The AI-Native Leader Playbook: Checklist

Your essential guide to driving AI adoption, alignment, and impact across your organization.

1. Start with Strategy

- ☐ Identify key business challenges AI can help solve.
- ☐ Define your organization's top AI objectives (e.g., efficiency, customer retention, automation).
- ☐ Prioritize use cases with fast time-to-value.

2. Lead With Data

- ☐ Establish a single source of truth across the system.
- ☐ Audit data quality and ensure alignment between teams.
- ☐ Use AI-generated insights to guide planning and decision-making.

3. Choose the Right Use Cases

- ☐ Start with mature, proven tools (e.g., forecasting, conversational AI, knowledge management).
- ☐ Align use cases to team goals (sales, customer success, service, etc.).
- ☐ Avoid feature overload—focus on what drives impact.

4. Train and Enable Your Teams

- ☐ Build contextual training into daily workflows.
- ☐ Show, don't tell—demonstrate how AI delivers value.
- ☐ Share early wins to build momentum and trust.

5. Automate To Empower (Not Replace)

- ☐ Identify manual workflows that AI can streamline to enhance efficiency.
- ☐ Utilize AI to support, not replace, customer-facing processes.
- ☐ Ensure automation improves the experience for both employees and customers.

6. Measure and Optimize

- ☐ Set clear KPIs (e.g., NRR, Time-to-Close, CSAT, rep productivity).
- ☐ Regularly evaluate AI performance and adoption.
- ☐ Iterate based on results—scale what works.

7. Act Like an AI-Native Organization

- ☐ Foster cross-functional alignment around AI goals.
- ☐ Embrace change as a constant—not a project.
- ☐ Lead from the front—model AI use in your own leadership workflows.

Want to go deeper?

Download the full AI-Native Organization Playbook from TSIA for research-backed insights and real-world examples.

TSIA's Complete Ecosystem

Benchmarking

Proprietary, data-driven comparisons against peer companies.

Performance Optimizer (self-serve or researcher-led): Measures maturity, identifies gaps, and compares against industry averages.

DataViews & Key Metrics: Bite-sized benchmarks (e.g., renewal rates, adoption ratios) available in the TSIA Portal.

Expert Inquiry

An Expert Inquiry is a direct engagement with a TSIA Research Executive to answer a specific business question or validate a strategy. Inquiries are addressed via a curated email response or a 30-minute call, depending on the complexity of the issue.

TSIA Intelligence (AI)

The first AI built exclusively for technology services. Provides trusted answers in seconds, complementing the expertise of human researchers.

Advisory Services

Advisory Blocks:
1−4 hour hyper-focused, virtual sessions solving a specific challenge.

Interactive Strategy Reviews (ISRs):
Researcher reviews strategy docs and hosts a 2-hour interactive session with recommendations.

Workshops:
Half-to full-day engagements for team enablement and transformation planning.

Speaking Engagements:
Keynotes, executive briefings, or panels delivered by TSIA experts.

TSIA Portal: Research & Insights

A rich library of proprietary research and tools.

Formats include:

- Research Reports (deep analysis)
- State of the Industry Reports (annual, free)
- Framework Papers (visual best-practice models)
- Articles (thought leadership)
- DataViews (benchmark stats, always paid)
- Webinars & Podcasts (free, expert-led)
- Industry Stories (real-world applications)
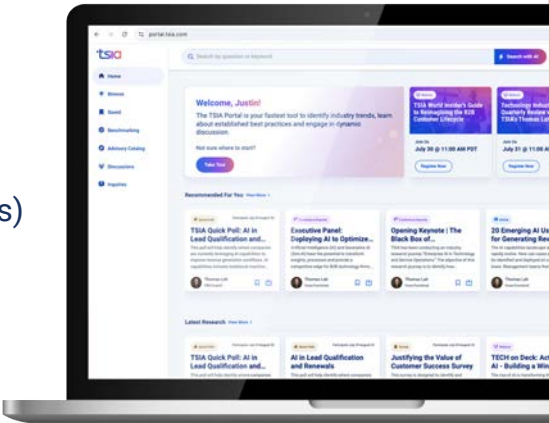
Community & Peer Learning

Advisory Boards:
Peer councils by Research Area.

TSIA World Conferences:
Keynotes, breakouts, and networking with thousands of executives.

STAR Awards:
Recognition of member success stories.

TSIA BOARD SUMMIT

Executive-Hosted Forum:
An invite-only experience for TSIA Advisory Board executives to think deeply, connect meaningfully, and act decisively on the future of technology services.

Role of TSIA Researchers & Experts

Content Creators:
Develop all research, frameworks, and models.

Inquiry Responders:
Deliver fast, curated answers and benchmark validation.

Advisory Partners:
Lead Advisory Blocks, ISRs, workshops, and speaking engagements.

Conference Leaders:
Present keynotes, facilitate boards, and run panels.

Community Anchors:
Contribute to boards and discussions, shaping peer learning.

AI + Human Synergy (TSIA Intelligence):
Provides instant answers, while researchers add context, nuance, and strategic guidance

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Free

Explore TSIA's ecosystem with limited access to research and AI tools—ideal for getting familiar before you commit.

👤 Single User

- ai **Limited** TSIA Intelligence
- ✓ **3 AI Inquiries:** Specialized AI Q&A for technology services.
- ✓ **3 AI Content Assistant Uses:** Instant summaries and deep dives into reports, videos, and more.
- ✓ **Limited Access** to TSIA research
- ✓ **Performance Optimizer Benchmarks** free version

Individual
Best for you

Get full, self-serve access to all research areas, TSIA Intelligence, and benchmarking—built for SMB leaders and solo professionals ready to level up.

👤 Single User

- ai **Unlimited** TSIA Intelligence
- ✓ **AI Inquiry:** Specialized AI Q&A for technology services.
- ✓ **AI Content Assistant:** Instant summaries and deep dives into reports, videos, and more.
- ✓ **Access to all TSIA Research Areas Content** including reports, on-demand content, webinars, data, and personalized study results
- ✓ **TSIA World** Industry Conference discounts

Enterprise
Best for your company

Access organization-wide research, expert advice, and advanced benchmarking to drive large-scale service transformation.

👥 Unlimited Users

- ai **Unlimited** TSIA Intelligence
- ✓ **AI Inquiry:** Specialized AI Q&A for technology services.
- ✓ **AI Content Assistant:** Instant summaries and deep dives into reports, videos, and more.
- ✓ **Everything in Individual** plus:
- ✓ **Expert Inquiry:** Personalized 1-on-1 guidance calls with TSIA researchers
- ✓ **Full Expert-led Benchmarking** with Performance Optimizer
- ✓ **Advisory Services**
- ✓ **Annual Industry Briefings**
- ✓ **Speaking Engagements**
- ✓ **Interactive Strategy Reviews**
- ✓ **TSIA World Industry Conference** vouchers
- ✓ **TSIA Board Summit Executive Event** invites
- ✓ **Be recognized among peers and customers** with STAR Awards
- ✓ **Member Success Planning**

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Questions? Our team is here to guide you toward the right TSIA solution for your needs.

Get in touch

tsia

Make smart decisions.™

TSIA (Technology & Services Industry Association) is dedicated to helping technology and services organizations large and small grow and advance in the technology industry. Find out how you can achieve success, too.

Have questions? [Let us know](#).

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