



The Hidden
Challenge of Going
AI First:

What Most
Companies Miss

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Andy Sack: There's a total shift in timeliness of better decisions faster. And it starts this week. Doesn't mean that the data is ready. And it doesn't mean that it doesn't take time to get the data ready. And it doesn't mean that the data and clean data and data lakes don't need to be established to get the full potential at scale of AI. It just means that there's a mindset shift to, hey, let's get this into the hands of smart people today and start making better decisions faster this week. This is AI First with Adam and Andy, the show that takes you straight to the front lines of AI innovation in business.

I'm Andy Sack and alongside my co-host, Adam Brotman. Each episode, we bring you candid conversations with business leaders, transforming their businesses with AI. No fluff, just straight talk and use cases and insights for you. Adam, good to see you. Glad we were able to get this recording done. This is one of our shorter episodes with me doing more of. And today I, what we want to talk about is observations and insights from the market. What is it that we're seeing? when we're talking to CEOs and executives at businesses, small, medium and large. And so I'll just start it off with a simple question for you, which is like would have been your market observations about AI transformation.

Adam Brotman: That it's hard. know, it's, it's, I know. mean, it's exactly. And that's it. You know, what makes it so hard is that it's, you're dealing with like all these different cross currents you've got on the one hand, we've never had digital transformation that affects the workflow of the leader of the knowledge worker like this.

Andy Sack: So true. Should we end the podcast now?

Adam Brotman: It's always affected more like your customer and or your, you know, some very vertical application that you use. so that alone makes it hard. But then what also makes it hard is that, there's still this muscle memory in organizations that, okay, there's some new technology that we can use. Let's give it to it and like, let it just go do it. Or we need to get our data in order and. What we found, you and I found is that...There's it's actually because there's all these different cross streams of muscle memory. What's new, how, you know, how this works. You end up in this really weird spot where, business leaders, they sort of want to, they want to become AI first.

They want to take advantage of this technology and yet they're sort of fighting. Fighting. They're sort of, they're both their impulse, their muscle memory and how to do digital transformation through IT with. You know, they're basically fighting that with, with how, you know, with the fact that this is a new and different implementation. And we can give examples of that in a second, but that's, that's what I'm finding is that it's, it's sort of the playbook for how you do this. It has to be as nuanced in a way as the technology is and how the transformation goes.

Andy Sack: Yeah, I'm reminded of Ethan Molyk's advice to us at the end of, the end in the last chapter of our book, AI First, when he said, you guys aren't going far enough to actually, like your playbooks all well and good, but you're not going far enough to actually push the level of transformation that businesses are going to need to deal with the rapid advancement of AI. And the reason I'm reminded of that is because it's really because of what you're saying. It's really, it's the limit, frankly, the limitations of the playbook. We're encountering clients who are like, yeah, like I read your book and I took the playbook and I formed an AI council and I got an AI charter for the, for the AI council. And, and yet the, the real change that's required is one that is much more significant than just that. Um, it's one that is a cultural change. Is a, at times maybe an org structure change. And it's, as you say, it's not an IT implementation.



Adam Brotman: Yeah, it's almost as if. It's almost as if there's an addendum to the playbook that we now talk about in our bootcamps and with our clients and publicly, which is that. The playbook itself and a council and a policy and all that good stuff, even an AI cat, you need all that. You need all that. You also need to get everybody proficient and, and using the technology at your company in a responsible way. However, you can't just go, okay, everybody here's. Shashvete business, here's co-pilot. We have a council, we've got a playbook, we've got a policy, let's go. And then assume that the organization is just going to organically transform itself. And so we've been talking about this sort of addendum to our playbook as being about really involving the CEO in a way we talk about in our book, but we emphasize it more now, which is the CEO him or herself has to have an aha moment, has to really empower some sort of a change agent or a transformation agent within the company, right?

Andy Sack: Yeah, I concur.

Adam Brotman: So like they have to empower this change agent or this transformation agent who then in turn uses the council and the policy and the AI Academy and all this stuff that's going on to facilitate the change happening within the organization, almost like a circulatory system. It's almost like the change agent, the transformation agent, which by the way, it can be a chief AI officer, can be a task force, a leader of a task force. They're almost like the heart that pumps the blood into the, in, the change into the company. And yet the, it's not about like forcing it on the company.

Like there's this really interesting dance of, of an AI mandate that's authentically coming from the CEO and the, the leadership team that is facilitated by this change agent group or person according to a bunch of governance that's smart. And that's a tricky dance, right? But that is how it happens. We're not unclear that that's how it happens. But getting that through to a group of people that have varying levels of understanding of what this alien intelligence even is, right? In other words, imagine explaining that to somebody and they're like, wait, what? You mean I don't just give it to my IT group. I've got to for an aha moment for change can occur and yet I still think of this thing as like a slightly better Google that can maybe write some emails like like there's this right

Andy Sack: Yeah, I mean, just it's, it's so interesting just listening to you talk to our audience and going, and, you know, I'm going, wow, these guys have gone all woo woo on me. Like, like, where, like, where's the, you know, business brass tacks and ROI and like, you know, it's all this soft language that you're talking about. And yet we wholeheartedly believe both in the power of AI and its ability to increase productivity as you say, faster, just faster, better decisions. And we also wholeheartedly believe that it's a mindset shift that's required and it needs to come from the CEO. The CEO needs to be involved in the transformation. Like we're increasingly talking about both of those things and we're increasingly sounding woo woo.

Adam Brotman: Yeah, that's right. So let's make it more tangible if we can, because you're right.

Andy Sack: Yeah, and we can use a couple of examples of clients to illustrate it.

Adam Brotman: Yeah, like one example is so we're one of our CEO, one of our client CEOs the other day, you know, I'm still, he's not one of our AI transformation clients. He's one of our other clients, but we're doing some AI work with them. And he was like, can AI actually help me with, you know, optimizing our ad spend and our discounts? Even though I don't have my data all organized in a perfect data lake or data, whatever. And I was like, of course it can. And he was like, okay, like how do I do that? And I said, well, why don't we just have a conversation about what you're trying to accomplish?



So I'm to record that conversation so I can use that transcript as part of my meta prompting that we're going to do. then I said, and bring onto the conversation, head of whoever's got your data, um, responsibility. we had the conversation, he brought her on the phone on the call. I'm recording it and I'm just, and I'm purposely setting the record for the transcript because I know that's going to go into the AI. because I have this understanding of like what a GPT-5 thinking heavy or GPT-5 Pro model is capable of doing from an analysis perspective, as long as it's got the right context.

And so I'm sitting there realizing the back of my mind, what the system is capable of. I'm, having in a very kind of meta way, I'm a conversation with the CEO about what probably trying to solve what data there is at his fingertips that relates to that problem. And, and I'm just like setting a record. He's got that data person on the call. She sends me a spreadsheet and she sort of threw together, even though they don't have other data organized. And I've got the transcript. I've got that data. I've got my own prompting skills. I throw that together into a GPT five pro chat and one shot it in like 15 minutes of GPT-5 pro thinking, like the answer to their optimization question.

And which I even, I still sometimes go like, wow, that was pretty good. And, and that's, and that's an example, by the way, sorry, just real quickly. That's an example that will confuse people. Cause like, is that a pilot that I just did? No. Did I automate a workflow? Sort of, but not really. I didn't automate it. Did I just solve a major problem for them potentially? Yes. Like this worth millions of dollars in theory. Yes. I'm not, I'm not shrugging my shoulders like, I did such a great thing or it's no big deal. I'm it's the, it's pointing out that like the real answer to how you bring this technology to bear has to do with like this combination of like understanding what his power is, understanding what problem you're trying to solve, and then weaving it into your workflow and doing that every organization, the company, that's hard to explain.

It's like we're being moved. We're like, yeah. And by the way, are they going to do that every day? A little bit, maybe some days are better days than others. Some weeks are better than others, but on the whole, if the whole organization does that, they will start to become a transformed company. And the more it's not relying on the CEO to call some consultant and the more that it's the CEO, or herself. His data person knows how to do this, not even checking with me, right? Like in a year from now, I hope that organization, they don't even need us because they're just like, they've ingrained this into their workflows. And it's like you said, they're just constantly making better decisions faster across all sorts of workflows.

Andy Sack: So for all those CEOs and executives listening to us right now, what you just told, you talked a little bit about some woo-woo stuff and you gave an example. What's the one thing that you want them to take away from that story?

Adam Brotman: Is that this, the minute that CEOs and leaders can start thinking of generative AI as a true augmentation to their leadership team, as a true augmentation to their enterprise's capabilities at the headquarters level, right? Meaning like, this isn't some, you know, some algorithm that's going to help you with your labor scheduling, even though it can do that or help you with your baking time if you're like a baking company or whatever. Although it can help with that. It's weird. People want to go to the specific. The point of the story was this can apply across all of the decisions you're making, all the analysis you're doing, all the planning you're doing. You need to sort of get to a place where culturally there's a mindset that says I should be running the stuff through AI and I got to learn how to do that and I got to teach my organization.



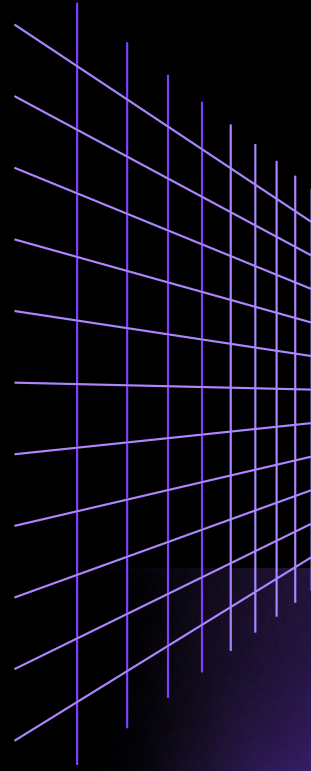
Andy Sack: I think the thing that I would highlight is really, which is in part from your story, but also really informed by our experience with working with our clients on AI transformation, is that if answer is, I need to, like that'll be delivered in three months, six months, a year from now for any end reasons data, the data is not ready, it's not integrated, regulatory, this, there are, the AI first organization starts the act and results start showing up this week. There's a total shift in timeliness of better decisions faster. And it starts this week. Doesn't mean that the data is ready. And it doesn't mean that it doesn't take time to get the data ready.

And it doesn't mean that the data and clean data and data lakes don't need to be established to get the full potential at scale of AI. It just means that there's a mindset shift to, hey, let's get this into the hands of smart people today and start making better decisions faster this week. Thank you for your short 10 minutes of time for listening to AI First with Adam and Andy. For more resources on how to become AI First, go to our website, forum3.com. we have case studies, research briefings, and lots of other, ~ we have a community sign up there. We have lots of amazing material on our website for those leaders looking to expand their knowledge.

We truly believe you can't over invest in AI. Onward.



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Andy Sack

Brings over 25 years of entrepreneurial and investment expertise in high tech and finance.



Adam Brotman

As the inaugural CDO at Starbucks, Adam's background in digital innovation is unparalleled.

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