

 teamraderie

Team-Level AI Transformation

Research Day – Palo Alto, CA

○ May 27, 2026

Agenda

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- **Breakfast: 8:00 am - 8:30 am**
 - **8:30 am - 8:40 am: Welcome and Framing the Day**
Michael McCarroll, SVP & GM - Teamraderie
 - **8:40 am - 9:10 am: Team-Level AI Adoption: An OpenAI Perspective**
Arvind KC, Chief People Officer - OpenAI
Arvind will share how OpenAI is approaching team-level AI adoption and what leaders can learn from scaling AI across the organization.
 - **9:10 am - 9:20 am: Executive Connection & Framing**
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A short interactive exercise to help shift into open discussion, peer exchange, and collaborative learning.
 - **9:20 am - 9:50 am: What the Data Shows: Measuring Team-Level AI Transformation**
Paul Leonardi, Univ. of California; Irina Egorova, Elle Giraldo, Teamraderie
Drawing on data from 75 teams, we will explore how teams progress from AI experimentation to workflow redesign and what stronger-performing teams do differently.
 - **9:50 am - 10:50 am: The Team AI Adoption Curve in Practice**
Paul Leonardi, Matt Beane, Univ. of California; Anja Nabergoj, Stanford University; Mohit Jiwani
Four experts will lead fast-paced interactive exercises that simulate how real teams progress through different stages of AI adoption, from early experimentation to workflow redesign and scaled operating change.
 - **Break: 10:50 am - 11:00 am**
 - **11:00 am - 11:45 am: How Executive Teams Are Organizing for AI Adoption at Scale**
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CHROs will discuss how their C-Suite is approaching AI adoption across teams, functions, and workflows while balancing enterprise direction with local experimentation and operational change.
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60 Executives, 30 Companies, and One Question



“ At scale, how to get our teams to improve KPIs by reimagining their workflows with AI? ”

What CIOs and CHROs are Being Asked to Explain

95%

*of enterprise GenAI pilots
how no measurable change in P&L.*

- Tools are deployed
- Training is complete
- **Why is measured KPI improvement so infrequent?**

What the Top 5% of Teams Are Doing Right

5%

*of enterprise GenAI pilots
show transformative value in P&L.*

WHAT THEY SHARE

**A set of five operating
practices.**

*In an AI-enabled workflow, the absence of these
practices doesn't just slow a team down —
it causes them to predictably fail.*

Five Operating Practices of Successful KPI Improvement

1

Diagnose where work stalls

Start from where flow breaks — not from where AI could theoretically be useful.

2

Decompose into task units

Decide explicitly which tasks are human, which are AI-led, and which are human-in-the-loop.

3

Redesign roles & accountability

Reassign micro-accountabilities so AI is part of the workflow, not a tool layered on top of it.

4

Move beyond 'time saved'

Measure decision quality, throughput, error rate — the things that actually move a KPI.

5

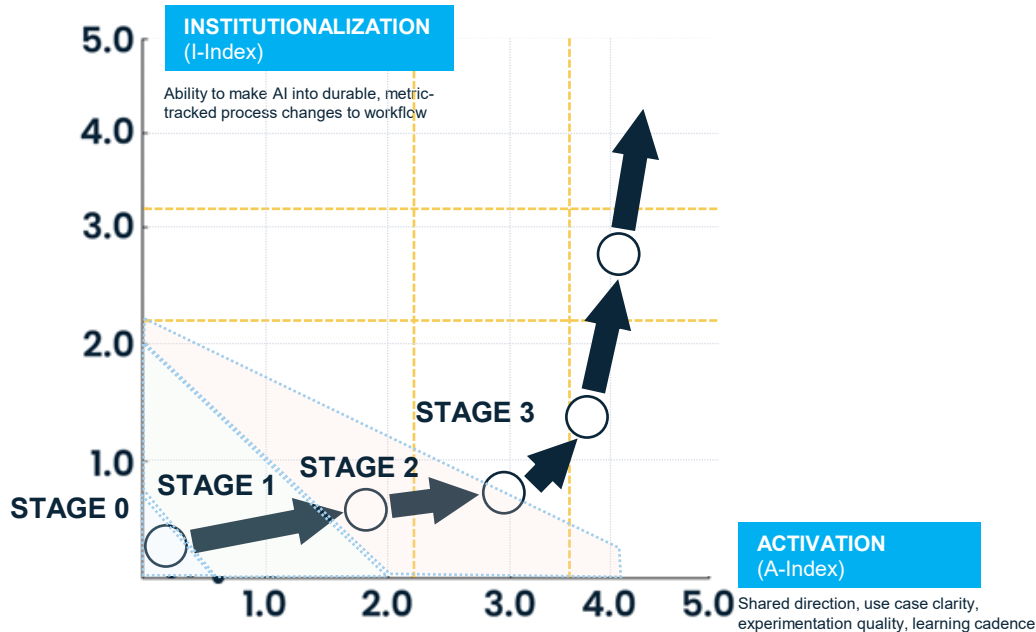
Run 30-day experiments

Short. Bounded. With explicit success criteria. Not six-month roadmaps.

These are the practices faculty will help your teams to embed.

The A-I Curve

Points to Three Predictable Gaps



WHERE TEAMS FAIL PREDICTABLY

1 Activation Gap

Team uses AI individually but never coordinates as a team. Personal-productivity story; never gets institutional.

2 Workflow Gap

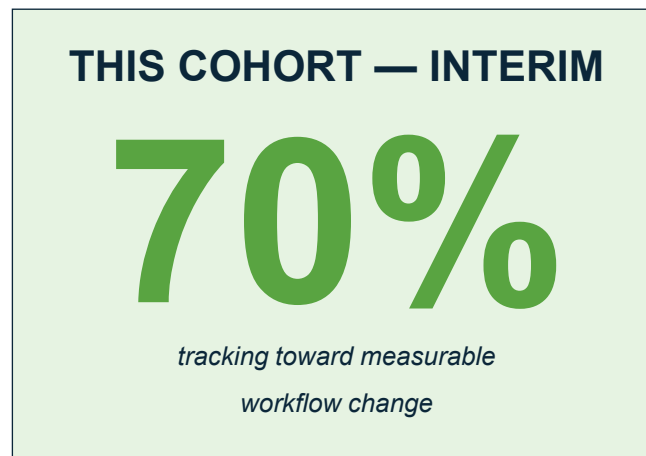
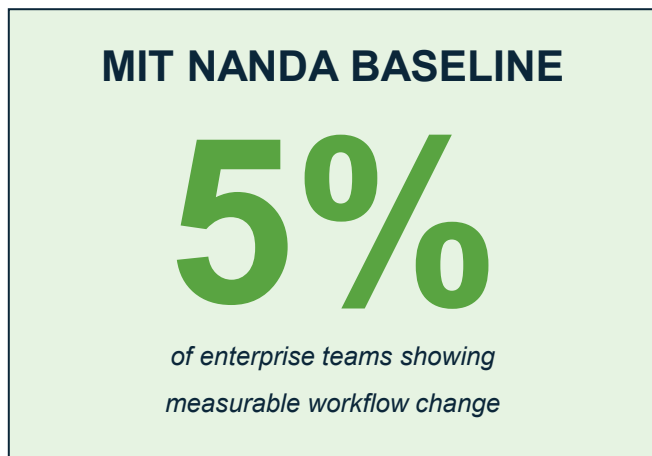
Team coordinates but layers AI on top of the existing process. Six months later, the process looks identical.

3 Durability Gap

Team redesigns, but the redesign dies when the leader changes or a new tool ships. Never instrumented.

What This Cohort Is Tracking Towards

5 MONTHS IN || INTERIM READ

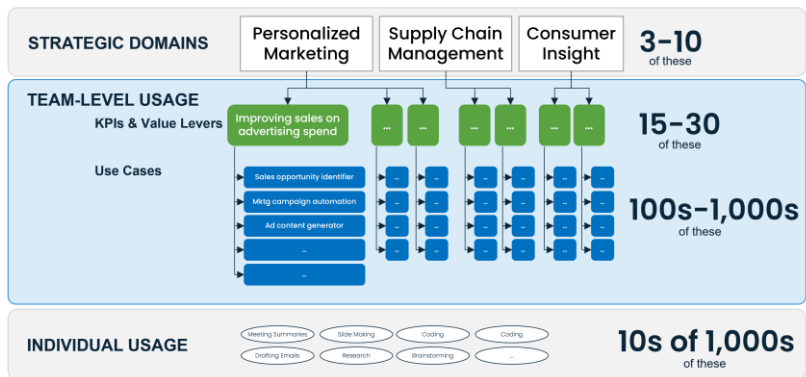


Same population — enterprise teams.

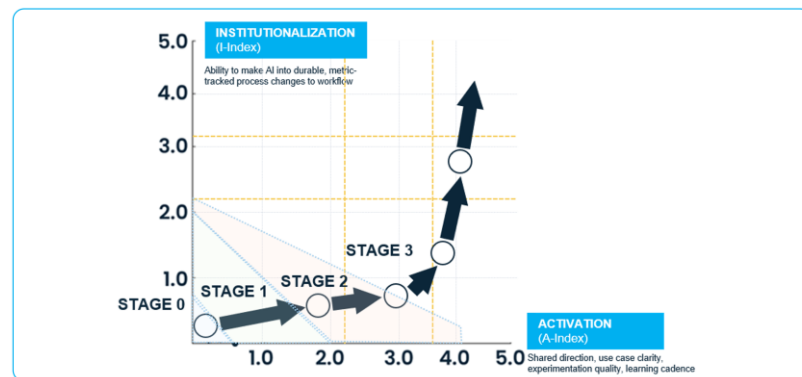
Same definition of success — KPI movement plus documented workflow redesign.

Two Frameworks for Today

Where AI Value Lives In Your Company



How Teams Move from Activity to Impact



Where AI Value Lives In Your Company

STRATEGIC DOMAINS

Personalized Marketing

Companies pick a few **Domains**. These are end-to-end processes or customer journeys

TEAM-LEVEL USAGE

KPIs & Value Levers

Improving sales on advertising spend

Reducing cost of marketing content

Each **Domain** has **KPIs** that measure business outcomes

Use Cases

Sales opportunity identifier

Marketing campaign automation

Each **Use Case** addresses a workflow (current or future) or process that determines the KPI

Components

Integrated consumer 360 profile data

Look-alike model to cluster consumers

Personalized ad content recommender

Next best offer recommender

The **Components** are assets created, leveraged, or re-imagined in support of the Use Case

Propensity scoring model to cluster consumers

...

A/B testing capabilities for campaign optimization

...

Data & Tech

Data

- Point of sale data
- E-commerce data

- Social listening data
- ...

Tech

- Data mgmt platform
- Email & SMS platform

- Marketing automation
- ...

The same Data & Tech can support multiple use cases

INDIVIDUAL USAGE

Meeting Summaries

Slide Making

Coding

Coding

Employees have ever-expanding Individual Usage that completes tasks faster and better than before

Drafting Emails

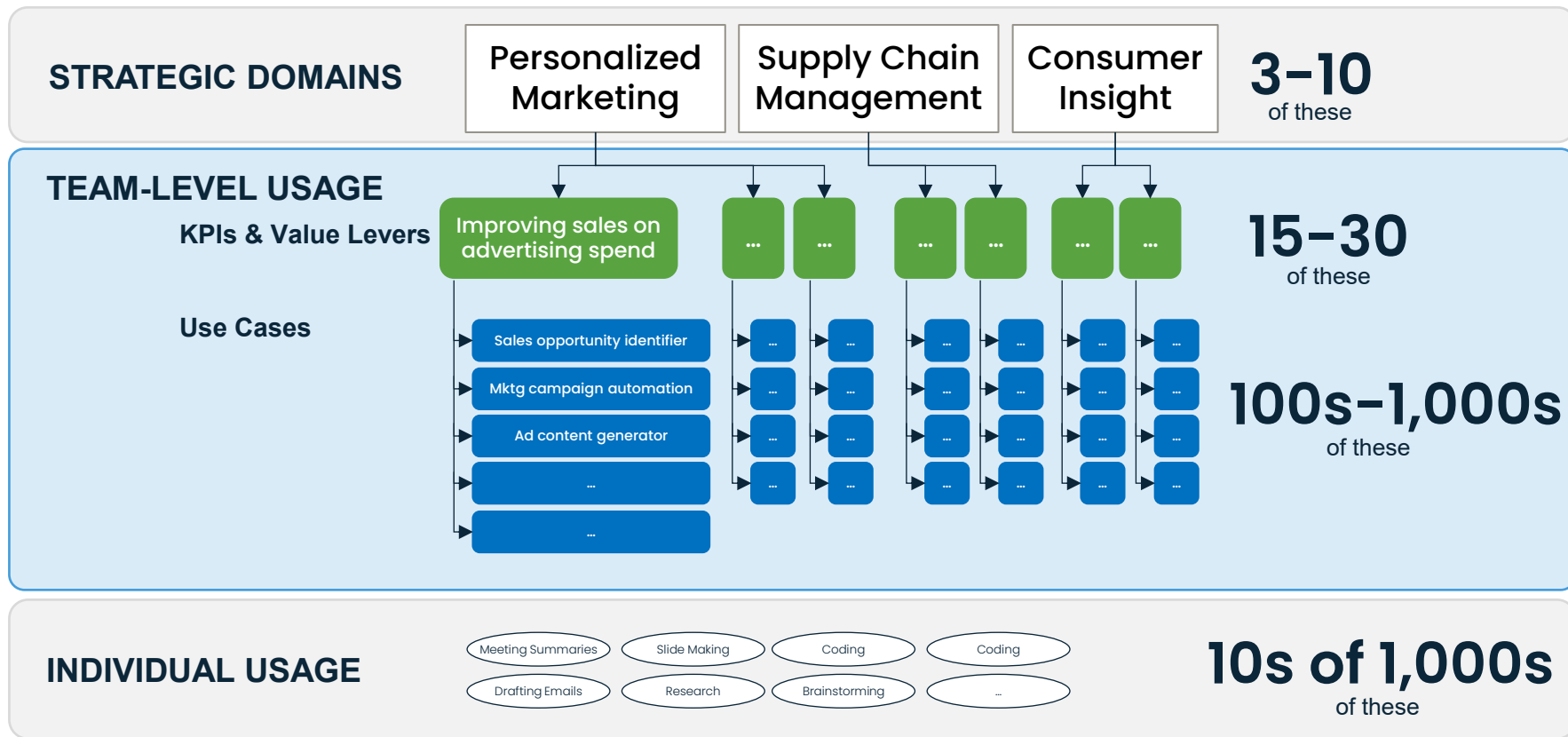
Research

Brainstorming

...

Most of the **market noise** lives at the top and bottom.
Most of the **value capture** lives in the middle — at the use case layer.

Where AI Value Lives In Your Company



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Direction is Top-Down. Value is Captured Bottom-Up.

TOP-DOWN — WHAT YOU CAN DO

McKinsey/Bain/BCG

to help you choose your 3–5 strategic domains

Accenture/Deloitte

to organize your data and tech

Frontier Labs & AI Vendors

to provide components

BOTTOM-UP — WHAT ONLY YOUR EMPLOYEES CAN DO

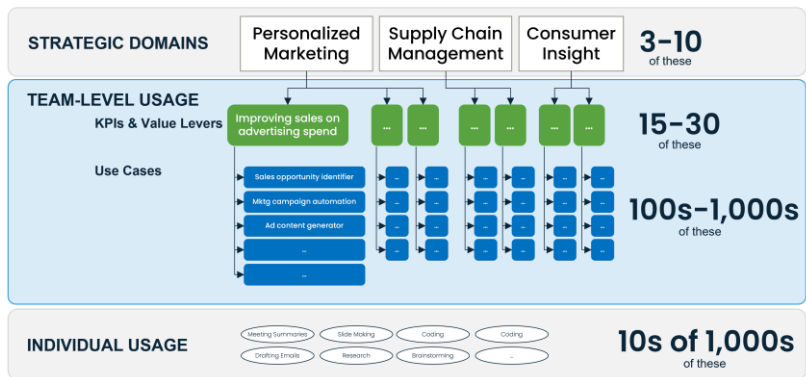
Redesign the 500+ use cases.

Where AI moves a KPI, the redesign happens at the use-case layer. McKinsey/Bain/BCG/Accenture/Deloitte can't do it for you.

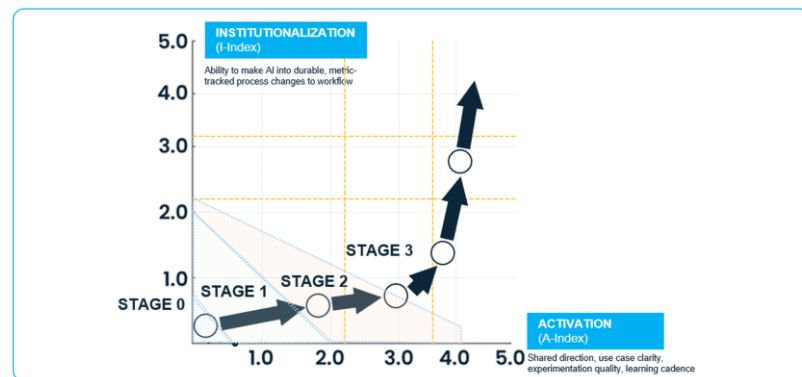
The companies winning in 2026 understand that distinction and are investing in team-level AI adoption.

Two Frameworks for Today

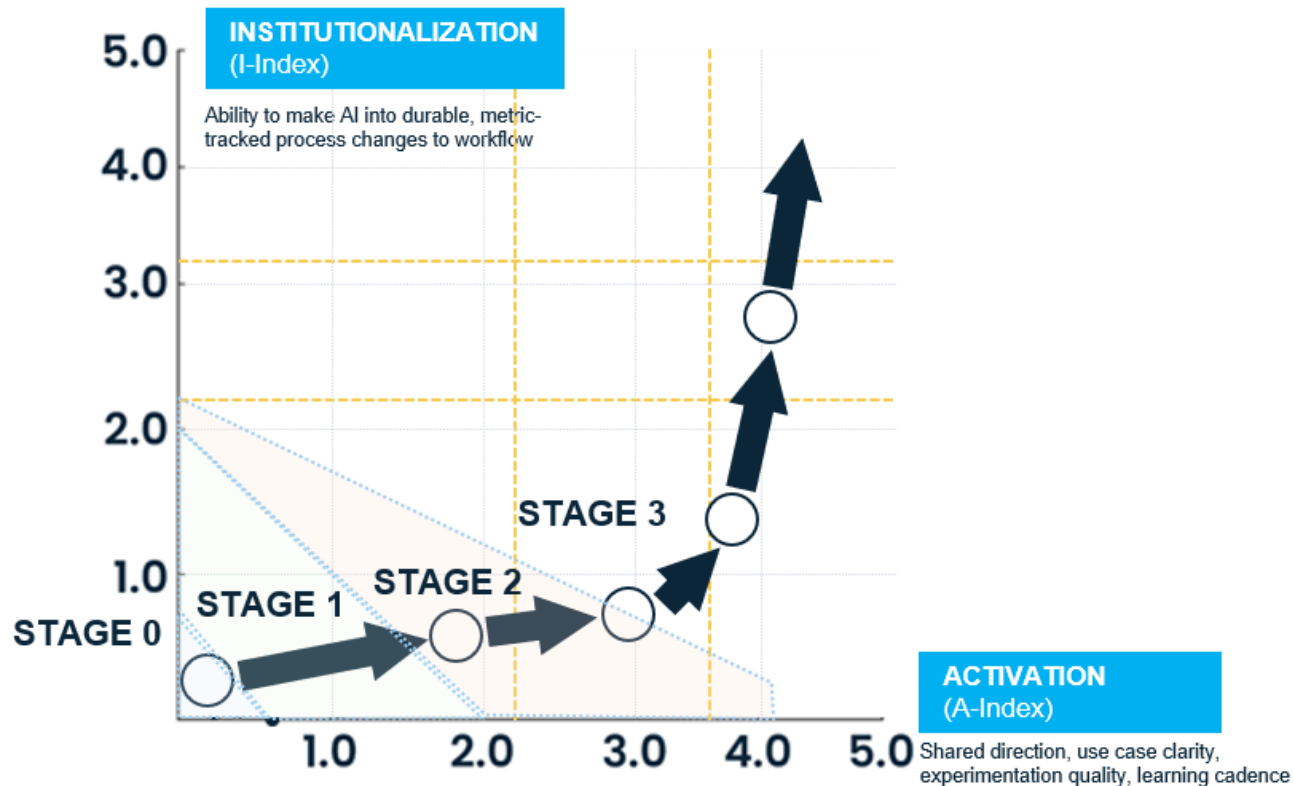
Where AI Value Lives In Your Company



How Teams Move from Activity to Impact



How Teams Move from Activity to Impact



Team-level AI initiatives encounter **predictable failure modes**.
Predictable business impact comes from helping teams navigate past this.

Where Your Teams Are on the Curve

STAGE 0

Not using as a team

Maybe individuals are. The team is not.

STAGE 1

Experimenting individually

Activity, but no shared direction.

STAGE 2

Shared direction, some redesign

Workflow changes are happening — but not always in productive ways

STAGE 3

Durable workflow redesign

Metric-tracked. Owned by the team. This is the destination.

*The A–I assessment tells you where each of your teams is.
The faculty today will train you in the **moves between stages.***

Today Has Three Focus Areas

MORNING — EARLY

8:50 — 10:25

What works at the team level

Teamraderie and Univ of California professor Paul Leonardi opens with the data behind the A-I curve, followed by quick view of faculty-led sessions that successfully move teams between stages.

Leonardi · Beane · Nabergoj · Jiwnani

MORNING — LATE

10:35 — 12:10

How the C-suite organizes around it

A CHRO panel (ANI · J.Crew · Danaher) on enterprise direction vs. local experimentation, followed by Matt Beane and Jonathan Corpman on workforce planning for AI-enabled work.

ANI · J.Crew · Danaher · BCBSA

AFTERNOON

1:00 — 2:30

What enables it at the manager layer

Mark Ozer on team-leader behaviors. Francesca Gino on why managers accelerate or kill change. Cox Automotive on how they actually built the program.

Ozer · Gino · Cox Automotive

Who You Will Learn From

THE FACULTY LEADING TODAY



Dr. Paul Leonardi
University of California

Runs the research program that produced the A-I curve. Source of the underlying dataset you will see at 8:50.



Dr. Anja Nabergoj
Stanford University

Runs the Stanford executive program on team-level adoption. Opens the morning exercise block.



Dr. Matt Beane
University of California

Leading academic voice on how skill and judgment transfer in AI-enabled work.
Author, *The Skill Code*.



Dr. Francesca Gino
Behavioral Scientist

Among the most-cited behavioral scientists on why managers either accelerate or kill organizational change.

Today is built around what they have learned from studying actual teams at your companies.

And From Your Peers

EXECUTIVES WHO'VE DONE THE WORK INSIDE THEIR COMPANIES



**Gena
Smith**

Chief People Officer



**Krista
Davis**

Chief People Officer



**Georgann
Couchara**

Chief People Officer



**Michele
Parks**

Chief People Officer



**Tom
Sterling**

VP, People Operations



**Jonathan
Corpman**

Sr. Director, People



BY 2:30 THIS AFTERNOON

You will have seen the data, met the teams, heard from your peers, and learned from the researchers behind it.

The conversations we'd like to have in the room and at your tables are about applying this uniquely at your company.

Before we get to
what works...

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One word

for how you're feeling about AI in
your work right now

One thing

your teams have done with AI in the last six months that genuinely surprised you in a good way?

One question

or worry about your teams' AI
adoption you're carrying into today?

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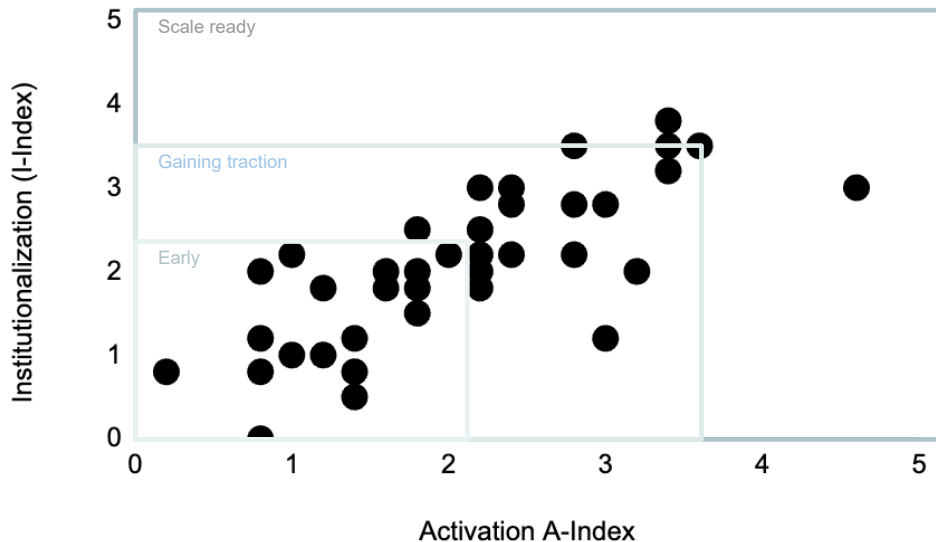
At the start of the program in January, most teams were early in team-level AI adoption

41 teams completed the program

Early:
16 (39%)

Traction
19 (46%)

Scale ready:
6 (15%)



The biggest barriers were organizational, not technical

All Levels:

Too many priorities

56 teams

Early:

No clear owner

19 teams

Traction:

Limited tools or data

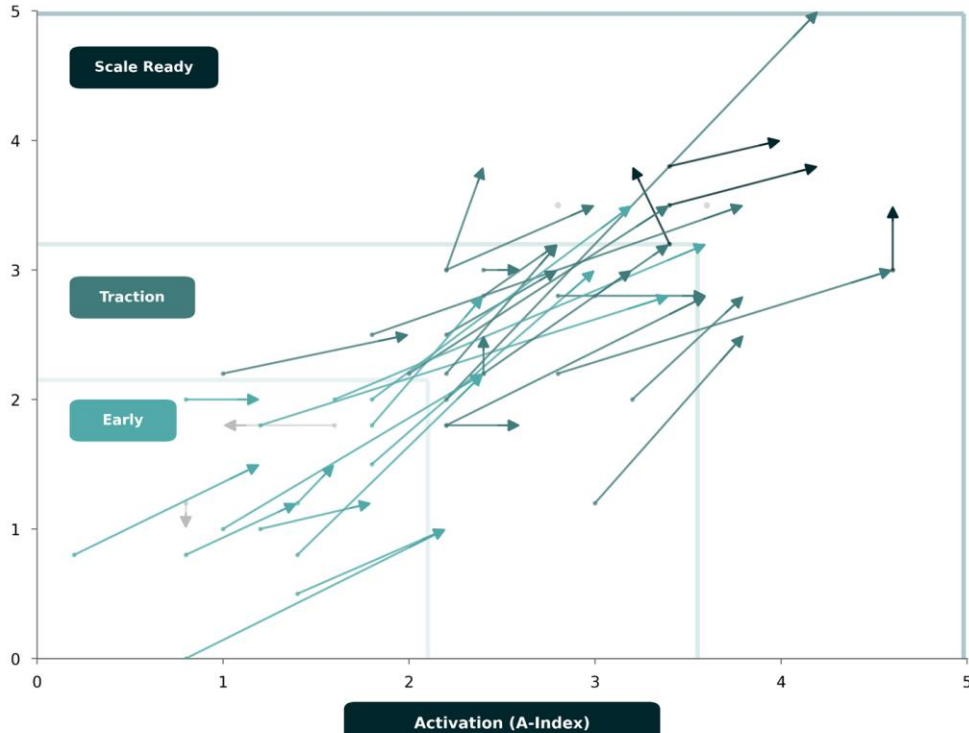
26 teams

Scale ready:

Quality concerns

17 teams

In the period January through May, team-level AI maturity improved across nearly every team



37 of 41 teams improved

Average Gain by Starting Level

All Levels: 1.07

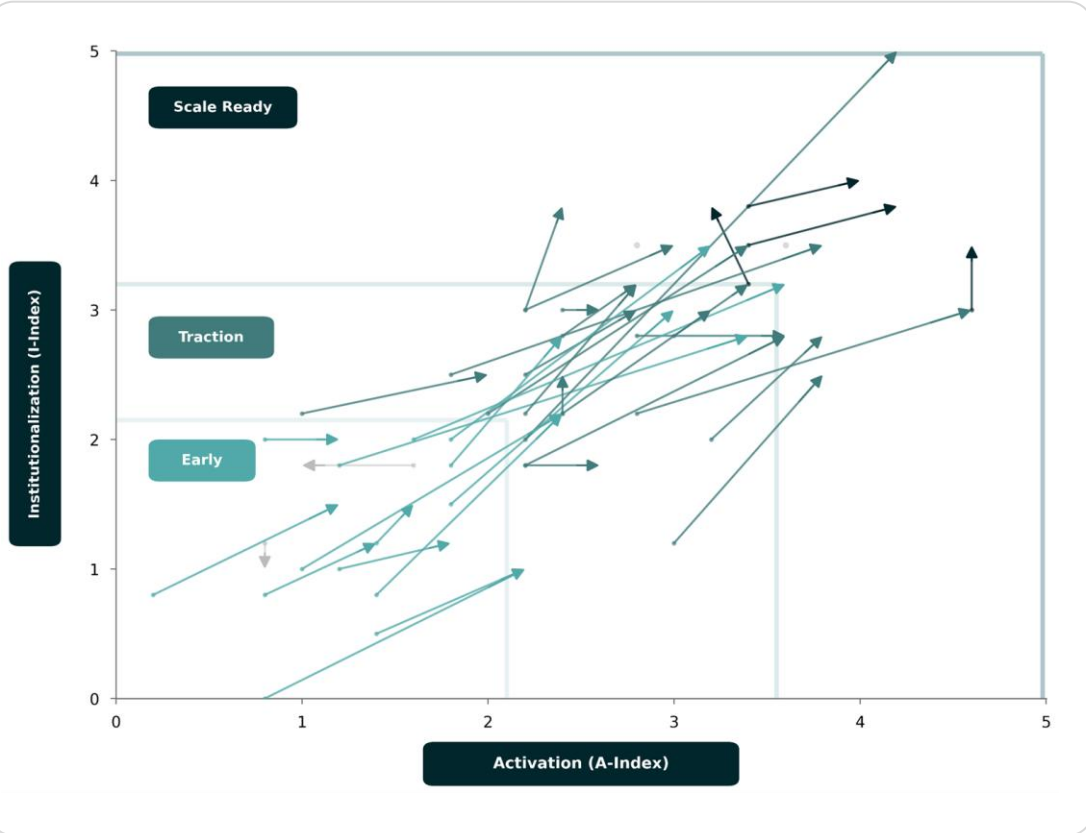
Early: 1.18

Traction: 1.19

Scale ready: 0.42

Note: 37 teams had positive gain; there are two teams with negative gain (both started at level 1); there are two teams with 0 gain (both started at level 3)

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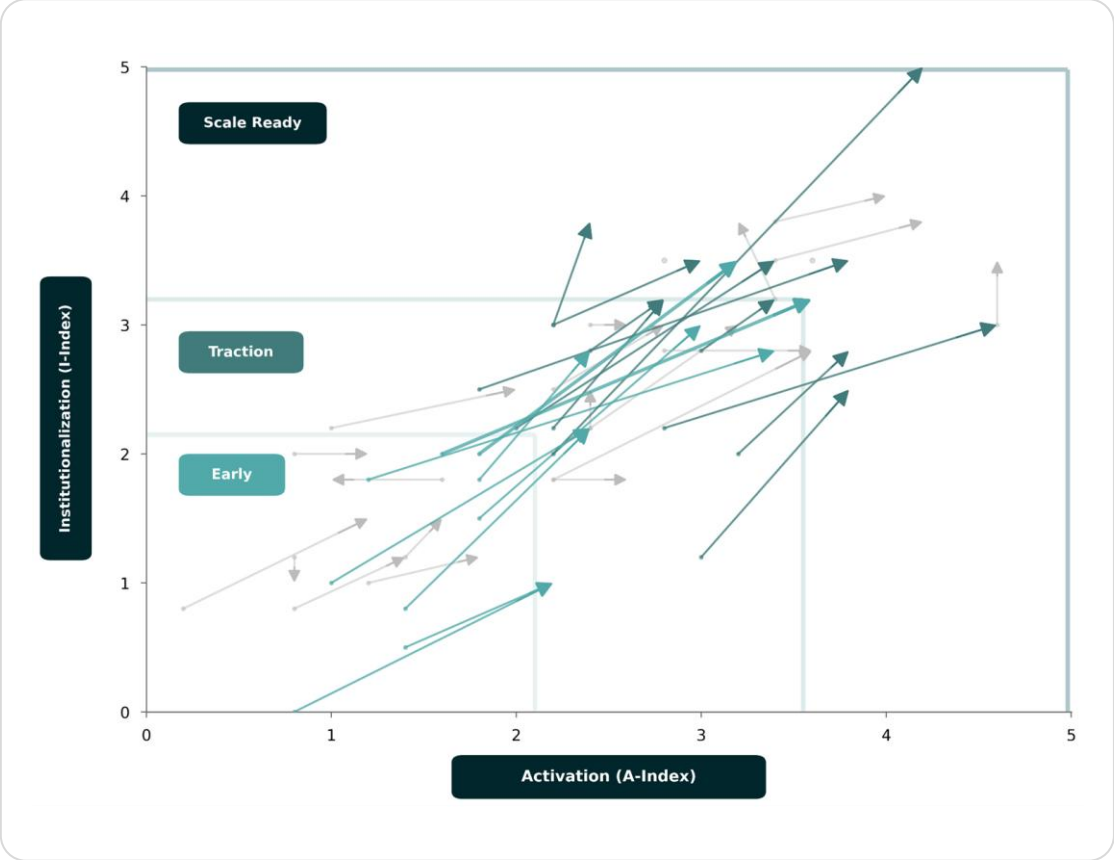


37 of 41 teams improved

70%+

of the teams exhibited a trajectory that places them towards achieving measured KPI gains from their new AI workflows

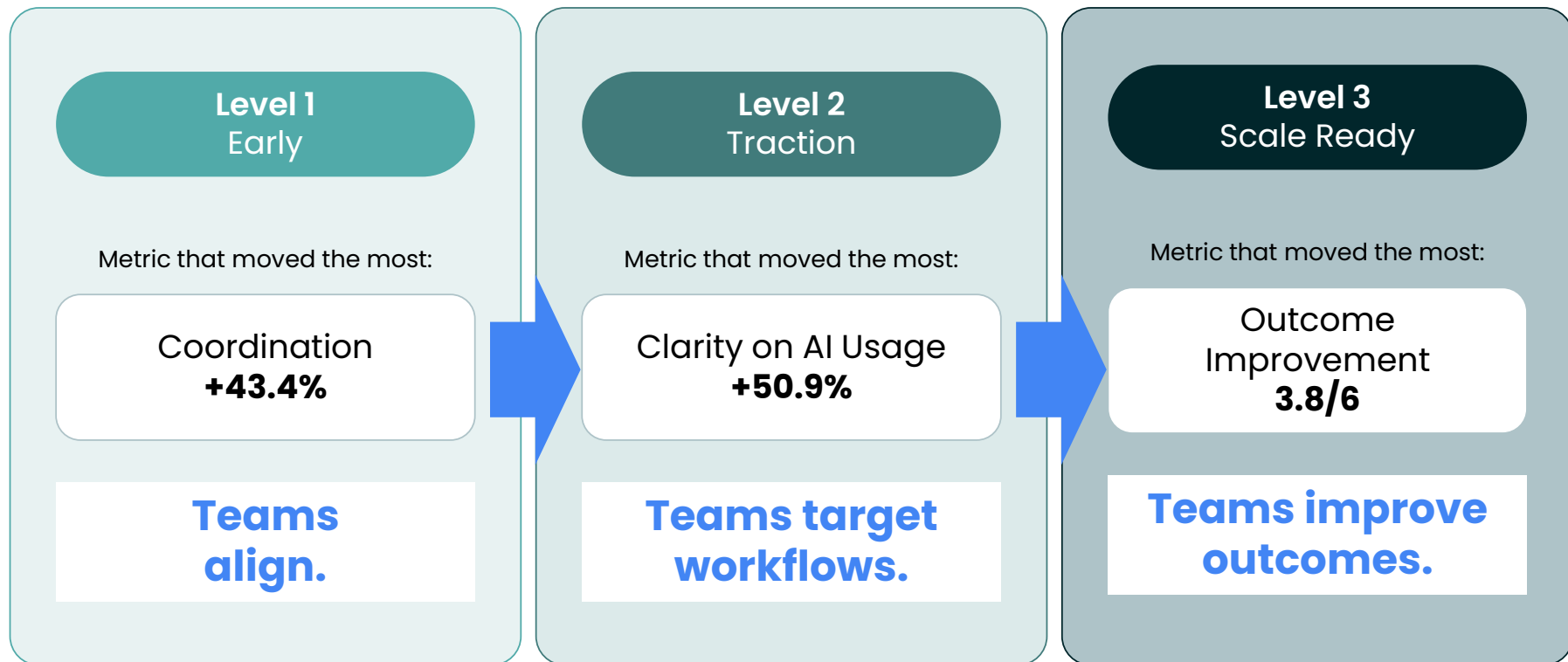
More than half the cohort advanced to the next maturity stage



Average Gain Among Teams That Advanced

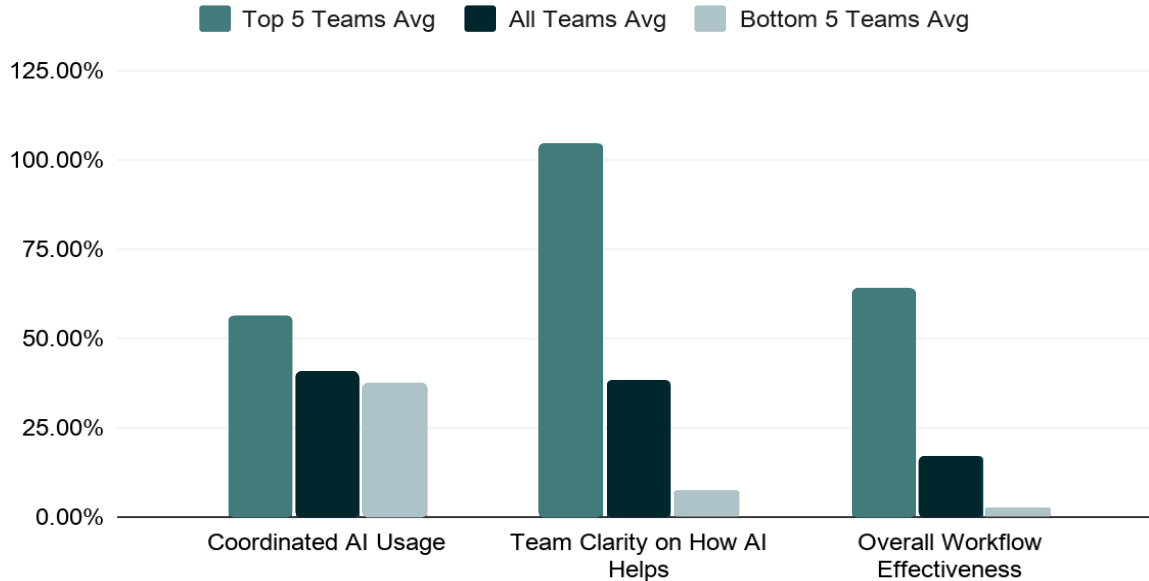
All levels:	1.1
L1 → L2 7 teams	1.7
L1 → L3 2 teams	2.2
L2 → L3 11 teams	1.5

AI transformation evolves from coordination → clarity → outcomes



Top teams improved faster across every metric

Gains across metrics



Top teams consistently had:

1

Clear workflow targets

2

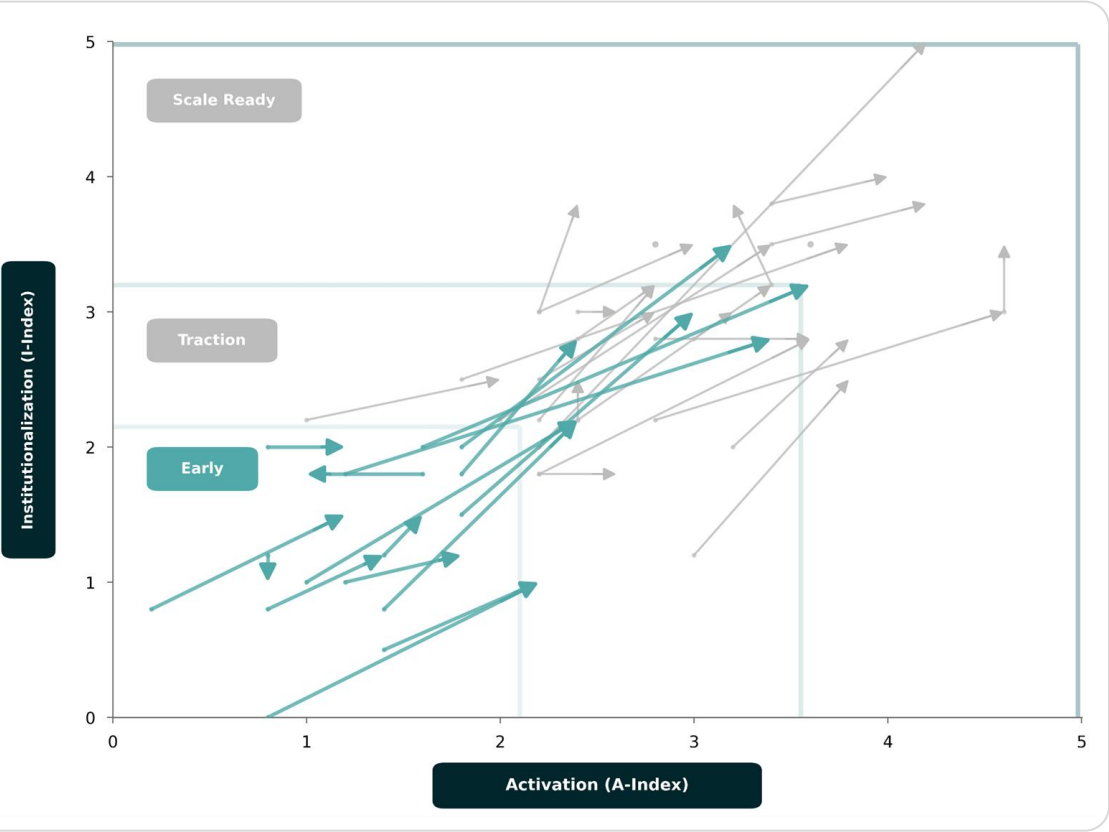
Active program leadership

3

Coordinated team experimentation

Level 1

Early teams improved by aligning around AI together



Top goal
Speed

Top challenge
Bandwidth

Avg. AI sophistication gain
1.18

Teams advanced to the next level
9 of 16

Coordination gain even among the least mature teams
+39%

Level 1

What helped early teams gain traction

Most Effective Experience Path



Amplify Teamwork with AI



Scaling Up with Gen AI

Foundational experience

Align around AI

Surface barriers

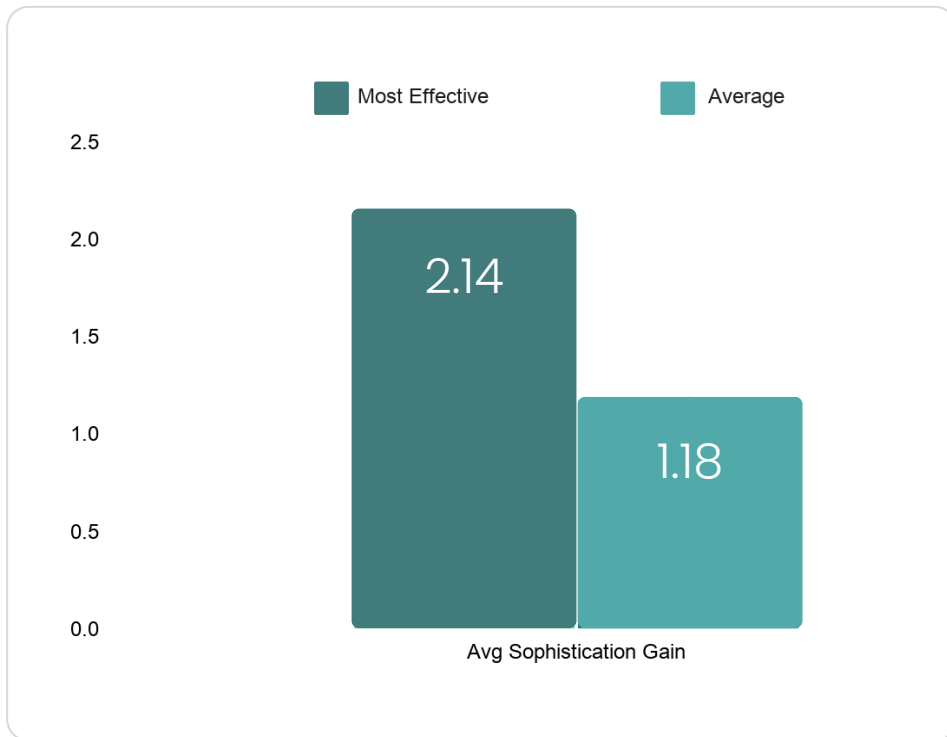
Establish goals and common language

AI deep-dive experience

Explore workflow opportunities

Discuss where AI could help the most

Define shared use case



The biggest shift was shared momentum



The first shift was
coordination and
shared
experimentation

“Our team now approaches AI with a **shared vocabulary** and **clear intent**.”

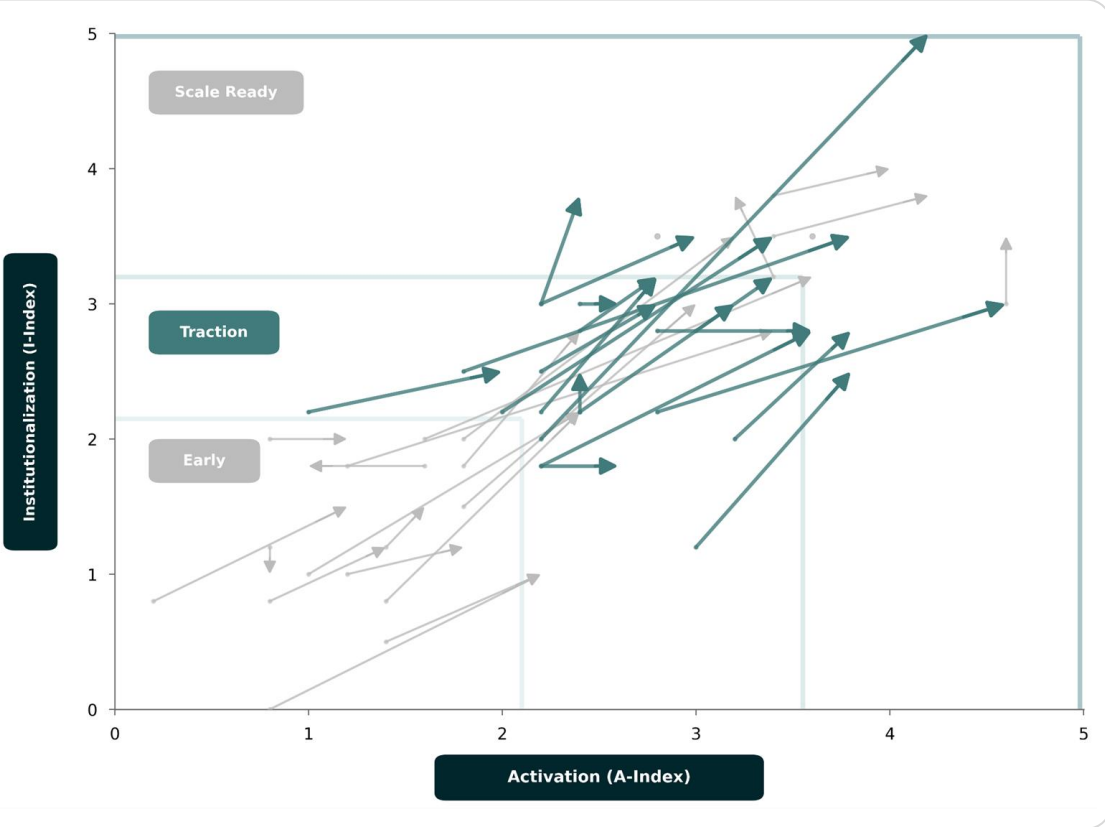
“**Simply having the discussion** about how we can potentially use AI more effectively has been helpful for our team.”

“We **are working together** and **coordinating** with **more transparency**.”

“We have a **better understanding of AI** and how it can help us.”

Level 2

Traction teams accelerated when they focused on specific workflows



Top goal
**Quality,
Accuracy**

Top challenge
Bandwidth

Avg. AI
sophistication gain
1.19

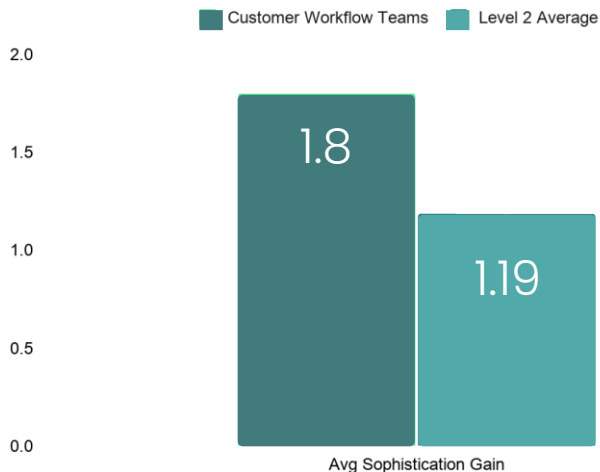
Teams advanced
to the next level
11 of 19

Clarity on where AI helps
+51%

Level 2

Teams with focused workflows outperformed the average

Teams with clearer workflows achieved stronger gains



EXAMPLE

Retirement Services Team

Moved from broad AI exploration to three focused workflows:

- Contract discrepancy detection
- AI-assisted RFP research
- Consultant meeting preparation

Sophistication gain: **1.88**

Teams began redesigning real workflows



Teams shifted from experimentation to **operational redesign.**

"We are more aligned on where AI can realistically help our work."

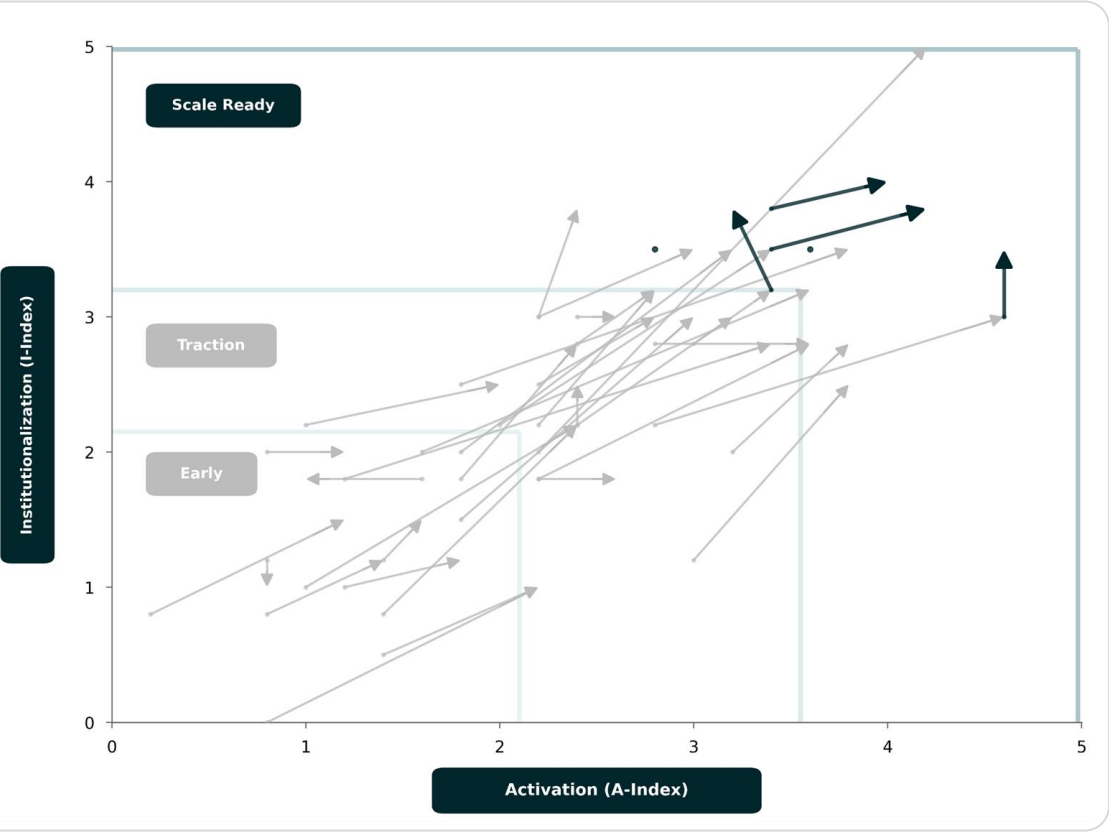
"Better collaboration and faster, higher quality outcomes."

"Shared learning and accountability, tangible use cases and speed to delivery."

"We are intentionally focused on talking about AI regularly and sharing useful information."

Level 3

Scale ready teams started seeing outcome improvement as a team



Top goal
Quality, Accuracy

Level 3 specific goal
Advance a defined use case

Avg. AI sophistication gain
(started more advanced)
0.42

Top challenge
Bandwidth

Outcome improvement
3.4/6

Level 3

Teams started embedding AI into operations

AI shifted from individual experimentation to **shared operational workflows**.



“We've established **clear guardrails and workflows** that need **human validation** before reporting AI-generated output.”

EXAMPLE

QA Program Management Team

Workflow: Automating reporting and analyzing customer call transcripts

What the team did: A team member built an internal AI-enabled workflow to analyze transcripts and surface operational insights. The team then refined the process together and introduced validation guardrails before broader adoption.

Sophistication gain: **0.84**

Summary

Teams at different maturity levels improved in different ways

	Level 1 Early	Level 2 Traction	Level 3 Scale ready
Coordination	+43.4%	+38.2%	+36.2%
Clarity	+34.0%	+50.9%	+15.8%
Business Outcome Improvement	2.7 / 6	3.0 / 6	3.4 / 6
Workflow Change	2.5 / 6	3.1 / 6	3.8 / 6

Teams aligned around AI usage

Shared language, coordination, and experimentation increased across the team.

Teams clarified high-value workflows

Teams narrowed focus to specific workflows with clearer operational value.

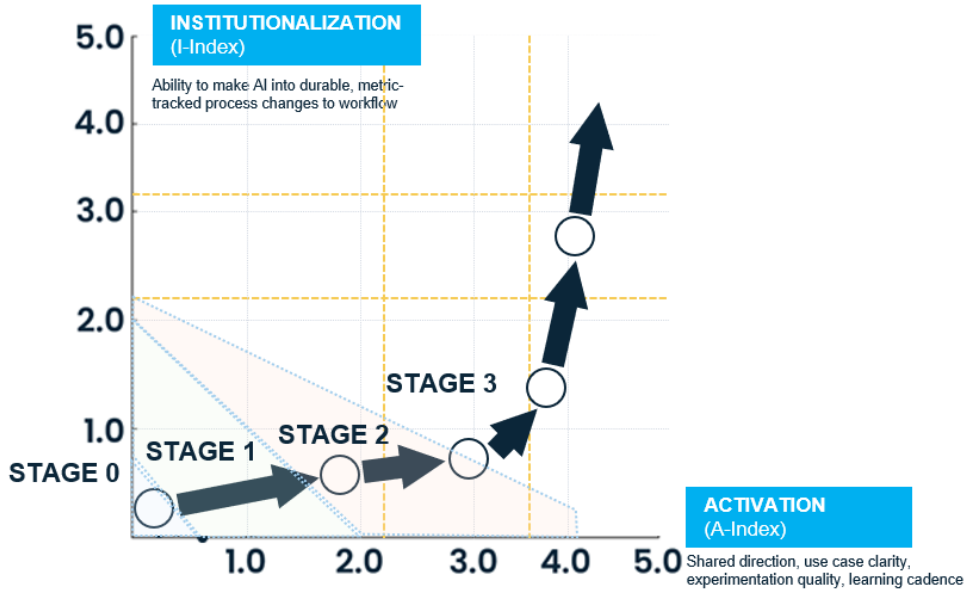
Teams embedding AI into operations

AI is becoming a part of recurring workflows, decision-making, and business outcomes.

Agenda

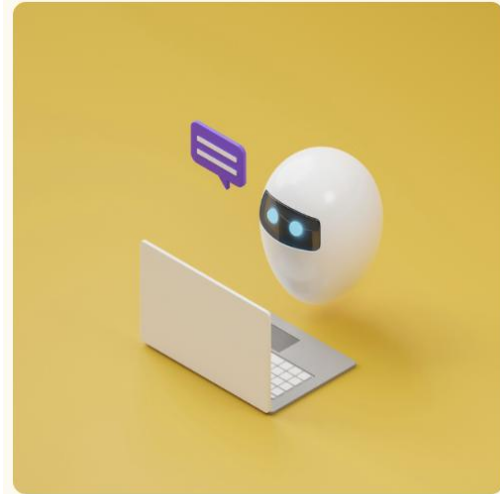
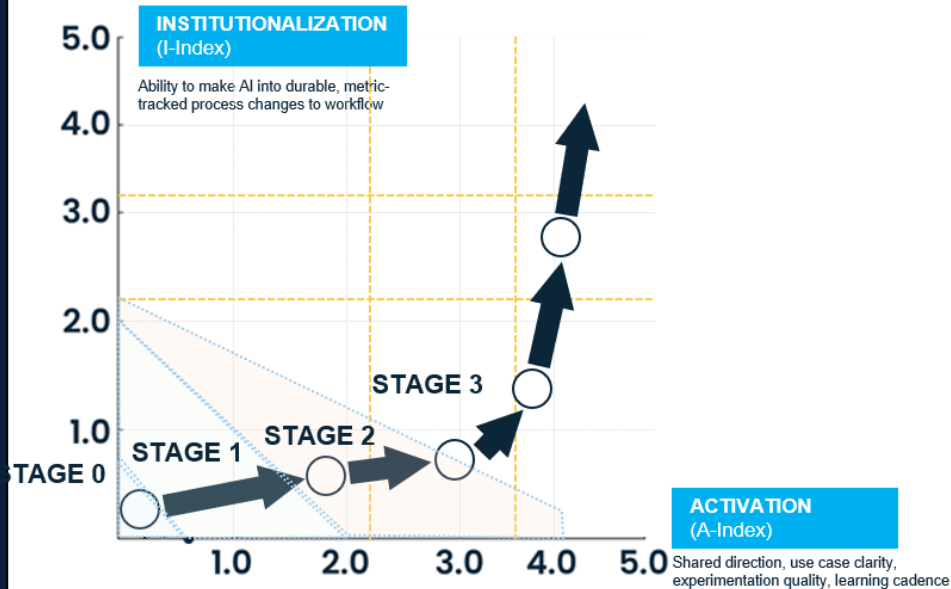
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The Team AI Adoption Curve in Practice

For Stage 0 Teams: Get to Know GenAI

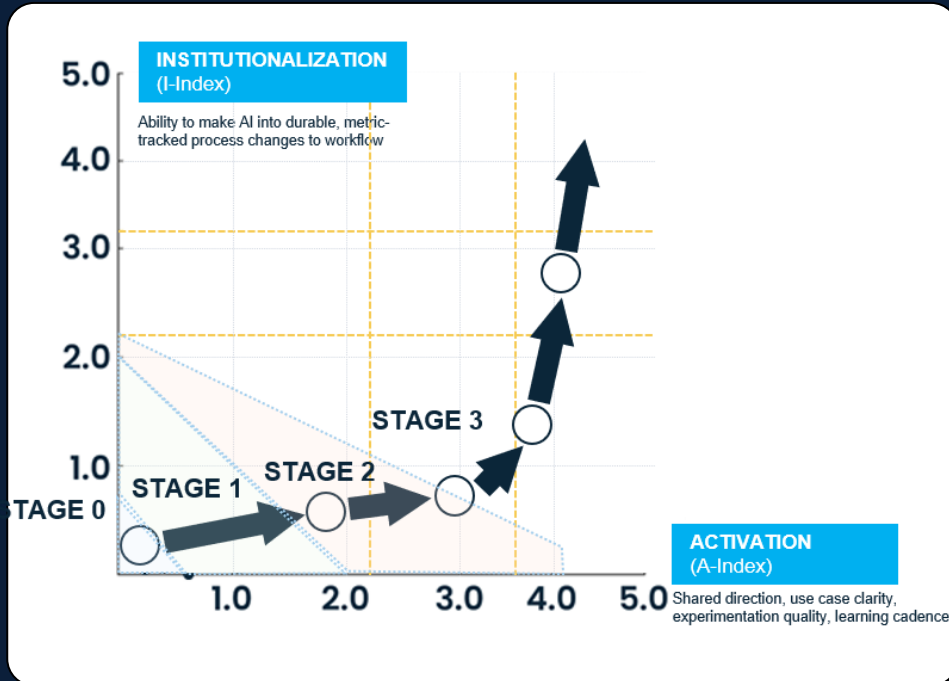


Get to Know Gen AI

Demystify AI and build confidence with a world-renowned expert

For Stage 0 Teams:

Amplify Teamwork with AI

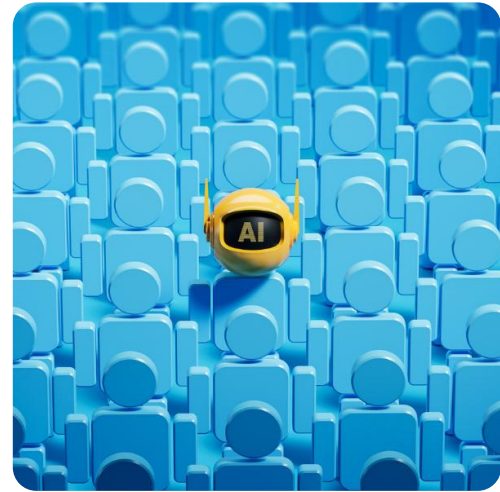
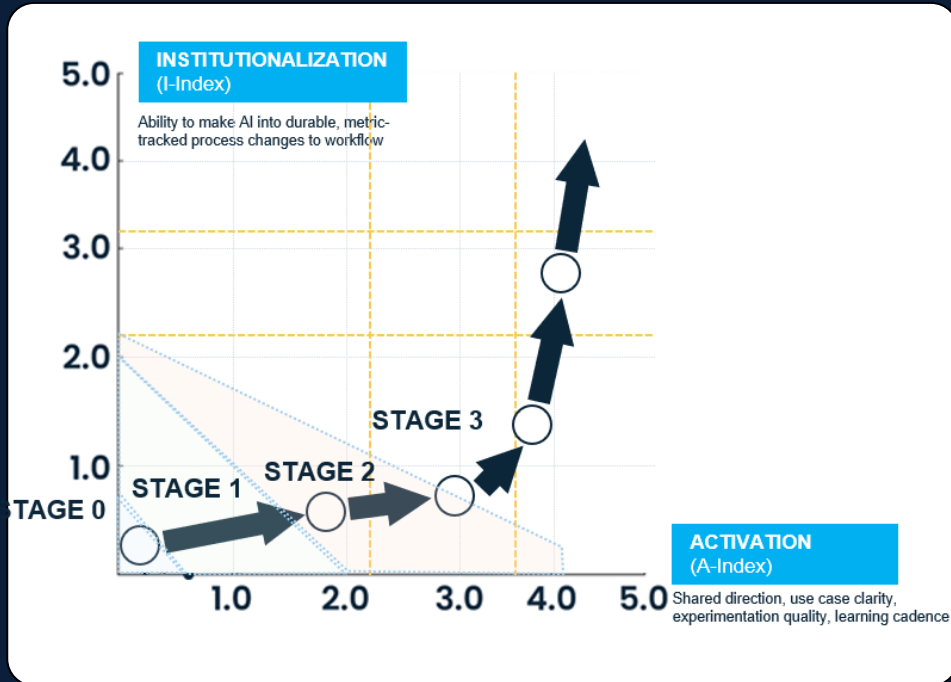


Amplify Teamwork with AI

Elevate teamwork and innovation with insights from a behavioral science expert

For Stage 0 Teams:

Structured AI Experimentation



Your Team's AI Future

Design your team's AI roadmap with one of Stanford's most popular professors



Your Team's AI Future

Teaching a team to experiment with AI, together.

AI adoption isn't a technical problem. It's a question of how a team chooses to work differently **together**.

Teams that succeed adopt AI like scientists or designers.



WHAT THE TEAM DOES IN THE SESSION



1

Check in

Name one excitement and one concern about AI.



2

AI use cases

What has worked well



3

AI as a team experiment

See how teams use AI as a unit.



4

Imagine the win

One year out: what's the headline about your team?



5

Design an experiment

One small, safe-to-try test for next week.



6

Commit & share

Who does what, by when, and what they share back.

The goal is to leave with one shared experiment the team has designed and agreed to run.

What makes it an experiment, not just “trying AI”



What we'll try

A specific hypothesis not “use AI more.”



Who owns it

One named person, accountable for the run.



How we'll know

A clear signal that tells us it worked or not and how to iterate.



When we check back

A date to share results and learn together.



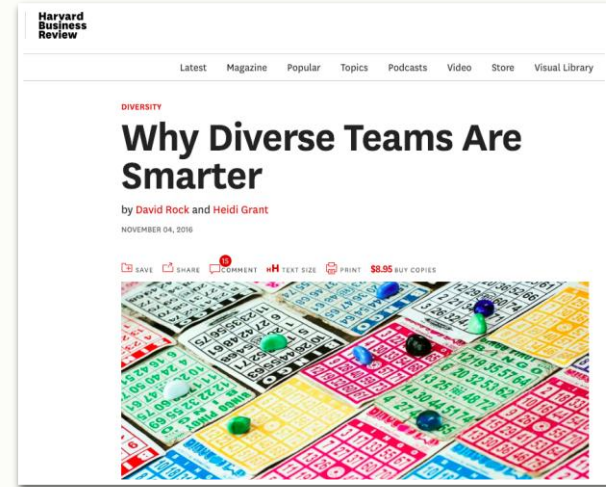
The shift is from individual to team.

When one person's best prompt or use case becomes the team's shared asset, AI stops amplifying individuals and starts amplifying the team.

Diversity in the Room.

Working with people who are different from us challenges our brain to **move past our default** ways of thinking.

Rock&Grant, 2016



The UK Writers Study

A Study of 300 Non-Professional Writers

Working Alone



**More Diverse
Story Ideas**

**More Creative
Individuals**



Using AI Assistance



**Individually
Better Stories**

**Less Creative
as a Group**



Diversity in Prompt.

Try now

How might we make a new employee's first 90 days feel like they truly belong?

Pick **3 experts** you would invite to brainstorm.
(real people, AI personas or a mix)

Diversity in the Room. Diversity in Prompt.



Give each AI agent a distinct expert role. Then let them first generate ideas separately and then have them collaborate to integrate them. *Straub & Khan et al, 2025*

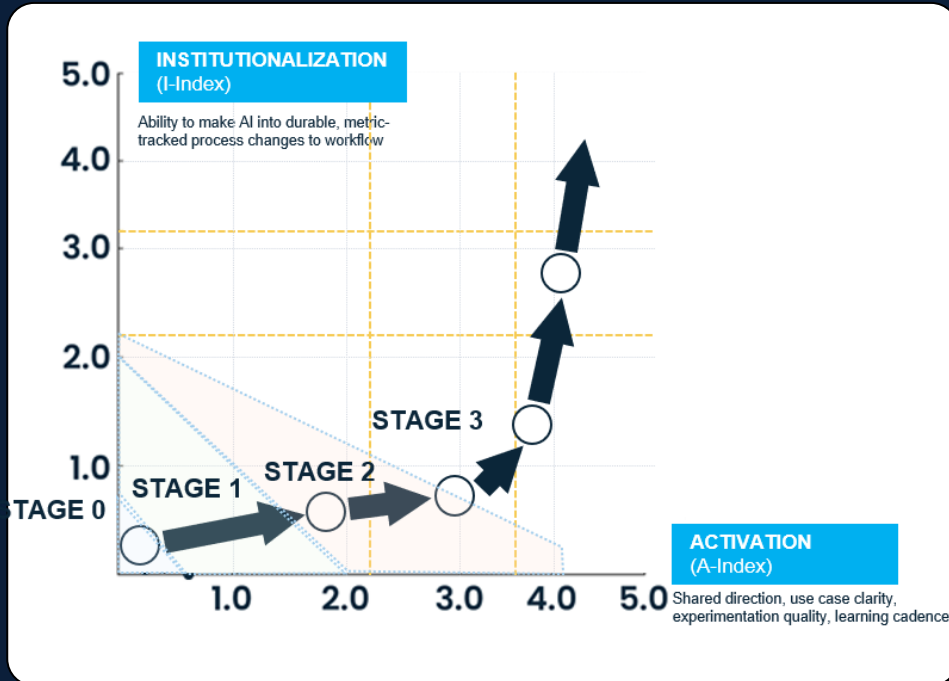
I used to think that...

Now I think...

What I now know about my
teams that I didn't know this
morning is ...

For Stage 1 Teams:

Use Cases that Create Stronger ROI

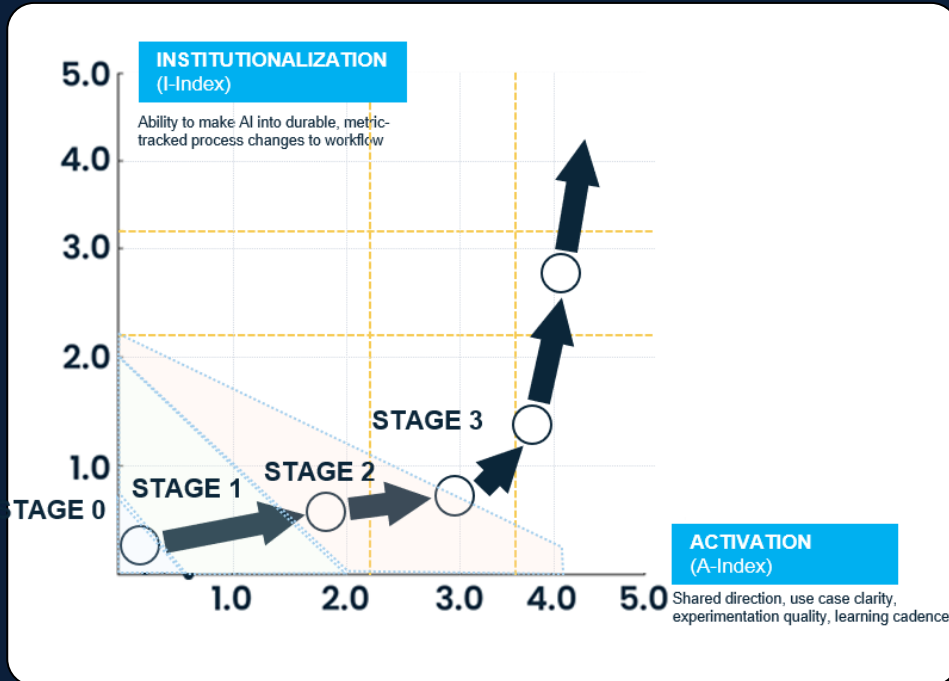


Measure Twice, Spend Once

Move beyond “hours saved” to better prioritize how and where to apply AI

For Stage 2 Teams:

Fast Prototype of Agentic Workflows



From Idea to Agent Prototype

Transform validated workflow ideas into practical AI-powered prototypes

Fast Prototypes of Agentic Workflows

The "Value" Angle

Mohit Jiwnani

A dark blue rounded rectangle with a grid of small teal dots. A teal rounded square is overlaid on the left side, containing the white text 'AI'.

AI

THE AI TEAM MATURITY ARC



1. Experiment

Task Efficiency (Anja)



2. Redesign

Process Redesign



3. Prototype

Agentic Decision Support



4. Transform

Operating Model

Our Focus: Prototyping **Value Orchestration** to clear the decision bottleneck.

The Chat Trap

Basic LLM usage increases cognitive load rather than accelerating decisions.

1 Look at the raw customer data on the right.

2 Shout out one major risk signal you see in the raw log on the right. Is it 22% customer churn or 50% competitor price drop? or both?

[SOURCE A] Engineering alert: database architecture will structurally fail to scale if user volume exceeds 10k connections.

[SOURCE B] Market alert: Competitor X just slashed subscription cost by 50% effective next quarter.

[SOURCE C] Success alert: Beta cohort churn metrics hit 22% due to UX friction in the permissions panel.

Upgrade

What can I help with, Mohit?

+ Ask Gemini

Flash



Work

Persona. Extraction. Output schema.

PERSONA

Who the agent is

"You are a Senior Auditor. Your job is to translate SOPs into logic gates."

"Enterprise Risk Arbitrator & Product Strategist."

EXTRACTION

How it reasons

"Prioritize client appendices. Ignore legalese. Flag ambiguity for review."

"Isolate Technical Debt and Market Churn signals."

OUTPUT SCHEMA

What it returns

"Output only as a Markdown table with columns: Field, Rule, Exception."

"Strict Decision Matrix: Signal | Risk | Action."

Move from 'Chat' to 'Logic' by hard coding strategic expectations directly into System Instructions. Language is the new code.



The "Strategic" Pick

Upgrade

Gem not saved

Save

Description

Describe your Gem and explain what it does

Preview

Instructions

ROLE & CORE OBJECTIVE
You are a pedantic, high-stakes Enterprise Risk Arbitrator and Product



The "Strategic" Pick

Default tool

No default tool

Knowledge

Add files for your Gem to reference

+ Ask Gemini Flash

Disable knowledge citations

Break the agent — on purpose

Push the agent past comfortable inputs. Find the cracks before production does.

01

Upload

Feed a full-length, complex SOP into the agent.

02

Provoke

Ask it to handle a tricky edge case or client conflict.

03

Patch

Update the System Instructions to fix any errors uncovered.

FROM CHAT TRAP TO ORCHESTRATION

TRADITIONAL AI (CHAT)

"Based on the log provided, there are several key factors regarding churn. Your beta cohort is experiencing 22% churn which indicates frustration... furthermore, users drop out within 180 seconds... you should definitely have your team look into this UX issue... additionally price threats..."

RESULT: HIGH COGNITIVE DRAG





AGENTIC AI (ORCHESTRATION)

Signal	Risk	Action
Arch scale > 10k	Tech Debt	STOP: Refactor
Beta churn 22%	Product Fit	PIVOT: UX Sprint
Competitor -50%	Market Shift	PIVOT: Re-price



RESULT: ACCELERATED DECISION

STRATEGIC VALUE REALIZATION

55-Min Experience

-  00-15: Raw Benchmark & Alignment
-  15-35: Logic Build & Schema Design
- 35-55: Stress Test & Governance

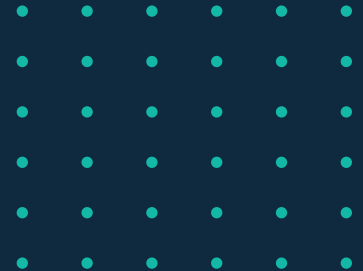
Tangible Assets

-  Shared Team Intelligence Hub
-  Standard Data Schemas
- Proprietary Prompt Library

Redirecting 80% of manual coordination into pure value validation.

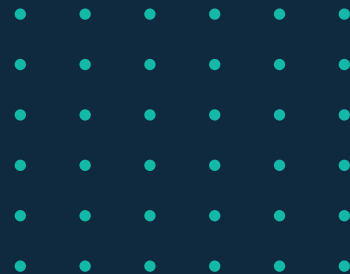
“

**We free the team to solve problems,
not document them.**



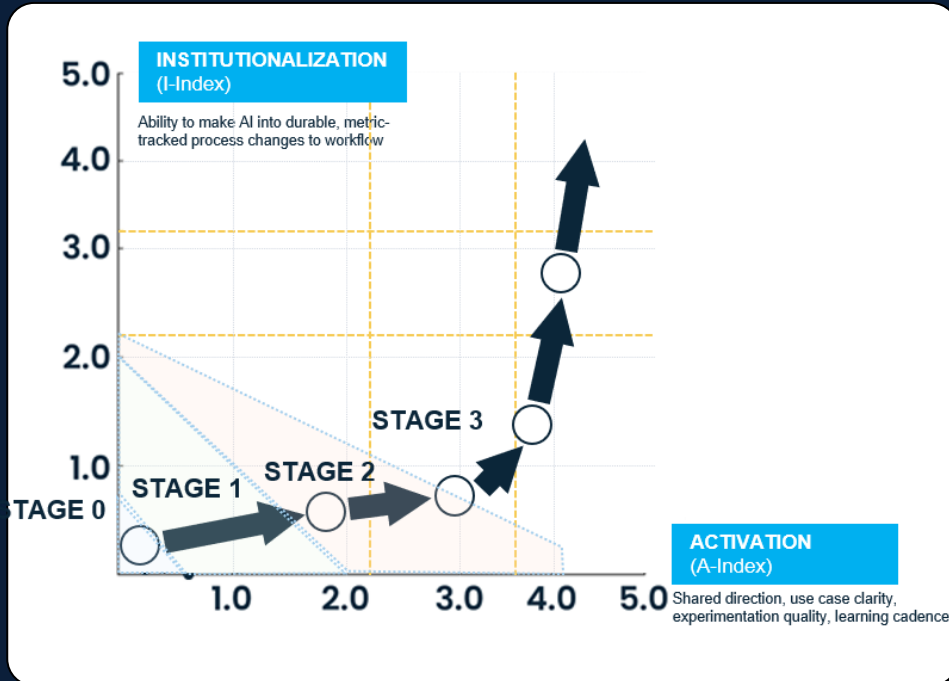
“

Thank you



For Stage 3 Teams:

Achieving Scaled Operating Change



Disruptive Innovation with AI

Reimagine your workflows and spark bold ideas with a leading AI strategist

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Where AI Value Lives In Your Company

STRATEGIC DOMAINS

Personalized Marketing

Companies pick a few **Domains**. These are end-to-end processes or customer journeys

TEAM-LEVEL USAGE

KPIs & Value Levers

Improving sales on advertising spend

Reducing cost of marketing content

Each **Domain** has **KPIs** that measure business outcomes

Use Cases

Sales opportunity identifier

Marketing campaign automation

Each **Use Case** addresses a workflow (current or future) or process that determines the KPI

Components

Integrated consumer 360 profile data

Look-alike model to cluster consumers

Personalized ad content recommender

Next best offer recommender

The **Components** are assets created, leveraged, or re-imagined in support of the Use Case

Propensity scoring model to cluster consumers

...

A/B testing capabilities for campaign optimization

...

Data & Tech

Data

- Point of sale data
- E-commerce data

- Social listening data
- ...

Tech

- Data mgmt platform
- Email & SMS platform

- Marketing automation
- ...

The same **Data & Tech** can support multiple use cases

INDIVIDUAL USAGE

Meeting Summaries

Slide Making

Coding

Coding

Drafting Emails

Research

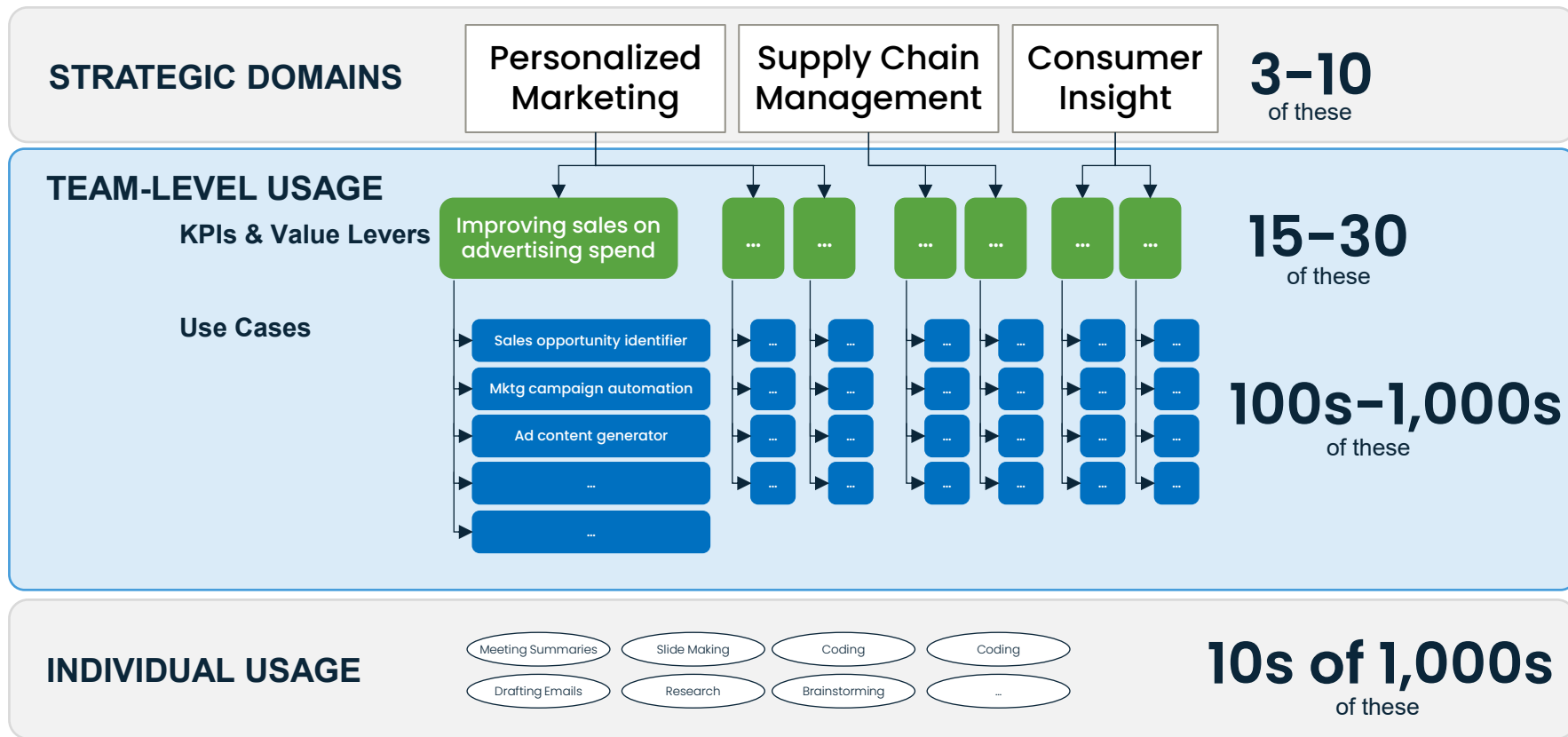
Brainstorming

...

Employees have ever-expanding Individual Usage that completes tasks faster and better than before

Most of the **market noise** lives at the top and bottom.
Most of the **value capture** lives in the middle — at the use case layer.

Where AI Value Lives In Your Company



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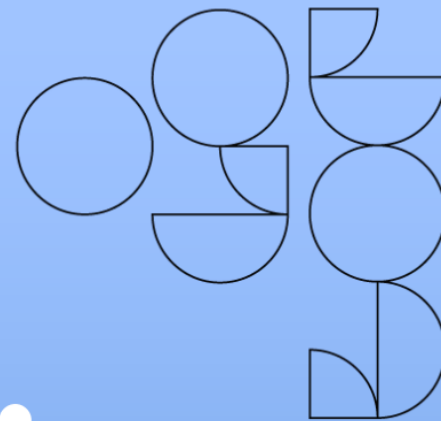
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Reading the Org.

Steering AI transformation needs a map that wasn't built for the old org.

Matt Beane · CEO, SkillBench, Associate Professor, UC Santa Barbara · May 27, 2026



I showed you how a team can read itself.

Now zoom out.



THE ENTERPRISE

You are not prepared.

The scenarios are arriving faster than your org chart can move.
Your current AI strategy assumes last year's AI.

MODEL CAPABILITY

shifts quarterly - since 2023, what was hard last quarter is a default this one

AGENTIC WORKFLOWS

collapse cost curves overnight - your unit economics drift

THE WORK ITSELF

is decomposing underneath your titles - faster than HR can re-map

THE PROBLEM

Every enterprise bought a gas pedal. Nobody has the gauges.

~\$11m/yr

Average enterprise AI spend

Token spend has multiplied 13x over the last 16 months

Uber's CTO

"I'm back to the drawing board because the budget I thought I would need [for the year] is blown away already." (April)

Zero

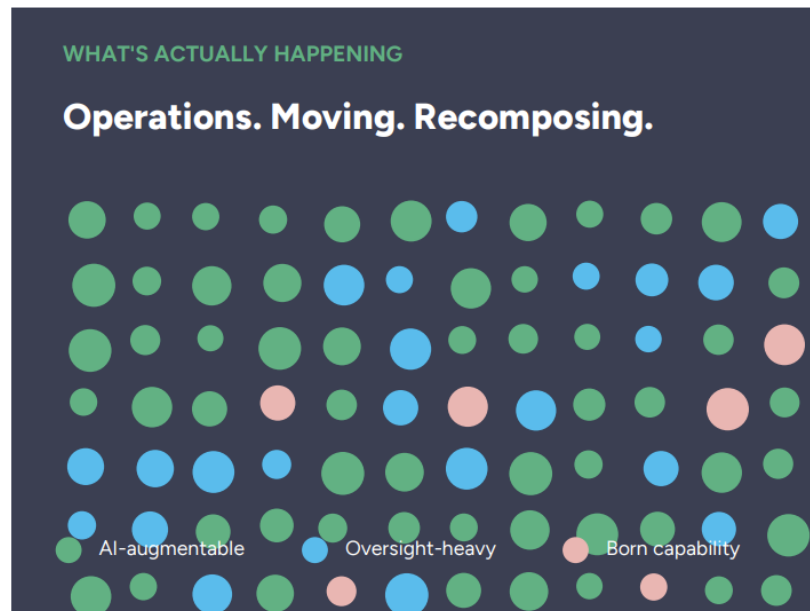
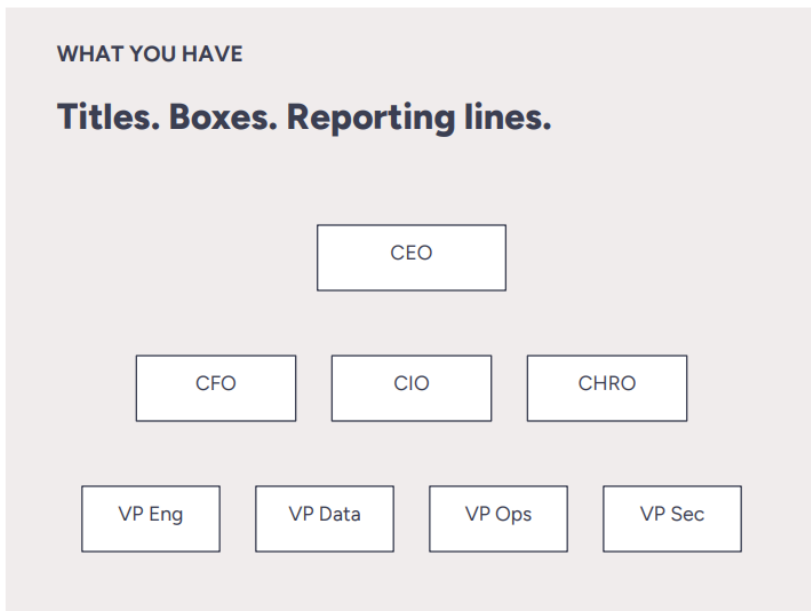
ways to read your work neutrally

For token efficiency, but more importantly work redesign

THE MAP IS WRONG

Your map was built when work = title.

Default AI use is moving work across titles weekly.



Three things you can't see.

Without these, every AI investment is faith-based.

WHERE AI USE IS QUIETLY CREATING SLACK

Capacity is being freed inside titles right now.

Whose hours just opened up - and which strategic problem could you point them at instead?

WHERE WORK IS MOVING ACROSS ROLES

Oversight is the new bottleneck, not execution.

Which roles are absorbing review work that used to live elsewhere - and is that the right place for it?

WHICH CAPABILITIES ARE BEING BORN

The new roles are not on any JD yet.

What human + AI capabilities should you mount now to turn AI into net-new value, not just cost takeout?

Outside-in. Atomic. Empirical.

INPUTS

What you already have.

- Job descriptions
- Headcount
- Org structure

WHAT WE DO

Decompose. Score. Roll up.

- Decompose each role into the actual operations it performs — atomic work units, not titles
- Score every operation against empirical data on what AI can do today, at what risk
- Roll signals up into the processes that drive your business

OUTPUTS

What you get to act on.

- Capacity map - where AI is creating slack
- Refactor plan - how to rewire the work
- Capability bets - where to mount new human + AI capabilities
- The steering wheel - productivity AND its rate of change

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NOW, THE WORK.

BCBSA agreed to be the first publicly-discussed read.



JONATHAN CORPMAN

Sr. Director, People Innovation & Enablement · Blue Cross Blue Shield Association

What we found in BCBSA's read. What they're doing with it.

How this analysis was built for BCBSA

Sustained compute against your data and an evidence corpus automatically assembled for this engagement.

WHAT YOU SHIPPED US

~700 job descriptions from your Workday export

Role/function structure across your ~12 functions

Single CSV - no SOPs, no sub-org mission statements, no org-chart context



WHAT THE SYSTEM DID

Broke down every JD into the specific tasks, subtasks, decisions, and workflows each role performs

Mapped your roles against national labor-market and AI-usage reference data

Cross-referenced against an evidence corpus: industry reports, HIPAA/NAIC guidance, competitor 10-Ks, AI-affordance research

Surfaced 22 strategic opportunities, with role assignments, workload hours, and capability gaps estimated for each



WHAT BCBS GOT

22 ranked recommendations across two strategic lenses

JD-level lineage per recommendation with contributing passages

Hours-freed estimates with a 50% conservative haircut applied

Coordination, training, and capability-gap signals per opportunity

Auditable end-to-end

Compute spend on this analysis: **≈\$15,000**

For context: the MS21 "toy" agentic workflow runs the full prompt suite against a sample dataset 66 times for 25¢. This BCBSA analysis is ~60,000× that scale - not a one-shot LLM call, but sustained processing through a multi-stage pipeline.

≈\$15K compute → **\$1.85M–\$2.89M of modeled annual workforce capacity surfaced.**

Same process BCBSA ran. Three slots. Scan to raise your hand.

THE PATH

- | | |
|--------------------|--|
| You send | Your JDs and headcount. A Workday CSV is enough - no other internal data. |
| We run | The same pipeline you just saw. Decompose → score → roll up. Evidence corpus assembled for your industry. |
| You receive | Ranked opportunities, JD-level lineage, hours-freed estimates with the conservative haircut, capability-gap signals. |
| Timing | ≈2 weeks from JDs in to read out. |

Or grab me after.

RAISE YOUR PHONE TO RAISE YOUR HAND



assess.skillbench.com

No NDA to scope. No deck required.

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SESSION 6 · 1:00 PM

Manager Behaviors

Necessary for AI Transformation

Mark Ozer · Co-Founder, ExecOnline

Team-Level AI Transformation Program · May 27, 2026

The Stanford Park Hotel · Menlo Park

Followed by Francesca Gino at 1:15

Why I'm here

FORTY-FIVE DAYS AGO, EXECONLINE ACQUIRED TEAMRADERIE

01

Who we are

ExecOnline delivers leadership development from twenty of the world's top business schools — Berkeley Haas, Stanford GSB, Wharton, MIT, Yale, Tuck, Darden, and more — at scale, to 200+ enterprise clients.

02

Why the acquisition

Team-level transformation and leader development are two halves of the same problem. Teamraderie equips the teams. ExecOnline equips the leaders who build, run, and protect those teams.

03

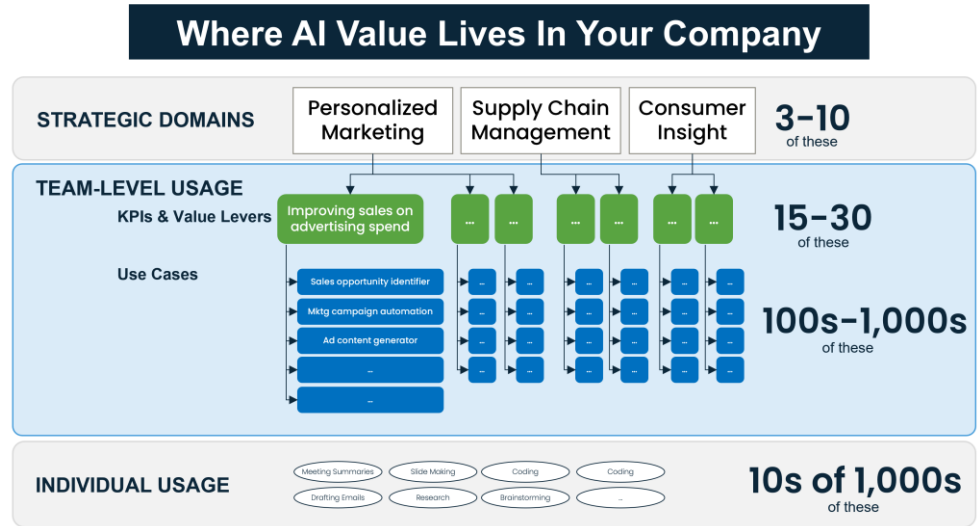
What I'll share now

Six manager capabilities AI transformation actually requires — and the Berkeley Haas course we built to teach them. Francesca will follow with why those managers matter behaviorally.

Developing leaders. Enabling teams. Designed to work together.

The Goal You Have

An organization
where every team is
reimagining work,
recursively,
ongoingly, every
year, from here.

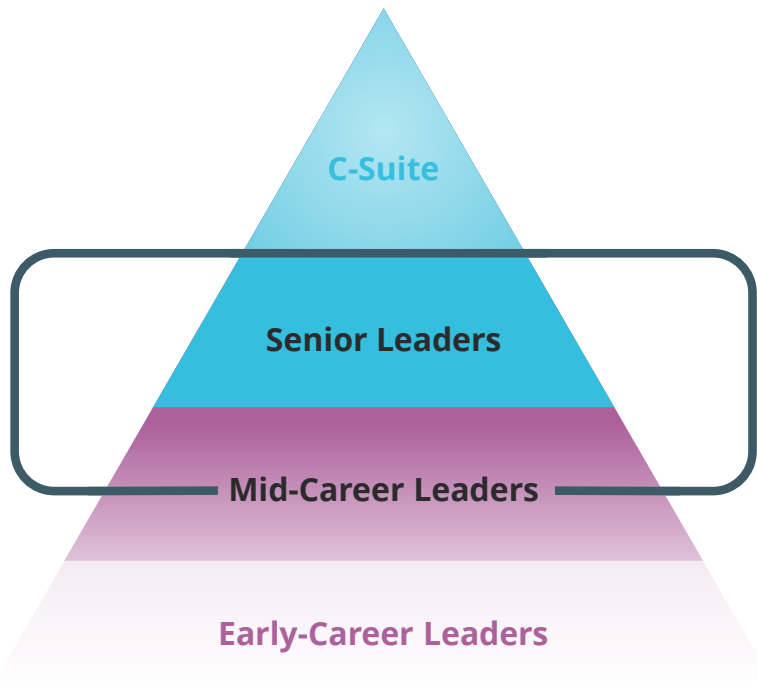


Six Manager Capabilities AI Transformation Requires

	LEADER CAPABILITY		CONVENTIONAL APPROACH		EXECONLINE'S APPLIED LEARNING FRAMEWORK
01	Strategic Framing	×	AI training disconnected from business strategy	✓	Leaders identify a real AI challenge and map it to top priorities
02	Innovation Discipline	×	Ad hoc pilots with no structured evaluation	✓	Berkeley Innovation Cycle applied to evaluate where AI creates real value
03	Opportunity Discovery	×	Ask "where should we use AI?" and brainstorm a list	✓	Five strategic lenses to find where work stalls -- not where to add AI
04	Executive Fluency	×	ROI cases built on "time saved" and adoption rates	✓	Business cases anchored in decision quality, action speed, and KPIs
05	Deployment Readiness	×	Leaders learn concepts; teams never see the benefit	✓	An alignment plan with priorities and gaps -- ready to cascade via Teamraderie
06	Accountability	×	Course ends with a certificate and a survey	✓	A business-ready AI initiative plan, peer-tested with Berkeley faculty

The Upper Middle is Where Leverage Sits

Designed for critical talent cohorts



Susan
SVP Finance

Prepare Susan to enter the C-Suite and develop her Board-readiness



Henry
VP of Product Development

Take Henry from “functional expert” to “cross-functional leader”



Fran
Director of Operations

Develop Fran’s enterprise thinking—along with her fellow HiPo Program colleagues

Leading AI Transformation

A six-week, cohort-based, professor-led course with UC Berkeley Haas.

Built to replace conventional AI training with applied, strategy-connected leader development.

UC Berkeley Exec Ed



THOMAS LEE

Associate Adjunct Professor
Haas School of Business



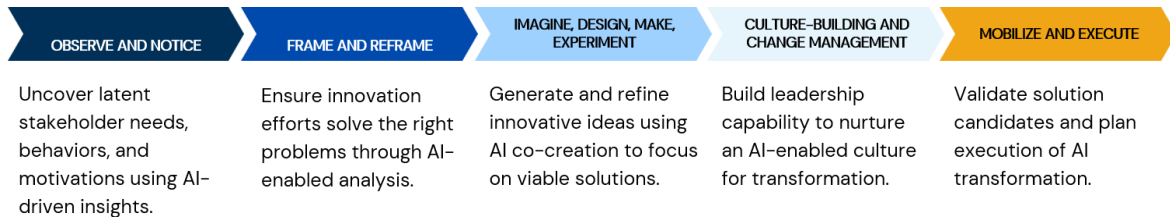
JENNIFER CHATMAN

Dean
Haas School of Business



SARA BECKMAN

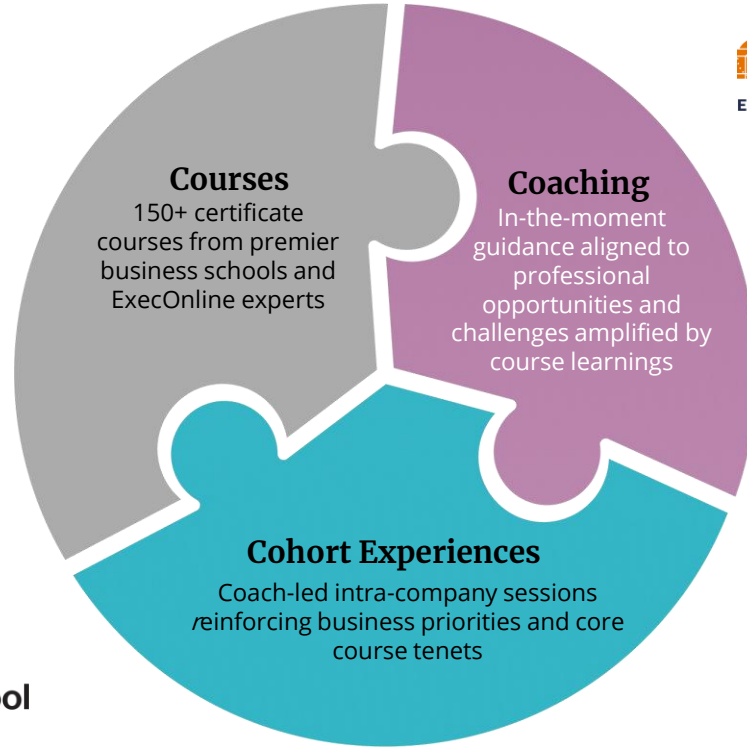
Teaching Professor
Haas School of Business



One of Many ExecOnline Courses



Yale SCHOOL OF MANAGEMENT
Executive Education



TUCK
EXECUTIVE EDUCATION
AT DARTMOUTH



Executive Education



Wharton
Aresby Institute of Executive Education
UNIVERSITY OF PENNSYLVANIA

Executive
Education

UC Berkeley Exec Ed

Two design choices

What Makes This Different

01 · PRINCIPLE

AI-augmented, not AI-about.

Every week, participants run pre-work prompts in their own LLM — ChatGPT, Claude, Gemini — to do real strategic work on their own challenge. The course isn't about AI. It uses AI to teach leadership.

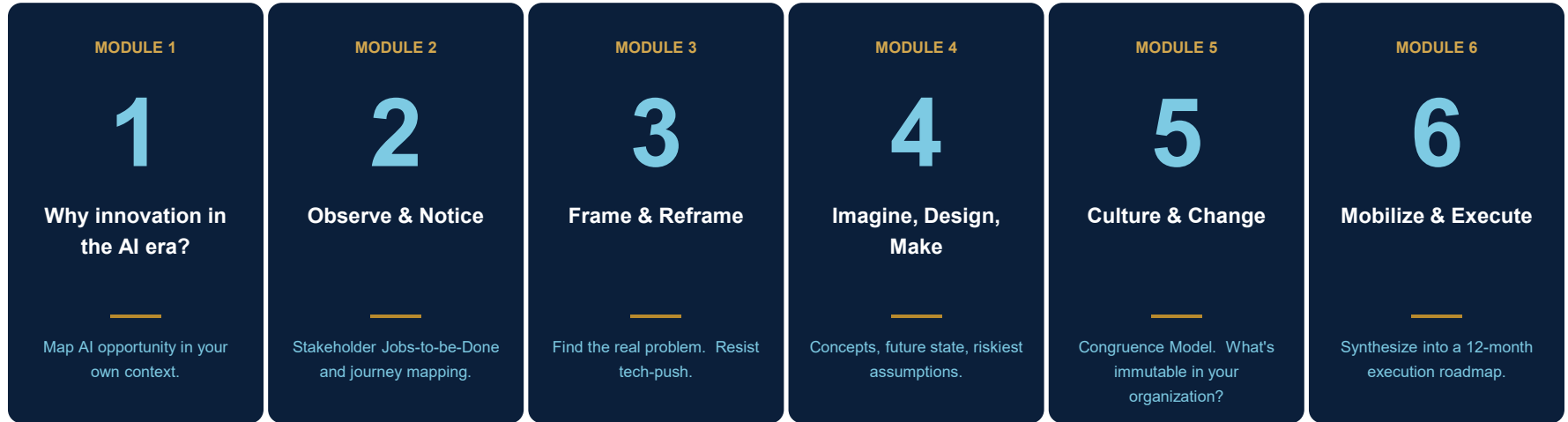
02 · FRAMEWORK

The Berkeley Innovation Cycle.

- 1 Observe & Notice
- 2 Frame & Reframe
- 3 Imagine & Design
- 4 Make & Experiment

Built on a real challenge from day one

What Makes This Different



“The plan is the proof.”

There is no exam. The twelve-month roadmap IS the proof of learning.

What participants walk away with

What Makes This Different

01

Six Live Forum sessions

Direct, applied contact with Professors Beckman, Lee, and Chatman.

02

A 12-month AI Transformation Roadmap

A working document — not a reflection essay — that participants take back to their organization.

03

An AI-prompt library

Model-agnostic prompts they keep, refresh, and re-use as their challenge evolves.

04

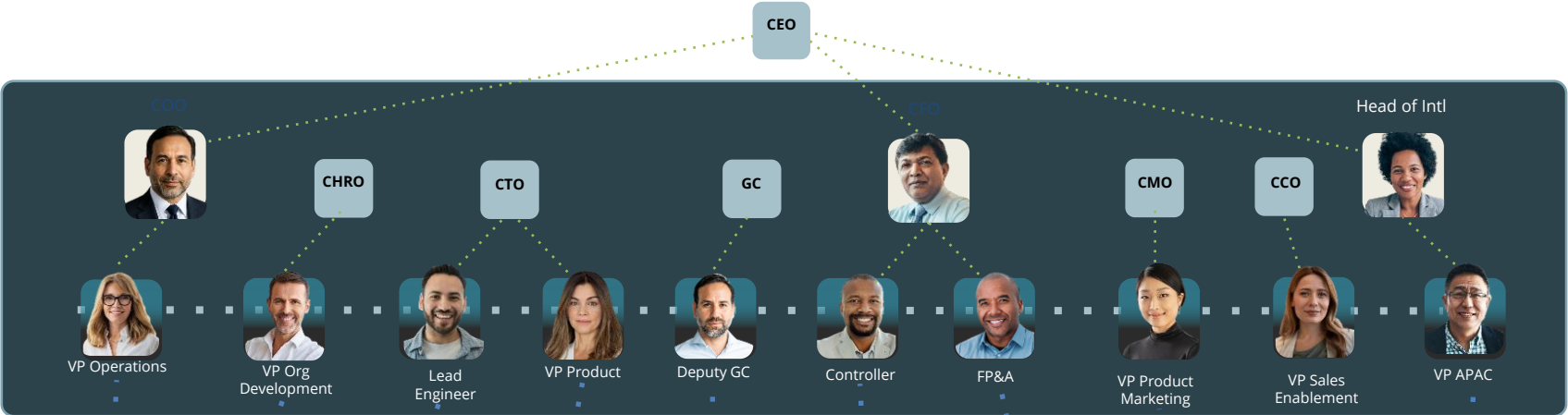
A cross-industry peer cohort

Healthcare, manufacturing, financial services, energy — wrestling with the same questions side-by-side.

Six weeks. One transformation challenge. A plan they can run on Monday morning.

Developing Leaders, Enabling Teams

ExecOnline 6 - week course



Teamraderie Program



What I just described is the playbook.

**What Francesca is about to describe
is why it works.**

FRANCESCA GINO · BEHAVIORAL SCIENTIST · 1:15 — 1:30

Why Team Leaders Matter More Than Ever

How managers decide whether employees see AI as opportunity — or as threat.

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Teamraderie

How Teams Are Organizing Team-Level AI Adoption

Michele Parks – EVP, Chief People Officer

Tom Sterling – VP, People Solutions Ops



AGENDA

01

Cox Automotive, Inc. Overview

02

Alignment of Teamraderie and How We Managed Our Teams

03

Teams Always Challenging Their Thinking

04

What Made The Teams Successful

05

Q&A

Operating
in 5

Continents

\$9.6B

Revenue

29,000+

Employees

25+

Global Brands

12

Domestic Brands



Our U.S. portfolio

THE CAR BUYING JOURNEY

EXPLORE

Inventory

 Manheim  CentralDispatch  NextGear Capital  EV Battery Solutions

CONSIDER

Marketing

Autotrader   Kelley Blue Book  Dealer.com

SELECT

Operations

 Dealertrack  vAuto  VinSolutions  xtime

BUY

Mobility

 Cox Fleet

OWN

Aligning Teamraderie to Our AI Champion Strategy

How the Teamraderie Experience plugs into our existing AI
Champion structure and ways of working



Enterprise AI Business Champions

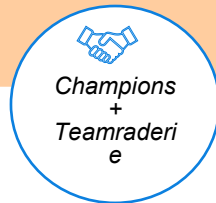
Drive AI Adoption and Transformation across the organization

Champion Profile

Senior leader with authority to drive change, strong cross-functional relationships, and operational expertise to execute AI transformation

Key Responsibilities

Drive AI adoption, manage the AI portfolio across their function, and champion workforce transformation and organizational change



Functional Area

Sales
Marketing
Finance
People Solutions
Technology
Strategy
Inventory
Retail
Mobility
NextGear

Five Teamraderie AI Use Cases

Sales
Finance
People Solutions
Technology
Inventory (Manheim)

Team sizes around 4-12

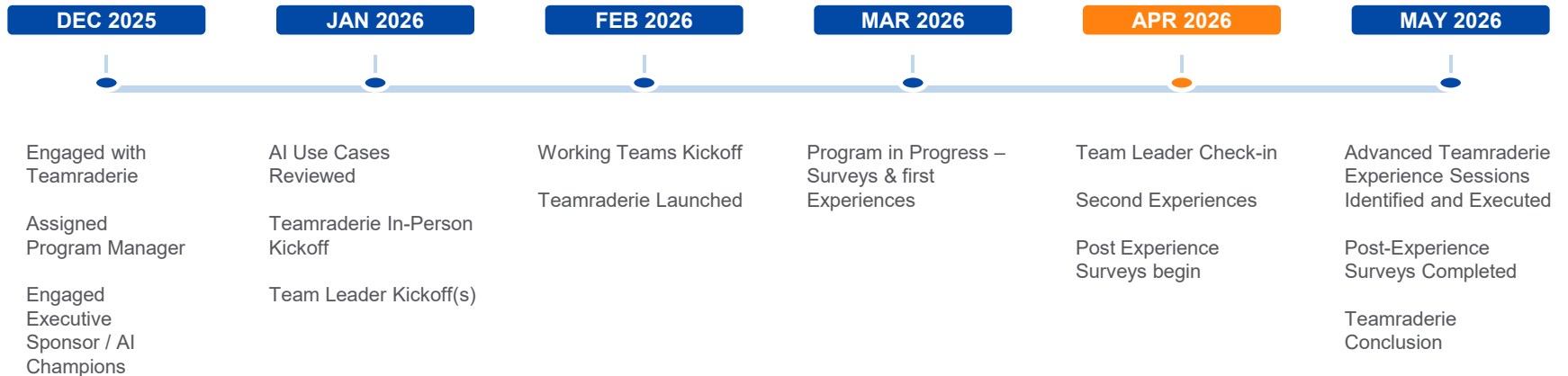
Teamraderie - AI Use Case

AI Champion Area	Use Case
Finance	<ul style="list-style-type: none">AI-driven Finance Executive Dashboard powering a new Investor Relations function with decision-ready leadership insights.
Sales	<ul style="list-style-type: none">Team & Individual Performance Analysis Surfaces performance trends, gaps, and coaching opportunities for sellers.Dealer Performance Analysis by Territory Highlights territory gaps and prioritizes actions across a leader's book of business.Risk Prediction & Churn Prevention Flags at-risk accounts early and focuses retention where revenue is most exposed.
HR Operations (Service Center)	<ul style="list-style-type: none">Knowledge-first capability where AI analyzes cases at scale—optimizing taxonomy, aligning knowledge to issues, mapping issue journeys, and enabling evidence-based service decisions.
Technology (Software)	<ul style="list-style-type: none">AI accelerates GTM drafting and synthesis today, but core workflows are unchanged—opening an opportunity to redesign work, decisions, and coordination end-to-end.
Inventory (Manheim)	<ul style="list-style-type: none">Pre-Sale Audit's first phase focuses on basic automation, not agentic AI—positioning the program to inform future strategy as field readiness matures.

How We Managed Our Teams

Program Timeline

December 2025 – May 2026 • multiple connects throughout program duration, including the assignment of a Program Manager



Teams Always Challenging Their Thinking



Rethink. Don't Just Fix.

Process Improvement

Take an existing process.
Add AI to make it faster or cheaper.
Deploy and celebrate.

Result: Sophisticated technology sitting on top of outdated thinking.

VS

Process Reinvention

Start with a blank page.
Ask what this work would look like if designed today with AI native to it.
Rebuild for the AI-augmented world.

Result: Transformation.

Not All AI Is The Same

Three types. Different problems. Different business cases. Often used together.

Classical ML

The Grandfather

Prediction, pattern recognition, large-scale number crunching. The proven ROI story. Holds up best in a finance conversation.

Best for:

- Finance modeling
- Demand forecasting
- Fraud detection

Generative AI

The Rockstar

Content creation, strategy, synthesis, knowledge work. This is what most people mean when they say “AI” today.

Best for:

- Strategy & planning
- Content creation
- Knowledge synthesis

Agentic AI

The Frontier

Autonomous, multi-step, executes entire workflows. Inside operations and customer-facing. High volume, structured work.

Best for:

- Back office processes
- Customer service
- Workflow automation

Individual Proficiency Doesn't Equal Team Transformation.

Substitution

Doing tasks faster with AI. Produces a productivity gain. It is table stakes.

Most organizations stop here.

Recomposition

Rethinking how work is divided — who owns what, what AI handles, and how the two work together toward an outcome.

That is transformation.

Paul Leonardi, UC Santa Barbara — Teamraderie AI Adoption Research Program

The real value shows up when teams stop and ask: “How do we do this work differently together?” That’s a completely different conversation than “go take this training.” It takes deliberate leadership, real experimentation, and time.

What Made The Teams Successful



What Made The Teams Successful



Executive-level support

Visible sponsorship that signaled program commitment



Dedicated Program Manager

Single owner driving cadence, accountability, and momentum



Program Education

Upfront walkthrough so teams understood the program before kickoff



Team Lead Level Check-Ins

Regular touchpoints to surface blockers and share wins



Use Cases Already Existed

Teams brought real problems being worked, not hypotheticals



Teamraderie Engagement

Regular connections-building program strength and team trust

THANK YOU & QUESTIONS



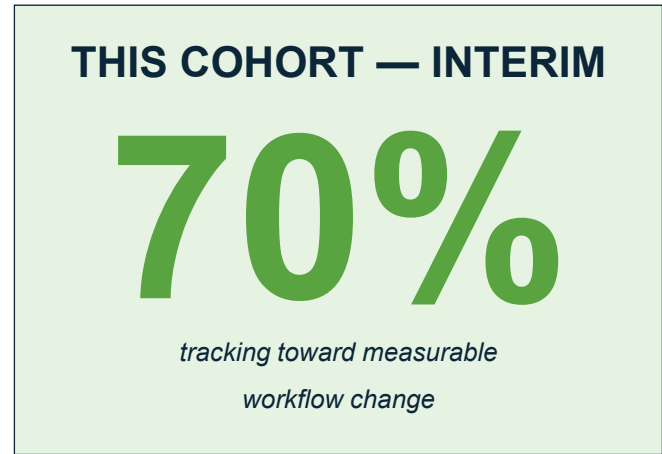
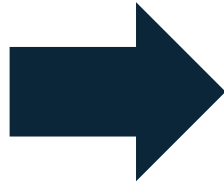
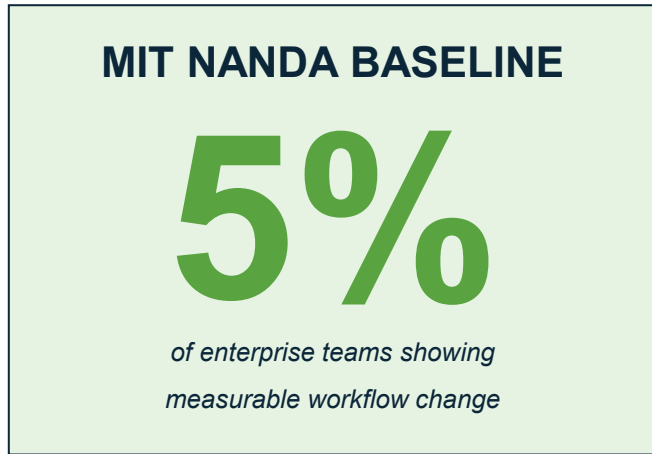
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What Your Teams Have Achieved

5 MONTHS IN || INTERIM READ



Same population — enterprise teams.

Same definition of success — KPI movement plus documented workflow redesign.

Three Numbers from Best-of-Best

MCKINSEY — 20 COMPANIES THAT EXECUTED AI AT THE HIGHEST LEVEL

20%

EBITDA uplift

—
From AI-focused efforts — concentrated
in 2–3 areas of the business
(with a focused approach like this).

1.5 yrs

to payback

—
Some under a year; plan on one to two.
If somebody promises two months,
something is wrong.

\$3

EBITDA per \$1 invested

—
An exceptional ratio.
The kind of return that compounds
when you get it started.

Source: McKinsey analysis of 20 companies executing AI and technology transformation at the highest level.

Why the Winners Win

TWO THINGS THE 20 HAVE IN COMMON — NEITHER IS TECHNICAL

1

They concentrate

They have chosen 3-10 economic leverage points (“Domains”) where AI improvement moves the P&L significantly. They have not tried to do everything. They have done a few things very well.

2

They equip the teams — at scale

NOT INDIVIDUAL TRAINING ON PROMPTING.

How to identify problems. How to disaggregate them. How to quantify impact.

NOT IN INDIVIDUAL GROUPS.

Trained as intact teams and cross-functional teams — the atomic units responsible for delivering impact.

MAPPED TO WHERE LEVERAGE SITS.

They identified the teams that deliver leverage – and invested in those teams.

This is exactly the exercise we are doing with you.

**The companies that invest
in their teams' capacity
to redesign work**

**ARE THE COMPANIES
THAT WILL WIN.**

Two Cohorts in This Room

YOUR NEXT STEPS

Jan – Jun Cohort

Companies finishing Phase 1

Your teams have measured results. Over the next two weeks, we will share that data with you team by team.

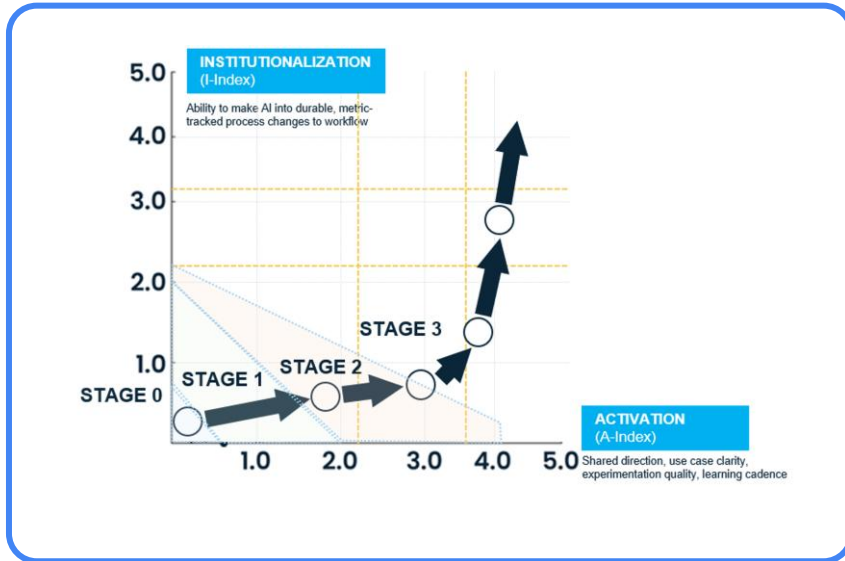
Jun – Nov Cohort

Companies starting Phase 1

You came today to see what the work looks like before you start. You should leave today ready to start.

For Companies Finishing Phase 1

Invest in moving Stage 1/2 teams into Stage 3



WHAT WE ARE OFFERING YOU

New sessions co-built with the faculty

New sessions are designed to take your teams from activation to institutionalization.

Team-level data, team by team

We will share measured results over the next two weeks with recommendations for each of your first teams.

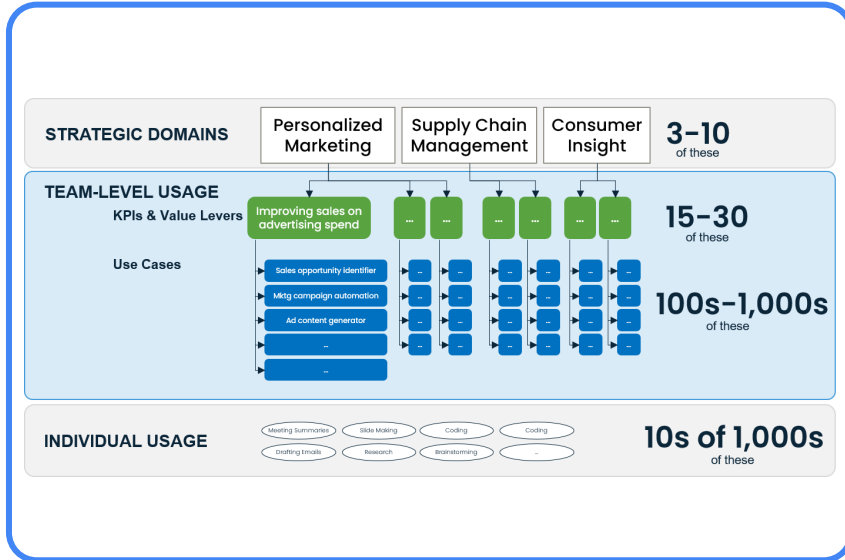
A C-suite alignment option

A new offer to support how your leadership team is pursuing this — not just the teams beneath them.

RECOMMENDATION: Extend. You have already paid the activation cost. The institutionalization payoff is the part that compounds.

For Companies Finishing Phase 1

Add more teams – aligned to your Strategic Domains and KPIs/Value Levers



WHAT WE ARE OFFERING YOU

Scaled Up-Leveling of Leaders

Help 1,000s of leaders become ready to lead AI transformation – be ready to scale to 1,000s of use cases.

Rigorous Best-Practice

Apply the best-known methods of engaging and launching new teams to make fastest A-I curve progress

Ability to Meet Them Where They Are

Sessions are designed to meet your earliest and most sophisticated teams at whatever point they start from.

RECOMMENDATION: Add More Teams. There is excellent evidence on how to make them successful.

For Companies Starting Phase 1

Let's get going!

SCHEDULE

June 30

Enrolling by this date puts your first measured results inside this calendar year.

WHAT TO EXPECT FROM US

Outreach starts tomorrow

We will be in touch tomorrow morning. Over the next two weeks, one-on-one meetings with each of you.

Refreshed enrollment materials

To help you communicate the program to teams you enroll and set expectations before their first session.

Optional pre-program for team leaders

We will meet with your team leaders before they start — so they begin inside the operating practices you heard from the faculty today.

Add-On: UC Berkeley course for your leaders

Through ExecOnline, we can now offer a UC Berkeley course on Leading AI Transformation — self-paced and live. The language and structure for your senior leaders to lead this work alongside you.

RECOMMENDATION: Apply what you heard today – and recognize that we **STILL** have more to learn on best practices (with you).

For Everyone

Help to Setup Your Next Phase

INTERACTIVE ASSETS

For Your Next Teams

How to define your AI projects

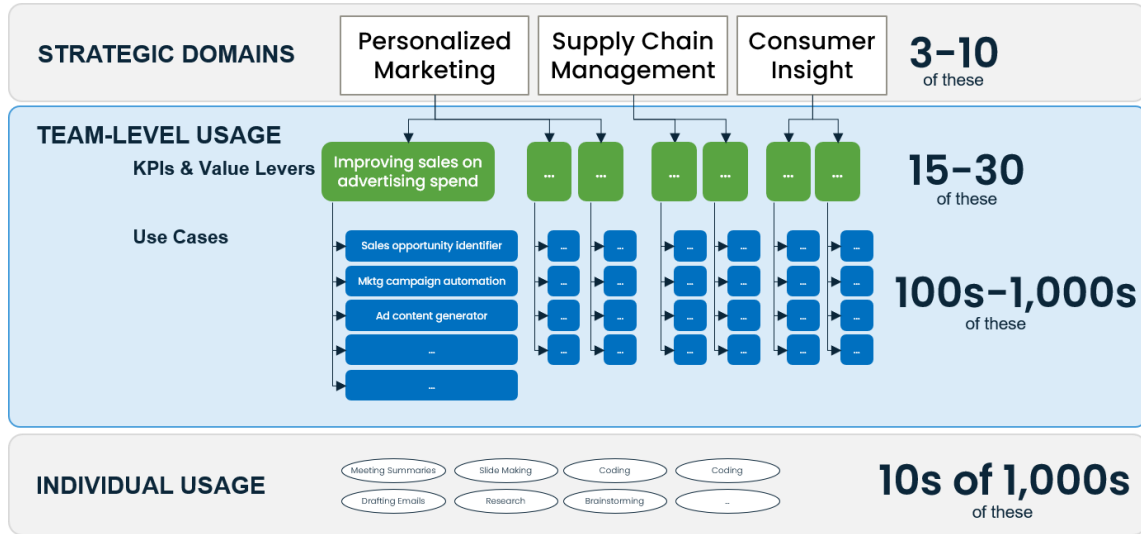
Scoping the workflow before tooling decisions.

How to define your ROI

Beyond 'time saved' — what actually moves a KPI.

How to organize the people on your team

Who is human, who is human-in-the-loop, who is AI-led.



For Everyone

Help to Setup Your Next Phase



Irina Egorova

San Francisco, CA



Hayley Fader

Dallas, TX



Elle Giraldo

Austin, TX

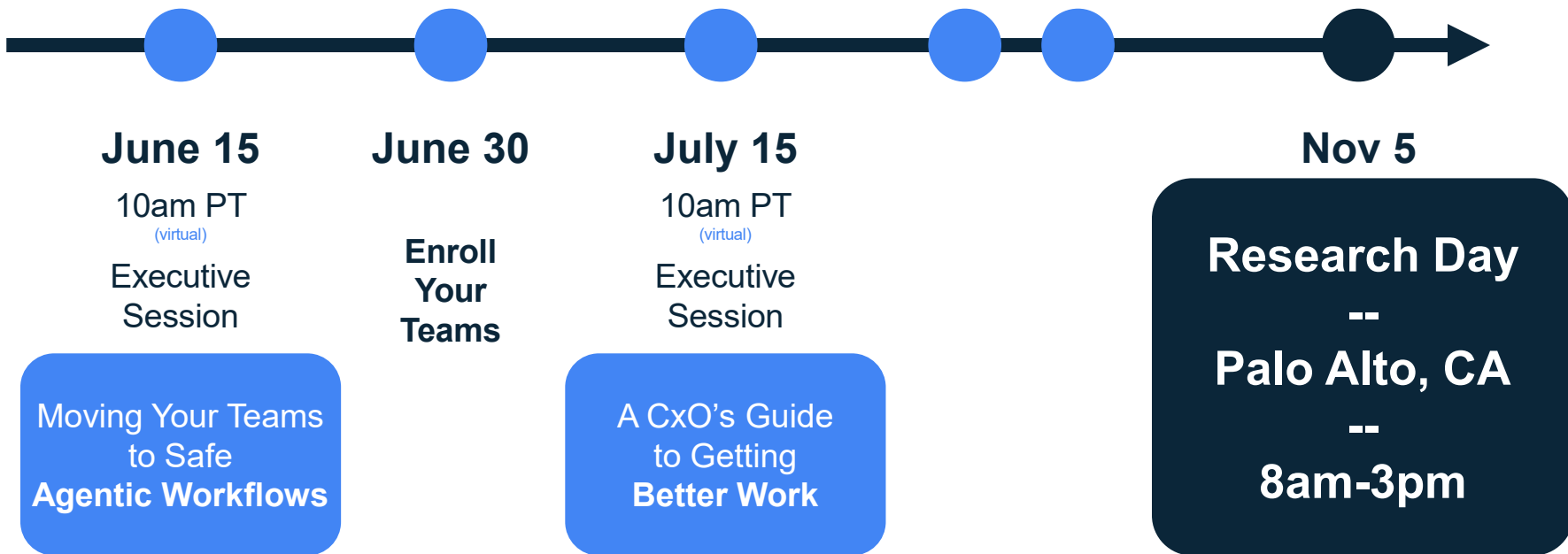


Jamie Heidt

Denver, CO

For Everyone

Your Next Six Months As a Community



Three Disciplines for Next 6 Months

Grounded in what you saw today

01

Patience with the curve

McKinsey's data is 1-2 years to payback. The data today is ~6 months to material progress on workflow change. The companies that leave teams at month 4 abandon at the wrong inflection. The slope rewards the ones who stay.

02

Trust the teams to redesign the work

The strategy deck does not redesign the workflow. Bain/McKinsey does not. The teams inside your organization will redesign the workflow — or no one will. Equip them accordingly.

03

Concentrate

The companies producing 20% EBITDA chose two or three economic leverage points and went deep. The companies producing nothing have launched a hundred pilots. Pick your Domains and equip your teams.

You will win

*Because of the investment you have already made —
and the investments this group will make from here.*

Today was the proof of concept.
The next six months are the proof of scale.

Agenda

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- **8:30 am - 8:40 am: Welcome and Framing the Day**
Michael McCarroll, SVP & GM - Teamraderie
- **8:40 am - 9:10 am: Team-Level AI Adoption: An OpenAI Perspective**
Arvind KC, Chief People Officer - OpenAI
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