



TIO
The Intelligent Organization

Templates Pack

Practical tools for turning TIO assessment into action

Ten practical templates to convert TIO assessment results into decisions, work, evidence, and value.

01

How to Use This Pack

Use the smallest set of tools that helps leaders decide and act.

These templates are not extra paperwork. Each one should clarify ownership, force a trade-off, record evidence, or help leaders decide what happens next.

Document Version 1.4 FINAL | TIO-KR-2026.08.0 | August 2026

© 2026 The Summit Leadership Alliance Inc. All rights reserved.

Template	Best used for	Primary decision
Evidence Gate One-Pager	Reviewing a tested improvement, AI Use Case, automation, or work redesign.	Continue, change, scale, pause, or stop.
Workstream Charter Lite	Starting a workstream without creating a heavy program office.	Who owns what, why it matters, and how progress will be judged.
First 90-Day Roadmap	Turning assessment results into a practical first action plan.	What happens first, what waits, and what must be decided.
Capacity Trade-Off Worksheet	Testing whether leaders and teams can absorb the work.	What will stop, pause, simplify, delegate, or need support.
Quarterly Value Review	Reviewing progress with leaders every quarter.	What value was proven, what risks changed, and what decisions are needed.

Common rules for all templates

- Use plain English. A senior leader should understand the page in five minutes.
- Name the accountable owner. If no owner is named, the work is not ready.
- Start with the business problem, not the tool.
- Write down the evidence before making the decision.
- Treat stopping weak work as a sign of discipline, not failure.
- Keep the template alive only while it helps decisions.

Reader rule

Do not use every template at once. Use the smallest set that helps the organization make a decision, start the right work, or prove value.

02

Minimum Evidence Rule

Activity is not progress until leaders can see what changed and decide what happens next.

TIO does not reward activity pretending to be progress. A template should make the evidence visible enough for leaders to make a better decision.

Evidence question	What good evidence looks like
What changed?	A clear before-and-after statement, workflow change, launch record, adoption result, or operating decision.
What value was expected?	A baseline, target, value hypothesis, risk-reduction goal, or service-improvement expectation.
What value was proven?	Actual results compared with the baseline or target, confirmed by the accountable owner.
What risks changed?	Privacy, security, legal, operational, workforce, data, vendor, or trust impacts reviewed where relevant.
What decision is needed?	A documented decision to continue, change, scale, pause, stop, fund, defer, or escalate.

Evidence rule

Evidence should be proportionate. The purpose is not to create a larger file. The purpose is to make the next decision more defensible.

03

Template 1: Evidence Gate One-Pager

Decide whether tested work should continue, change, scale, pause, or stop.

Purpose

Use after a pilot, first launch, proof of concept, or any material review point where evidence should drive the next decision.

1A. Evidence Gate Summary

Field	Entry
Initiative or improvement name	
Related TIO capability or capabilities	
Business owner	
Technology, data, risk, people, or finance partners	
Problem or opportunity being addressed	
Baseline before launch	
Target or expected value	
Launch or test period reviewed	
Evidence reviewed	
Decision required today	

1B. Evidence Review

Evidence area	What was expected	What happened	Confidence	Notes
Value			High / Medium / Low	
Adoption			High / Medium / Low	
Risk and trust			High / Medium / Low	
Cost and effort			High / Medium / Low	
Operational			High / Medium /	

Evidence area	What was expected	What happened	Confidence	Notes
stability			Low	

1C. Decision Record

Decision option	Select one	Reason
Continue		Evidence supports continued use at the current scope.
Change		The idea has promise, but scope, design, controls, adoption, or support must change.
Scale		Evidence supports expansion beyond the first launch area.
Pause		Readiness, risk, evidence, capacity, or timing is not sufficient.
Stop		Evidence does not justify continued effort. Capture lessons and release capacity.

Facilitator note

Do not let the meeting become a status update. The purpose is to decide what happens next based on evidence.

04

Template 2: Workstream Charter Lite

Give a priority workstream enough structure to move without creating a heavy program office.

Use when

A capability, domain, first move, or priority initiative needs a clear owner, scope, outcomes, evidence, and decision rhythm.

2A. Workstream Charter

Field	Entry
Workstream name	
TIO domain and capability focus	
Executive sponsor	
Workstream owner	
Purpose in one sentence	
Business problem this workstream addresses	
In scope	
Out of scope	
Target outcome	
Evidence that will prove progress	
Key risks or constraints	
Decision rhythm	

2B. Workstream Operating View

Area	Answer
Current state	What is happening today?
Near-term move	What will be done in the next 30 days?
Dependencies	What decisions, systems, data, people, vendors, or funding are needed?
Capacity check	Who must spend time on this, and what will they stop or pause?
Risks to escalate	What issues should move to the sponsor or governance forum?

Area	Answer
Next review date	When will progress be reviewed?

2C. Workstream Decision Log

Date	Decision	Owner	Due date	Status

Good charter test

A new leader should understand the work in ten minutes and know exactly what decision or action is needed next.

05

Template 3: First 90-Day Roadmap

Turn TIO assessment results into a narrow, owned, capacity-aware first action plan.

Use when
Use after a capability assessment, leadership workshop, executive briefing, or sponsor decision to move from understanding to action.

3A. Roadmap Setup

Field	Entry
Organization or business unit	
Sponsor	
Roadmap owner	
Assessment date or source	
Top capability gaps	
Top priority opportunities	
Main risks to manage	
Capacity constraint	
Decision needed before day 30	

3B. 90-Day Roadmap

Period	Leadership focus	Work to complete	Evidence of progress	Decision needed
Days 1 to 15	Confirm mandate, owner, scope, and first priorities.			
Days 16 to 30	Confirm first moves and assign workstream owners.			
Days 31 to 60	Start selected moves and prepare affected teams.			
Days 61 to 90	Review evidence and decide what continues or changes.			

3C. First Moves Tracker

First move	Related capability	Owner	Start	Due	Status	Notes

Roadmap rule

The first 90 days should create visible movement, not complete transformation. The best early plan is narrow, owned, evidence-based, and capacity-aware.

06

Template 4: Capacity Trade-Off Worksheet

Make capacity visible before approving new work.

Purpose

Force the practical question every transformation must answer: what will stop, pause, simplify, delegate, sequence later, or receive support so the new work can happen?

4A. Capacity Demand

Work item	Owner	People affected	Estimated effort	Timing	Capacity concern

4B. Trade-Off Options

Option	Work affected	Decision owner	Impact	Decision
Stop				
Pause				
Simplify				
Delegate				
Sequence later				
Add support				

4C. Capacity Decision

Question	Answer
Is there enough leadership capacity to sponsor this work properly?	Yes / No / Not yet
Is there enough delivery capacity without damaging operations?	Yes / No / Not yet

Question	Answer
Is there enough people capacity for adoption and change?	Yes / No / Not yet
What will stop, pause, simplify, or be delegated?	
What support is required?	
Final capacity decision	Proceed / Proceed with changes / Pause / Stop

Capacity rule

A roadmap is not credible until capacity has been tested. Unfunded time is hidden cost. Hidden cost becomes delay, fatigue, or failed adoption.

07

Template 5: Quarterly Value Review

Review what changed, what value was proven, what risk needs attention, and what leaders must decide.

Use when

Use with the executive sponsor, governance group, transformation lead, or leadership team every quarter after first moves are underway.

5A. Quarterly Summary

Field	Entry
Quarter reviewed	
Sponsor	
Prepared by	
Overall verdict	On track / At risk / Off track / Rebaseline needed
Most important progress	
Most important concern	
Decision needed from leaders	

5B. Value and Evidence Review

Initiative or workstream	Expected value	Evidence this quarter	Risk or issue	Decision needed

5C. Capability Movement

Domain	Capability focus	Current score	Target score	Movement this quarter	Evidence confidence
Leadership					
Data					
Technology					

Domain	Capability focus	Current score	Target score	Movement this quarter	Evidence confidence
Factory					
People					

5D. Leadership Decision Log

Decision	Owner	Due date	Follow-up evidence

Quarterly review rule

Do not review everything. Review what changed, what value was proven, what risk needs attention, and what leadership must decide.

08

Template 6: Work and Decision Map**Describe the future work before choosing a tool.**

Field	Working entry
Outcome and service promise	What result must improve, for whom, and how will success be recognized?
Bounded work	What complete workflow, service, case, transaction family, or decision is in scope?
Decisions	Which decisions occur, who is accountable, and which decisions must remain human?
People and roles	What do people lead, judge, approve, challenge, handle, and remain accountable for?
Intelligence	Where can AI expand reasoning, creativity, synthesis, learning, or decision support?
Automation	Which steps should stop, simplify, integrate, use rules, workflow, RPA, AI, agents, or physical automation?
Knowledge and state	Which sources establish truth now, who owns them, and how current must they be?
Authority and controls	Who or what may read, infer, recommend, approve, commit, monitor, stop, and recover?
Evidence	What baseline, quality, value, risk, adoption, stakeholder, and recovery evidence will govern the next decision?
Use rule	
Use the smallest complete map that supports a decision. Detailed process and architecture design remain client-specific.	

09

Template 7: Intelligent System and Agent Operating Record

Make the Assurance and Operations lifecycle visible after launch.

Field	Working entry
System or agent	Name, purpose, business owner, technical owner, and current status.
Approved work and users	What bounded work is supported and who may use it?
Knowledge and data	Approved sources, sensitivity, residency, retention, memory, and prohibited uses.
Authority	Current Delegated Autonomy level, permitted actions, limits, approvals, and expiry.
Active components	Models, agents, tools, services, versions, providers, and material dependencies.
Evaluation and monitoring	Quality, cost, controls, impact, adoption, drift, incidents, and review cadence.
Stop and recovery	Stop authority, safe degradation, manual fallback, reconciliation, rollback, and recovery evidence.
Change and retirement	Last change, next review, replacement or exit plan, and retirement conditions.
Use rule	
Register. Approve. Operate. Observe. Review. Change. Recover. Retire.	

10

Template 8: Affected Stakeholder Impact Check

Use proportionate review for material or rights-affecting work.

Field	Working entry
Affected stakeholders	Who may be helped, burdened, excluded, monitored, or affected by error?
Material impact	What decisions, services, rights, employment, safety, financial, or public outcomes could change?
Transparency	What should affected people know about AI, automation, data use, and decision responsibility?
Human review	Where is meaningful human judgment required?
Challenge and recourse	How can a person question, correct, appeal, or obtain help?
Evidence and monitoring	What outcome, error, fairness, complaint, override, and impact evidence will be reviewed?

Use rule

Use the depth that matches the consequence. The accountable executive and required specialists decide whether the work may proceed.

11

Template 9: Enterprise Autonomy and Dependency Check

Test whether the organization remains able to choose and change direction.

Field	Working entry
What must remain controlled	Mandate, knowledge, data, identity, authority, evaluation evidence, operations, recovery, and business logic.
Material dependencies	Models, platforms, providers, hardware, data services, integrations, talent, and

10

Template 8: Affected Stakeholder Impact Check

Use proportionate review for material or rights-affecting work.

Field	Working entry
	contracts.
Portability	What can be exported, moved, retested, or replaced, and what would have to be rebuilt?
Operating capability	Can the organization understand, monitor, stop, recover, and support the capability?
Exit and continuity	Transition rights, data return or deletion, alternative path, time, cost, and service continuity.
Decision	Accept, reduce, diversify, transfer, retain, or stop the dependency; name the owner and review trigger.

Use rule

Enterprise Autonomy does not require owning everything. It requires enough control, understanding, capability, and resilience to remain the author of the organization's future.

12

Template 10: Transition Choice and Legacy Outcome

Choose the route and make the movement of work and authority explicit.

Field	Working entry
Transition unit	What bounded part of the organization is changing?
Route	Evolve the Current Operation, or Establish the New Operation Beside It? Why does the route fit?
Proof method	Simulation, prototype, shadow, parallel, limited-live, phased, or other client-specific method.

10	Template 8: Affected Stakeholder Impact Check Use proportionate review for material or rights-affecting work.	
Field		Working entry
Movement cadence		One cutover or controlled waves by team, geography, service, case type, customer group, or volume.
Authoritative truth		Which system or operation establishes truth and commits transactions during each temporary state?
Authority transfer		What work, decisions, transactions, accountability, support, and stakeholder expectations move?
Recovery		What conditions trigger pause, return, rollback, fix-forward, reconciliation, or stop?
Legacy outcome		Retire what is replaced. Explicitly decide what is replaced, integrated, retained, allowed to coexist, returned, or stopped.
Use rule		
Most enterprises use a portfolio of both routes. Route, proof method, movement cadence, sourcing, and legacy outcome are related but separate decisions.		

08

Appendices

Choose the right template, use consistent decision language, and start small.

Appendix A. Template Selection Guide

Situation	Use this template first	Then use
The organization completed a TIO assessment and needs to start.	First 90-Day Roadmap	Workstream Charter Lite and Capacity Trade-Off Worksheet
A priority capability needs an owner and structure.	Workstream Charter Lite	First 90-Day Roadmap
A pilot or first launch produced results.	Evidence Gate One-Pager	Quarterly Value Review
Leaders are approving too much work.	Capacity Trade-Off Worksheet	First 90-Day Roadmap
The program needs executive review.	Quarterly Value Review	Evidence Gate One-Pager

Appendix B. Decision Language

Decision word	Use when
Proceed	The work is ready, owned, and has enough capacity and controls.
Proceed with changes	The direction is right, but scope, owner, timing, risk controls, or capacity must change.
Defer	The work may be useful later, but the timing is wrong.
Pause	The work should stop temporarily until evidence, readiness, capacity, or decisions improve.
Stop	The work does not justify continued effort. Capture lessons and release capacity.
Scale	Evidence supports expansion beyond the first team, process, business unit, or use case.
Rebaseline	The original target, timeline, cost, or value expectation is no longer credible.

Appendix C. Good First Use

For a mid-sized enterprise, a practical first use of this pack is simple:

- Use the First 90-Day Roadmap after the capability assessment.
- Create one Workstream Charter Lite for each of the top three first moves.
- Run the Capacity Trade-Off Worksheet before approving the roadmap.
- Use the Evidence Gate One-Pager after the first launch or 60 to 90 days of testing.
- Use the Quarterly Value Review with the executive sponsor at the end of the first quarter.

Final test

If the templates do not help leaders make better decisions, simplify them.