



TIO

The Intelligent Organization

Factory Domain Guide

Turn ideas, AI Use Cases, automation, and work redesign into measured value.

01

Purpose and Use of This Master

This document captures the working definition of the TIO Factory Capability Domain and its five constituent capabilities. It is intended to become the reusable master pattern for the Factory domain within the broader TIO Capability Model.

This is a master definition document. It should support framework writing, capability assessment, statement of work design, workshop design, maturity scoring, roadmap development, and future translation into the TIO Capability Model and Tool.

02

TIO Factory Domain

Factory is the organization's ability to turn improvement ideas, AI Use Cases, automation opportunities, and work redesign into measured value.

In TIO, Factory is not an AI lab, a technology delivery team, or a project management office. It is the repeatable organizational engine that finds the right work to improve, designs the improved way of working, delivers the change, proves whether it worked, and decides what should scale, change, continue, retire, or stop.

Factory receives direction from Leadership, depends on Technology and Data, and hands workforce implications to People. It is where enterprise ambition becomes practical operating change.

Domain Role

- Convert strategy, pain points, AI Use Cases, automation ideas, and work redesign opportunities into measured value.
- Create a disciplined path from idea to working improvement.
- Protect the organization from scattered pilots, tool-first delivery, and unmeasured claims of success.
- Use Evidence Gates to decide what should scale, continue, be redesigned, retire, or stop.
- Build repeatable operating patterns so value compounds across teams, functions, and quarters.

Domain Operating Logic

Discovery finds. Design shapes. Delivery launches. Measurement proves. Scaling compounds.

Domain Principles

- Factory starts with work, not tools.
- AI Use Cases must be business-owned, not technology-owned.
- The unit of Factory work is a practical use case or improvement with an owner, baseline, value hypothesis, controls, and decision point.
- Do not automate broken work before redesigning it.
- Measurement begins before launch, not after someone asks for proof.
- Evidence Gates protect value, trust, and capacity.
- Stopping weak work is a sign that the Factory is working.
- Scaling means expand, adapt, repeat, retire, or stop based on evidence. It does not mean blind rollout.
- Factory must stay connected to Technology, Data, Leadership, and People. It cannot succeed as a standalone team.

2026.08 ALIGNMENT | Factory in the refreshed TIO system

Primary outcome contribution: Automation with Intelligence and Enterprise Autonomy

- Factory starts with a bounded outcome and the Work and Decision Map, then selects the simplest reliable form of automation, whether deterministic or AI-enabled.
- Factory uses the End-State Architecture to understand the destination and Transition Architecture to decide how the work will move.
- Evidence Gates govern proof, movement, Delegated Autonomy, scale, redesign, coexistence, retirement, or stop.

Evidence at managed maturity: Work and Decision Maps, transition choices, proof methods, Evidence Gates, operating measures, and retirement outcomes are used consistently.

2026.08 ALIGNMENT | Factory in the refreshed TIO system**03****Standard Capability Definition Template**

Each Factory capability uses the same structure as the approved TIO Leadership and Technology working masters so the full framework remains consistent and easy to translate into tools, assessments, workshops, and statements of work.

Required Capability Structure

- Capability title: one-word name wherever possible.
- Short definition: what the organization must be able to do repeatedly.
- Plain-English Test: a simple test a non-technical leader can understand.
- Description: plain-English explanation of why it matters and how it works.
- Why it matters: the client problem this capability solves.
- Five behaviors: the repeatable actions that make the capability real.
- What this capability owns and does not own: boundary protection.
- What people actually do: the day-to-day activities and roles that make the capability real.
- Real-world example: a simple, practical example with no client identifiers.
- Practical outputs: no more than three concrete deliverables, routines, or artifacts.
- Evidence of maturity, useful measures, maturity model, owners, service connection, top-down validation, bottom-up validation, and boundary notes.

Practicality Standard and SOW Test

- Every TIO capability must be simple to name, clear to define, practical to build, observable in operation, measurable in maturity, and useful enough to scope into real work.
- Every capability must pass the SOW Test: Could a client hire someone to help build this capability, and would both parties understand the expected outputs?
- Every capability must produce no more than three practical outputs. This keeps the framework useful, memorable, and deliverable.
- Every capability must include What People Actually Do and a Real-World Example so non-technology executives can see how the capability works in practice.
- The title should be memorable. The definition should be precise. The outputs should make it real.

04

Factory Capability Set

The Factory domain contains five working capabilities. Together, they form the path from opportunity to measured value.

Capability	Simple Meaning	Primary Question
Discovery	Find the right work to improve.	What should we improve first, and is it ready?
Design	Redesign the work before building.	How should the work change, and what must be protected?
Delivery	Build, launch, and stabilize the improvement.	Can we turn the design into a working release?
Measurement	Prove what changed.	Did it work, compared to the baseline?
Scaling	Grow, adapt, repeat, retire, or stop based on evidence.	What should happen next?

Factory flow: Opportunity -> Designed Use Case -> Working Release -> Evidence Gate -> Scale, Redesign, Continue, Retire, or Stop.

05 Discovery

Short Definition: Discovery is the organization's ability to find, assess, and prioritize real opportunities for improvement, AI Use Cases, automation, and work redesign.

Plain-English Test: Can leaders and teams see which work is worth improving first, why it matters, who owns it, whether it is ready, and what value could be proven?

Description

Discovery turns scattered ideas into a managed pipeline of improvement candidates. It looks for real operating pain, customer friction, risk exposure, wasted effort, slow decisions, rework, manual handoffs, and expert time being consumed by low-value tasks.

A mature Discovery capability is not a suggestion box. It uses strategy, frontline input, process evidence, data signals, customer feedback, and risk insight to identify work that is valuable enough and ready enough to enter the Factory.

Why It Matters

- Without Discovery, AI and automation ideas arrive randomly and compete for attention based on enthusiasm, seniority, vendor pressure, or noise.
- Discovery protects the organization from chasing attractive but undeliverable ideas.
- It creates the first filter for value, readiness, ownership, risk, and strategic fit.

Five Behaviors

Behavior	Meaning
Sense	Look across strategy, operations, customer experience, risk, and frontline work for pain worth solving.
Listen	Use managers, employees, customers, and process owners to surface real work friction.
Filter	Separate valuable, ready opportunities from vague ideas, distractions, and tool-led proposals.
Prioritize	Rank candidates by value, feasibility, readiness, risk, and business sponsorship.
Assign	Name the process owner, sponsor, and next step before a candidate moves forward.

What This Capability Owns

- Opportunity intake and triage.
- Initial AI Use Case candidate definition.
- Readiness screening for value, process, data, technology, risk, people, and sponsorship.
- Prioritized Factory backlog.
- Recommendation on which candidates move to Design.

What This Capability Does Not Own

- Enterprise strategy or investment posture.
- Detailed solution design.
- Technology architecture or platform ownership.
- Data remediation work.

- Final funding decisions above agreed thresholds.

What People Actually Do

People make Discovery real by connecting strategic priorities to real work pain, then testing whether the candidate is worth designing before time and money are spent.

Role	What they actually do
Factory Lead	Runs intake, applies screening criteria, manages the opportunity backlog, and prepares recommendations.
Process Owner	Explains the current work, pain points, volume, exceptions, and operational value.
Frontline or User Representative	Shows how the work actually happens and where waste, frustration, or risk appears.
Data or Technology Partner	Checks whether the needed data and systems are accessible enough for the next stage.
Sponsor	Confirms why the opportunity matters and whether it deserves time, attention, and possible funding.

Simple activity flow:

1. Collect candidates from strategy, operations, customer feedback, risk, data, and frontline work.
2. Clarify the pain, process, owner, affected users, and expected value.
3. Screen each candidate for readiness, feasibility, risk, data needs, and sponsor strength.
4. Rank candidates and decide which move to Design, which wait, and which are rejected.
5. Record the decision and next step in the Factory backlog.

Real-World Example

A service organization hears repeated complaints that customer onboarding is slow and inconsistent. The Factory Lead gathers input from customer service, finance, operations, and frontline coordinators. The team finds that staff rekey information from emails into three systems, chase missing documents, and create manual status updates.

Discovery does not jump straight to an AI tool. It defines the opportunity, checks data and system readiness, estimates the value of reducing cycle time and rework, names the process owner, and moves the candidate into Design.

Practical Outputs

Output	What it contains
Opportunity Backlog	A visible list of AI Use Case, automation, workflow redesign, and improvement candidates with owners, status, and next steps.
Prioritization Scorecard	A simple scoring view of value, readiness, risk, feasibility, data needs, user impact, and strategic fit.
Approved Candidate Shortlist	The small set of candidates approved to enter Design with named sponsors and process owners.

Evidence of Maturity

- Documented intake method.
- Current opportunity backlog.
- Prioritization criteria.
- Named owners and sponsors for active candidates.
- Clear record of accepted, deferred, rejected, and waiting candidates.
- Readiness notes for candidates entering Design.

Useful Measures

Measure	What it tells us
Backlog quality	Percentage of candidates with clear owner, pain, value hypothesis, risk level, and readiness assessment.
Decision speed	Time from candidate submission to accept, defer, reject, or request more information.
Readiness accuracy	Percentage of candidates that enter Design without major undiscovered readiness gaps.

Maturity Model

Level	Maturity	Description
0	Absent	No common way exists to find or prioritize improvement, AI Use Case, or automation candidates.
1	Initial / Ad-Hoc	Ideas are collected informally. Selection depends on enthusiasm, urgency, or senior preference.
2	Repeatable	A basic intake and screening method exists, but quality, ownership, and prioritization are inconsistent.
3	Defined	Discovery is documented, owned, communicated, and used consistently across the organization.
4	Managed	Discovery uses evidence, scoring, pipeline review, and readiness checks to guide Factory capacity.
5	Optimized	Discovery continuously improves using value evidence, operational signals, risk patterns, user feedback, and strategy shifts.

Typical Owners and Participants

Role	Typical participants
Executive sponsor	Chief operating officer, transformation sponsor, chief executive officer, or business unit executive.
Accountable owner	Factory Lead, transformation lead, operational excellence lead, or AI Use Case portfolio owner.
Participants	Process owners, frontline users, data, technology, risk, finance, people, and customer-facing leaders.

Top-Down Validation

A senior leader can see how the backlog connects to enterprise priorities, value, risk, and capacity. They can explain why some ideas are moving forward and why others are not.

Bottom-Up Validation

People close to the work recognize their pain points in the backlog and can see that the organization is using evidence, not slogans, to decide what gets attention.

TSLA Service and Artifact Connections

- AI Use Case Opportunity Scan.
- Factory Backlog Design Workshop.
- Opportunity Prioritization Scorecard.
- Executive Thought-Partnership for use case selection.
- Sector-specific AI Use Case candidate library where available.

Domain Boundary Notes

- Discovery owns candidate finding, screening, and prioritization.
- Design owns work redesign and use case definition.
- Leadership owns strategic direction, investment posture, and governance thresholds.
- Data and Technology advise on readiness but do not own the Factory backlog.

06 Design

Short Definition: Design is the organization's ability to redesign work, decisions, tasks, controls, and user experience before building or configuring a solution.

Plain-English Test: Can the team clearly explain how the work happens today, how it should work tomorrow, what people will still own, what AI or automation may do, and what controls are required?

Description

Design turns an approved candidate into a clear, buildable, governed AI Use Case or improvement. It studies the current workflow, tasks, handoffs, decisions, exceptions, data, controls, users, and risks before a tool is selected or configured.

A mature Design capability prevents tool-first delivery. It makes the organization redesign the work before automating the work. This is where task-level change, human judgment, AI assistance, automation, data needs, and control requirements come together.

Why It Matters

- Without Design, organizations automate broken work and scale the same confusion faster.
- Design protects human judgment by deciding what people still own before technology is deployed.
- It gives Delivery a clear blueprint and gives Measurement a clear value test.

Five Behaviors

Behavior	Meaning
Map	Document how the work happens today, including tasks, handoffs, systems, data, decisions, and exceptions.
Simplify	Remove unnecessary steps, duplicate effort, unclear ownership, and avoidable friction before automation.
Redesign	Define the future workflow, task split, human review points, and user experience.
Control	Specify risk, privacy, security, quality, approval, and human accountability requirements.
Specify	Translate the redesigned work into a brief that Delivery, Data, Technology, People, and Leadership can use.

What This Capability Owns

- Current-state and future-state workflow design.
- Task-level redesign for the AI Use Case or improvement.
- Human review and control design for the use case.
- User journey and work experience design.
- AI Use Case design brief.

What This Capability Does Not Own

- Enterprise technology architecture.
- Detailed technical build decisions.
- Full workforce reskilling program.

- Production support model beyond the use case handoff.
- Policy design owned by Leadership or risk functions.

What People Actually Do

People make Design real by slowing down enough to understand the work before they change it. The goal is not a better diagram. The goal is a better way of working that can be built, tested, trusted, and adopted.

Role	What they actually do
Factory Lead	Guides the design process and makes sure the output is clear enough for Delivery and Measurement.
Process Owner	Confirms the current work, future workflow, decision rights, exceptions, and operating constraints.
User Representative	Explains what makes the work hard, what must be protected, and what would make the new workflow usable.
Technology and Data Partners	Confirm platform, integration, data, access, and automation implications.
Risk, Privacy, Security, or Legal Advisor	Identifies controls, approval points, disclosure needs, and human review requirements.

Simple activity flow:

1. Map the current workflow, tasks, systems, data, handoffs, decisions, and exceptions.
2. Identify what should be stopped, simplified, automated, assisted, or kept human.
3. Design the future workflow and define the human and system roles.
4. Specify controls, review points, data needs, user experience, and change implications.
5. Produce the AI Use Case design brief for Delivery approval.

Real-World Example

A finance team wants to use AI to support vendor onboarding. Design shows that the real problem is not document extraction alone. The current process has unclear ownership, duplicate requests to vendors, inconsistent risk checks, and manual status tracking.

The redesigned workflow creates a single intake, automated document extraction, risk flags, human approval for exceptions, and a status dashboard. The AI is helpful because the work was redesigned first.

Practical Outputs

Output	What it contains
Current-to-Future Workflow Map	A plain-English view of how the work happens today and how it should work after redesign.
AI Use Case Design Brief	A practical brief covering purpose, users, tasks, data, technology needs, controls, value hypothesis, and ownership.
Control and Human Review Design	The review points, escalation rules, accountability, risk checks, and boundaries for AI or automation use.

Evidence of Maturity

- Current-state workflow map.
- Future-state workflow map.
- Task split between people, AI, automation, and systems.
- Defined controls and review points.
- Named accountable owner.

- Approved AI Use Case design brief.

Useful Measures

Measure	What it tells us
Design completeness	Percentage of design briefs with clear workflow, owner, value hypothesis, data needs, controls, and user impact.
Rework avoided	Frequency of Delivery delays caused by missing design details.
User validation	Percentage of designs reviewed by people who do the work before build begins.

Maturity Model

Level	Maturity	Description
0	Absent	The organization jumps from idea to tool without redesigning the work.
1	Initial / Ad-Hoc	Some design occurs informally, but workflows, tasks, controls, and users are not consistently documented.
2	Repeatable	A basic design method exists for some use cases, but quality varies by team and sponsor.
3	Defined	Design is a required Factory step with standard briefs, workflow maps, control design, and user validation.
4	Managed	Design quality is measured through Delivery outcomes, user adoption, risk findings, and value evidence.
5	Optimized	Design continuously improves based on real use, feedback, evidence, operating changes, and new AI or automation capability.

Typical Owners and Participants

Role	Typical participants
Executive sponsor	Chief operating officer, transformation sponsor, business unit executive, or functional executive.
Accountable owner	Factory Lead, process design lead, transformation lead, or operational excellence lead.
Participants	Process owners, frontline users, business analysts, data, technology, risk, privacy, security, legal, finance, and people leaders.

Top-Down Validation

A senior leader can see what work will change, what value is expected, what risk is controlled, and what the organization must be ready to support.

Bottom-Up Validation

People who do the work can recognize the redesigned workflow, understand what changes for them, and see where their judgment remains necessary.

TSLA Service and Artifact Connections

- AI Use Case Design Brief.

-
- Work Redesign Workshop.
 - Control and Human Review Design Template.
 - Task and Workflow Mapping Session.
 - SATA or ALA integration where leadership or team priorities must be translated into work change.

Domain Boundary Notes

- Design owns the use case workflow and task-level redesign.
- Technology owns enterprise architecture, platforms, integration, automation infrastructure, and resilience.
- People owns deeper role redesign, reskilling, workforce transition, culture, and adoption system.
- Leadership owns enterprise governance design, risk posture, and funding thresholds.

07 Delivery

Short Definition: Delivery is the organization's ability to build, configure, test, launch, stabilize, and support approved AI Use Cases, automations, and work improvements.

Plain-English Test: Can the organization move from approved design to a working release with clear ownership, testing, controls, launch readiness, user support, and issue resolution?

Description

Delivery turns a designed use case into a working improvement. It coordinates the build, configuration, testing, launch, stabilization, and early support needed to make the redesigned work real.

A mature Delivery capability is disciplined but not heavy. It does not treat go-live as success. It treats go-live as the beginning of proof. Delivery connects Factory to Technology, Data, Leadership, Risk, and People so the use case can work in the real operating environment.

Why It Matters

- Without Delivery, strong ideas and good designs remain documents, prototypes, or disconnected pilots.
- Delivery protects the organization from fragile launches, unclear ownership, untested workflows, and unsupported users.
- It creates the operating bridge from approved use case to measurable value.

Five Behaviors

Behavior	Meaning
Plan	Define the delivery path, roles, timeline, dependencies, risks, testing, launch, and support needs.
Build	Configure or coordinate the solution using approved platforms, data, integrations, and controls.
Test	Test functionality, data, controls, user experience, exceptions, and human review points.
Launch	Release the improvement with training, communication, support, and clear ownership.
Stabilize	Track issues, fix defects, support users, and prepare the use case for Measurement.

What This Capability Owns

- Use case delivery planning.
- Build coordination and release management for the approved use case.
- Testing and launch readiness.
- Early stabilization and issue resolution.
- Handoff to Measurement and ongoing owners.

What This Capability Does Not Own

- Enterprise platform strategy.
- Ongoing enterprise system operations.
- Full data governance or data quality ownership.
- Long-term workforce reskilling.
- Portfolio-level investment governance.

What People Actually Do

People make Delivery real by doing the disciplined practical work between design and value. They build, test, train, launch, stabilize, and fix the use case in the real organization.

Role	What they actually do
Factory Lead	Coordinates delivery, manages dependencies, protects scope, and prepares launch and Evidence Gate readiness.
Product or Use Case Owner	Owns business decisions, accepts the solution, and confirms that it is fit for purpose.
Technology Partner	Builds or configures approved tools, integrations, automations, and access controls.
Data Partner	Confirms required data access, quality, lineage, and use case data readiness.
User and People Partners	Support testing, training, communication, adoption, and issue capture.

Simple activity flow:

1. Confirm approved design, owner, scope, funding, dependencies, controls, and success measures.
2. Build or configure the solution using approved platforms, data, and technology patterns.
3. Test the workflow, outputs, controls, exceptions, user experience, and support path.
4. Launch with training, communication, clear ownership, and issue management.
5. Stabilize the use case and hand it to Measurement with baseline and operating evidence.

Real-World Example

An operations team approves a use case to reduce manual status reporting. Delivery configures a workflow that pulls status data from the work management system, drafts updates, routes exceptions to team leads, and publishes approved summaries to a dashboard.

The team tests data accuracy, access rules, exception handling, and user experience before launch. During the first month, the Factory Lead tracks defects and adoption issues, fixes the workflow, and prepares the use case for Measurement.

Practical Outputs

Output	What it contains
Delivery Plan	The agreed plan for build, dependencies, testing, launch, training, support, and stabilization.
Tested Release	The working pilot or release, tested against functional, data, control, user, and exception requirements.
Launch Readiness Checklist	A simple readiness record confirming owner, users, controls, support, training, communications, and measurement baseline.

Evidence of Maturity

- Approved delivery plan.
- Named use case owner and delivery roles.
- Test records and issue log.
- Launch readiness checklist.
- Training or user enablement materials.
- Stabilization log and handoff record.

Useful Measures

Measure	What it tells us
Delivery predictability	Percentage of use cases delivered within agreed scope, timeline, and readiness conditions.
Launch quality	Number and severity of defects, control gaps, and user issues after launch.
Stabilization speed	Time from launch to stable operation ready for Measurement.

Maturity Model

Level	Maturity	Description
0	Absent	No repeatable way exists to deliver AI Use Cases or work improvements.
1	Initial / Ad-Hoc	Delivery depends on individual effort, informal coordination, and heroic problem-solving.
2	Repeatable	A basic delivery routine exists, but testing, launch readiness, and stabilization vary by team.
3	Defined	Delivery has standard planning, build, test, launch, support, and stabilization practices.
4	Managed	Delivery performance is measured and improved using launch quality, adoption, risk findings, and value outcomes.
5	Optimized	Delivery operates as a reliable production capability that improves with each release and adapts to changing technology and work patterns.

Typical Owners and Participants

Role	Typical participants
Executive sponsor	Chief operating officer, business unit executive, transformation sponsor, or functional executive.
Accountable owner	Factory Lead, product owner, delivery lead, transformation lead, or operational excellence lead.
Participants	Technology, data, process owners, frontline users, risk, privacy, security, finance, people, communications, and support teams.

Top-Down Validation

A senior leader can see which use cases are being delivered, what risks and dependencies exist, and whether launch readiness is real.

Bottom-Up Validation

Users experience a working improvement with clear support, training, issue handling, and visible ownership rather than another unsupported tool rollout.

TSLA Service and Artifact Connections

- AI Use Case Delivery Plan.
- Launch Readiness Checklist.
- Pilot Stabilization Review.
- Use Case Owner Coaching.

-
- Thought-Partnership support for early portfolio delivery.

Domain Boundary Notes

- Delivery owns the use case path from approved design to stable release.
- Technology owns enterprise platforms, integration standards, automation infrastructure, and resilience.
- Data owns data quality, lineage, stewardship, model reliability, and observability standards.
- People owns broader adoption, workforce transition, reskilling, and culture.

08 Measurement

Short Definition: Measurement is the organization's ability to prove whether an AI Use Case, automation, or work redesign created value, reduced risk, improved work, or should be changed or stopped.

Plain-English Test: Can the organization show what changed, compared to what baseline, with what evidence, and what decision should now be made?

Description

Measurement is the discipline that keeps the Factory honest. It sets the baseline before launch, tracks results after launch, compares actual outcomes to the value hypothesis, and supports an Evidence Gate decision.

A mature Measurement capability does not rely on anecdotes or enthusiastic success stories. It asks what changed, what did not change, what value was created, what risk emerged, what capacity was redirected, and whether the use case deserves to scale, be redesigned, continue testing, pause, or stop.

Why It Matters

- Without Measurement, every pilot can be called a success and weak ideas can quietly consume capacity.
- Measurement protects investment discipline, trust, and learning.
- It gives leaders the evidence needed to make scale, redesign, continue, or stop decisions.

Five Behaviors

Behavior	Meaning
Baseline	Record current performance before the use case launches.
Track	Measure actual performance after launch using agreed value, quality, risk, user, and workforce indicators.
Compare	Compare outcomes to the baseline, target, control expectations, and user experience.
Learn	Capture what worked, what failed, what surprised the team, and what should change.
Decide	Prepare the Evidence Gate recommendation: scale, redesign, continue testing, pause, retire, or stop.

What This Capability Owns

- Use case baseline and success measures.
- Value scorecard for AI Use Cases and work improvements.
- Evidence Gate preparation.
- Post-launch learning capture.
- Recommendation for scale, redesign, continuation, pause, retirement, or stop.

What This Capability Does Not Own

- Enterprise financial reporting.
- Full business performance management.
- Data platform observability owned by Data.
- Technology service monitoring owned by Technology.
- Final Steering Committee decisions above agreed thresholds.

What People Actually Do

People make Measurement real by agreeing in advance what success means, tracking actual outcomes, and telling the truth even when the answer is inconvenient.

Role	What they actually do
Factory Lead	Ensures each use case has a baseline, scorecard, evidence record, and Evidence Gate recommendation.
Use Case Owner	Confirms the business meaning of the measures and owns the operating result.
Finance Partner	Validates financial, cost, productivity, or capacity measures where relevant.
Data Partner	Confirms data sources, quality, definitions, and measurement reliability.
User or People Partner	Captures adoption, sentiment, workload, role impact, and user experience evidence.

Simple activity flow:

1. Define the value hypothesis, baseline, target, measure owner, and evidence source before launch.
2. Track results after launch across value, quality, risk, adoption, and user experience.
3. Compare actual outcomes against the baseline and expected benefit.
4. Capture learning, issues, unintended consequences, and user feedback.
5. Prepare the Evidence Gate recommendation and decision record.

Real-World Example

A customer service team launches an AI-supported response drafting workflow. The baseline shows average first response time, rework rate, quality review findings, customer satisfaction, and agent workload before launch.

After 60 days, Measurement shows that response time improved, but rework increased for complex cases. The Evidence Gate decision is not a simple success story. The team scales the workflow for simple cases, redesigns controls for complex cases, and updates training.

Practical Outputs

Output	What it contains
Baseline and Target	The starting performance level, expected change, evidence source, owner, and timing for measurement.
Value Scorecard	A practical scorecard showing results across the measures that matter for the use case.
Evidence Gate Decision Record	The recommendation and final decision to scale, redesign, continue testing, pause, retire, or stop.

Evidence of Maturity

- Baseline captured before launch.
- Named measure owners and evidence sources.
- Value scorecard updated after launch.
- User and operational feedback.
- Evidence Gate decision record.
- Learning log and follow-up actions.

Useful Measures

Measure	What it tells us
Baseline discipline	Percentage of use cases launched with a documented baseline and target.
Evidence quality	Percentage of Evidence Gate decisions supported by reliable data and user feedback.
Decision integrity	Percentage of use cases that receive a clear scale, redesign, continue, pause, retire, or stop decision.

Maturity Model

Level	Maturity	Description
0	Absent	Use cases are launched without baselines, targets, or evidence-based decisions.
1	Initial / Ad-Hoc	Some results are discussed, but evidence is incomplete, inconsistent, or gathered after the fact.
2	Repeatable	Basic baselines and measures exist for some use cases, but quality and follow-through vary.
3	Defined	Measurement is required for every Factory use case, with standard baselines, scorecards, and Evidence Gate records.
4	Managed	Measurement results guide funding, scaling, redesign, retirement, and Factory capacity decisions.
5	Optimized	Measurement continuously improves the Factory, the portfolio, and enterprise learning across domains and use cases.

Typical Owners and Participants

Role	Typical participants
Executive sponsor	Chief operating officer, chief financial officer, transformation sponsor, or business unit executive.
Accountable owner	Factory Lead, portfolio owner, transformation lead, operational excellence lead, or value realization lead.
Participants	Use case owners, finance, data, technology, risk, people, frontline users, customer experience, and operations leaders.

Top-Down Validation

A senior leader can see whether the Factory is creating measurable value, learning from failure, and making evidence-based decisions instead of protecting preferred projects.

Bottom-Up Validation

People close to the work can see that the organization is measuring real outcomes, not just claiming success because a tool went live.

TSLA Service and Artifact Connections

- Value Scorecard.
- Evidence Gate Design.
- AI Use Case Measurement Pack.
- Post-Launch Value Review.

-
- Executive portfolio review support.

Domain Boundary Notes

- Measurement owns use case value proof and Evidence Gate preparation.
- Leadership owns portfolio governance, investment decisions, and enterprise value priorities.
- Data owns underlying data reliability, lineage, model performance, and observability standards.
- Finance validates financial measures where the claim affects budget, cost, or return.

09

Scaling

Short Definition: Scaling is the organization's ability to expand, repeat, improve, redesign, retire, or stop AI Use Cases and work improvements based on evidence.

Plain-English Test: Can the organization decide what deserves to grow, what must change first, what should become a repeatable pattern, and what should stop?

Description

Scaling turns one successful or instructive use case into broader organizational learning and value. It is not the same as rollout. Rollout pushes a solution wider. Scaling makes a deliberate decision based on evidence, readiness, risk, ownership, support, and value.

A mature Scaling capability grows what works without losing control. It also stops or retires weak ideas without embarrassment. This is where Factory becomes an enterprise capability rather than a sequence of disconnected projects.

Why It Matters

- Without Scaling, organizations get isolated wins that do not compound.
- Scaling protects the organization from expanding immature solutions before people, data, technology, support, and controls are ready.
- It creates the discipline to repeat patterns, retire weak ideas, and convert learning into better future delivery.

Five Behaviors

Behavior	Meaning
Decide	Use Evidence Gate results to decide whether to scale, redesign, continue testing, pause, retire, or stop.
Prepare	Confirm readiness across process, people, data, technology, controls, support, and ownership.
Adapt	Adjust the solution for different teams, regions, business units, or contexts before expansion.
Standardize	Turn repeatable methods, templates, controls, and lessons into reusable Factory patterns.
Retire	Stop or remove weak, outdated, risky, duplicated, or low-value use cases when evidence supports it.

What This Capability Owns

- Scale, redesign, continue, pause, retire, or stop recommendations.
- Scaling plan for approved use cases.
- Repeatable patterns, playbooks, and lessons learned.
- Readiness checks before expansion.
- Use case retirement or stop discipline.

What This Capability Does Not Own

- Enterprise-wide change strategy owned by People and Leadership.
- Enterprise technology roadmap owned by Technology.

- Ongoing business process ownership after handoff.
- Final executive approval where thresholds require Leadership decision.
- All sector or scale adaptation outside the approved use case scope.

What People Actually Do

People make Scaling real by refusing to confuse enthusiasm with readiness. They use evidence to decide what should grow, what should change, what should be reused, and what should end.

Role	What they actually do
Factory Lead	Prepares scale recommendations, readiness checks, playbooks, and portfolio learning.
Executive Sponsor	Approves scale decisions within governance thresholds and removes barriers.
Use Case Owner	Owens the operating result and confirms readiness for expansion or handoff.
Technology, Data, and People Partners	Confirm whether platforms, data, support, controls, users, and adoption capacity can carry the scale decision.
Receiving Team Leader	Confirms local fit, readiness, user impact, and support needs before adoption.

Simple activity flow:

1. Review the Evidence Gate decision and determine whether the use case deserves scale, redesign, continuation, pause, retirement, or stop.
2. Assess readiness across people, process, data, technology, controls, support, and ownership.
3. Adapt the solution and operating model for the next team, process, region, or business unit.
4. Create or update the playbook, pattern, controls, and support model.
5. Scale, redesign, retire, or stop the use case and capture learning for the Factory.

Real-World Example

A procurement team pilots an AI-supported supplier document review workflow. Measurement shows strong cycle-time improvement, low error rates, good user adoption, and clear human review for exceptions.

Scaling does not simply push the workflow to all departments. The Factory checks whether each department has the same document types, data access, approval rules, and support capacity. The pattern scales to two similar teams, is redesigned for one higher-risk team, and is not applied to a fourth team where the data is not ready.

Practical Outputs

Output	What it contains
Scale Decision	The documented decision to scale, redesign, continue testing, pause, retire, or stop, with evidence and rationale.
Scaling Plan	The practical plan for expansion, adaptation, readiness, support, controls, timing, and ownership.
Repeatable Pattern or Playbook	The reusable method, template, checklist, control set, and lessons that help the organization repeat what worked.

Evidence of Maturity

- Evidence Gate decision record.
- Readiness assessment before expansion.

- Scaling plan with owners and support model.
- Updated playbook or repeatable pattern.
- Record of retired, stopped, or redesigned use cases.
- Post-scale value and adoption review.

Useful Measures

Measure	What it tells us
Scale success	Percentage of scaled use cases that maintain or improve value after expansion.
Pattern reuse	Number of future use cases accelerated by reusable playbooks, controls, or templates.
Stop discipline	Percentage of weak, outdated, duplicated, or risky use cases retired or stopped when evidence supports it.

Maturity Model

Level	Maturity	Description
0	Absent	Successful use cases remain isolated or are rolled out without evidence, readiness, or control.
1	Initial / Ad-Hoc	Some use cases are expanded based on sponsor enthusiasm or local demand, but scaling discipline is informal.
2	Repeatable	A basic scale decision method exists, but readiness checks, adaptation, and retirement discipline are uneven.
3	Defined	Scaling uses standard decisions, readiness checks, scaling plans, playbooks, and stop or retire logic.
4	Managed	Scaled use cases are monitored for value retention, adoption, risk, support load, and pattern reuse.
5	Optimized	Scaling continuously compounds value by improving repeatable patterns, retiring weak assets, and feeding learning back into Discovery and Design.

Typical Owners and Participants

Role	Typical participants
Executive sponsor	Chief operating officer, chief executive officer, transformation sponsor, or business unit executive.
Accountable owner	Factory Lead, portfolio owner, transformation lead, or operating model lead.
Participants	Use case owners, receiving teams, technology, data, people, risk, finance, customer experience, and support leaders.

Top-Down Validation

A senior leader can see how Factory value compounds across teams and quarters, and can see that the organization has the courage to stop weak work.

Bottom-Up Validation

People receiving a scaled use case understand why it is coming, what evidence supports it, what changes for them, and what support is available.

TSLA Service and Artifact Connections

- Scale Decision Pack.
- Factory Playbook.
- Use Case Retirement Review.
- Quarterly Factory Portfolio Review.
- Executive Thought-Partnership for scale, stop, or redesign decisions.

Domain Boundary Notes

- Scaling owns evidence-based expansion, adaptation, repeatable patterns, and retirement decisions for Factory use cases.
- Leadership owns enterprise governance thresholds, portfolio funding, and strategic trade-offs.
- Technology, Data, and People own their domain readiness and operating responsibilities at scale.
- The receiving business area owns the work after handoff, unless a shared service model is explicitly approved.

10

Factory Domain Boundary Summary

Factory is deliberately positioned between the other TIO domains. It does not replace them. It connects them through practical work.

Boundary	Factory Relationship
Leadership	Leadership sets direction, risk posture, funding thresholds, governance design, and enterprise accountability. Factory converts approved priorities and opportunities into measured operating change.
Data	Data owns data quality, stewardship, lineage, model reliability, data readiness standards, and observability. Factory uses Data readiness to decide whether a use case is ready to design, deliver, measure, or scale.
Technology	Technology owns architecture, platforms, integration, automation infrastructure, and resilience. Factory uses these foundations to deliver use cases and improvements.
People	People owns workforce transition, reskilling, adoption, culture, and change experience. Factory identifies task and workflow implications and hands them to People when workforce change is required.
Business Operations	Business owners own the work and results. Factory helps redesign, deliver, measure, and scale improvements, but it does not permanently own every improved process.