledge and ability gaps that must be addressed at the individual level: 30% lack the ability to deploy AI at scale, 29% lack responsible AI/compliance expertise, and 28% lack the ability to translate business needs into AI solutions. (Source: Drexel LeBow/Precisely)
- Banks are building reinforcement mechanisms around AI/ML accountability: 95% have clearly defined the model owner role, and 59% identify AI/ML models as such in their model inventories. (Sources: Deloitte 2025 EMEA MRM Survey)

Square 4 — Process × Kotter (Coalition Building & Process Design)

- Growing process coalitions around governance: 63% of organizations have some form of AI governance, 40% have expanded existing data governance to include AI governance, and 83% report an ongoing data governance program. (Source: Drexel LeBow/Precisely)
- In banking, process design is being formalized through policy and shared information structures: 94% of banks have a model risk policy, and 90% agree their inventory stores information about the model landscape in one place. (Source: Deloitte 2025 EMEA MRM Survey)

Square 5 — Process × Lewin (Changing & Process Transformation)

- The strongest process-transformation signal is data-quality work for AI: 94% have initiated data-quality improvement efforts for AI, 55% are already executing those initiatives, and 51% identify data quality as the top data-integrity priority. (Source: Drexel LeBow/Precisely)
- Banking respondents report a tooling shift consistent with process change: model risk management is moving away from unmanaged spreadsheets toward in-house solutions, with 40% now using in-house tools versus 24% still relying on Excel. (Source: Deloitte 2025 EMEA MRM Survey)

Square 6 — Process × ADKAR (Desire & Process Optimization)

- Governance can create desire for better processes because organizations see concrete value: 42% say governance improves AI readiness, 39% say it improves the quality of AI outcomes, and governance/integration efforts are associated with 44–45% reporting improved data quality. (Source: Drexel LeBow/Precisely)
- Banks are still targeting process optimization in core control activities, with improvement priorities concentrated in model validation, analytics/reporting, governance, and monitoring. (Source: Deloitte 2025 EMEA MRM Survey)

Square 7 — Technology × Kotter (Vision Communication & Technical Infrastructure)

- There is a technical-vision gap that leaders must communicate clearly: 87% say they have AI-ready infrastructure, yet 42% still cite infrastructure as a top AI challenge and 54% say more technological infrastructure is needed for AI readiness. (Source: Drexel LeBow/Precisely)
- Harvard Business Review Analytic Services describes the supporting infrastructure for "connected risk" as modern GRC platforms that centralize audit, risk, and compliance data, automate workflows, and maintain consistent documentation. (Source: HBR Analytic Services)

Square 8 — Technology × Lewin (Refreezing & Technical Integration)

- Technical integration is becoming more durable: 82–85% support cloud/SaaS or hybrid licensing for critical data-management capabilities, and modernization is described as an ongoing process rather than a one-time project. (Source: Drexel LeBow/Precisely)

- In banking, generative AI is moving toward more normalized use: 76% report using generative AI and large language models, and 43% of large banks report validated generative AI use cases. (Source: Deloitte 2025 EMEA MRM Survey)

Square 9 — Technology × ADKAR (Ability & Technical Enablement)

- Technical enablement remains a bottleneck : 30% say the missing skill is the ability to deploy AI at scale, 43% cite data readiness as the biggest barrier to AI alignment with business objectives, and only 31% have AI success metrics tied to business KPIs. (Source: Drexel LeBow/Precisely)
- Banks report that AI-specific technical ability is constrained by validation complexity: 36% cite model complexity and interpretability as the main AI model validation challenge, while 53% foresee increased automation in data preparation as part of the response. (Source: Deloitte 2025 EMEA MRM Survey)

Across the Nine-Square Grid, evidence shows a common pattern: organizations are moving from isolated AI experimentation toward more disciplined operating models, but skills, data quality, governance, and technical integration remain the biggest constraints on sustainable change.

The strongest organizational change programs combine people enablement, governed process redesign, and scalable technical foundations rather than treating AI as a standalone tool deployment.

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