

# The OrgChange.AI Dispatch — March 2026

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This month's Dispatch captures a clear shift: organizations are moving from 'AI pilots' to 'AI as the operating model.' The pattern is consistent across the case studies below—create a sanctioned environment for safe experimentation, embed copilots and agents directly into core workflows, and measure the change where it matters: cycle time, throughput, quality, and customer outcomes. The headline isn't that AI can write or summarize; it's that AI can redesign work—compressing weeks into hours, shrinking rework, and freeing scarce talent to supervise, decide, and improve.

## Case Studies

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### Anaplan

- AI Tools:
  - Google Agent Space (sanctioned internal AI workspace)
  - Role-based analyst agents (domain-specific assistants embedded in Anaplan)
  - Co-Modeler (AI-assisted model/digital-twin creation)
  - AI-assisted engineering quality checks (story quality inspection)

Anaplan treats AI as an operating-model shift: it provides a governed place to experiment, embeds role-based agents into daily planning work, and uses Co-Modeler to compress model-building from weeks/months to minutes/hours. This reduces workflow friction, changes how teams plan and decide, and supports new value metrics (speed, quality, adoption) alongside productivity—while improving engineering throughput by reducing rework.

### Coupa

- AI Tools:
  - Google AI Platform (sanctioned internal use)
  - GitHub Copilot (engineering)
  - Anthropic Claude (engineering)
  - Pitch Monster / AI coaching for skills certification
  - Coupa embedded agents (e.g., Bidding Agent for sourcing recommendations)

Coupa operationalizes AI through measurable workflow redesign: support teams use AI for root-cause analysis to resolve issues faster; engineers use Copilot/Claude to speed releases and reduce defects; and regulated work (e.g., DORA compliance) is delivered with smaller teams and shorter cycles. Internally, AI-assisted certification increases capability and standardizes best practices—turning adoption into a repeatable change program rather than a one-off pilot.

### Accenture — Marketing & Communications

- AI Tools:
  - 14 embedded AI agents (market research, content generation, planning, campaign execution)
  - GenAI assistants for just-in-time support in the flow of work
  - LearnVantage co-learning practices (feedback loops + coaching)
  - Yoodli AI coaching (skills practice and certification)

Accenture redesigned marketing work end-to-end, then embedded agents directly into the workflow. The change program paired platform/data consolidation with new roles, coaching, and a two-way learning loop where marketers refine outputs and train agents. Results included fewer handoffs, faster first drafts, and shorter time-to-market—demonstrating how agentic tools can be used to simplify processes, accelerate learning, and normalize new ways of working.

### Leading UK Banking Group (anonymous case)

- AI Tools:
  - Agentic AI for complex reasoning and problem-solving
  - Digital channels + workflow automation
  - Data products supporting rapid experimentation

The bank treated AI as a catalyst to pay down workflow debt and redesign roles at the same time. It rebuilt a customer engagement process from 60–100 days and 10+ handoffs into a one-day cycle, then shifted from large specialized teams to small ‘full-stack’ teams with redesigned roles (e.g., engagement leads, compliance leads). This paired workflow simplification with reskilling and empowerment so adoption could scale quickly.

### Global Pharmaceutical Company (anonymous case)

- AI Tools:
  - Autonomous agents for research synthesis
  - AI-generated risk assessments
  - Agent-assisted regulatory documentation
  - Adaptive learning modules + peer learning/recognition

Leaders launched a strategic genAI ‘catalyst’ initiative focused on rapidly prototyping and scaling workflow changes in a highly regulated setting. Agents streamline R&D and compliance documentation, while adaptive learning and recognition systems reinforce that AI augments expertise. The result is higher regular usage and faster, standardized outputs—supported by culture-shaping mechanisms (experimentation, recognition, learning pathways).

### Global Biopharmaceutical Company (anonymous case)

- AI Tools:
  - AI-powered research assistant (literature + multi-omic analysis)
  - Explainability features for validation
  - Three-tier AI literacy program (Bronze/Silver/Gold)

The organization embedded change management into capability building: a tiered training pathway taught governance/compliance, prompt interaction, and peer-led best-practice sharing. Scientists learned to validate insights using explainability, then collaborated with the assistant in real time—shifting human time from data processing to higher-value scientific decisions (trial planning, precision medicine) while maintaining oversight and integrity.

### Global Cloud Services Provider (anonymous case)

- AI Tools:
  - Yoodli AI coaching tool (real-time feedback)
  - Asynchronous peer coaching workflows

To drive rapid capability change at scale, the provider replaced instructor-led certification with AI-driven practice and feedback in the flow of work. The program scaled pitch certification to 15,000+ employees within a month,

improved completion rates, and increased quality metrics (key talking points). Peer sharing created a social learning loop—turning training into a collaborative, behavior-changing system.

### **Global Financial Institution (anonymous case)**

- AI Tools:
  - Bespoke AI governance model (compliance + business reviews)
  - Explainability tools embedded in AI systems
  - Trust & safety reporting channel
  - Micro-learning on responsible AI use

This organization used governance as an adoption accelerator: compliance experts and business teams jointly reviewed outputs; explainability made it easier for employees to question results; and a trust/safety channel created fast feedback for issues. Micro-learning and manager recognition reinforced responsible use—building psychological safety and accountability so AI adoption could expand without eroding trust.

### **Global Consumer Products Company (anonymous case)**

- AI Tools:
  - Advanced Planning System (APS) as planning backbone
  - AI ‘cognitive layer’ on top of APS
  - Automated external demand-signal processing within guardrails
  - Explainability + drift monitoring

The company layered AI onto an existing planning backbone to shift planners from manual data juggling to exception-based decision orchestration. Explainability was a deliberate change lever—making forecasts defensible and improving trust—while guardrails clarified human–AI decision rights. This combination improved planning performance and reinforced new routines for how decisions get made.

### **Global Medical Technology Company (anonymous case)**

- AI Tools:
  - Advanced Planning System (APS)
  - Forecast validation + parameter correction
  - Improved inventory netting + strengthened IBP cadence

After an APS deployment underperformed, the company reset around operating-model fundamentals—correcting parameters, validating forecasts, improving inventory visibility, and strengthening the IBP process. This is a classic change story: re-establish trust in the system, reduce manual overrides, and make the new tool usable in day-to-day work through process discipline and governance.

### **Industrial Equipment Manufacturer (composite example; fictionalized in source)**

- AI Tools:
  - Multiagent AI support team (interface + classification + analysis + resolution agents)
  - AI agent observability / agent operations (telemetry, dashboards, alerts)
  - Human-on-the-loop approvals for sensitive actions
  - KPI framework for agent performance (cost, speed, productivity, quality, trust)

The organization introduced digital workers for L1/L2 application support and redesigned oversight, measurement, and roles to match. Business process decomposition defined agent responsibilities and new KPIs; observability created transparency and rapid issue response; and human-on-the-loop controls protected

compliance and trust. The change program explicitly addressed training, incentives, and cultural impacts so humans could move from execution to supervision without backlash.

### Advisor360° (Wealth Management)

- AI Tools:
  - AI assistants for meeting summaries and CRM updates
  - Workflow automation for client communications
  - Human review/oversight controls (advisors retain final say)

Advisor workflows are being redesigned around 'low-risk automation with high oversight': AI drafts and summarizes, updates records, and prepares communications, while advisors retain final accountability. This approach expands adoption by improving efficiency without compromising compliance, and it creates a repeatable pattern for change: start with safe tasks, build trust with auditability, then expand autonomy step-by-step.

## Leadership Quotes

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The case studies show 'what' is changing in the work and the numbers that follow. The quotes that follow reveal the 'how': leaders widen access while tightening guardrails, fund AI explicitly, and force prioritization by redirecting resources toward AI-first solutions. Listen for the pragmatic posture—measurement is still messy, governance is lagging the tech, and the winners are engineering trust by pairing probabilistic AI with deterministic systems and clear decision rights.

### Anaplan/Charles Gottdiener, CEO

**"We've issued a tool Google agent space to everybody in the company so they can start experimenting with AI."** Sanctioned access reduces shadow IT risk and accelerates safe experimentation.

**"We're going to do 6,000 releases this year... Last year we did 4,000... we've only grown our engineering team by 10%."** Throughput up ~50% with near-flat headcount; mix of AI, process, and tooling.

**"Enter AI. And so now we can look at the quality of the stories... we can eliminate or minimize all this rework"** AI checks requirements-to-story translation; humans intervene early; less refactor.

**"I pushed my leaders pretty hard and took money away from them and said, go solve that problem with AI"** Creates urgency and constraints to catalyze AI-first solutions.

### Coupa/ Leagh Turner, CEO

**"Delivering higher value for our customers faster. That's the main thing"** Frames AI as a value/velocity lever, not a novelty.

**"We can release code about 20% faster... and... reduce the level of defects by about 30%"** Human + AI teaming (Copilot/Claude) changes developer work.

**"We manage AI... top down and bottom up... we've developed an AI COE... [and] ask every single function... to build their own AI strategy"** Central standards; federated ownership; accountability.

**"Governance isn't evolving as fast as the technology... that's the gap that we all feel"** Argues for measured scale with strong guardrails.

**"It's like the industrial revolution... you never did it the same way again"** Sets expectations for enduring, structural change in work.

### Unnamed Health Insurance Company (Accenture research)

**"There's a flywheel effect: the more humans interact with AI, the more confident they become... AI then improves through those interactions. That's co-learning in action."** (Senior Director, Data Science & AI, Global Health Insurer. Design feedback-rich workflows; measure interaction loops.)

### Unnamed Energy Company (Accenture research)

**"Leadership must drive a mindset shift so people see gen AI as an empowering partner rather than a threat."** (Director, Innovation, Energy sector. Themes: Leadership & culture, Trust.)

## The OrgChange.AI Nine-Square Grid

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Taken together, the quotes read like an executive field guide—strategy, risk, skills, and commercial models evolving in real time. But scaling AI change requires more than conviction; it requires a repeatable change architecture. That's why the final section maps the evidence into the OrgChange.AI Nine-Square Grid across People, Process, and Technology—anchored in Kotter, Lewin, and ADKAR—so you can diagnose where adoption stalls and choose interventions that convert awareness into ability, and experiments into durable performance. (Source citations can be found in the bibliography.)

### People — Square 1 (Kotter: Urgency & Awareness)

- AI-related “angst” is common: about eight in ten employees report strong concern on at least one AI-angst item; 65% worry they will be replaced by someone who uses AI better. (HBR, p.2)
- High AI angst can drive usage without true buy-in: high-angst employees report ~65% of their job AI-assisted vs. 42% for low-angst, while also reporting much higher resistance (4.6 vs. 2.1 on a 5-point scale). (HBR, p.6)
- In Hong Kong, technological change (including AI) is a major driver of near-term role impact (~40% expect large/very large impact), and job-security confidence is comparatively low (35% very/extremely confident). (PwC, p.69; p.71)

### People — Square 2 (Lewin: Unfreezing & People Management)

- Psychological safety is uneven: 41–46% agree their team supports learning from failure, speaking up, trying new approaches, and asking for help; Gen Z reports higher safety than older cohorts. (PwC, p.66)
- Perceived control is limited: only 24% expect large/very large control over how technology affects their work, reinforcing the need for involvement and support during change. (PwC, p.70)
- Agentic work models emphasize “human-on-the-loop” oversight—humans supervising agents—to manage errors and maintain quality as work shifts from execution to oversight. (Deloitte, p.124–125)

## **People — Square 3 (ADKAR: Awareness, Knowledge, Ability, Reinforcement)**

- Skill readiness remains a constraint: 51% cite skills as a top AI-readiness need, yet only 38% feel “very prepared” with staff skills/training; the most-lacking areas include deploying AI at scale (30%) and responsible AI/compliance (29%). (Drexel/Precisely, p.40–41)
- Workforce enablement is lagging demand: only 26% of workers report training on how to collaborate with AI, even as 84% of executives expect AI agents to work alongside humans within three years. (Accenture, p.146)
- Different adoption profiles require tailored reinforcement (peer mentors, safe learning spaces, empathy-first support, and engagement tactics). (HBR, p.7–8)

## **Process — Square 4 (Kotter: Coalition Building & Process Design)**

- Governance correlates with trust: 71% of organizations with governance programs report high trust in data vs. 50% without. (Drexel/Precisely, p.14; p.31)
- AI governance is present but not mature: 63% report some form of AI governance, and only ~34% of those have reached monitoring/optimization stages. (Drexel/Precisely, p.22)
- Change coalitions matter: leading transformations rely on cross-functional teams (technology, process owners, finance, HR) as the core unit of change for workflow redesign and workforce modernization. (Bain, p.83–84)

## **Process — Square 5 (Lewin: Changing & Process Transformation)**

- APS and other major platforms underdeliver when legacy processes are replicated; adoption suffers and users revert to spreadsheets if decision flows, roles, governance, and training aren’t redesigned. (BCG, p.101)
- Process and data integration gaps show up in planning: forecasting inaccuracy/misalignment (78%) and end-to-end visibility (38%) are top internal challenges. (BCG, p.97)
- Many organizations are actively improving data quality for AI: 55% report pilots/implementation (or beyond) for AI data-quality initiatives; 94% have begun discovery/business-case/approval steps. (Drexel/Precisely, p.34–35)

## **Process — Square 6 (ADKAR: Desire & Process Optimization)**

- Reinforcement can be operationalized through incentives: PwC recommends recognition frameworks and performance criteria that value digital/AI skills and reward measurable productivity improvements. (PwC, p.75)
- Measurement remains a weak link: only 31% have well-established metrics tied to business KPIs, and 69% struggle to connect AI performance to outcomes—limiting reinforcement and scaling discipline. (Drexel/Precisely, p.22)
- For agentic work, business-process decomposition helps identify where agents add value and which KPIs are needed to monitor and optimize performance (cost, speed, productivity, quality, trust/purpose). (Deloitte, p.127–128)

## **Technology — Square 7 (Kotter: Vision Communication & Technical Infrastructure)**

- A readiness “confidence-reality” gap persists: 87% claim AI-ready infrastructure, yet 42% cite infrastructure as a top AI challenge; 30% report missing expertise in deploying AI at scale. (Drexel/Precisely, p.13; p.24)
- AI is already shaping enterprise data programs: 52% cite AI as the primary influence, with adoption across predictive analytics (52%), gen AI (47%), and agentic AI (41%). (Drexel/Precisely, p.21)

- In planning, vendors and frontrunners largely treat APS as the backbone and AI as an “intelligence layer” (copilots/agents) rather than a replacement. (BCG, p.104–105)

### Technology — Square 8 (Lewin: Refreezing & Technical Integration)

- Context enrichment is widespread (96% invest in location intelligence and third-party data enrichment), but integration and risk remain obstacles (44% integration complexity; 46% privacy/security concerns). (Drexel/Precisely, p.36; p.39)
- Scaled impact requires embedding AI into workflows: BCG notes AI that runs alongside APS is easy to ignore; durable adoption comes from integrating AI into planning rituals and systems. (BCG, p.109–113)
- Technical “refreezing” needs observability and guardrails: Deloitte describes agent operations with telemetry plus hot-path alerts for risk and warm-path analytics for performance patterns. (Deloitte, p.132–133)

### Technology — Square 9 (ADKAR: Ability & Technical Enablement)

- Enablement gaps are specific: leaders cite missing ability to deploy AI at scale (30%), responsible AI/compliance (29%), and business translation skills (28%). (Drexel/Precisely, p.41)
- To prove and improve agent performance, observability should track token usage and latency (retrieval/generation/tool calls) and surface results via dashboards, alerts, and reports. (Deloitte, p.133–135)
- Human–AI decision rights should be explicit: define what AI can recommend vs. execute and when human sign-off is required; copilots and narrowly scoped agents are expected to emerge first in well-governed domains. (BCG, p.112–113)

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