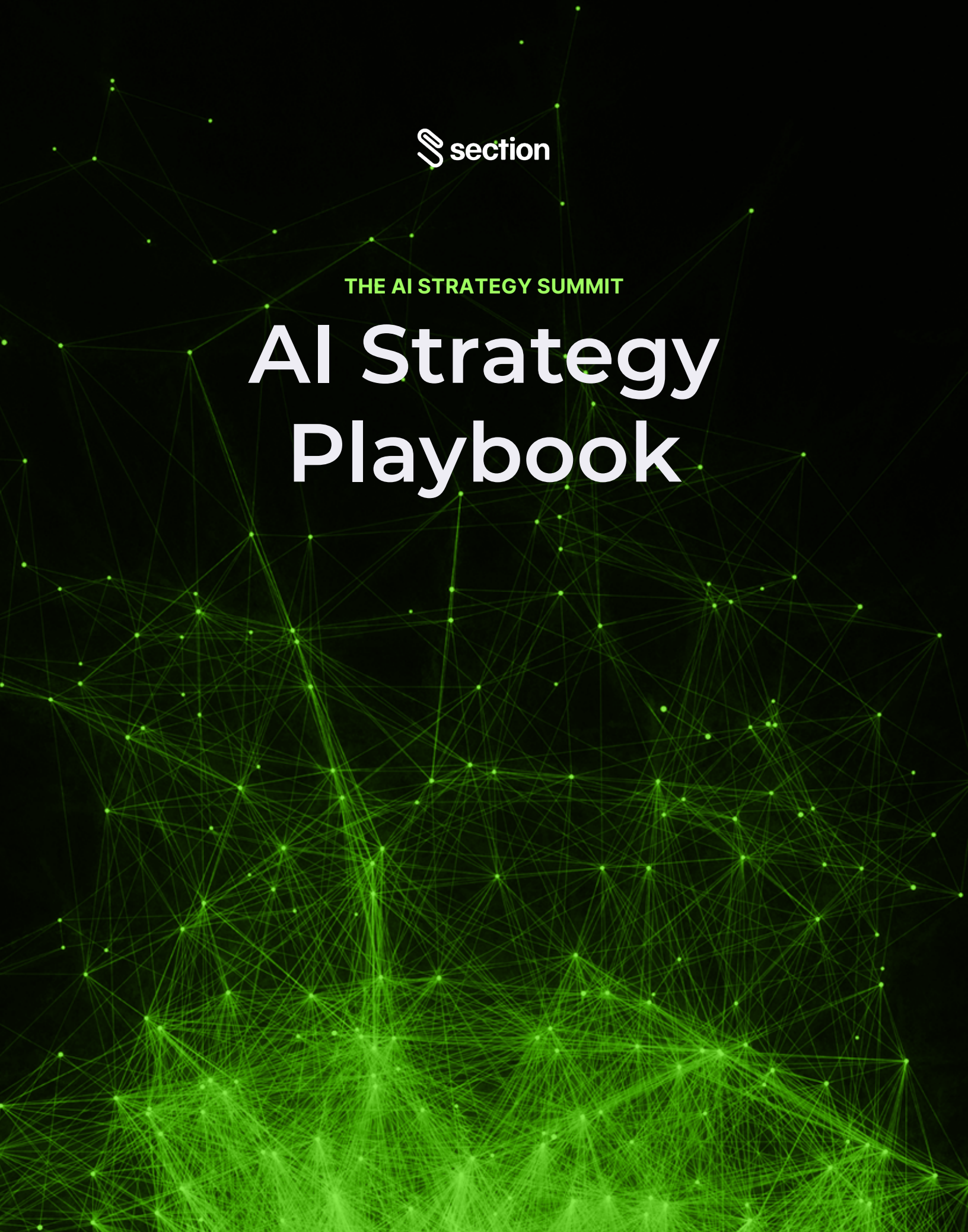
section

THE AI STRATEGY SUMMIT

AI Strategy Playbook



Real-world advice from leaders driving enterprise AI transformation

Most organizations know they should be doing something with AI, but there's no tried-and-true playbook for successful AI deployment – because very few people have done it before.

We gathered 10 enterprise leaders to share their tips, tricks, and strategies for deploying generative AI to a large organization. In this working playbook, you'll learn from them directly – and gain strategies to take back to your own company.

Our favorite strategies and tips for a successful AI deployment

1 **FOCUS ON THE DATA FOUNDATIONS BEFORE YOU JUMP TO MODELING.**

Two questions matter: Do you have the data to support AI and (more importantly) do you have the data infrastructure to enable it? (Amadeus Tunis, Acxiom)

2 **PURSUE RIGOROUS VALIDATION RATHER THAN ENDLESS EXPLANATION.**

The key to overcoming resistance: Prove that it works. This has more value than 50 meetings where you explain AI's value. (Zachi Attia, Mayo Clinic)

3 **DON'T BUY AI BEFORE YOU MAP YOUR WORKFLOWS.**

Take 30-60 days, focus on one function, and map workflows to pinpoint where you can use AI. (Shruthi Shetty, SAP)

4 **WIN THE HEARTS AND MINDS OF YOUR FRONTLINE MANAGERS.**

They're the ones driving this change, not CEOs or VPs. They know the work inside out, they're candid and critical, and they have real credibility with their peers. (Don Bennion, Adobe)

5 **EVALUATE 'AI FITNESS' WITH AN EVOLVING SCORE.**

Moderna's AI Fitness Score measures four things: number of messages, frequency of usage, use of reasoning models, and connection to data. But it's also changing – "good" AI use now will be mediocre AI use in 6 months. (Brice Challamel, Moderna)

6 **TRAIN YOUR MANAGERS TO DO WORKFLOW AUDITS.**

Workflow audits are now a leadership requirement. Train managers to deconstruct jobs into tasks and then determine if those tasks can be outsourced, augmented, or accelerated with AI. (Ravin Jesuthasan, Mercer)

7 **MEASURE THE LEADING INDICATOR (ADOPTION) AND THE LAGGING INDICATOR (OUTCOMES).**

The first signal to look for: Are your employees using AI and using it safely? Then, the more important metric: Is it driving your business outcomes? (Lexi Reese, Lanai, and Tony Gentilcore, Glean)

8 **ADAPT YOUR APPROACH AS YOU MATURE.**

AI prompt libraries are useful at first, but they lose value as people get comfortable with AI. Know that what you do today won't make as much sense in a few months – that's okay. (Olya Taran, Manulife)

Greg's advice

THIS IS HARD. AND IT'S WORTH IT.

In every executive conversation, we hear that AI deployment is a grind and rife with failures. If you're struggling, you're not alone – but stick with it, because the benefits will be immense. (And if you need a partner, **call us**).

How to get your organization's data AI-ready

With Amadeus Tunis, Acxiom

Most AI projects fail not because of poor models, but because organizations skip the critical decision-framing step. Before building anything, you need clarity about why you're building it.

> **"AI isn't missing imagination. It's missing integration."**

Without this clarity, even sophisticated AI becomes "math experiments pointing into fog" that either fail quietly or succeed without business impact. The key is solving backwards from business outcomes, not forward from the model, and prioritizing foundational data infrastructure.

Key insights:

1 **Start with four critical questions before building anything.** What decision is being made and by whom? What exactly are you trying to influence? What does success look like in business terms? What evidence would change your mind?

2 **Build the AI enablement pyramid from the bottom up.** Focus on data foundation and activation orchestration before jumping to modeling. Three-quarters of AI's value comes from the foundation, not the sexy algorithms on top.

Two questions matter to AI enablement: Do you have the data to support it? And (more importantly) do you have the data infrastructure to enable it? Most leaders say "we have a ton of data," but that data is trapped in silos and hard to activate. **"Insights mean nothing if they die in a dashboard."**

3 **If your data isn't ready, your AI won't be either.** Data readiness means more than availability. It requires governance, trust, and the ability to activate insights into business workflows. Here are the questions to ask:

Foundational

- ☐ Do you have a centralized, governed data store?
- ☐ Is your data not just available, but accessible, usable, and trusted?
- ☐ Can you trace where data comes from, how it's used, and whether it's reliable?

Structural

- ☐ Is your metadata structured, consistent, and shared across teams?
- ☐ Are APIs or orchestration layers delivering the right data to the right places?

Scalable

- ☐ Do you track when data changes?
- ☐ Can downstream systems automatically adapt or recover from these changes?

How to redesign roles and processes with AI

With Ravin Jesuthasan, Mercer

Ravin has seen organizations experience 20-60% productivity gains by treating AI as a workforce transformation challenge, not a technology deployment. His advice is starting with work redesign, not AI implementation.

Rather than shoehorning technology into existing roles, Mercer deconstructs jobs into elemental tasks to see clearly where AI substitutes, augments, or creates new work opportunities. The key is involving employees early in redesigning their own work - no one knows the job better than the person doing it, and variance in how work gets done explodes exponentially as organizations grow.

Key insights:

1. **Start with work design, not technology deployment.** Deconstruct jobs into elemental tasks first. This makes it clear where technology substitutes repetitive work, augments human creativity, or creates demand for new skills. Make this a core management competency.

2. **Redesign job descriptions to include AI.** Don't leave AI adoption to individual choice. Job descriptions should read "you start with our language model - this is how you do the work" rather than hoping people figure it out themselves.

3. **Give employees three things:** early involvement, incentives to participate, and safe landing zones. People need reasons to engage in work redesign and confidence they won't be left behind.

> **We don't have the luxury of doing transformation like we did 10 years ago, where we'd reset the operating model every 7 years. If you can teach managers to do this, your organization will perpetually reinvent work."**

How to identify and pilot high-impact AI use cases

With Don Bennion, Adobe

Adobe has achieved massive AI adoption by focusing on practical problem-solving over technology evangelism. Don's breakthrough insight is starting with the problem, not the technology. Rather than getting enamored with shiny AI tools, Adobe identifies specific pain points – like sellers spending hours every week reviewing deals – and then evaluates whether to build, buy, or partner for solutions. This approach led to multiple high-adoption tools, but also required the courage to kill projects that weren't working, even after significant investment.

The biggest challenge isn't technical – it's change management. With multiple teams building AI tools simultaneously, Adobe teams were overwhelmed by scattered innovations. Don's solution: speak in one unified voice about value, not features. Instead of saying "use our cool tool," they focus on the specific business problem it solves and embed AI directly into existing workflows rather than requiring new tools or windows.

Key insights:

1. **Problem-first, not tech-first.** Identify the specific workflow pain points your people face daily, then find the right technology to solve them. Don't fall in love with solutions – stay married to problems.

2. **Balance high value / low volume with incremental / high volume use cases.** "A little bit for a lot is the same as a lot for a little." Some use cases might help a few people dramatically (like sales ops getting massive time savings) while others provide small improvements to many people.

3. **Use adoption as a leading indicator of impact.** When Don sees thousands of people using a tool they're not required to use, that signals real value. High adoption without mandates indicates you've solved a genuine problem.

> **"The tech is hard. Change management is harder. If you're gonna look at the long pole in the tent, it's the change management."**

How to get team buy-in and prepare your org for AI

With Olya Taran, Manulife

Manulife achieved 50% active AI adoption across 40,000 employees by focusing on human behavior change rather than technology deployment. Their breakthrough came from “promptathons” – live, hands-on AI challenges where executives and employees solve real work problems using AI tools. What started as executive sessions scaled organization-wide, with waiting lists for participation.

Olya’s key insight is that “relevance beats readiness” – you’ll never feel fully prepared for AI, so start with immediately useful applications embedded in actual workflows. Generic roadshows and presentations fail because they remain abstract and disconnected from daily work. Successful adoption requires institutionalizing ownership (making it someone’s job), leveraging existing cultural threads rather than overhauling culture entirely, and focusing on peer-to-peer learning through AI communities.

Key insights:

1. **Replace presentations with hands-on experience.** Skip decks where your CEO brags about how important AI is. Give people real challenges to solve with AI tools, let them fail first, then teach better prompting techniques to create immediate value demonstrations.

2. **Start small and immediately useful.** Don’t wait to be perfectly prepared. Find use cases embedded in real workflows that solve actual problems people face today.

3. **Culture is your most underleveraged AI strategy.** Don’t overhaul your culture - amplify existing cultural characteristics, teams, and habits that support experimentation, learning, and improvement. Every organization has something to build on.

> **“Relevance beats readiness. You will never be ready. It’s like a trap. Don’t wait.”**

Driving AI transformation in highly regulated + reluctant industries

With Zachi Attia, Mayo Clinic

Mayo Clinic has developed AI models that double the detection rate of heart disease using just a 15-second ECG test, proving that AI can deliver life-saving healthcare improvements when deployed with rigorous validation. Zachi's insight is that trust comes from validation, not explanation. Rather than trying to explain AI's "black box" decisions, Mayo focused on building comprehensive testing processes that prove the models work safely across all populations.

Zachi's team conducted retrospective studies, prospective studies, and multi-site validation across diverse populations to demonstrate their ECG-based heart failure detection works equally well for all races and ethnicities. They also embedded AI scientists directly in clinical departments rather than IT, enabling real translation between technical capabilities and medical needs.

> **"'If you build it, they will come' is not true. If you build it well, it will allow you to start the process."**

Key insights:

1. **Trust through validation, not explanation.** Like airport bomb-sniffing dogs, you don't need to understand how AI works internally - you need rigorous testing that proves it works reliably. Design comprehensive validation studies from the start.

2. **Embed technologists in clinical teams, not IT departments.** Zachi shares an office with cardiologists and joins patient cases to understand real workflows. This translation between technical and clinical worlds is essential for building useful tools.

3. **Understand regulatory requirements early and design for them.** Don't build first and seek approval later. Go to regulatory bodies with proof-of-concept and ask "what do we need to prove?" Then design your studies and data collection to meet those requirements.

How to get to 80% AI adoption in a global workforce

With Brice Challamel, Moderna

Moderna achieved 80% adoption of AI across all desk workers and deployed 3,000 custom GPTs in under two years by treating AI as a utility, not a pilot program. Brice recommends going organization-wide immediately rather than running limited experiments. His philosophy: You can't understand AI's potential by giving five people access - utilities are only effective at scale when everyone uses them, learns from neighbors, and builds collective proficiency.

Moderna now measures AI fitness scores across four components: number of messages, frequency of use, use of reasoning models, and connection to data. The formula is dynamic and adaptive, constantly raising the bar as the organization's AI maturity grows. Managers can see "red streaks" in their teams and apply targeted change management where adoption lags.

Key insights:

1. **Deploy utilities organization-wide, not as pilots.** AI is like the internet - its true value emerges when everyone has access and can learn from each other. Pilots create artificial constraints that prevent understanding real potential.

2. **Measure AI fitness dynamically, not statically.** Track multiple dimensions of usage and constantly evolve your standards. What counts as "good" AI usage today should be different from six months ago as capabilities and organizational maturity advance.

3. **Use AI to teach AI as the technology evolves.** Traditional training assets become obsolete before they're finished. Moderna uses what they call "the last training on Earth" - an AI-based system that searches for the latest trends and teaches them automatically, to help humans keep up with the pace of change.

> **"We aren't going to lose our jobs because we don't live in a perfect world. Everyone is not healthy. We have climate change, demographic change, crime. We are not anywhere near being out of work - the world needs us to solve those problems."**

How to set up enterprise AI deployments for success

With Lexi Reese, Lanai, and Tony Gentilcore, Glean

Glean reached $100M ARR in under three years and Lanai helps organizations track AI usage across their enterprise by focusing on strategic security and visibility over blind AI mandates.

Tony says that context, not models, is now king. Rather than getting locked into specific AI models that change every Tuesday, successful organizations focus on governing and exposing their data safely to whatever AI system currently leads.

Lexi Reese's research at Lanai reveals the hidden reality: in many organizations, half of all AI prompts contain sensitive data that leaders don't know about, and unsanctioned AI usage often exceeds sanctioned tools. Her solution: treat AI capabilities like new teammates and implement observability to see who's using what tools, how frequently, and how safely before you can measure ROI.

Key insights:

1. **Don't fall into the "BAM era"** - Blind AI Mandates. Don't dictate that you're "AI first" without knowing your current adoption baseline and the business outcomes you're trying to drive.

2. **Context beats models, governance beats features.** Focus on safely organizing and exposing your data to AI systems rather than getting locked into specific models. The leaderboards change constantly - your data strategy should outlast any single AI vendor.

3. **Turn on the lights before measuring ROI.** You need visibility into who's using AI where, with what data, and how safely. Track both leading indicators (adoption, safety) and lagging indicators (business outcomes achieved).

> **"You can't manage what you can't see, and you really can't empower what you don't understand. Treat AI functionality like a new teammate."**

What has to be true for enterprise AI success

With Shruthi Shetty, SAP

SAP achieved enterprise AI deployment success by treating AI as infrastructure, not just individual tools. Shruthi said they created an omnipresent, integrated AI assistant that can invoke specialized agents through conversation, rather than deploying scattered point solutions. Her framework starts with AI assistants (tell me what you want, I'll do it), adds agents (tell me the problem, we'll figure out how to solve it), embeds AI across existing applications, and finally builds custom solutions for remaining white spaces.

She says the biggest mistake organizations make is rushing to build custom AI applications without understanding what their existing vendors already provide. Shruthi's solution: map workflows first (a 30-60 day exercise), then audit what AI capabilities already exist in your current tech stack before making build-vs-buy decisions. This prevents costly redundancy and leverages investments you've already made.

Key insights:

1. **Map workflows first, then audit existing vendor AI capabilities.** Don't rush to build custom solutions - most vendors are rapidly adding AI features. Understand what you already have before deciding what to build.

2. **Validate in weeks, not months.** Deploy quickly in production and assess within 2-3 weeks whether the AI delivers promised value. If not, cut it immediately and move to the next solution.

3. **Choose high value, lower complexity use cases first.** Get quick wins that demonstrate ROI before tackling more complex integrations. This builds organizational confidence and momentum.

> **"One of the biggest companies in the world has a validation period of three weeks across 100+ countries. If they can do it in three weeks, smaller companies can do it in one week."**

Want to make your team AI-powered?

Section can help you get the most value, productivity, and ROI from your AI investment. Book a meeting to learn more.

BOOK A MEETING