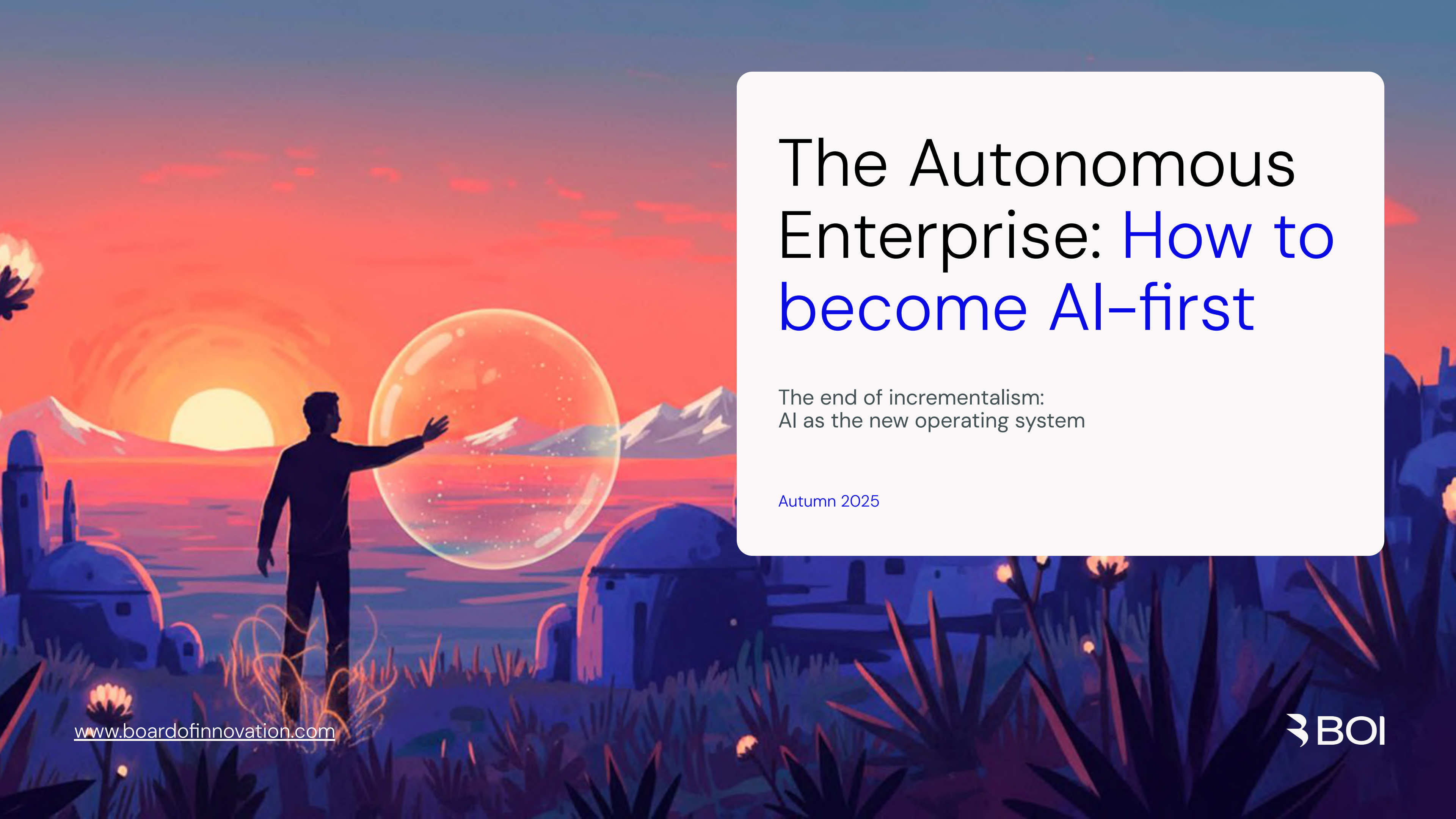




The Autonomous Enterprise: **How to become AI-first**

The end of incrementalism:
AI as the new operating system

Autumn 2025

The industry has a playbook for AI. Probably ten, as every big consultancy has one. But they all say the same thing: adopt fast, find efficiencies, strike a balance.

These playbooks are built on a false premise: treating AI as just another tool to optimize processes, rather than as a general-purpose technology that requires rethinking how businesses operate and grow.

For corporates, the trap is seductive. With deep pockets, large workforces, and legacy systems, even small wins look impressive. The playbook may feel “good enough”. Pilots buy time, tick the innovation box, and avoid disrupting the core. But the result is scattered experiments and marginal gains.

For scale-ups and mid-sized companies, the playbook is lethal. They lack the time, budget, or margin for half-measures. Incrementalism wastes resources and opens the door to AI-native challengers built for speed, data, and automation. These companies need focus, bold bets, and AI as the operating system for how they grow, compete, and deliver value.

That’s why we’ve made it our mission to provide the alternative. We partner with leaders to place concentrated bets that rewire the organization, not for marginal lift, but for structural, defensible advantage through data, workflows, and position. These are the moats investors already screen for in scale-ups, and the same dynamics will decide which corporates stay ahead or get displaced.

Eventually, we will all be forced out of the “AI as a tool” mindset. The question is whether you make the shift intentionally or wait until the market makes it for you.

A new mindset

The single biggest reason enterprise AI fails is that **companies still treat it as a tool instead of a general-purpose technology.** Until that mindset shifts, AI will keep producing pilots, not transformation.



Hello, we are 3BOI

We help companies outgrow their peers by becoming AI-first sooner

AI-first transformation

Innovation

Marketing

Sales

SIEMENS

ING 

amazon



IKEA

MARS

 Nestlé

HALEON

Coca-Cola

Walmart 



MERCK

Roche

Mondelēz
International

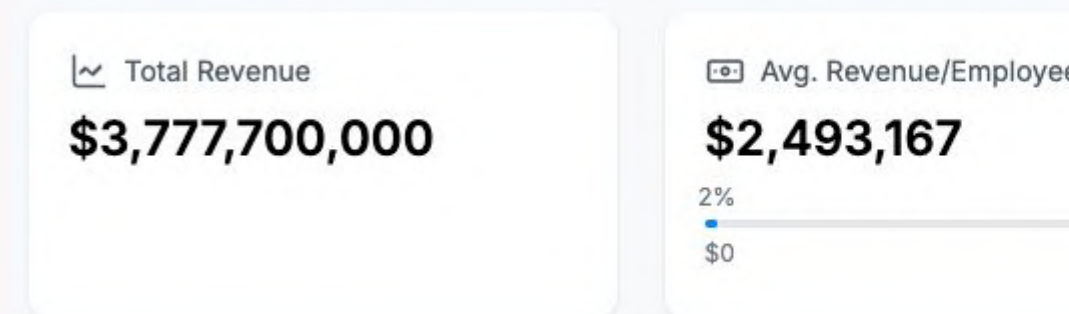
Strategic rationale: Why shift to AI-first	1
→ The trap of the traditional AI playbook	
→ Why scale-ups and mid-sized companies can't afford incrementalism	
→ From linear growth to exponential leverage	
→ New strategic moats in the AI era	
→ Why now: urgency, maturity, and collapsing barriers	
From traditional to AI-first: The 5 pillars of reinvention	2
Core design shifts in operating models	3
The three tracks of AI-first transformation	4
→ Track 1: Strategic Reinvention	
→ Track 2: Operational Redesign	
→ Track 3: AI-First Operating Model	
Practical accelerators: Steps and tools to move from idea to execution	5
Your 90-day AI-first transformation roadmap	6
→ Phase 1: Align, Focus & Rationalize (Weeks 1–3)	
→ Phase 2: Redesign & Pilot (Weeks 4–7)	
→ Phase 3: Codify & Scale (Weeks 8–12)	
What success looks like by day 90	7
How this blueprint creates durable strategic advantage	8

SECTION 1

Why shift to AI-first



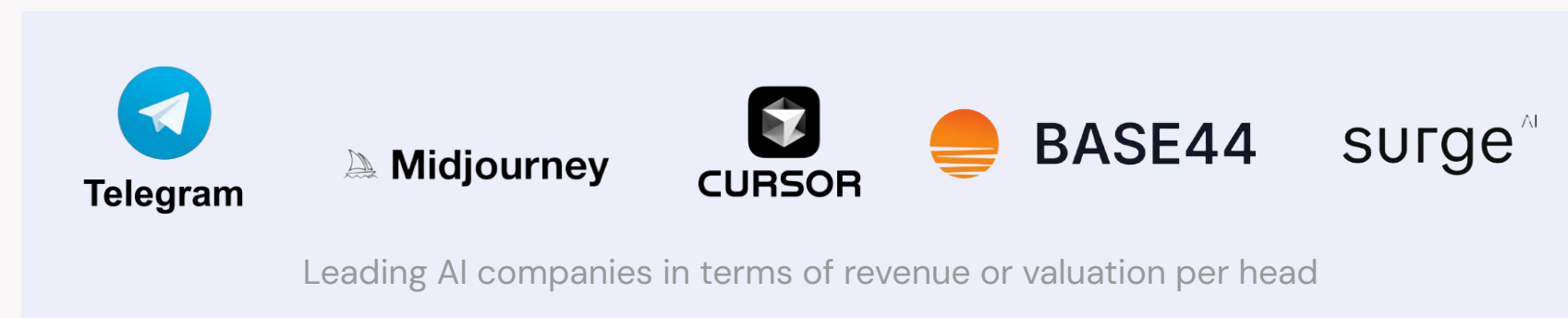
A strategic redefinition of value creation: You don't need headcount or massive capital to scale. **You need AI at the core**



AI has matured at unprecedented speed and will now rapidly become the core infrastructure of businesses. Foundation models, autonomous agents, and low-code AI tools have dramatically lowered the barriers to entry and scale. Today, small teams can build global businesses, automate entire workflows, and deliver hyper-personalized services that outpace traditional players.

This new breed of AI-native businesses is proving that you don't need headcount or massive capital to scale. You need AI at the core. According to the Lean AI Native Companies Leaderboard, the most successful early-stage AI-native startups:

- Operate with teams under 50 people
- Generate \$2.5M+ in revenue per employee
- Achieve valuations exceeding \$117M per employee



These companies are structured around AI from day one, with architecture, workflows, and business models designed for scale, speed, and autonomy.

While large corporates may feel overwhelmed by the idea of "AI-first," the lesson is just as urgent for them: **real value doesn't come from layering AI on top of legacy processes, but from doing the harder work of rethinking how you operate, design, and grow with AI at the core.**

Forbes, *Business Insider*, and *Seedtable* consistently spotlight these companies as case studies in what's possible when you remove organizational drag and lean into AI as your foundational layer.

From linear to exponential operating models:
AI-first companies don't just do things faster: they redefine what's worth doing, how it gets done and **scale through intelligence**.

Traditional organizations' growth

AI-first organizations' growth

Adding headcount



Scale through automation

Optimizing processes



Embed intelligence into core operations

Reacting to change



Proactively adapt systems that learn

Linear growth with output proportional to input (e.g. headcount, budget)



Decouple growth from labor, achieving exponential outputs with marginal costs

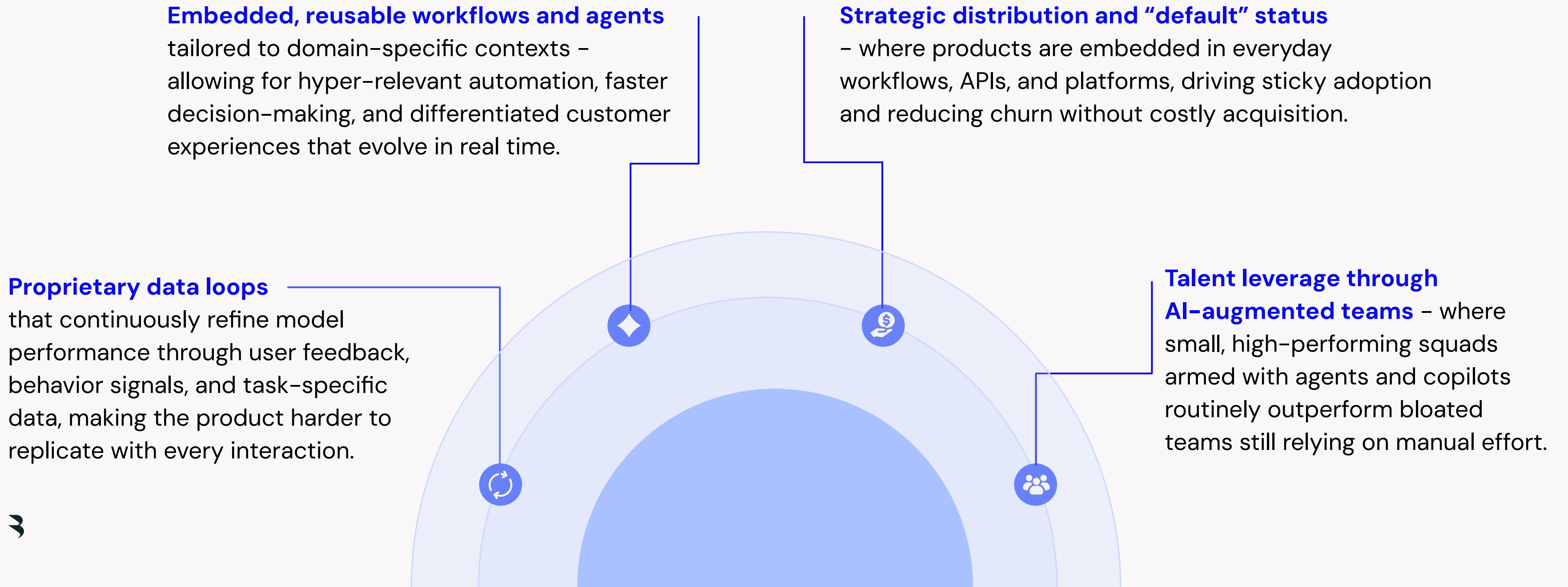
Higher strategic agility and resilience: AI-first companies are structurally designed for continuous adaptation

- Workflows and decisions can be reconfigured in real time by modifying agent logic, not retraining humans.
- Intelligence is embedded into processes, enabling faster response to customer signals, market changes, or operational anomalies.
- Reliance on rigid hierarchies or static org charts is reduced and they operate through modular, orchestrated systems.

Example: If regulations change, an AI-first insurer can update policy logic in hours via prompt changes and model instructions, while traditional insurers require retraining, compliance reviews, and months of rollout.

A new competitive moat: size doesn't matter

In the AI era, the old moats (scale, brand spending, capital access) no longer guarantee defensibility. Open-source models, cloud-based infrastructure, and off-the-shelf agents have leveled the technical playing field. What matters now is different.



A new competitive moat: size doesn't matter

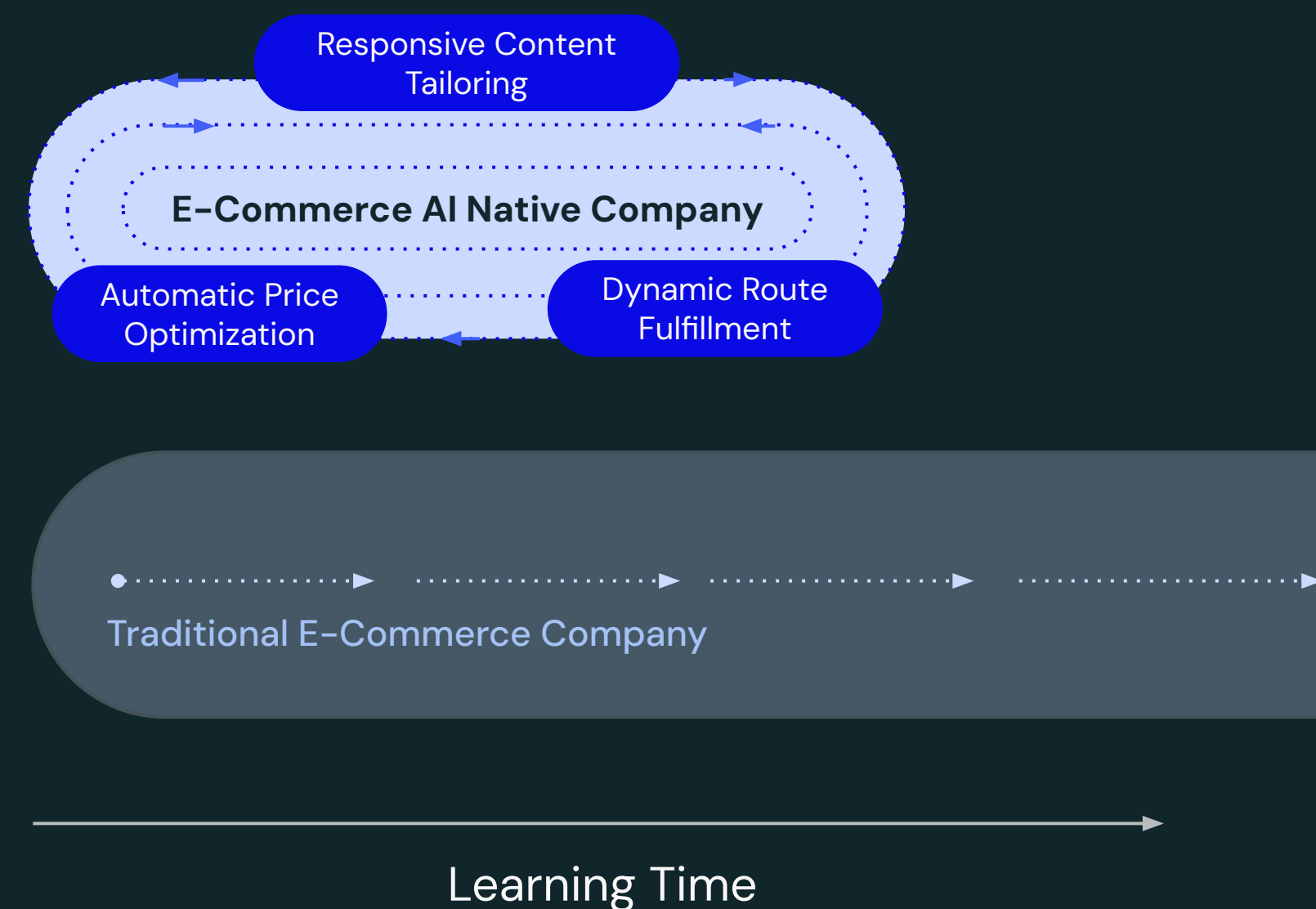
In the AI era, the old moats (scale, brand spending, capital access) no longer guarantee defensibility. Open-source models, cloud-based infrastructure, and off-the-shelf agents have leveled the technical playing field. What matters now is different. AI-first companies are built on systems that improve with use, deepen with scale, and get harder to copy the more they're used.

	Proprietary data loops	Context-specific agents & workflows	Embedded distribution	Talent leverage	Non-linear advantage
Evidence	Feedback integration deepens model defensibility	Tailored automations outperform general tools	Stickiness via integrations	Revenue per employee >\$2M in top AI-native startups	System improves with use, increasing gap over time
Real-world examples	Harvey, Hippocratic	Magic, Cursor	Hugging Face, OpenAI x MSFT	Lean AI Leaderboard	Vellum, Perplexity

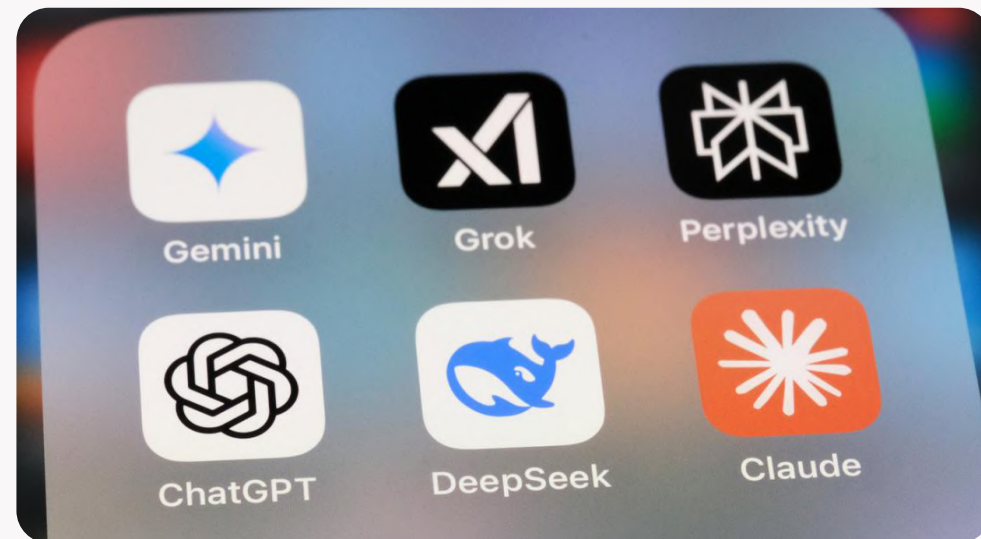
A new competitive moat: example

Example: In e-commerce, AI-native companies use real-time agents to optimize pricing, tailor content, and route fulfillment dynamically based on user signals, inventory, and behavior. Their advantage isn't margin but learning velocity. Traditional firms can't match that speed without rewiring their architecture.

Together, these ingredients create **non-linear, asymmetrical advantage**. AI-first organisations don't compete on the same terms. They **learn faster**, adapt continuously, and grow with compounding returns.



Why now? The timing has never been more urgent



From edge to core: AI is no longer experimental – it's core infrastructure. Powerful models (GPT-5, Claude, Gemini) and low-code tools make rapid production-ready deployment possible with minimal investment.



The playing field is shifting: The cost and complexity barriers that once protected incumbents have crumbled. AI-native challengers hit \$50–100M ARR with <30 people by leveraging agents, workflows, and learning systems. They scale faster, adapt quicker, and operate at near-zero marginal cost.



Incumbents are drowning in process debt, legacy tech and layered hierarchies: this slows adoption and AI initiatives often remain siloed or stuck in pilots. Delay isn't just lost time, it's lost terrain and opening the door to agile, AI-native, nimble competitors.

"The companies that will dominate the next decade aren't just adopting AI – they're built around it."

Where AI-native wins are showing

The market isn't waiting and we believe this is the inflection point. In two years, companies will either be scaling with AI, or watching their competitors do it. The opportunity to lead is here. But it won't stay open for long.

AI-first companies are already locking in early-mover advantages by:

- Accumulating proprietary data that improves their systems with every use
- Building reusable workflows and agents that scale across functions
- Normalizing AI-native ways of working before inertia makes change harder
- Securing executive buy-in and market momentum
- Institutionalizing fluency while others are still running pilots

Education

AI tutors and learning companions are scaling personalized instruction at fractional costs.

Consulting

Lean AI firms are undercutting incumbents with agent-led research and strategy synthesis.

Legal

In legal, AI-native startups are displacing traditional firms by offering 10x faster services with better accuracy.

AI-native wins

SECTION 2

The 5 pillars of organizational reinvention





From traditional to AI-first:

The 5 pillars of organizational reinvention

Becoming an AI-first company requires a deep, structural shift, not just in technology adoption, but in how the business operates, decides & grows. Here is a comparison across five strategic pillars that highlight the **seismic difference** between the old model & the AI-first model.



AI-first is a leap in how companies learn, adapt, and deliver

Growth → Exponential leverage, not linear scaling:

Traditional companies grow in direct proportion to headcount and resources. AI-first organizations scale through compounding effects: reusable agents, codified intelligence, and AI-augmented teams. A 10-person team can now outperform a 100-person org. This isn't productivity gain, it's a new scale paradigm.

Innovation → Always-on intelligence:

R&D used to rely on experts and long cycles. Now, AI can generate insights in seconds, suggest ideas, run simulations, and co-create. Innovation becomes democratized and continuous, not centralized and episodic.



Efficiency → Redesign,
not just optimize

Traditional orgs tinker with legacy processes. AI-first companies start over. They ask: “If AI could do 70% of this, what would the process look like?” Workflows are rebuilt for speed, cost, and autonomy.

Talent → Fewer, smarter,
empowered

Talent density is expected to increase, but the AI-first workforce will be exponentially more capable. Roles evolve from “doers” to “orchestrators,” curators, and decision-makers. Human creativity and judgment are amplified, not replaced.

Resilience → Self-learning
systems

Instead of reacting with committees and crisis teams, AI-first systems detect anomalies, flag risk, and adapt in real-time. Resilience becomes proactive and data-driven, not reactive and manual.

AI-enabled vs. AI-first: Two very different paths

AI-enabled companies

adopt fast, find efficiencies, and strike a balance – but often spread resources thin, retrofit old logic, and stall in pilot purgatory.

STANDARD INDUSTRY AI IMPLEMENTATION PLAYBOOK
THE REASON WHY MANY COMPANIES ARE STUCK

AI-first companies

rethink how they grow, operate, and compete, building with AI at the core to unlock nonlinear gains and strategic defensibility.

AI-enabled vs. AI-first: Two very different paths

	AI-Enabled (Standard Industry Playbook)	AI-First (Differentiated Approach)		AI-Enabled (Standard Industry Playbook)	AI-First (Differentiated Approach)
Strategic Intent	Adopt AI to support existing operations and gain efficiencies	Use AI to reshape the business model, workflows, and advantage from the ground up	Perception of AI	AI is an enabler of productivity	AI is a driver of growth, resilience, and scale
Role of AI	AI is a tool to enhance current processes	AI is the foundation of how value is created, scaled, and defended	Scalability	Gains are incremental and siloed	Gains are systemic and compounding across the org
Approach to Use Cases	Bottom-up hunting for use cases across functions	Top-down focus on strategic bets tied to moat-building	Moat Building	Focus on cost and efficiency gains (easily replicable)	Builds structural moats (e.g., proprietary data loops, agentic systems, sticky workflows)
Resource Allocation	Spread thin across multiple pilots with unclear ROI	Concentrated investments in a few transformative domains	Talent Model	Upskill staff to use AI tools	Redefine roles to orchestrate AI-led systems
Workflow Design	Retrofitting AI into legacy processes	Rebuilding workflows from zero with AI as the native actor	Cultural Shift	AI seen as “optional enhancement”	AI seen as “non-negotiable core capability”
Decision-making	Periodic, human-driven decisions with AI support	Real-time, AI-augmented decisions with human oversight	Outcome	Marginal gains, risk of pilot purgatory	Durable advantage, increased leverage, readiness for compounding impact

SECTION 3

Core design shifts



“

An AI-first transformation requires more than adding tools, it demands a reinvention of how work is done. Traditional human-led workflows give way to AI-executed processes, functional silos collapse into outcome-based pods, and decision-making becomes real-time and predictive.

The organization evolves from being people-powered to **AI-orchestrated**

Domain	Legacy organization		AI-first organization
Execution	Human-led workflows	→	AI agents drive execution
Org design	Siloed, functional	→	Cross-functional pods with AI at the center
Decision-making	Periodic, subjective	→	Real-time, predictive, embedded
Tech ownership	Centralized in IT	→	Federated to business units
Workforce	Large, hierarchical	→	Lean, AI-augmented, high-leverage

SECTION 4

Three tracks of AI-first transformation



Three tracks of AI-first transformation

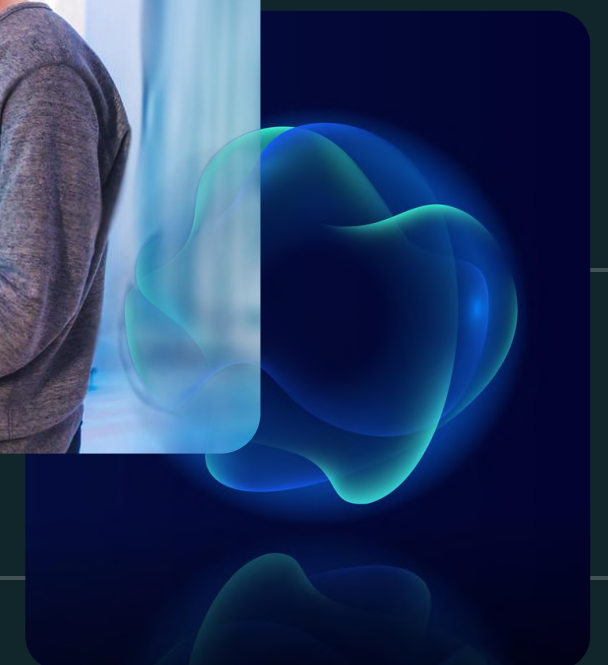
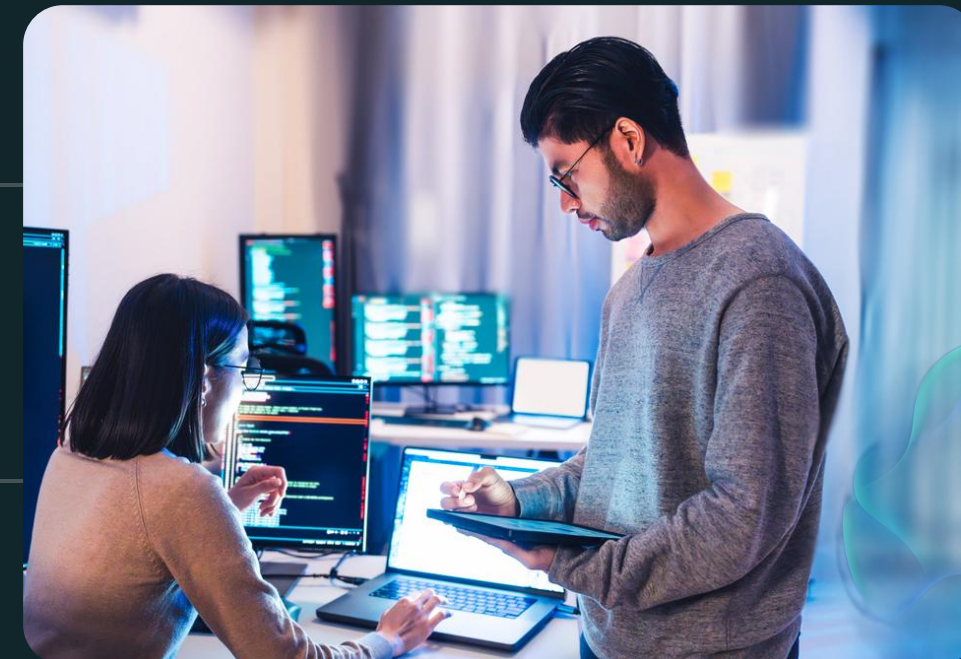
To move from vision to execution, organizations need more than ambition. They need a practical system for reimagining how value is created, how work gets done, and how that work scales across the enterprise. This requires thinking in layers – each unlocking a different aspect of enterprise reinvention.

We call these the three tracks of AI-first transformation:

TRACK 1 Strategic Reinvention

TRACK 2 Operational Redesign

TRACK 3 AI-First Operating Model



Track 1: Strategic reinvention (Top-down, moat-focused)

Reimagine your core business model and strategic edge for an AI-native world: where you play, how you win, and what sets you apart. Reinvention means rethinking the 'why' and the 'where', challenging the very logic of how you create value in the age of intelligent systems.

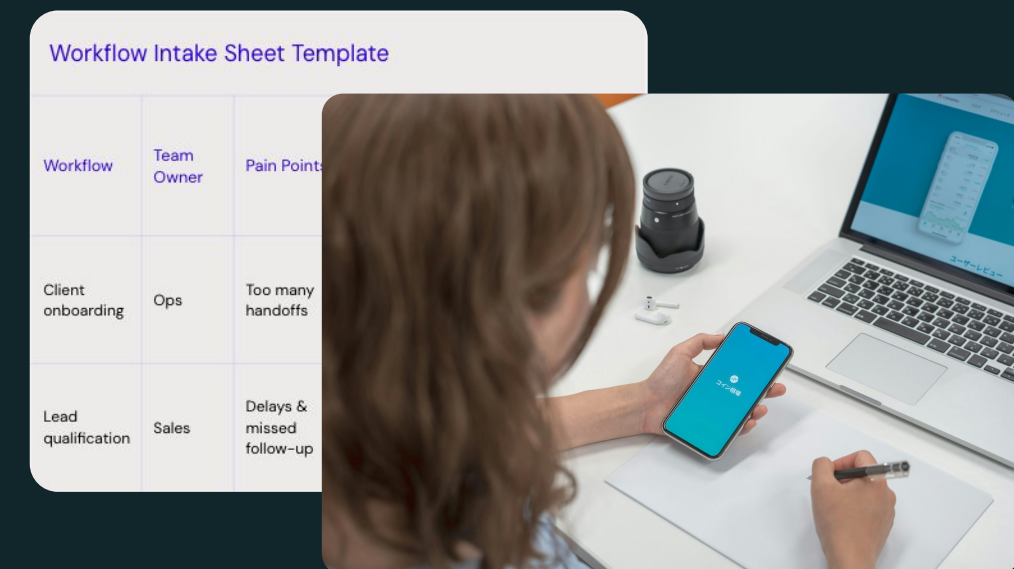
This is top-down, core-focused, and future-back. It's about:

- Reinventing how your company operates, creates and **captures value in an AI-native world**
- Making deliberate, concentrated bets to protect or reshape your **core strategic advantage**
- Asking: *"How would an AI-native disruptor make our core business obsolete?"* and then building from there



Outcomes often include:

- A new product/service logic
- A redefined operating model
- A proprietary data flywheel or agentic system
- A hard-to-copy, defensible moat



This is where tools like the **AI Opportunity Mapping**, **Use Case Canvas**, and **Moat Reflection templates** play a central role.

Case: A client in healthcare insurance

Challenge

A mid-sized health insurer realized that incremental AI investments, such as automating claim handling and adding chatbots, weren't enough to defend their market position. They initiated a strategic reinvention track to rethink their core value proposition.

Strategy and reinvention

In a future-back strategy sprint, they asked: "What would a fully AI-native insurer look like?" The answer: real-time, personalized coverage, dynamically priced on lifestyle and health signals, and embedded in fitness and telehealth platforms.

They committed to a bold reinvention bet:

1. Launch a subscription-based preventative care product, powered by AI agents that monitor behavior and nudge healthier decisions.
2. Build a proprietary data loop to continuously improve underwriting and personalize care recommendations.

This repositioned the company as a proactive health partner, not just a claims processor, creating a defensible moat around behavioral data and engagement.

Key outcomes:

- New product line with \$80M growth potential
- Proprietary data asset built from real-time health signals
- Moat strengthened through predictive personalization and early intervention



Track 2: Operational redesign (Bottom-up, workflow-focused, efficiency-driven)

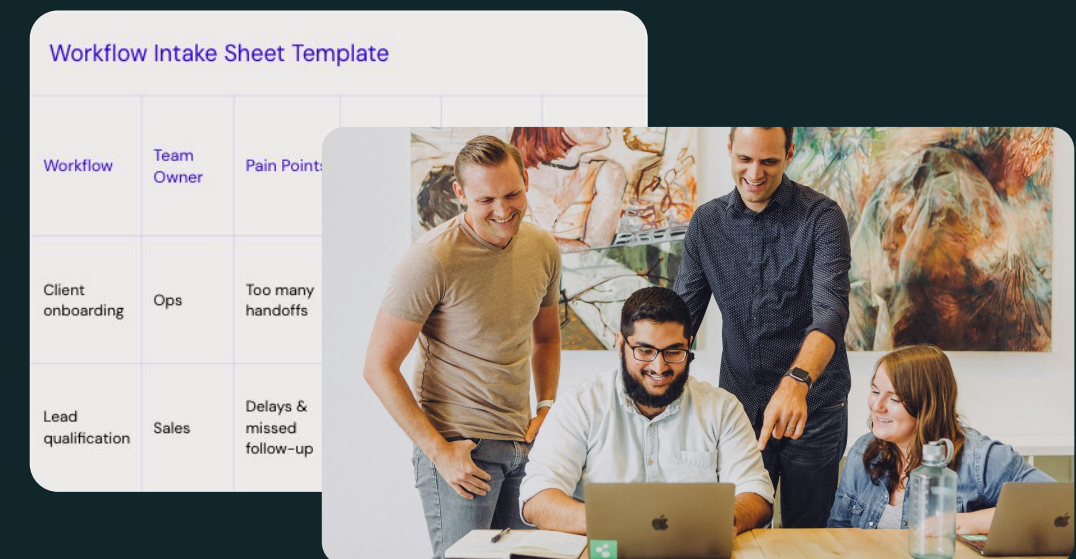
Redesign is about rethinking the how: transforming the flow of work to unlock speed, productivity, and new patterns of human-machine collaboration.

This is bottom-up, execution-focused, and inside-out. It's about:

- Systematically rebuilding workflows, roles, and tools with AI embedded at the core
- Using zero-based redesign to challenge old assumptions and unlock non-linear productivity
- Reclassifying who does what (AI, human, hybrid) and identifying reusable agent patterns

Outcomes often include:

- New process flows
- Ownership heatmaps
- Role redefinitions and upskilling tracks
- AI orchestration and guardrails



This is where our **Zero-Based Workflow Design, Ownership Heatmap, and Before/After Mapping** tools come in.

Case: A client in logistics

Challenge

A global logistics leader struggled with inefficiencies in client onboarding and shipment quoting. The process spanned 9 steps, 6 separate systems, and manual handoffs across sales, legal, and operations. While AI tools were deployed in isolated departments, the end-to-end workflow remained fragmented and costly.

Strategy and reinvention

Through the operational redesign track, they launched zero-based redesign sprints. A cross-functional team rebuilt the quoting and onboarding workflow from scratch – this time around AI agents. The result: an AI-native flow where agents generate quotes, pre-approve standard contracts, trigger shipment bookings, and escalate only exceptions.

Ownership heatmaps clarified roles, showing that 70% of steps could **be fully automated or hybridized**. New roles like “Agent Supervisor” and “Prompt Curator” were introduced. Within weeks, cycle time dropped from 5 days to under 2 hours.

.Key outcomes:

- 80% reduction in onboarding time
- 60% cost reduction per quote
- Human roles elevated to handle complex edge cases and relationship management



Track 3: AI-first operating model

(Systemic, integrative, and future-proofing)

Embed and scale transformation by redesigning the enterprise’s structure, governance, and capabilities. This connects the ambition of reinvention with the execution of redesign, making AI-native ways of working durable, repeatable, and enterprise-wide. Think of it as the meta-layer that enables your organization to learn, adapt, and synchronize all AI activity across the business.

It’s about:

- Designing an operating model that can continuously learn, adapt, and scale AI across the enterprise
- Ensuring AI-native ways of working become sustainable, not situational
- Turning repeatable success into a coordinated system of work – spanning teams, domains, and functions



Outcomes often include:

- New governance and investment mechanisms for AI
- Scalable capability backbone
- AI-native culture with fluency, clear roles, and incentives built into daily work.
- Adaptive learning loop to track adoption, cost, risk, and impact, turning experiments into compounded advantage

Workflow Intake Sheet Template

Workflow	Team Owner	Pain Points	Frequency
Client onboarding	Ops	Too many handoffs	Weekly
Lead qualification	Sales	Delays & missed follow-up	Daily

This is where tools like the AI Operating Model Canvas, AI Governance Framework, Org Design Patterns, and Fluency & Enablement Tracks come into play.

Case: A client in fintech

Challenge

A fintech company was running dozens of AI pilots, but value wasn't compounding. Costs crept up, teams duplicated tools, and experiments stayed stuck in silos. Leadership realized the problem wasn't lack of adoption, but lack of orchestration.

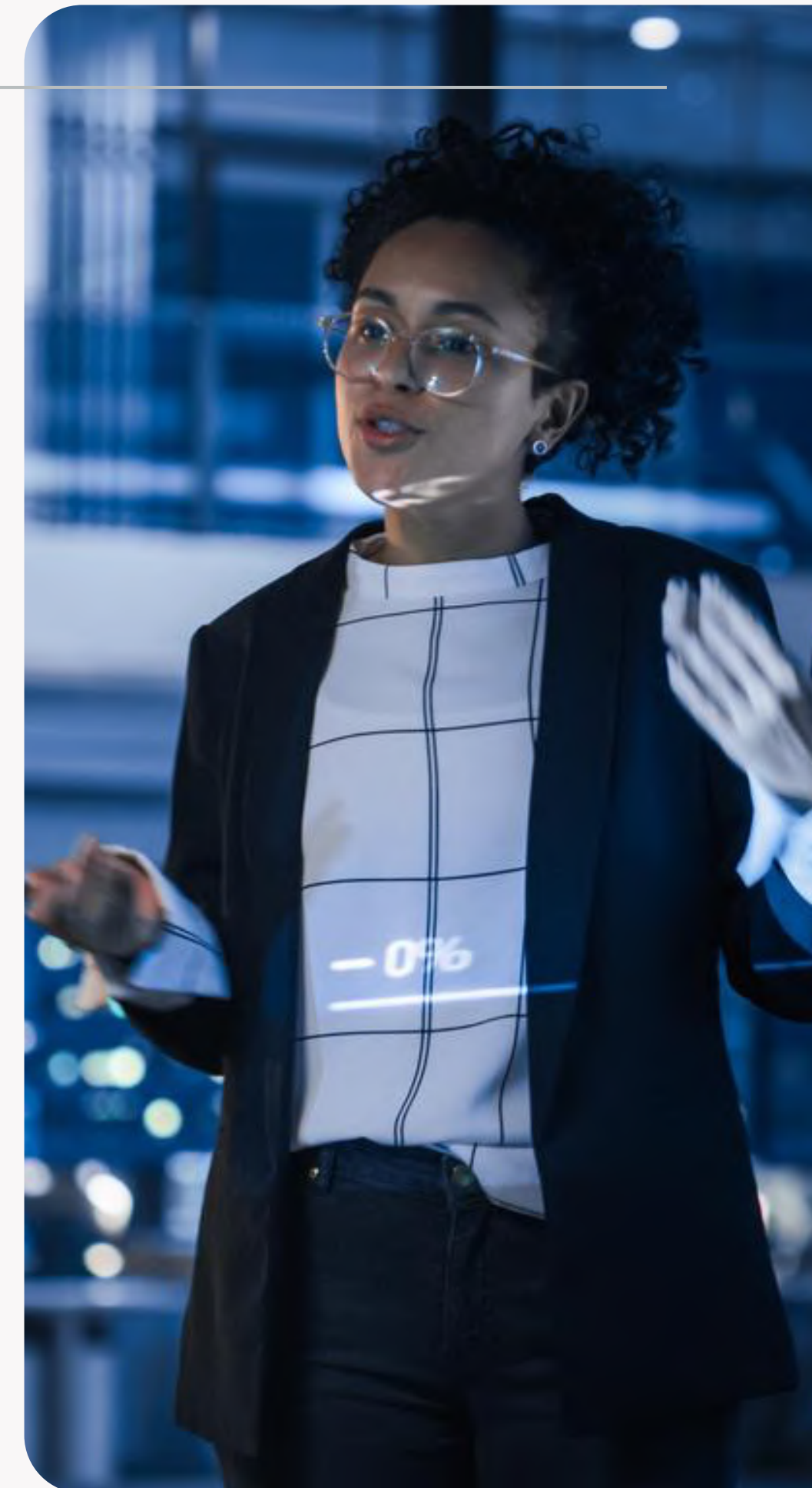
Strategy and reinvention

They activated the **AI-first operating model track**, starting with a live experimentation registry, a shared prompt library, and automated guardrails for tool spend and compliance. AI capabilities were federated to business domains, while a small central office provided standards and enablement.

Crucially, they redefined roles: employees became Prompt Architects, AI Workflow Owners, and Output Validators, shifting from "doing tasks" to orchestrating how humans, systems, and AI agents work together. Within months, local wins started compounding into enterprise capability, with reusable patterns and shared foundations replacing tool sprawl.

Key outcomes:

- 3x reuse of AI workflows via internal marketplace
- 40% fewer duplicative pilots
- Enterprise-wide AI fluency tracked and improved quarterly



All three tracks are essential, but distinct

	Strategic reinvention	Operational redesign	AI-first operating model
Core focus	Where to compete and win	How to work smarter	How to embed and scale transformation
Primary lens	Future-back strategy	Inside-out execution	Enterprise-wide systems thinking
What it transforms	The core business system	Supporting workflows and roles	Structure, governance, and capabilities
Main value delivered	Moats and competitive advantage	Leverage and efficiency	Repeatability and enterprise-wide scalability
Ownership needed	Executive ownership	Cross-functional enablement	Org design and leadership alignment
What drives it	Vision and ambition	Workflow and systems design	Operating model architecture and adaptability
Role in transformation	Sets direction and ambition	Delivers change in the flow of work	Embeds and sustains change across the enterprise

Who leads what: Clarity is key to momentum

Each track of AI-first transformation requires distinct types of leadership, focus, and ownership. Strategic reinvention needs bold, top-down ambition. Operational redesign thrives under empowered cross-functional teams. And building the AI-first operating model demands system-wide coordination and architectural thinking. This isn't a one-team job.

		Primary owner	Cross-functional allies
TRACK 1	Strategic Reinvention	CEO / CPO	Strategy, Product
TRACK 2	Operational Redesign	COO / Functional Leads	AI Transformation Office
TRACK 3	AI-First Operating Model	COO / CIO	HR, IT, Legal, Finance

How to sequence without making it linear

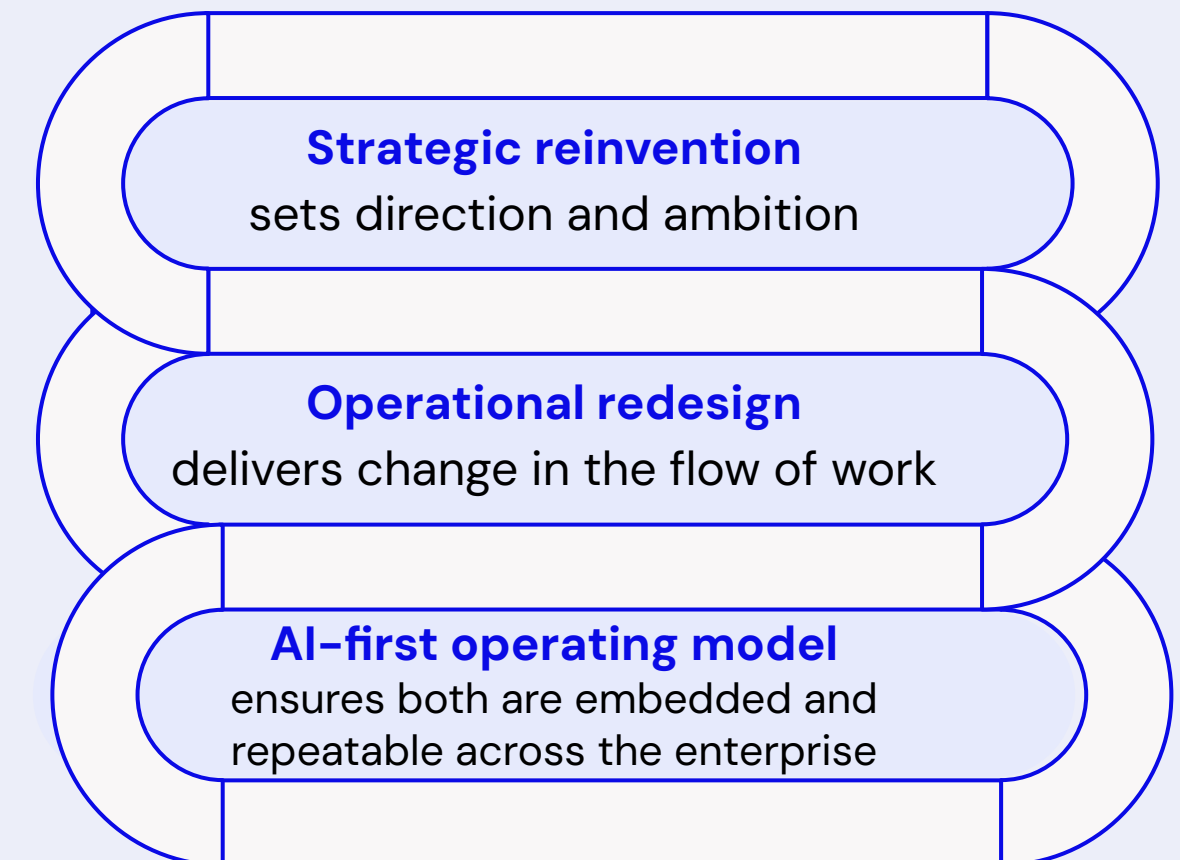
AI-first transformation has three distinct tracks, but they don't follow a strict step-by-step order. Instead, think of them as interlocking layers that reinforce one another – with different tracks taking the lead depending on your maturity, ambition, or current bottlenecks.

Some organizations begin with top-down reinvention. Others start with productivity gains in workflows. But long-term success comes when all three tracks operate in sync – turning isolated wins into enterprise-wide capability.

A useful approach:

- Start with strategic reinvention, to set ambition, direction, and business relevance, even if only for a single domain.
- Pair it with operational redesign in high-impact workflows, to demonstrate traction, build belief, and validate design patterns.
- Continuously evolve your AI-first operating model, to turn fragmented success into a system – ensuring alignment, reuse, and scale.

Think of AI-first transformation as a three-layer system:



SECTION 5

The accelerators



From ambition to execution: the practical accelerators to build like an AI-first company

Each of the three tracks calls for distinct tools and conversations. That's why we've developed hands-on accelerators you can put to work from day one, whether in workshops, redesign sprints, or transformation planning. They're designed to be practical, repeatable, and scalable, giving your teams the structure to think clearly, move fast, and cut through complexity.

ACCELERATOR 1

Strategic Reinvention

ACCELERATOR 2

Operational Redesign

ACCELERATOR 3

AI-First Operating Model

Strategic reinvention: Build your AI moat

Goal: Make concentrated, future-back bets that rewire the core of your business to build a decisive, defensible advantage.

This track ensures you anchor your AI transformation in what matters most: your core advantage, your customer promise, your right to win.

Unlike traditional AI strategy playbooks, which often:

- Hunt for bottom-up use cases
- Prioritize easy wins or automation
- Spread investment thin across functions
- Lead to pilot sprawl and tooling fatigue

Strategic reinvention flips the script:

- Top-down, not tool-down
- Future-back, not feasibility-first
- Focused, not scattered
- Designed to build structural moats, not marginal gains

Expected outputs of Strategic Reinvention accelerator

- A small number of high-conviction bets (1–3 max)
- Clearly articulated AI-native vs current logic
- Moat hypothesis for each bet
- Directional “AI-native” transformation sketch
- Clear handoff to operational redesign teams

Step 1: Frame the threat & opportunity

Set the tone. It forces outside-in thinking and helps teams confront disruptive possibilities head-on – before someone else does.

Strategic question: Where are we most at risk and where are we most ripe for reinvention?

Key tools

- Provocation prompts worksheet to jolt teams out of the status quo
- Pre-mortem workshop: "It's 2028. We've lost 40% market share. Why?"

Tips & tricks:

- Pull in outside-in examples from AI-native competitors and adjacent industries.
- Don't just provoke fear – provoke possibility: What could we become?

Outcome:
A visual map of the most strategically vulnerable and high-potential areas in your business.

Provocation Prompts Worksheet	
Use these provocation prompts to jolt teams out of the status quo	
Prompt	Discussion Purpose
What if 80% of this was done by an AI agent?	Spark radical thinking
What if our core product or services were commoditized by AI?	Surface existential threats
What if onboarding took 30 seconds?	Imagine next-gen experiences
What if an AI-native startup competed with us?	Force future-back design

Step 2: Clarify your strategic levers

Not all vulnerabilities are equally important. This step helps you focus on what drives value, differentiation, and defensibility.

Strategic question: Which parts of our business model give us advantage today and are worth protecting, reshaping, or replacing?

Key tools

→ Strategic Lever Mapping Canvas

Tips & tricks:

- Use the value equation:
 - Value created (customer outcomes)
 - Value captured (margin, data, lock-in)
 - Velocity (speed of scale/delivery)
- Run competitor teardown exercises: “If a startup rebuilt our core from scratch with AI, what would they keep? What would disappear?”

Outcome:
A shortlist of 2–3 core levers (e.g., onboarding, fulfillment, fraud detection) that underpin your moat.

Strategic Lever Mapping Canvas for AI			
Use this visual grid to identify which parts of your business model are most vital. Ask: Where do we currently outperform?, Which levers are manual, slow, or easy to copy?			
Strategic Lever Examples	Description	Today's Strength	Reinvention Potential
Personalization	Tailored experiences	High	Use intent modeling with AI
Trust	Brand reputation	Medium	Add transparent AI explainability
Speed	Time to quote/onboard	Low	Agent-led fulfillment in minutes

Step 3: Explore future-back reinvention ideas

This is where strategy meets imagination. You’re not picking use cases, you’re designing alternate futures.

Strategic question: How could AI radically transform or amplify those core levers?

Key tools

- AI Opportunity Mapping (cluster, score, prioritize ideas)
- Reinvention Prompts (e.g., “If this function was 100% AI-native...”)

Tips & tricks:

- Start with reinvention ideas, then reverse-engineer the AI enablement, not the other way around.
- Cluster ideas by ambition level:
 - 10% gain → optimization
 - 1.5x improvement → differentiation
 - Category shift → strategic reinvention
- Use mapping tools live in workshops. Let teams score ideas by:
 - Strategic importance
 - Feasibility
 - Moat potential

Outcome:
A filtered set of bold, AI-native concepts that reshape your advantage.

AI Opportunity Mapping Grid				
Visualize bold reinvention ideas by ambition level and feasibility:				
Idea/ example	Ambition Level	Strategic Importance	Feasibility	Moat Potential
Autonomous underwriting	Strategic reinvention	High	Medium	High
Smart pricing engine	Differentiation	Medium	High	Medium
Automated reporting	Optimization	Low	High	Low

Step 4: Commit to 1–3 strategic bets

Focus creates clarity and momentum. This is where you stop generating and start committing.

Strategic question: Which few bets are worth building our AI transformation around?

Key tools

- Strategic Bets Canvas
- Moat Reflection Checklist

Use the canvas to ask:

- What is the job-to-be-done?
- How is AI solving a bottleneck, not a nice-to-have?
- What does the AI-native version look like?

Stress-test moat defensibility:

- Does it improve with more data?
- Is it hard to replicate?
- Does it lock in behavior or ecosystem effects?

Apply a **“Go Big or Kill”** filter: If it doesn’t move the needle or build a moat, it doesn’t make the cut.

Outcome:

1–3 high-conviction reinvention bets, each with: clear value proposition, AI-native logic (not a retrofit) and moat hypothesis

Strategic Bets Canvas

Element	Example
Job-to-be-done	Deliver instant pricing to customers
AI-native logic	Predictive agent sets price in real time using customer intent
Moat hypothesis	Improves with data, hard to replicate due to vertical depth

Step 5: Design the future-state blueprint

This step delivers a tangible blueprint teams can align on before moving into detailed design and build.

Strategic question: If we rebuilt this part of the business with AI at the core, what would change?

Key tool

AI-Native Transformation Sketch – a simple 2-column view of what changes.

Tips & tricks:

- Don't get stuck in flowcharts, this isn't a process map. It's a mission brief.
- Focus on:
 - What disappears
 - What becomes real-time, agent-led, or self-optimizing
 - What new experience or logic emerges
- Involve execution teams early to pressure-test feasibility and raise red flags.

Outcome:
A directional blueprint of what should be re-architected, automated, or redesigned, ready for handoff to operational and design teams.

AI-Native Transformation Sketch	
AI-Native Logic	Implications for Execution
Agents onboard customers in <5 mins	Real-time verification, fallback rules
Dynamic pricing based on user behavior	Requires pricing engine, feedback loop
Product design driven by live A/B testing with AI	Build automated experiment orchestration

Operational redesign: Unlock productivity & scale through AI-native workflows

Goal: Systematically rebuild workflows, roles, and tools with AI at the core to unlock non-linear gains in speed, cost, and quality.

AI is a force multiplier for daily execution. But most companies treat AI as a bolt-on tool. This track flips the logic: it starts from zero, redesigning core processes with AI as the native actor. This is where productivity is transformed, duplication is eliminated, and AI-human collaboration becomes real. Unlike Strategic Reinvention, which sets ambition, Operational Redesign delivers impact where it counts – in the flow of work.

Most AI transformations stall by staying abstract or automating broken processes. This track breaks through by:

- Rethinking, not retrofitting
- Redesigning for orchestration
- Empowering teams through clarity
- Recognizing that retrofitting AI into legacy roles is one of the biggest reasons companies fail to capture expected cost savings

Done right, this can become your new operating rhythm. Leaner. Faster. Smarter. This is your bridge from doing AI to operating as an AI-native company.

Expected outputs of operational redesign accelerator

- 1+ fully redesigned, AI-native workflow
- Ownership heatmap across workflow
- Role definitions and orchestration logic
- Guardrails and feedback loops
- Pilot-ready execution briefs

Step 1: Pick a high-friction workflow

You’re not designing hypotheticals. This grounds your effort in lived experience and ensures relevance and ownership.

Execution question: What workflow today causes drag, delay, or cost – and would unlock real impact if rebuilt?

Key tools

Tips & tricks:

Workflow Intake Sheet

- Ask teams:
 - What takes too long
 - Involves too many handoffs
 - Creates inconsistent outcomes
 - Feels frustrating or inefficient
- Use a scoring rubric:
 - Frequency
 - Friction
 - Impact potential
 - AI readiness
- Keep it bottom-up; be specific ("client onboarding" not "operations")

Outcome:
1–2 real workflows prioritized per team/function with clarity on where to start.

Workflow Intake Sheet Template					
Workflow	Team Owner	Pain Points	Frequency	Impact potential	AI Readiness
Client onboarding	Ops	Too many handoffs	Weekly	Medium	High
Lead qualification	Sales	Delays & missed follow-up	Daily	High	Medium

Step 2: Redesign the workflow from zero

Avoid retrofiting. Most legacy workflows aren't designed for AI. This is where reinvention begins.

Strategic question: If we rebuilt this workflow today with AI from the start, what would it look like?

Key tools

- Zero-Based AI Workflow Redesign Canvas
- AI Workflow + Data Governance Overlay

Tips & tricks:

- Start with the end goal (e.g., "qualified lead")
- Ignore SOPs and legacy roles
- Break into atomic steps
- Define orchestration: triggers, approvals, monitoring
- Use before/after maps to visualize change

Outcome:

A clean-sheet AI-native workflow with clearly assigned ownership and agent logic.

Zero-Based AI Workflow Redesign Canvas

What it does:

- Anchors on the outcome
- Questions if the workflow or parts of it should exist at all
- Rebuilds with AI-first logic
- Breaks the workflow into granular steps
- Identifies (reassigns ownership):
 - Tasks to automate (AI-owned)
 - Tasks to augment (AI + Human)
 - Tasks to retain (Human-led)
- Reassigns ownership: AI, Human, Hybrid
- Reimagines the sequence, agents, prompts, handoffs, and guardrails
- Output is a new AI-native process design

Step 2: Redesign the workflow from zero

Instead of marginally improving legacy workflows, this canvas enables teams to rethink processes from a clean slate. It breaks workflows into tasks and reassigns ownership: what AI can automate, what it should support, and what remains human-led. The goal is not to digitize the past but to design the future, with AI agents at the center.

Here's a concrete, end-to-end example of how to apply the zero-based workflow redesign canvas using a realistic scenario: employee onboarding in HR.

Example Template: Zero-Based AI Workflow Canvas

Step	Outcome	Ownership	Trigger	Notes
Welcome email sent	Personalized onboarding intro	AI-owned	New hire confirmed in HR system	Auto-generated using metadata
Accounts provisioned	Slack, Google, Notion access	AI-owned	Completion of welcome step	Integrated with Okta APIs
FAQ access enabled	Self-serve chatbot	AI-owned	Login complete	Uses internal knowledge base
Intro meetings scheduled	Calendar invites across teams	Hybrid	Completion of setup	Agent suggests, manager confirms
Progress monitored	Dashboard updated	Human-led	Daily data sync	Weekly summaries auto-emailed

Data & tooling redesign: An inseparable layer of workflow reinvention

Workflow redesign is often seen as a productivity play – shifting tasks, collapsing steps, or introducing agents. But done right, it becomes your biggest structural lever to:

- Improve data quality and governance
- Rationalize and replatform your tool stack
- Enable agentic execution across AI-native systems

In an AI-first company, data, tools, and workflows converge – they can't be redesigned in isolation.



Data as a workflow design asset: Govern in the flow

AI-native workflows are only as strong as the data flowing through them. Most legacy workflows:

- Lack structured input formats
- Fragment data across tools
- Obscure ownership and validation
- Leave feedback loops to chance

Workflow redesign is your opportunity to build data governance into execution, not bolt it on later.

Use every step in the workflow to ask:

- What data is captured and how?
- At what moment?
- By whom?
- Where is feedback collected?
- How is feedback used to improve execution or models?

Design each step as a data-quality engine, with built-in structure, ownership, validation, and feedback loops.

"Don't treat data governance as a separate project. Bake it into the flow of work."

Include in your workflow redesign:

- A data capture map for each step (structured vs unstructured, manual vs AI-captured)
- Owners for data accuracy, review, and enrichment
- Embedded feedback loops (e.g., user satisfaction scores, error correction, outcome tracking)
- Validation logic: where human-in-the-loop (HITL) applies

Tooling redesign: The execution stack must evolve

Redesigned workflows often hit a wall because legacy tools:

- Can't be triggered by agents
- Don't support structured prompts or outputs
- Fragment process context across screens
- Offer no orchestration or composability

Each AI-native workflow redesign should be accompanied by a tooling rationalization, asking:

- Can our current tool support AI execution or orchestration?
- Does it enable feedback loops and structured capture?
- Is it composable with the rest of our stack?
- Should we buy, compose, or build this capability?

Tooling overlays should accompany every workflow map, showing:

- Tool touchpoints per step
- Friction points to replace
- Agent-to-tool integration logic
- Ownership of configuration, prompts, or logic updates

"Tools are no longer neutral infrastructure – they're execution interfaces for humans and agents alike."

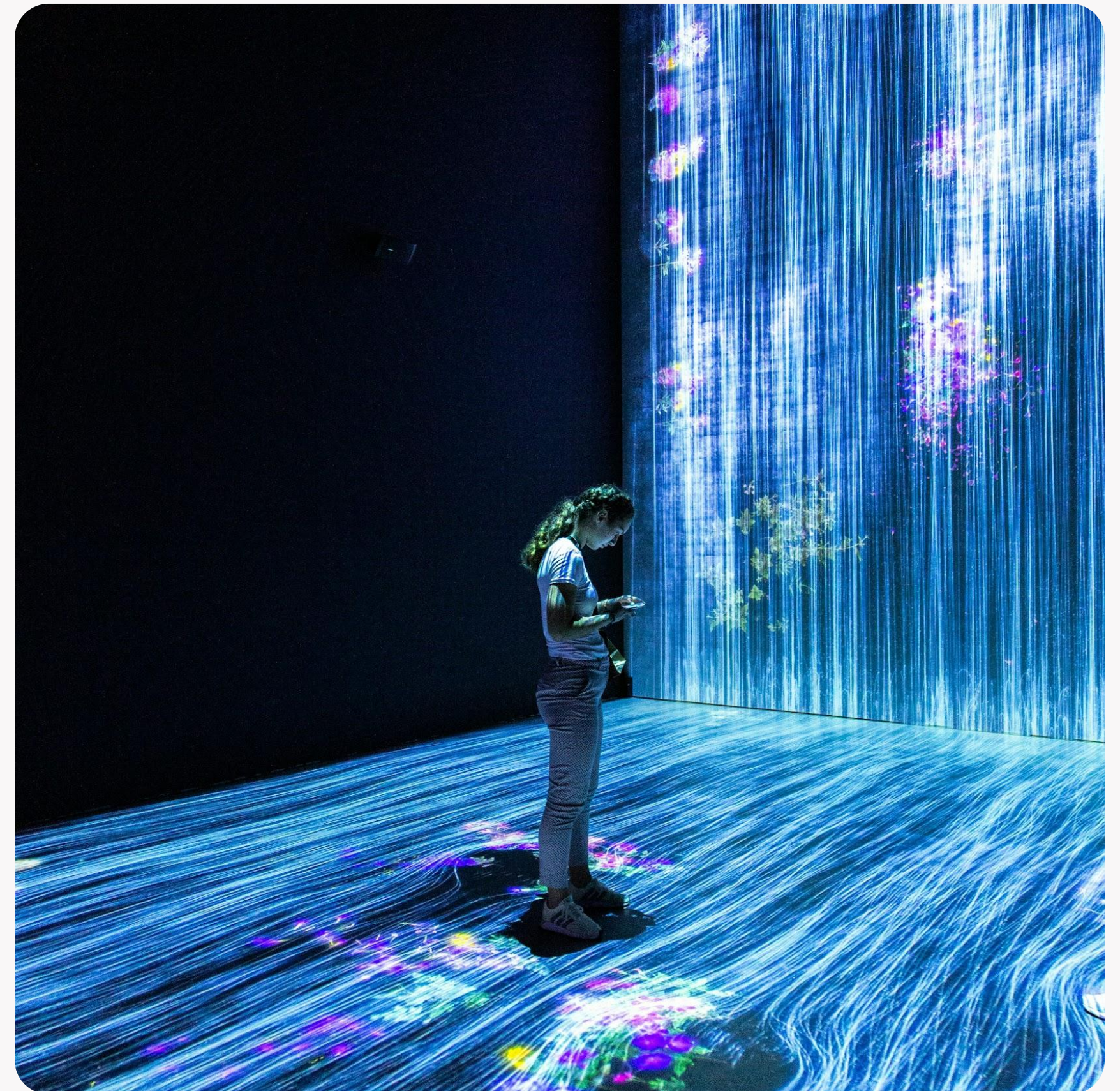


A mindset shift: workflows as operating systems

Treat every redesigned workflow as its own operating system:

- Data is the memory layer
- Tools are the execution layer
- Agents and humans are the actors
- Governance is built into the code, not layered on top

This systems thinking ensures that what you build doesn't just work today – it scales, learns, and improves over time.



What to include in your redesign outputs

Asset	Purpose
AI Workflow + Data Overlay	Map data capture, feedback, ownership at each step
Tooling Overlay	Visual tool interactions across redesigned flow
Buy / Build / Compose Matrix	Tool decision logic
Role-Tooling Map	Who owns configuration, prompts, oversight
Data Quality Checklist	Fields, formats, validation logic, HITL checkpoints

Step 3: Classify ownership – AI, human, or hybrid

This step is about task-level ownership within a workflow – classifying whether AI, humans, or hybrids execute each step, and how they interact in redesigned flows. It clarifies role split, reduces ambiguity, and helps guide investment and training.

Strategic question: Who (or what) should own each step?

Key tool

AI Ownership Heatmap

- AI Ownership Heatmap
- Use this heatmap to outline who (or what) owns each step in your workflow
 - Use color-coded tables or Miro boards
 - Assign clearly: avoid "unclear" zones
 - Aim to move 50% of workflows to AI-executed within 3–5 years

Outcome:
A mapped view of AI-owned, human-led, and hybrid workflows.

AI Ownership Heatmap – Example (HR onboarding):

Task	Ownership
Welcome comms & scheduling	AI Owned
Account provisioning	AI Owned
FAQs & document guidance	AI Owned
Progress monitoring	Hybrid
Feedback review	Hybrid
Final coaching	Human-owned

Step 4: Clarify step ownership and human-AI handoffs

AI changes roles and handoffs. Without clarity, confusion and failure points arise.

Strategic question: What changes for people involved and how is the system stitched together?

Key tool

- Role Redefinition Prompts: Document which roles shrink, grow, or evolve
- AI Orchestration Planner



Outcome:
Redefined roles (e.g., AI operator, prompt QA) and a clear orchestration plan: sequencing, monitoring, exception handling.

AI Orchestration Planner

- Define AI-human handoffs and escalation paths
- Identify orchestration gaps: trust layer, prompt library, routing engine

Example (HR onboarding) – Swimlane Diagram (simplified)

Step	Trigger	AI Agent	Human	Escalation Path
Auto-welcome email	New hire logged	Agent sends message	–	–
Provision tools	Email sent	Agent triggers Okta	–	Failure → IT support
Meeting scheduling	Setup done	Agent proposes slots	Manager approves	Delay → Ops team
First-week feedback	5 days post-start	Agent collects pulse	HR reviews flags	Negative → escalation to HR lead

Step 5: Prepare for pilot and feedback loop

Don't wait for perfection. Real feedback beats assumptions.

Strategic question: What do we need to launch and learn – fast?

Key tool

- Pilot Design Sheet
- Risk Tiering Framework

Tips & tricks

- Start small: one team, one flow
- Define clear go/no-go success criteria
- Assign a pilot owner with proximity to the work
- Plan for rapid iteration

Outcome:

- Small-scope pilot plan
- Guardrails in place
- Metrics to track speed, quality, satisfaction



Your AI-first operating model: From workflows to system

Goal: Design and embed a cohesive AI-native operating model – spanning governance, decision-making, capabilities, and incentives – to ensure AI is scaled and sustained across the enterprise.

Strategic reinvention sets the ambition. Operational redesign delivers it in workflows. But without a unifying operating model, these wins stay isolated. Without an AI-native operating model:

- Pilots remain isolated
- Teams duplicate effort
- Risks go unmanaged
- ROI is never fully realized

This track turns scattered successes into a repeatable system by:

- Connecting redesigns across domains
- Embedding governance that scales, not stalls
- Aligning talent, tools, and incentives with AI-first logic

Done right, this is how AI moves from a series of pilots to a new way of operating. It's how you go from doing AI to being AI-native.

With it, AI becomes not a one-off project, but a foundational capability. This track helps you:

- Operationalize strategic ambition
- Scale workflow redesigns coherently
- Govern experimentation without killing it
- Evolve roles, incentives, and decision rights for an AI-native future

Expected outputs of AI-first operating model accelerator

- System map of AI-human-agent orchestration
- Clear buy/build/compose capability decisions
- Live experimentation registry + cost controls
- AI-first role taxonomy and team charter
- Defined governance and escalation paths
- Enterprise-level enablement plan

Step 1: Visualize the AI operating model

Organizations are shifting from process hierarchies to agentic systems. This step makes AI-human orchestration visible, intentional, and scalable

Design question: How do humans, AI agents, systems, and governance layers interact?

Key tool

- AI Operating Model Visual Builder

Tips & tricks

- Design around real-time orchestration, not static flows
- Highlight agent-to-agent interactions across functions
- Make handoff and escalation logic explicit

Outcome:

A swimlane or system-level diagram with roles, agents, systems, and governance mapped.

What it does

- Maps how agents, humans, and systems collaborate
- Shows handoffs, triggers, sequencing, and guardrails
- Visualizes flattened hierarchies and agent pods
- Reveals oversight and governance points

Step 2: Make smart capability decisions

As teams race to adopt AI, many organizations waste resources building what they should buy – or buying generic tools where they should build proprietary advantage.

Design question: Where should we buy, build, or compose AI capabilities?

Key tool

→ Buy-vs-Build Matrix

What it does:

- Encourages buying commodity tools (e.g., transcription)
- Highlights where to build proprietary models (e.g., pricing engine)
- Suggests where to compose wrappers or hybrids

Outcome:
A clear capability map that aligns tech decisions with strategic value.

Buy-vs-Build Matrix
Use this tool to define what to build and what to buy.
Rule of thumb: Buy what's generic. Build what differentiates. Compose for flexibility.

Example:

Capability	Differentiator	Custom data	Integration needed	Decision
Internal chatbot	✗	✗	✗	Buy
Risk prediction model	✓	✓	✓	Build
Proposal generator	✓	Some	Medium	Compose

Step 3: Govern experimentation and control costs

AI is flooding into organizations through every open door, accelerated by low-code and no-code. While the old playbook clings to centralization, the real shift will be from rigid control to federated enablement. Without lightweight governance, AI adoption becomes fragmented and costly. This step creates structure without stifling innovation.

Design question: How do we enable bottom-up experimentation without chaos or tool sprawl?

Key tools

Experimentation Registry

- Centralized tracker of all AI experiments (in Notion, Airtable, etc.)
- Fields: Team, Owner, Use Case, Model/Tool, Impact, Contact
- Outcome: Institutional memory, pattern recognition, reuse

GATE Framework

Cost Guardrails

- Spend thresholds with review triggers
- Outcome: Budget control with flexibility



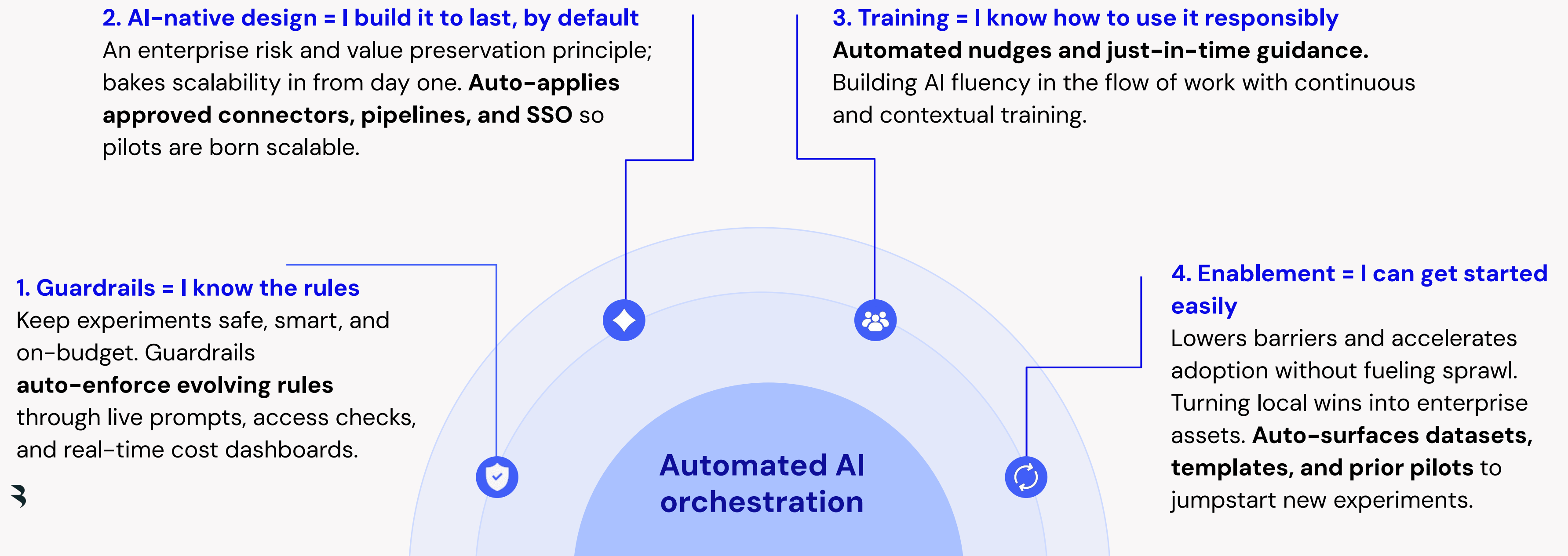
Tips & tricks

- Tag reusable experiments in the registry
- Run monthly AI experiment retros
- Publish a "Top 5 Experiments" newsletter to encourage cross-pollination



GATE framework: making AI orchestration work at scale

Orchestration succeeds when experimentation is guided by four elements, run on automation. Guardrails, design, training, and enablement all scale only if they are embedded and automated. That's how orchestration keeps pace with AI itself



Step 4: Redefine roles around orchestration and oversight

In AI-first systems, humans don't disappear – they move up the stack. This step remaps roles from execution to orchestration, oversight, and exception handling. Note that this is not about individual workflow ownership. While Operational Redesign clarifies who does what within workflows, this step defines the new roles your organization needs to sustain and scale AI-first ways of working across domains. It's about building the role architecture and capability system that lets AI-first operations scale – across functions, domains, and teams

Design question: As agents take over execution, what do humans do?

Key tool

- Role Remapping Framework

Tips & tricks

- Build capability tracks tied to these roles
- Redesign job descriptions using AI-first logic
- Embed these roles into governance structures and transformation teams

Outcome:

A set of clearly defined, high-leverage roles built for agentic execution environments.

Role Remapping Framework

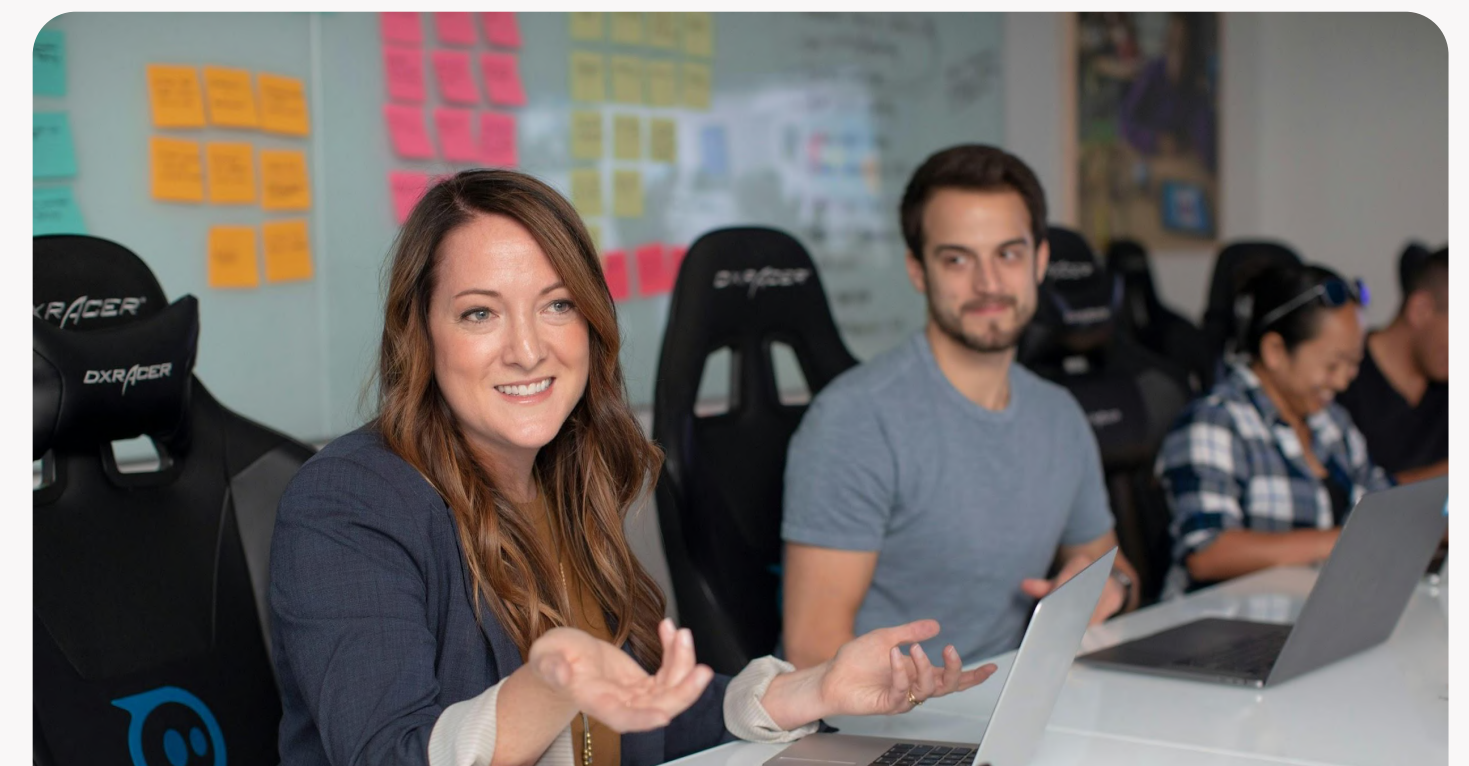
- Drives leaner, smarter teams with exponential leverage
- Aligns hiring and upskilling with AI-native execution
- Sustains redesigned workflows beyond launch

Examples:

Legacy role	AI-first role	Shift
Customer Agent	AI Supervisor	Task handler → Exception manager
Analyst	Output Validator	Modeler → Reviewer
Ops Manager	Workflow Owner	Coordinator → Agent designer
Writer	Prompt Architect	Creator → Curator

Typical AI-first role profiles

- **AI Workflow Owner:** Designs and optimizes agent-led workflows
- **Output Validator:** Ensures AI output quality and compliance
- **AI Supervisor:** Monitors agent performance and handles exceptions
- **Prompt Architect:** Crafts, curates, and evolves system prompts
- **AI Orchestrator** (optional composite): Manages integration, metrics, and lifecycle of AI systems across teams



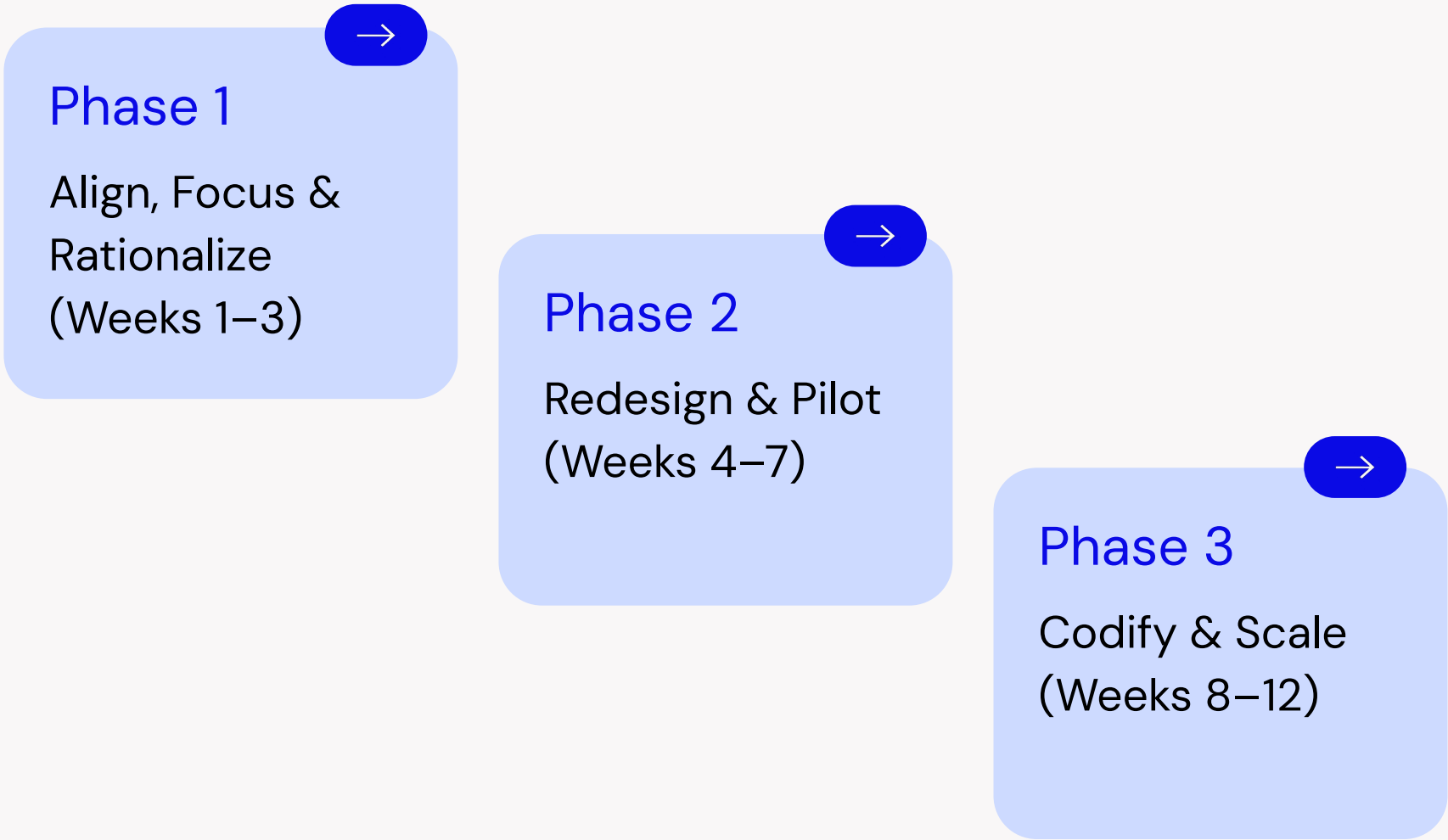
SECTION 6

Your 90-day AI-first transformation roadmap



Your 90-day AI-first transformation roadmap

This roadmap helps you move from vision to velocity in just three months – with early wins, structural enablers, and a system that scales.



By day 90 you've built:	
Capability	Outcome
Strategic focus	Clear AI ambition + 3 strategic bets
Workflow reinvention	5+ redesigned workflows live
Orchestration logic	Swimlanes, handoffs, ownership across roles & agents
AI adoption	100+ users with co-pilot kits, prompt libraries
Governance	Registry, cost guardrails, responsible AI policy live
Cultural activation	AI showcase rituals, internal marketplace, role pilots
Infrastructure	AI operating model sketch + internal scaling assets

Phase 1: Align, Focus & Rationalize (Weeks 1–3)

Goal: Establish a bold AI-first ambition, surface your most strategic opportunities, and clean up your current AI portfolio to focus on what truly aligns.

Outputs

- Bold AI-first ambition & north star commitment
- Strategic lever map defining where AI can reshape advantage
- Rationalized AI portfolio (continue/pivot/kill matrix)
- Prioritized domain focus for redesign (2–3 to start)
- Taskforce activated with execution mandate

Tips & Tricks for Rationalization:

- Be honest: What was built just to “do something with AI”?
- Use your AI-first ambition as the filter. If it doesn’t accelerate it, cut it.
- Expect to retire or repurpose 40–60% of the existing portfolio – this isn’t failure; it’s focus.
- Socialize this as “freeing up capacity” to double down on what matters.

Key activities

Action	Tool	Outcome
Define AI-first ambition	Exec Vision Prompts + AI North Star Goal Canvas	1–2 North Star goals (e.g., “Redesign 10 workflows,” “50% AI-executed tasks,” etc.)
Run C-Suite Reinvention Workshop	Strategic Lever Mapping Canvas	Agreement on 2–3 strategic levers to protect, reshape, or replace
Frame AI-native threats & possibilities	Provocation Prompts + Pre-mortem Workshop	Visual threat map + reframed opportunity space
Audit existing AI initiatives	AI Initiative Review Board (see template below)	Full inventory of current AI pilots, tools, projects
Apply Continue / Pivot / Kill logic	Initiative Scoring Framework	Decision matrix across portfolio – expected: ~50% discontinued
Prioritize 2–3 lighthouse domains	Opportunity Mapping Canvas	Functions/workflows selected for AI-native redesign
Activate the AI Transformation Office	Charter Template + Role Mandates	Named cross-functional leads reporting into COO/CEO, focused on enablement & orchestration, not ownership

Phase 2: Redesign & Pilot (Weeks 4–7)

Goal: Run rapid AI-native redesigns of high-friction workflows, supported by early governance and clear ownership.

Outputs

- 3–5 AI-native workflows live or in test
- Ownership heatmaps and swimlanes for orchestration
- Centralized experimentation registry
- Tool usage dashboard and license policy live
- Teams trained on co-pilots with prompt libraries

Key activities		
Action	Tool	Outcome
Run 2–3 zero-based redesign sprints	AI Workflow Redesign Canvas	Clean-sheet AI-native workflows with ownership mapped
Build AI Ownership Heatmaps	Ownership Matrix	Visual task ownership split: AI / Human / Hybrid
Launch pilots with orchestration logic	Orchestration Swimlanes	Clarity on agents, humans, triggers, and escalations
Set up Experimentation Registry	Notion / Airtable Template	Shared log of all AI experiments, tagged for reuse
Define cost controls & usage guardrails	Tiering Framework + Dashboard	Predictable spend + guardrails without stifling innovation
Begin prompt literacy & co-pilot training	AI Co-Pilot Kits	Teams equipped with prompt libraries and task templates
Run weekly “AI Wins” demos	Slack/Teams Showcase	Cross-team momentum & cultural reinforcement

Phase 3: Codify & Scale (Weeks 8–12)

Goal: Move from experiments to systems. Embed new ways of working, redefine roles, and build your AI operating model.

Outputs

- AI-first role pilots embedded in 2–3 teams
- AI operating model visual shared org-wide
- Marketplace with 10+ reusable workflows/prompts
- Governance framework, spend guardrails, role clarity
- Internal dashboard with early business impact

Key activities		
Action	Tool	Outcome
Redefine pilot team roles	Role Remapping Framework	Introduce new roles: AI Supervisor, Prompt Architect, Validator
Visualize operating model	AI Operating Model Builder	Swimlane diagram across agents, humans, governance
Launch AI Marketplace	Internal Miro/Notion Library	Repository of prompts, workflows, pilots
Run 2–3 “Prove & Scale” Clinics	Prove & Scale Tracker	Institutionalize 3 high-ROI use cases across teams/domains
Introduce AI Governance Lite	Responsible AI Checklist + Review Flow	Ethics, human-in-loop checkpoints, data tiers
Publish AI impact dashboard	Early KPI Tracker	Tracks: time saved, % AI-executed steps, satisfaction, rework rates
Redefine pilot team roles	Role Remapping Framework	Introduce new roles: AI Supervisor, Prompt Architect, Validator

Built-in momentum for beyond day 90

- **Reuse over reinvention:** Shared marketplace, prompt library, and experiment registry prevent duplication.
- **Flywheel effect:** Success stories feed into exec reviews, inspire new sprints, and fuel budget reallocation.
- **Role readiness:** Pilot teams become talent accelerators for new capability tracks.
- **Execution rhythm:** Lightweight rituals (weekly demos, retros, AI clinics) build habit and help scale without bureaucracy.



Key takeaways

Becoming AI-first is a strategic shift, not a tooling upgrade.

AI rewrites how value is created, decisions are made, and work is organized.

Capturing real value requires redesigning the system itself

Transformation happens across three interconnected tracks.

Strategic reinvention, operational redesign, and an AI-first operating model must move in sync to turn isolated wins into structural advantage.



Ready to become an AI-first company?

We help you set an integrated strategy that lets you capture the value of AI, both in the short and long term.

Let's talk

AI reinvention sprint

Define where AI can reshape your business model and **create moats competitors can't copy**. In 4–6 weeks, we help leadership align on bold, future-back bets that anchor AI transformation in strategy, not scattered pilots.

Zero-based workflow redesign sprints

Rebuild your most critical workflows from scratch with AI at the core. In just a few weeks, **we transform high-friction processes into AI-native flows** that cut cost, speed up execution, and prove what 80% AI-executed really looks like.

AI-first operating model blueprint

Codify the system that makes AI adoption scalable and safe. In 10–12 weeks, **we design governance guardrails, role taxonomies, and capability roadmaps** so your organization moves from isolated wins to a repeatable AI-first model.

Artificial intelligence. Real outcomes.

We are BOI. Your AI transformation partner.

Let's talk

Authors



Laura Stevens PhD.
Managing Director, AI Transformation
[Connect on LinkedIn](#)
laura.stevens@boardofinnovation.com



Philippe De Ridder
CEO & AI speaker
[Connect on LinkedIn](#)
philippe@boardofinnovation.com



Let's
make it
happen

BOI

Get in touch

hello@boardofinnovation.com