



TIO
The Intelligent Organization

Implementation Guide for Managed Enterprises

The First 12 Months | Typical size: 50 to 200 employees

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How to Use This Guide

Read the Starting Point first to confirm that this guide matches how your organization actually operates. Use the first-year path and phase sections to sequence the work. Use the operating rhythm, decision-rights, artifact, and roadmap sections as practical working references. Adapt the structure to fit your organization, but protect the core logic: direction first, assessment before commitment, a small portfolio, clear ownership, Evidence Gates, communication, and measured value.

00

Starting Point

The practical first-year path for managed enterprises

Purpose

A practical starting path for organizations that have moved beyond direct owner control but are not yet large enough for a full transformation office. This guide helps leaders move from informal coordination to a simple management system for strategy, AI fluency, assessment, priority work, communication, and measured value.

A managed enterprise does not need a heavy transformation program. It needs a clear owner or CEO mandate, a small leadership group that can make decisions, capable managers, a simple scorecard, an honest maturity baseline, a practical operating rhythm, and a few priority improvements that prove value.

TIO helps this size of organization professionalize without becoming bureaucratic. The goal is to move from owner-led coordination to management-led execution while protecting speed, culture, customer intimacy, and trust.

This guide is written for organizations with roughly 50 to 200 people. It can apply to professional services firms, construction businesses, trades companies, cleaning businesses, engineering firms, field services businesses, local retailers, manufacturers, agencies, and similar organizations.

Who This Guide Is For

Use this guide when the organization is too large for the owner or CEO to personally coordinate everything, but too small for a large-enterprise transformation structure.

Typical signal	What it means
The owner or CEO is still central.	The leader still sets direction and culture, but too many decisions still route back to them.
Managers now matter.	Supervisors, managers, and functional leads are becoming the real operating system.
Communication is starting to break.	People no longer hear the same message at the same time or interpret priorities the same way.
Processes are inconsistent.	Work gets done, but often through individual knowledge, exceptions, and workarounds.
AI use has started informally.	Some people are trying tools, but guardrails, training, data rules, and value measures are light.

Is This the Right Guide?

TIO Implementation Guides are organized by operating reality, not only by headcount. Choose the guide that best matches how your organization actually works today.

Guide	Typical size	Operating reality	Use when...
Owner-Led Business	10 to 50 people	The owner is still the system.	The owner, founder, or partners still carry most decisions, culture, exceptions, and follow-through.
Managed Enterprise	50 to 200 people	Managers are becoming the system.	The owner or CEO still sets direction, but managers must now carry daily execution, communication, and accountability.
Mid-Sized Enterprise	200 to 1,000 people	The leadership team and transformation rhythm must become the system.	The organization needs workstreams, assessments, steering rhythm, Evidence Gates, and cross-functional coordination.

This guide is for organizations where managers are becoming the system. The owner or CEO can set direction, but managers must make the direction real.

The Manager Test

A managed enterprise is ready for TIO when managers can explain the priorities, own team-level actions, surface issues early, and make routine decisions without waiting for the owner or CEO. If managers are unclear, the transformation will drift back to the owner.

The Simple Idea

The first 12 months:

Clarify the owner or CEO mandate. Align the leadership group. Run a practical TIO Maturity Assessment. Choose a small number of priorities. Build a simple operating rhythm. Raise AI fluency in the owner, partners, and key managers. Improve the most important work. Communicate clearly. Measure value. Adjust every quarter.

01

How This Guide Fits in TIO

Where this implementation guide sits in the wider TIO system.

TIO layer	Question it answers	Primary output
Executive Brief	Why does TIO matter?	Shared understanding of the enterprise transformation problem.
Framework Document	How does the whole TIO system work?	Source-of-truth explanation of TIO.
TIO Capability Model	What must the organization be able to do?	Five domains and 25 capabilities.
Capability Model and Maturity Assessment Tool	Where are we today?	Current maturity, target maturity, evidence, gaps, and priorities.
Implementation Guide by Scale	What do we actually do?	A first 12-month path matched to size and complexity.
Industry Guide	What changes in our sector?	Sector-specific risks, opportunities, examples, and starting moves.
End-State Architecture	What future operating condition are we building?	A reference destination for intelligence, knowledge, authority, action, assurance, and accountable people.
Transition Architecture	How will this bounded part of the organization move?	A route, temporary operating states, movement of work and authority, recovery, and legacy outcome.
Delivery Ecosystem Guide	Who can help, and what must remain inside?	A scale-fit mix of internal capability, external partners, platforms, transfer, portability, and support.

This document is the implementation layer for managed enterprises. It is lighter than the Mid-Sized Enterprise guide and more structured than the Owner-Led Business guide.

2026.08 alignment	How this guide applies the refreshed TIO system
More Intelligent	Begin with direct, safe leadership use of approved frontier AI. Expand through leadership, then by role and work. Connect personal use to governed enterprise knowledge and systems as capability matures.
More Automated	Use the Factory to redesign bounded work and apply the simplest reliable form of automation. Preserve the human contribution the outcome requires.
More in Control	Define the organization's Enterprise Autonomy position: knowledge, data, authority, dependencies, portability, operating capability, recovery, and freedom to change direction.
Scale-fit application	Use Route 1 for most work and Route 2 selectively for bounded services such as onboarding, intake, scheduling, invoice processing, or internal support. Managers must be able to operate the temporary state. Enable the owner or CEO and leadership group, then key managers by role and work. Use one small portfolio and an explicit operating owner for

2026.08 alignment	How this guide applies the refreshed TIO system
	every live improvement.
Material transition output	Purpose
Transition Choice	Define the bounded unit, accountable owner, target condition, primary route, and reason it fits.
Transition Map	Show current and target operations, work routing, authoritative truth, human and machine roles, temporary states, Evidence Gates, movement of authority, and recovery.
Cutover and Legacy Outcome Decision	Confirm what work and authority move, what evidence supports the decision, how recovery works, and what is replaced, integrated, retained, allowed to coexist, returned, or stopped.

02

The Managed Enterprise Reality

Why this operating stage requires stronger management capability.

At 50 to 200 people, the organization is usually crossing an important line. The owner or CEO cannot personally hold every client, job, project, exception, person, and decision together. The business now needs managers, routines, standards, data, and communication that work even when the owner is not in the room.

- The organization needs structure, but not corporate heaviness.
- The owner or CEO must still lead visibly, but must stop being the only operating system.
- Managers need clarity, authority, and support.
- AI and automation should improve real work, not become a side hobby.
- The first year should professionalize the business without slowing it down.

03

What Should Be True After 12 Months

The practical outcomes leaders should expect from the first year.

Area	What should be true
Leadership	The owner or CEO and leadership group have a clear mandate, strategic priorities, scorecard, and monthly decision rhythm.
Data	The organization knows which data matters most, who owns it, where quality is weak, and what must improve first.
Technology	The major systems, tools, manual workarounds, and integration gaps are visible and tied to priority work.
Factory	One to three AI Use Cases, automations, or workflow improvements have moved through a simple evidence-based path.
People	Managers and teams understand the direction, know what is changing, and have practical support to adopt new ways of working.
Value	The organization can show what changed, what value was created, what did not work, and what comes next.

04

The 12-Month Starting Path

A sequenced path from mandate to measured value.

The sequence matters. Do not start with tools. Start with the business, then use TIO to decide what capabilities must mature first.

Phase	Timing	Primary question	Core outputs
1. Set the Mandate	Month 0 to 1	What must this organization become, and why now?	Owner or CEO Mandate, Ambition Statement, first leadership commitment.
2. Align the Leadership Group	Months 1 to 2	What are the few choices and priorities that matter most?	Simple Strategic Choices, small scorecard, leadership principles.
3. Assess and Focus	Months 2 to 3	What are we capable of today, and what must mature first?	TIO Maturity Assessment, priority capability gaps, first 12-month roadmap.
4. Mobilize and Prove Value	Months 3 to 12	How will managers and teams act, adopt, and prove value?	Manager activation, AI fluency, priority improvements, communication rhythm, value reviews.

Assessment rule:

Do not lock the first-year plan before completing a practical TIO Maturity Assessment. The strategy sets the direction. The assessment shows what the organization is capable of doing today. The first-year plan closes the gap between the two.

P1**Phase 1: Set the Mandate***Clarify ambition, pressure, risk, and leadership commitment.*

Timing: Month 0 to 1

The first move is a direct conversation with the owner, CEO, managing partner, founder, president, or executive sponsor. The conversation should begin with ambition, pressure, risk, capacity, culture, and what the leader is trying to protect.

- What must the organization become over the next three years?
- What is the owner or CEO trying to protect as the business changes?
- Where is the business already strained?
- Which decisions still depend too much on the owner or a few key people?
- How do AI, automation, data, technology, labor, customer expectations, cost, and trust change the answer?

Output	Purpose
Mandate Conversation Notes	Capture what the owner or CEO is really trying to achieve and protect.
Ambition Statement	State where the business is going in language people can repeat.
Leadership Commitment	Confirm who will sponsor, participate, decide, and stay engaged.
Owner or CEO AI Fluency Plan	Give the top leader first-hand experience with frontier AI tools in a safe learning lane.

P2**Phase 2: Align the Leadership Group***Turn ambition into choices managers can use.*

Timing: Months 1 to 2

At this size, leadership alignment should be practical and fast. The leadership group should make a few choices, not write a long strategy document. The goal is clarity that managers can use.

Question	Plain-English meaning
What are we trying to become?	The ambition for the next three years.
Where will we focus?	Which customers, services, markets, geographies, jobs, or segments matter most.
How will we win?	Why customers choose us and why they will keep choosing us.
What must we become better at?	The capabilities, roles, systems, data, and habits that must improve.
How will we manage the work?	The scorecard, cadence, decisions, communication, rewards, and manager routines needed.

Output	Purpose
Simple Strategic Choices	Clarify the few choices that matter most.
One-Page Scorecard	Make the strategy measurable without building a reporting machine.
Manager Priority Map	Show what each manager owns and what support they need.
Transformation Narrative	Give the organization a plain-language story about why change is happening.

P3**Phase 3: Assess and Focus***Use evidence to identify the capabilities that matter most.*

Timing: Months 2 to 3

The TIO Maturity Assessment should be light, honest, and evidence-based. At this scale, it should not become a large consulting exercise. It should help leaders see the current state across the 25 capabilities and choose the few that matter most for the first year.

Assessment area	What it tells leaders
TIO Maturity Assessment	Current maturity, target maturity, evidence, gaps, and priority capabilities across the five domains.
AI Usage Survey	Who is already using AI, for what, with what risks, and where support is needed.
Data and Reporting Check	Which data and reports are trusted, which are not, and what blocks better decisions.
Technology and Workflow Check	Which systems, handoffs, manual workarounds, and automation opportunities matter most.
Manager and Team Pulse	Whether people understand priorities, capacity, roles, and change expectations.

Focus rule

A managed enterprise should usually choose three to five capability priorities for the first year. Trying to improve all 25 capabilities at once will create noise, not progress.

Decision	Who should decide
Which capabilities matter most this year	Owner or CEO with leadership group.
Which AI Use Cases or workflow improvements enter discovery	Owner or CEO, manager owner, and technology or data support.
What data may be used	Data owner or process owner, with privacy, security, or legal input where needed.
What risk is acceptable	Owner or CEO for material risk; delegated owner for low-risk work.
What must stop or pause to create capacity	Owner or CEO with affected manager.

P4**Phase 4: Mobilize and Prove Value***Activate managers, improve real work, and measure results.*

Timing: Months 3 to 12

By this point, the organization should be moving. Managers need to translate priorities into daily work. Teams need to understand what is changing. AI and automation opportunities need to move through a simple evidence path. Value needs to be measured against a baseline.

Activate managers

Managers are the transmission system at this scale. The owner or CEO can explain the direction, but managers make it real through priorities, routines, coaching, escalation, and follow-through.

- What is our team being asked to do?
- Which priorities matter most?
- What work will change?
- What support do we need?
- What must we stop doing because it no longer fits?

Build AI fluency in the owner and key managers

Senior leaders and managers lean in when they personally experience what AI can do. Demos help, but they do not build judgment. The owner, partners, senior managers, and selected champions should use AI safely and regularly so they can sponsor useful work and spot weak claims.

Fluency focus	Why it matters
Personal use	Leaders learn by using frontier AI models on public information, drafting, thinking, learning, and preparation.
Safe boundary	People learn what belongs in personal tools and what must stay inside approved enterprise systems.
Manager use	Managers learn how AI can help with planning, communication, issue analysis, and team support.
Use case translation	Personal experience becomes problem-first opportunities, not tool-first pilots.

Run a small portfolio

In year one, run a small number of priority improvements well. One to three AI Use Cases, automations, or workflow redesigns are often enough. A weak organization with ten pilots is still weak. A focused organization with three measured improvements is building capability.

Evidence Gate	Question
Problem	Is this a real problem worth solving?

Evidence Gate	Question
Readiness	Do we have enough process clarity, data, ownership, and capacity?
Risk	What could go wrong, and what controls are needed?
Design	How will the work change, and who must adopt it?
Value	What baseline will prove whether value was created?
Next step	Should this be stopped, redesigned, continued, or scaled?

05

The Operating Rhythm

Create a sustainable cadence for decisions, action, and learning.

The operating rhythm is the heartbeat of the first year. It should be simple enough to sustain and strong enough to force decisions.

Cadence	Mechanism	Purpose
Weekly	Manager or priority sync	Move active work, clear blockers, and surface issues early.
Monthly	Owner or CEO leadership meeting	Review scorecard, priorities, AI Use Cases, risks, capacity, decisions, and next 30 days.
Monthly	Manager forum	Equip managers to explain priorities, support teams, and share feedback.
Quarterly	Value review	Review evidence of value, adoption, risk, and next-quarter priorities.
Quarterly	Owner or CEO message	Keep everyone connected to direction, progress, expectations, and trust.

The rule

If a meeting does not create a decision, learning, action, or useful alignment, simplify it or stop it.

06

How TIO Works With What You Already Have

Connect existing management systems into a clearer operating model.

TIO should not force a managed enterprise to throw away useful management habits. It should connect them and make them more practical.

Existing system	How TIO uses it
Scorecard or dashboard	Turns strategy into a small set of measures leaders actually review.
Weekly management meeting	Becomes the operating rhythm for priorities, blockers, risks, and decisions.
Job costing or project tracking	Supports measurement, pricing, margin, and operational improvement.
CRM or client/job system	Supports customer visibility, handoffs, follow-up, and AI Use Case discovery.
HR or performance process	Connects leader and manager objectives to the strategy.
Quality, safety, or compliance routines	Become evidence sources for risk, change, and adoption.

CP

Companion Delivery Ecosystem Guide: Building Your AI Delivery Ecosystem

This Implementation Guide shows a managed enterprise how to move from owner-led coordination to manager-led execution. The companion Delivery Ecosystem Guides help leaders decide how to access Data, Technology, and Factory delivery capability when the organization has more work to improve than internal specialists to do it. Use the companion Delivery Ecosystem Guides when the organization needs external delivery capacity, but still wants to build internal ownership and manager accountability. Use the Delivery Ecosystem Guide for Owner-Led Businesses if the owner or partners still carry most major decisions and the business behaves closer to a 10 to 50 person organization. Use the Delivery Ecosystem Guide for Small and Mid-Sized Businesses if managers are becoming the system and the organization needs a primary delivery partner, selected specialists, or a small external Factory pod. Use the Playbooks when AI Use Cases, automation ideas, data issues, reporting needs, and workflow improvements exceed the capability of the internal team. Use them before hiring a vendor, signing a managed service agreement, or allowing one enthusiastic champion to carry the whole effort alone.

What must remain inside the organization

At this scale, external support works best when the owner, CEO, and managers stay accountable for the work, not just the contract. Owner or CEO mandate, priorities, and final trade-offs. Manager ownership for adoption, local workflow change, and team communication. Data boundaries, access decisions, and safe AI practice rules. Evidence Gate decisions about whether work should stop, redesign, continue, or scale. Capacity decisions: what must stop, pause, simplify, or receive support.

What external support can provide

External support should make the management system stronger and reduce dependence on heroic internal effort. Provide practical Data, Technology, and Factory capacity that the organization does not yet have internally. Support workflow redesign, automation, AI Use Case delivery, integration, reporting, and value measurement. Help managers understand and adopt the new way of working. Transfer knowledge, documentation, and operating routines to the internal team. Make recommendations that fit the organization's scale, budget, risk, and capacity.

Research basis and reader responsibility

The Delivery Ecosystem Guides are based on publicly available information available at the time of writing. Provider examples are research candidates, not endorsements. TSLA has not interviewed the providers, performed confidential reference checks, reviewed private proposals, or verified non-public claims. Readers should validate all facts directly before making a sourcing decision, including current ownership, delivery locations, security posture, pricing, staffing model, client references, contractual terms, data handling, intellectual property rights, and fit for their specific organization.

Simple rule

A managed enterprise can use external capability, but managers must still become the system that carries execution, adoption, and accountability.

07

Where TSLA Can Help

Practical support for leadership, assessment, activation, and value.

TIO is open source. Leaders can use the model directly. TSLA helps organizations apply it safely, practically, and faster by providing thought-partnership, facilitation, assessment, leadership activation, team activation, AI fluency, and implementation support.

Implementation moment	TSLA support
Mandate and ambition	Owner or CEO Thought-Partnership, Executive TIO Briefing, leadership group briefing.
Strategic choices	Simple Strategic Choices Cascade, one-page scorecard, leadership alignment.
Assessment baseline	TIO Maturity Assessment, AI Usage Survey, data and technology readiness checks.
Leadership and manager activation	ALA for owners and leaders, manager priority maps, team activation.
AI fluency	Executive AI Fluency, AI Ally support, safe-use boundary, personal AI Chief of Staff setup.
Factory and value	AI Use Case discovery, Evidence Gates, value tracking, quarterly review support.
People and change	Transformation narrative, communication rhythm, manager cascade, pulse checks.

08

The First 90 Days

The first actions, decisions, and outputs required to establish momentum.

Time	Leadership work	Enterprise work	Outputs
Days 1 to 15	Owner or CEO mandate conversation. Confirm the core leadership group.	Collect current strategy, scorecards, org chart, systems list, major pain points, and current AI use.	Mandate notes, document inventory, interview list.
Days 16 to 30	Run executive TIO briefing and align on the transformation problem.	Identify strategic questions, capacity constraints, AI and automation pressure points.	Ambition statement, transformation problem statement.
Days 31 to 60	Facilitate simple Strategic Choices Cascade and scorecard. Launch owner and key manager AI fluency.	Start TIO Maturity Assessment and AI Usage Survey. Define safe personal practice boundary.	Strategic choices, scorecard draft, assessment launch, AI fluency plan.
Days 61 to 75	Review assessment signal and choose first-year capability priorities.	Identify first AI Use Cases or workflow improvements and capacity needs.	Priority capabilities, use case shortlist, capacity check.
Days 76 to 90	Lock the first 12-month roadmap and monthly rhythm.	Prepare communication, manager activation, and first Evidence Gates.	Roadmap, operating rhythm, transformation narrative, first action plan.

09

Lessons from Practice

Practical lessons that should shape implementation choices.

Lesson	Why it matters
The owner or CEO cannot be the only operating system.	Growth stalls when every important decision still depends on one person.
Managers are the leverage point.	At 50 to 200 people, managers make the strategy real or they quietly dilute it.
Professionalize without becoming corporate.	This size needs rhythm, standards, and ownership, not bureaucracy.
AI fluency should start with leaders.	Leaders who use AI personally ask better questions and sponsor better work.
Data and reporting gaps are usually management gaps.	Bad reporting often hides unclear ownership, inconsistent processes, or weak system discipline.
Start with a small portfolio.	A few measured improvements build confidence faster than many scattered pilots.
Communication must become a habit.	People cannot follow a strategy they only hear once.
Capacity must be protected.	The same people running the business cannot absorb unlimited transformation work.

10

How the 25 TIO Capabilities Show Up in Year One

How the full capability model becomes practical at this scale.

Domain	Year-one focus
Leadership	Strategy, Fluency, Governance, Risk, and Transformation become visible through the mandate, scorecard, decision rhythm, AI fluency, and roadmap.
Data	Ownership, Quality, Access, Flow, and Insight become practical through priority data, reporting, AI Use Case readiness, and decision evidence.
Technology	Architecture, Platforms, Integration, Automation, and Resilience become visible through systems mapping, tool standards, automation choices, and reliability needs.
Factory	Discovery, Design, Delivery, Measurement, and Scaling become visible through the small portfolio and Evidence Gates.
People	Change, Adoption, Skills, Roles, and Culture become visible through manager activation, communication, skills support, role clarity, and trust.

11

First-Year Artifact Checklist*Create only the artifacts that help leaders decide and act.*

Artifact	Useful when it helps leaders...
Mandate Conversation Notes	Say why the transformation exists.
Ambition Statement	Explain where the organization is going.
Simple Strategic Choices	Choose what matters and what does not.
One-Page Scorecard	Track the few measures that matter.
TIO Maturity Assessment	Know the capability baseline before locking the plan.
AI Usage Survey	See current AI use, opportunity, and risk.
Manager Priority Maps	Make managers accountable for practical priorities.
Transformation Narrative	Explain the change in plain language.
AI Use Case Shortlist	Make the first opportunities visible and governable.
Evidence Gate Records	Decide whether to stop, redesign, continue, or scale.
Quarterly Value Review	Show what changed and what comes next.

12

Do This, Not That*Simple choices that protect focus and avoid common failure modes.*

Do this	Not that
Start with owner or CEO mandate.	Start with tools and demos.
Run a practical TIO Maturity Assessment early.	Build the plan only from opinion or urgency.
Choose three to five capability priorities.	Try to mature all 25 capabilities at once.
Equip managers before asking teams to change.	Assume the owner message is enough.
Run one to three improvements well.	Launch many pilots with no baseline.
Make decisions monthly.	Hold meetings that only report status.
Protect capacity.	Assume busy people can absorb everything.
Communicate repeatedly in plain language.	Announce once and expect adoption.

13

What Comes Next

Use evidence from year one to define the next horizon.

After the first year, the organization should decide its next horizon based on evidence, not enthusiasm.

- Which capabilities improved?
- Which capabilities remain exposed?
- Which AI Use Cases or workflow improvements created measurable value?
- Which managers became stronger owners of the work?
- Where did communication, capacity, or adoption fall short?
- What must the next 12 months prove?

Closing thought

The managed enterprise advantage is closeness with enough structure. TIO should protect that advantage. The purpose is not to make a 50 to 200 person organization behave like a large enterprise. The purpose is to help it become clearer, more capable, more adaptive, and better able to use AI, automation, data, technology, and human judgment well.

A

Appendix A: Suggested 12-Month Roadmap

A month-by-month view of the first year.

Month	Main work	Decision or output
0	Mandate and sponsor confirmation.	Mandate Conversation and Leadership Commitment.
1	Executive briefing and strategic choices preparation.	Transformation problem statement.
2	Simple Strategic Choices Cascade and scorecard.	Strategic choices and scorecard draft.
3	TIO Maturity Assessment, AI Usage Survey, and AI fluency launch.	Assessment baseline, AI fluency plan, priority capability gaps.
4	Manager priority mapping and operating rhythm.	Manager maps and monthly leadership meeting design.
5	AI Use Case and workflow improvement discovery.	First shortlist and capacity check.
6	Roadmap lock and communication launch.	First 12-month roadmap and transformation narrative.
7	Team activation and first improvement design.	Team action plans and Evidence Gate records.
8	Data, technology, and process readiness work.	Readiness actions and support decisions.
9	First value review and adoption check.	Continue, redesign, stop, or scale decisions.
10	Manager rhythm improvement and second improvement wave.	Updated priorities and support plan.
11	Performance and role alignment for next cycle.	Updated manager objectives and role clarity.
12	Year-one review and next-horizon plan.	TIO progress report and year-two priorities.

B

Appendix B: Questions for the Owner or CEO

Questions that clarify mandate, ownership, and readiness.

- What must be true three years from now for this work to matter?
- What are you unwilling to lose as the organization professionalizes?
- Which decisions still depend too much on you?
- Which managers are ready to own outcomes, and which need support?
- Where is growth creating the most strain?
- Which data, technology, or process weakness creates the most pain?
- Where is AI already being used without enough visibility?
- What should employees hear from you first?
- What will you personally stop doing so others can own more?
- What will you personally do differently to show this is real?

C

Appendix C: Stewardship

How TIO definitions, official materials, and public versions are maintained.

TIO is an open-source framework stewarded by The Summit Leadership Alliance Inc. The framework may be shared and adapted under its license. Official versions, capability definitions, maturity language, and assessment tools are maintained through TSLA's stewardship process. Major changes are reviewed and approved by Dalibor Petrovic before release.