

wavex

EXECUTIVE WORKSHOP RESOURCE · 2026

AI-First Leadership Workbook

Cloud-First Freed Technology. AI-First Frees Your People.

A practical framework for changing the habits, information and processes that allow AI to create real business value.

01 WHY AI-FIRST, WHY NOW?

Cloud-first changed the technology model. AI-first changes the operating model.

A decade ago, cloud-first strategies changed the default assumption: technology no longer needed to be constrained by physical infrastructure. AI is creating a similar shift, but the constraint this time is how work gets done.

An AI-first organisation is not simply one with licences, chat tools or pilots. It deliberately changes how meetings are captured, information is structured, processes are designed, people learn and successful ideas become normal working practices.

The shift is already underway

Widespread access is no longer the differentiator. The leadership task is to create the conditions in which people can use AI responsibly, confidently and repeatedly.

89%

of respondents report regular AI use in at least one business function.

McKinsey, The State of AI: Global Survey 2026

44%

report that AI is scaling across their enterprise. Adoption is broad; maturity is still catching up.

McKinsey, The State of AI: Global Survey 2026

67% / 32%

Organisational factors versus individual factors in Microsoft's model of reported AI impact.

Microsoft, 2026 Work Trend Index. Association, not causation.

40% higher

productivity growth at companies most exposed to AI versus least exposed.

PwC, 2026 AI Jobs Barometer

26% Only 26% of AI users surveyed by Microsoft said their leadership was clearly and consistently aligned on AI. Leaders have an opportunity to turn scattered effort into a shared direction.

> The opportunity is no longer simply to provide access to AI. The opportunity is to redesign the organisation so people can actually benefit from it.

Sources: McKinsey, *The State of AI: Global Survey 2026*; Microsoft, *2026 Work Trend Index*; PwC, *2026 AI Jobs Barometer*. Figures checked 23 October 2026. Full URLs are listed in the source note at the end of this workbook.

02 A PRACTICAL LEADERSHIP CONVERSATION

Ten characteristics. Four stages. One useful next behaviour.

Use the pages that follow as a leadership team, not as a compliance exercise. For each characteristic, decide where you are now, where you need to be and what must become normal next.

1 AI Curious	2 AI Enabled	3 AI Embedded	4 AI First

AI Curious: informal or individual experimentation. **AI Enabled:** basic tools and practices exist but adoption varies. **AI Embedded:** AI-supported behaviours are becoming repeatable. **AI First:** work is routinely designed assuming AI can participate appropriately.

> Maturity comes from repeated behaviours, not isolated projects.

Our overall starting point: _____ Our 12-month ambition: _____

The most important behaviour to normalise first: _____

The ten characteristics

01 Meetings become organisational knowledge	06 Managers challenge manual work
02 Information is ready for AI	07 Experiments become capability
03 Approved AI is clear and easy to use	08 AI access and agents are governed
04 Training is relevant to people's jobs	09 AI value is measured
05 Employees experiment and share	10 Leadership makes AI visible

Companion reading

This workbook accompanies Wavex's practical guide, How to become an AI-first organisation. Use the guide for context and this workbook to lead the discussion.

Facilitate a 60-minute leadership session

1. Score honestly

Take each area in turn. Use the stage descriptions as evidence, not aspiration. Ask what happens repeatedly today.

2. Choose the next move

Do not try to jump to Stage 4. Identify the one behaviour, control or capability that would make progress real.

3. Name the proof

Assign an owner, a date and a measure. Agree what you should be able to observe at the next review.

Session date: _____ Facilitator: _____

The leadership question we most need to answer: _____

01 MEETINGS BECOME ORGANISATIONAL KNOWLEDGE

Make important conversations usable after they end.

Meetings contain decisions, commitments, context, customer knowledge and actions. When that value disappears into personal notes or memory, the organisation loses the ability to learn from its own work.

AI becomes more useful when meetings create structured, searchable knowledge that can prepare follow-ups, recover decisions and surface what has changed.



A record is valuable when it supports a decision, an owner or the next conversation.

1 Conversation › 2 Capture › 3 Decisions & actions › 4 Searchable knowledge › 5 Better follow-through

1
AI CURIOUS
Personal notes dominate. Trial transcription in one management meeting and compare AI actions with manual notes.

2
AI ENABLED
Define which meetings are captured. Use one summary format with decisions, owners and due dates.

3
AI EMBEDDED
Important meetings routinely create summaries, actions and follow-ups stored somewhere searchable.

4
AI FIRST
Meeting knowledge informs workflows. AI can answer what changed, what is outstanding and what to discuss next.

Leadership discussion: How much useful organisational knowledge disappears when our meetings end?

Personal notebooks | No agreed format | Unclear follow-up

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

One behaviour this month: _____

Owner: _____ Success looks like: _____

Governance note: not every meeting should be recorded. Sensitive HR, legal or confidential discussions may require different handling.

02 INFORMATION IS READY FOR AI

AI needs more than access to information. It needs access to the right information.

Duplicate documents, old versions, abandoned Teams, unclear permissions and conflicting policies create confusion for people. They create the same problem for AI, only faster and at larger scale.

Information readiness means clarifying ownership, authoritative sources and lifecycle rules. It is not an IT tidy-up. It is a business decision about what the organisation should be able to trust.



The aim is reliable answers, not simply more content.

ORGANIC INFORMATION GROWTH

Several versions, sites no one owns, scattered records and permissions that do not reflect today's work.

→

INFORMATION READY FOR PEOPLE AND AI

Clear owners, authoritative sources, review cycles, relevant access and information that is maintained as work changes.

01 → 04

From clean-up to a deliberate information architecture

AI Curious	Information has grown organically. Start by naming the areas where people most often cannot find a reliable answer.
AI Enabled	Basic cleanup begins. Assign owners, archive clearly obsolete sites and identify the most important duplicate content.
AI Embedded	Authoritative sources, content ownership, permissions reviews and lifecycle rules exist for high-value information.
AI First	Information architecture is actively designed for people and AI, with metadata, review rhythms and clear accountability.

Leadership discussion: If two employees ask the same question, will they reliably find the same answer?

Duplicate truth | Obsolete content | No owner

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Priority information area: _____

Owner: _____ First clean-up action: _____

Related Wavex reading: SharePoint storage limits: avoid costly problems. Better information hygiene can also reduce unnecessary storage and associated costs.

03 APPROVED AI IS CLEAR AND EASY TO USE

Make the safe path easier than the unsafe one.

If approved tools are hard to find, access or understand, people may avoid AI entirely or turn to unapproved alternatives. Clarity is an adoption feature as much as a governance control.

Employees need a plain answer to three questions: Which tools can I use? What information can I put in them? When should I ask for help or human review?



Good controls help people move with confidence, rather than stopping useful work.

Shadow route

Unclear policy, personal accounts and unknown data handling produce inconsistent workarounds.

Approved route

Named tools, clear data-handling guidance, simple access and a visible route for questions.

Governed operating model

AI identity, supplier assurance, permissions, lifecycle management and auditability work with normal IT management.

AI CURIOUS

Individuals experiment without a shared understanding of safe use.

AI ENABLED

Approved platforms and basic guidance exist, but awareness is uneven.

AI EMBEDDED

Data handling, review and approval are built into normal ways of working.

AI FIRST

Governed AI identities, access and lifecycle management are managed alongside other enterprise services.

Leadership discussion: Do employees know exactly which AI tools to use and what information they can safely give them?

Confusing guidance | Personal accounts | No review path

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

A safe-path improvement: _____

Owner: _____ Evidence of clarity: _____

Related Wavex reading: AI agents need an identity: how to govern them.

04 TRAINING IS RELEVANT TO PEOPLE'S JOBS

Training should answer "How does this make my job easier?" not "What does this tool do?"

Generic awareness builds curiosity, but practical confidence comes from familiar tasks. A finance leader needs a different starting point to a salesperson, HR adviser or operations manager.

Role-relevant enablement gives people permission to try useful patterns while preserving judgement, quality control and accountability.



The most persuasive use cases are close to the work people already do.

Finance
Variance commentary, forecast analysis, board reporting and data analysis.

Sales
Account research, meeting preparation, proposal drafting and CRM updates.

HR
Policy search, employee communications, job descriptions and learning material.

Operations
Exception analysis, reporting, process improvement and knowledge retrieval.

1
AI CURIOUS
Generic awareness sessions introduce possibilities without a clear link to a person's own work.

2
AI ENABLED
Role-specific examples and guided practice help teams try appropriate, low-risk uses.

3
AI EMBEDDED
Departments maintain use-case libraries, examples and peer support around recurring work.

4
AI FIRST
AI capability is part of role development, onboarding and how work quality is improved.

Leadership discussion: Could every employee name three ways AI could make their own job easier?

Generic training | No practice time | No job context

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Priority role or team: _____

Useful task to start with: _____ Owner: _____

05 EMPLOYEES EXPERIMENT AND SHARE

Innovation spreads socially.

People are more likely to adopt AI when they see trusted colleagues demonstrate a useful example. One practical five-minute demonstration can do more than another broad presentation about possibility.

Small experiments need visible routes into collective learning. Otherwise helpful techniques stay hidden in individual habits.



Sharing turns a private shortcut into a repeatable organisational idea.

1 See a useful example › 2 Try it on a real task › 3 Improve the approach › 4 Share the result › 5 Others adapt it

01 → 04

Make learning visible, lightweight and normal

AI Curious	Individuals experiment quietly. Good ideas rarely travel beyond the person who discovered them.
AI Enabled	Leaders encourage experimentation through weekly tips, small challenges and department examples.
AI Embedded	Use-case demonstrations, AI idea-of-the-month stories and champions routinely share successes.
AI First	Experimentation, peer learning and thoughtful iteration are a normal part of continuous improvement.

Leadership discussion: How would somebody in Finance learn about an AI technique discovered by somebody in Operations?

Ideas stay private | No showcase | Fear of imperfect trials

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Sharing habit to introduce: _____

First team: _____ Owner: _____

06 MANAGERS CHALLENGE MANUAL WORK

Ask the management question that unlocks redesign: "Why are we still doing this manually?"

An AI-first organisation does not assume existing work should continue as it does today. Managers ask which parts need human judgement, which AI can prepare, which can be automated and where human approval matters most.

This is not a call to automate everything. It is an invitation to remove avoidable effort so people can apply more of their time to decisions, relationships and improvement.



Start with the work that consumes time without requiring much judgement.

Manual	AI assisted	Automated	Agent supported
Person completes all steps and searches for information.	AI prepares a draft, summary or analysis for review.	Known steps move without manual intervention.	A governed agent performs defined work with ownership and controls.

1 AI CURIOUS

Teams spot individual tasks that could be faster, such as research or document preparation.

2 AI ENABLED

Managers use recurring prompts to challenge reporting, data entry, classification and follow-up.

3 AI EMBEDDED

Process reviews regularly distinguish human judgement, AI preparation and automation opportunities.

4 AI FIRST

New work is designed with appropriate human and AI contributions from the outset.

Leadership discussion: Which five activities consume the most employee time without genuinely requiring human judgement?

"How we've always done it" | No process owner | Automate before understanding

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Manual activity to challenge: _____

Human judgement point: _____ Owner: _____

07 SUCCESSFUL EXPERIMENTS BECOME ORGANISATIONAL CAPABILITY

A useful prompt helps one person. A repeatable workflow can help the organisation.

Personal productivity becomes transformation when useful behaviours are captured, improved and incorporated into shared processes. The practical question is not “Who knows a good prompt?” It is “How will the next person benefit without starting again?”



Turn a promising habit into a reusable capability before moving to more complex automation.

Prompt
One person asks AI to research an account.

Template
The team creates a standard, reviewed prompt.

Workflow
CRM information is added to a defined process.

Automation
A meeting briefing is generated automatically.

Agent
A governed agent supports defined steps.

AI CURIOUS
Useful AI behaviours depend on individuals and their personal ways of working.

AI ENABLED
Teams begin sharing templates, prompts and examples for recurring tasks.

AI EMBEDDED
Repeatable workflows use shared data, standards and clear owners.

AI FIRST
Reusable capability is deliberately built into systems, workflows and governed agents.

Leadership discussion: Which useful AI behaviours currently depend entirely on one employee knowing how to do them?

Hero-user dependency | No shared standard | No process owner

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Experiment worth standardising: _____

Process owner: _____ Next form: _____

Wavex examples: secure AI sales enablement and property portfolio AI automation.

08 AI ACCESS AND AGENTS ARE GOVERNED

Risk changes when AI moves from answering questions to taking actions.

As AI becomes more capable, it may gain access to information, systems and operational steps. Governance must become more specific: identity, permissions, ownership, approval, audit, lifecycle and human accountability.

Governance is not a standalone policy document. It is the set of working controls that lets people use AI and agents safely in live processes.



If an AI agent can perform an action, somebody still needs to own that action.

Identity
Who or what is the agent?

Access
What data and systems can it reach?

Ownership
Who is accountable for its purpose and outcome?

Audit & lifecycle
Can we review, change or retire it deliberately?

01 → 04

Move governance with the level of autonomy

AI Curious	Personal assistant use is emerging. Controls are informal and risk is managed case by case.
AI Enabled	A basic policy defines approved tools, sensitive data and expectations for human review.
AI Embedded	Agents and permissions are governed with named ownership, approval, audit and access controls.
AI First	AI identities are managed like other enterprise identities throughout their lifecycle.

Leadership discussion: If an AI agent performed an incorrect action tomorrow, could we establish who owned it, why it happened and what permissions enabled it?

Unnamed ownership | Over-broad access | No audit trail

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Control to strengthen: _____

Accountable owner: _____ Review date: _____

09 AI VALUE IS MEASURED

The objective is not more AI usage. It is more organisational capacity.

Licences, prompts and tools show activity. They do not prove a business outcome. A mature approach links AI-enabled work to time saved, administration reduced, faster turnaround, better decisions, capacity, customer response, risk reduction or revenue contribution.



Measure the work and the business result, not merely the presence of the technology.

Activity measures

Number of licences, prompts, tools or logins. Useful for context, but not for value.

Outcome measures

Time saved, throughput, turnaround, error reduction, customer response and capacity created.

Decision measures

Where investment is working, where to redesign further and where controls must improve.

AI CURIOUS

Stories and anecdotes suggest value but there is little shared evidence.

AI ENABLED

Adoption metrics show where people are trying approved AI tools.

AI EMBEDDED

Teams track business outcomes for priority use cases and share learning.

AI FIRST

Leaders make portfolio-level decisions about AI investment, redesign and risk using evidence.

Leadership discussion: Could we show the Board where AI created measurable value last quarter?

Licence count as success | No baseline | No owner for value

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Use case to measure: _____

Outcome measure: _____ Baseline source: _____

10 LEADERSHIP MAKES AI VISIBLE

Employees notice what leaders do more than what leaders announce.

Leadership behaviour sets the permission structure for change. When leaders visibly use AI for preparation, research, summaries, drafting and action tracking, they show that exploration and quality control belong together.

They also shape the better question. Rather than asking whether someone has tried a tool, they ask where effort can be removed, work can be redesigned and human judgement can be put to better use.



Modelling considered use is more powerful than issuing another announcement.

INSTEAD OF ASKING

"Have you tried Copilot?"

ASK

"Could AI remove some of the effort from this?"

"Why are we still doing this manually?"

1 AI CURIOUS

Leaders sponsor activity and communicate why AI matters, often from a distance.

2 AI ENABLED

Leaders participate in practical examples and use approved AI in visible, sensible ways.

3 AI EMBEDDED

Leaders routinely challenge manual work, share learning and ask teams to evidence value.

4 AI FIRST

Leaders redesign the operating model around appropriate human and AI collaboration.

Leadership discussion: What AI behaviour are our leaders currently modelling for everybody else?

Sponsorship without participation | Mixed messages | No protected time

WHAT COULD WE DO NEXT?

Current stage: _____ Target stage: _____

Leadership behaviour to make visible: _____

Leader: _____ When will we review it? _____

11 WHY AI ADOPTION IS REALLY A BEHAVIOUR-CHANGE PROGRAMME

AI adoption is not a launch event.

A launch email, policy, training invitation or licence notification may make AI available. Lasting change needs people to see a useful behaviour, try it safely, share what worked and see that the organisation values the learning.

Microsoft's 2026 Work Trend Index reported that organisational factors such as culture, manager support and talent practices were more strongly associated with reported AI impact than individual factors. That does not prove cause and effect, but it is a useful prompt for leaders: build the conditions around the person, not just the person's skill.

> Change rarely happens because a solution becomes available. It happens because new behaviour becomes normal.

Show
Use a concrete example from a role people recognise.

Try
Make one small, low-risk experiment easy to begin.

Share
Let colleagues see a useful approach and adapt it.

Measure
Track where adoption and business value are emerging.

Recognise
Reward thoughtful innovation and good judgement.

Repeat
Keep learning in the rhythm of normal work.

What leaders can do this week

- Open a meeting with a real use case, not a tool demonstration.
- Ask a team to try one helpful pattern on one recurring task.
- Make space for a five-minute peer demonstration.

What to notice

- Which teams are producing outcomes, not only activity?
- Where are people blocked by access, confidence or information?
- Where could a manager make experimentation safer?

OUR ADOPTION LOOP

One behaviour to show: _____

Team that will try it: _____

How we will share learning: _____

What evidence we will notice: _____

12 90-DAY AI-FIRST LEADERSHIP PLAN

Choose a balanced start: quick wins, foundations and one opportunity to transform.

Do not attempt everything at once. Use the next 90 days to make a few useful behaviours visible while building the information, governance and leadership foundations that let them last.

Three quick wins

Visible actions that build confidence and create practical learning.

- ☐ Begin transcribing leadership meetings
- ☐ Start a weekly AI tip or demo
- ☐ Publish approved AI tools and data guidance
- ☐ Trial role-specific AI training
- ☐ Invite employee use-case demonstrations

Three foundations

The conditions that make adoption safer and more repeatable.

- ☐ SharePoint or information clean-up
- ☐ Content ownership and review cycles
- ☐ AI governance and approval route
- ☐ Permission and identity clarity
- ☐ AI value measurement

One transformation opportunity

Choose a process where time, experience or quality could improve materially.

- ☐ Sales enablement
- ☐ Customer onboarding
- ☐ Reporting
- ☐ Proposal creation
- ☐ Invoice processing
- ☐ Knowledge management

Current process
What is slow, repetitive or hard to find?

›

AI-assisted
What could AI prepare for a person to review?

›

Automated
Which known steps could move without manual effort?

›

Future AI-first process
What becomes normal, governed and measurable?

Transformation opportunity: _____ Executive sponsor: _____

The outcome we intend to improve: _____

13 ACTION PLANNING TABLE

Turn the conversation into ownership.

Complete this table after working through the maturity areas. Aim for a small number of observable next actions, with a named owner and a clear measure of success.

Area	Current stage	Target stage	Next action	Owner	Target date	Measure of success
01 Meetings become knowledge						
02 Information ready for AI						
03 Approved AI is clear						
04 Role-relevant training						
05 Experiment and share						
06 Challenge manual work						
07 Experiments become capability						
08 Govern AI access and agents						
09 Measure AI value						
10 Leadership makes AI visible						

Keep the plan usable

A plan with fewer, clearer commitments is easier to lead. Review it every month, celebrate evidence of real behaviour change and adjust where learning tells you to.

Next leadership check-in: _____ Who will maintain this plan: _____

What must be true by the next review: _____

14 FIVE QUESTIONS FOR THE LEADERSHIP TEAM

Make the conversation about work, not technology.

Use these prompts in a facilitated session. Invite different functions to contribute, write the answers down and look for one shared pattern that deserves action.

1. Where do our people lose the most time today?

2. Which organisational knowledge is hardest to find?

3. Which successful AI behaviours depend on individuals?

4. Which processes are we maintaining simply because "that is how we have always done it"?

5. If AI capability doubled in the next two years, what would prevent us benefiting from it?

15 WHAT AI-FIRST REALLY MEANS

AI-first does not mean AI everywhere.

People remain critical for judgement, leadership, relationships, empathy, creativity, negotiation, accountability and complex decisions.

The aim is not to remove people from work. It is to remove work that prevents people doing what they are best at.

> Cloud-First Freed Technology. AI-First Frees Your People.

The organisations that gain the most from AI will not necessarily be those with the greatest number of tools. They will be those that become best at changing behaviour, improving information, redesigning processes and turning AI capability into normal everyday working practices.

From AI experimentation to AI-first: the Wavex approach

Assess	Prepare	Enable	Transform	Manage
Readiness, staff survey, opportunity discovery and process analysis.	SharePoint, information quality, permissions, governance and DLP.	Copilot, approved AI platforms, training and adoption.	Automation, workflow redesign, agents and integrations.	Security, identity, governance, measurement and continuous improvement.

Where should your organisation start?

Wavex's **AI Readiness & Opportunity Assessment** helps leadership teams assess people, processes, information, governance and technology, then turn the findings into a practical roadmap.

Read the Wavex AI-First guide and talk to Wavex about AI readiness

Continue the conversation

Return to the companion article: How to become an AI-first organisation.

Leadership challenge

What are our people still spending time doing today that they should not need to be doing two years from now?

Evidence sources: McKinsey State of AI 2026 · Microsoft 2026 Work Trend Index · PwC 2026 AI Jobs Barometer. Additional Wavex reading: IT strategy and business strategy · AI without lock-in.