

# IMPLEMENTATION ROADMAP FOUNDATIONS

An AI Transformation Guide: Technology, People, Governance, and Culture

## PURPOSE

This guide gives delivery leaders, PMO directors, and program executives a structured, phased path from their current state to predictive execution intelligence. Most AI transformations fail not because the technology did not work, but because the human side was ignored. This guide covers both: the technical implementation and the people, communication, training, and change management work that determines whether your organization actually adopts it. This guide represents the foundational layer. For organizations ready to go deeper — advanced implementation strategy, custom frameworks, and hands-on support are available through ExecutelQ.

## HOW TO USE THIS GUIDE

Step 1: Complete the Starting Profile Diagnostic. Step 2: Complete the Discover and Align section before Phase 1 begins. Step 3: Build your Stakeholder Map including the Change Champion Network. Step 4: Work through each phase sequentially. Do not advance until the Governance Gate is cleared. Step 5: Run the pre-survey before Phase 1 and the post-survey after Phase 5.

<b>Organization:</b>	_____ _____	<b>Date:</b>	_____ _____
<b>Implementation Lead:</b>	_____ _____	<b>Executive Sponsor:</b>	_____ _____
<b>Target Start Date:</b>	_____ _____	<b>Target Completion:</b>	_____ _____

## STARTING PROFILE DIAGNOSTIC

Answer each question and total your score. Your score determines which profile applies and which phase is your true starting point.

Question	Yes (2)	Partial (1)	No (0)	Score
Does your organization have at least two delivery tools actively connected and in use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a named owner responsible for delivery intelligence or PMO operations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has your organization piloted any AI or automation in delivery workflows before?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have a baseline measurement of current status reporting time or risk discovery lag?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is your leadership team actively requesting better visibility into delivery performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Do your teams have documented processes for status reporting and risk escalation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Can you currently map any active program or sprint to a specific business outcome or KPI?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>TOTAL SCORE</b>				<b>__ / 14</b>

0-5

### PROFILE A: STARTING FROM ZERO

No AI tools. Data completely siloed. Begin at Phase 1 and move sequentially.

6-10

### PROFILE B: PARTIAL FOUNDATION

Some tools connected. Inconsistent adoption. Begin at Phase 2.

11-14

### PROFILE C: READY TO SCALE

Foundation in place. Begin at Phase 3 or 4. Focus on outcomes and scaling.

## AI VS. AUTOMATION: AN IMPORTANT DISTINCTION

Automation replaces people. Execution intelligence makes people more powerful. Your team's jobs are not being eliminated. Their admin burden is. The hours spent gathering status, chasing updates, and manually compiling reports will be returned to them as strategic capacity. AI handles the noise so your people can focus on the work that actually requires human judgment: decisions, relationships, and leadership. When your team asks 'will this replace me?' — the answer is: No. It will make you more valuable. Share this message early, often, and honestly.

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■ *KEY PRINCIPLE: Map your dependencies before Phase 1 starts. A dependency that is not tracked is a blocker waiting to happen. The goal is not to eliminate dependencies — it is to see them coming.*

**PRE-IMPLEMENTATION SURVEY: Send to all affected teams before Phase 1 begins.**

- Do you understand why this implementation is happening and what problem it solves?
- Do you feel your concerns about this change have been heard?
- Do you understand how this will affect your day-to-day work?
- Do you trust that leadership is committed to making this successful?
- On a scale of 1-5, how ready do you feel for this change? (1 = not ready, 5 = fully ready)

**IMPORTANT:** If more than 30% of respondents score readiness below 3, address trust and communication gaps before proceeding. An implementation launched into a low-trust environment will fail regardless of how good the technology is.

## STAKEHOLDER MAP

Name every person in each role before Phase 1 begins. Implementations without named owners do not move. Implementations without a named skeptic get derailed.

<b>EXECUTIVE SPONSOR</b>	Name(s): _____ Has budget authority. Protects the initiative politically. Signs off on phase completions. Receives monthly executive visibility update between governance gates. How to Engage: _____
<b>IMPLEMENTATION LEAD</b>	Name(s): _____ Owns the overall roadmap. Coordinates across workstreams. Escalates blockers to Executive Sponsor. Runs the feedback loop and communicates progress to all teams. How to Engage: _____
<b>CHANGE CHAMPION NETWORK</b>	Name(s): _____ A group of trusted individuals across teams who drive adoption from within. They are not managers — they are peers that their colleagues trust and listen to. Recruit them early. Train them first. Give them a voice in the process. How to Engage: _____
<b>PILOT TEAM LEAD</b>	Name(s): _____ Leads the first pilot team. Most likely to succeed early and create internal proof of value. Their results become your most powerful change management tool. How to Engage: _____
<b>THE SKEPTIC</b>	Name(s): _____ The person most likely to resist. Name them. Plan for them. Engage them early — ideally include them in the pilot. Unaddressed skeptics become vocal opponents. How to Engage: _____

■ *THE CHANGE CHAMPION NETWORK is the most scalable human-side investment you can make. One champion per team, trained and trusted, drives adoption faster than any top-down mandate. They answer the questions people are afraid to ask leadership.*

**EXECUTIVE VISIBILITY CADENCE:** Do not wait for governance gates to update your Executive Sponsor. Send a brief monthly update covering: what phase you are in, one concrete result, one active risk, and what you need from them. Keep it to one page or less. Sponsors who feel informed stay engaged. Sponsors who feel uninformed withdraw their protection.

Connect your tools. Establish your single source of truth. Baseline your current state before anything changes.

Key Actions	What Done Looks Like	Common Blockers	Owner
Inventory all active delivery tools and data sources	Complete tool inventory with owner and data type documented	Teams using unofficial shadow tools resist disclosure	PMO Lead
Connect primary tools to intelligence layer	All primary tools connected and data flowing into unified source	IT security review delays integration approvals	IT Lead
Capture baseline measurements: status hours, risk discovery lag, report frequency	Baseline document signed off by Executive Sponsor	No baseline captured — cannot measure ROI later	Impl. Lead
Communicate the why to all affected teams before Phase 1 begins	All teams briefed. Questions addressed. Feedback channel open.	Teams not informed until after implementation — resistance spikes	Change C hampion
Complete training for pilot team on new tools and workflows	Pilot team trained and confirmed ready before go-live	Training skipped to save time — adoption fails later	Impl. Lead

**HUMAN SIDE**

Before Phase 1 closes: Hold a team session to share what is changing and why. Open a dedicated feedback channel. Address the 'will AI take my job?' concern directly and honestly. Celebrate the team for participating in something that will make their work better.

**GOVERNANCE GATE: Do not advance to Phase 2 until all boxes are checked.**

■ All tools connected and data verified as flowing correctly
■ Baseline measurements documented and approved by Executive Sponsor
■ All affected teams communicated with and feedback channel open
■ Pilot team trained and confirmed ready
■ Monthly executive visibility update sent

Activate your first automated workflow. Run your pilot. Measure everything against your baseline.

Key Actions	What Done Looks Like	Common Blockers	Owner
Activate first automated workflow with pilot team	First automated report generated from live data	Team defaults back to old process out of habit — remove old process	Pilot Lead
Run 30-day pilot and measure against baseline	30-day success metric achieved and documented	Pilot scope creeps to too many teams too fast	Impl. Lead
Present before/after results to leadership	Leadership briefed with concrete before/after comparison	No baseline captured in Phase 1 — results cannot be proven	Impl. Lead

Key Actions	What Done Looks Like	Common Blockers	Owner
Collect feedback from pilot team mid-pilot and at close	Feedback documented. Issues resolved. Adoption above 70%.	Low adoption after Week 4 — address before expanding	Change C hampion
Celebrate the first win visibly and publicly	Win recognized organization-wide. Early adopters acknowledged.	Win ignored — momentum opportunity lost	Exec. Sponsor

**HUMAN SIDE**

When the first automated report is generated — celebrate it. Share it with leadership. Name the team that made it happen. This is your proof of concept moment and your most powerful change management tool. Skeptics pay attention when they see real results.

**GOVERNANCE GATE: Do not advance to Phase 3 until all boxes are checked.**

- First automated workflow live and generating results
- 30-day success metric achieved and documented
- Before/after comparison completed and presented to leadership
- Pilot team adoption above 70% and feedback documented
- First win celebrated and communicated organization-wide
- Monthly executive visibility update sent

Activate risk detection. Build governance language standards. Expand the intelligence layer.

Key Actions	What Done Looks Like	Common Blockers	Owner
Activate predictive risk detection across connected tools	First risk flagged by AI before it was manually escalated	Team does not trust AI flags — build explainability into every flag	PMO Lead
Establish governance language standards	Language standards documented and included in status report templates	Resistance to changing status report format	Change C hampion
Expand automated workflow to second team	Second team onboarded with adoption above 60% by Week 12	Second team has different tools — integration gap discovered late	IT Lead
Train second team before go-live	Second team trained and confirmed ready before activation	Training skipped again — same adoption problems repeat	Impl. Lead
Document first Prevention Proof report	Report shows risks caught early vs. late — with cost comparison	No early detections to report — revisit detection configuration	Impl. Lead

**HUMAN SIDE**

Reinforce the 'AI makes you more powerful' message as the tool catches its first real risk. Show the team exactly what the AI flagged and why — transparency builds trust. When people see the system working for them, not watching them, adoption accelerates.

- Predictive risk detection active with at least one verified early flag
- Governance language standards adopted in status reporting
- Second team onboarded and trained successfully
- First Prevention Proof report presented to leadership
- Monthly executive visibility update sent

Connect execution to business outcomes. Complete Outcome Mapping before this phase closes.

Key Actions	What Done Looks Like	Common Blockers	Owner
Complete Outcome Mapping for all active programs	Every active sprint mapped to a strategic goal, KPI, or OKR	Teams cannot name the business outcome their work supports	PMO Lead
Activate data-driven prioritization framework	Priority decisions traceable to data not urgency or politics	Leadership continues to prioritize based on who is loudest	Exec. Sponsor
Build Prevention Proof reporting cadence for leadership	Monthly report showing what was prevented — not just what went wrong	Leadership only wants delivery metrics — reframe the conversation	Impl. Lead

Key Actions	What Done Looks Like	Common Blockers	Owner
Connect delivery KPIs to organizational OKRs in reporting	Leadership view shows delivery metrics alongside business outcomes	OKRs not defined at organizational level — escalate to leadership	Exec. Sponsor

**HUMAN SIDE**

By Phase 4 your team should be feeling the difference. Ask them. Run a quick mid-point pulse check — one question: 'Is this making your work better?' Their answer tells you what to amplify and what to fix before you scale.

- Outcome Mapping completed for all active programs
- At least one priority decision documented as data-driven
- Prevention Proof reporting cadence established
- Delivery KPIs connected to organizational OKRs
- Monthly executive visibility update sent

PHASE 5

**SCALE**

Weeks 21+

Expand across all teams. Build the champion network. Present ROI. Establish continuous improvement.

Key Actions	What Done Looks Like	Common Blockers	Owner
Expand intelligence layer to all delivery teams	All teams onboarded. Adoption above 70% organization-wide.	Team-specific tool stacks require custom integrations	IT Lead
Formalize and expand the Change Champion Network	At least one champion identified, trained, and active in each team	Champions not given time or authority to drive adoption	Exec. Sponsor
Train all remaining teams before expansion	Every team trained before go-live. No exceptions.	Assuming knowledge transferred without formal training	Impl. Lead
Present full ROI report to leadership	Leadership approves funding for next phase of investment	ROI report not prepared before leadership presentation	Impl. Lead
Establish continuous improvement cadence	Quarterly review of effectiveness. Roadmap updated.	Implementation treated as done rather than ongoing	PMO Lead

**HUMAN SIDE**

Run the post-implementation survey before closing Phase 5. Compare results to the pre-survey from Discover and Align. The delta tells you whether the human side of the transformation actually worked.

- All teams onboarded with adoption above 70%
- Change Champion Network formalized across all teams
- All teams trained before go-live
- Full ROI report presented and leadership approval secured
- Post-implementation survey completed and compared to pre-survey
- Continuous improvement cadence established

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## 0 OUTCOME MAPPING: CONNECTING EXECUTION TO BUSINESS 4 OUTCOMES

Complete this before closing Phase 4. Every active program must map to at least one business outcome. If you cannot complete the right columns for any row — that work needs to be reprioritized or stopped. Delivery work that cannot be connected to a business outcome is activity, not strategy.

Program / Sprint / Initiative	Strategic Goal it Supports	KPI or OKR Connected	Revenue / Cost / Mission Impact

### POST-IMPLEMENTATION SURVEY: Send to all affected teams after Phase 5 closes.

- Do you understand how the AI tools support your work — not replace it?
- Has your admin burden (status gathering, reporting) decreased since implementation?
- Do you feel more or less empowered in your role since this implementation?
- Do you trust the AI-generated insights and reports you are receiving?
- On a scale of 1-5, how satisfied are you with how this change was managed? (1 = very unsatisfied, 5 = very satisfied)
- What one thing would have made this implementation better for you?

Compare post-survey results to your pre-survey baseline. The delta is your change management ROI. Share the results transparently with your team — including what you will do differently based on their feedback.

## 0 RED FLAG EARLY WARNING SYSTEM 5

Check this list at the end of every phase. Each flag comes with a specific recovery action.

### Adoption rate below 50% after Week 4 of any phase

Recovery: Stop expanding. Run a listening session with the resistant team. Identify the specific friction and address it before moving forward.

<b>■</b>	<p><b>Pre-survey results show readiness below 3 out of 5 in more than 30% of respondents</b></p> <p>Recovery: Do not proceed with Phase 1 until trust and communication gaps are addressed. An implementation launched into low trust will fail.</p>
<b>■</b>	<p><b>No baseline measurement was captured before Phase 1 closed</b></p> <p>Recovery: Capture baseline now using current state data. Imperfect is better than nothing. You cannot prove ROI without it.</p>
<b>■</b>	<p><b>Pilot owner or Change Champion changed mid-implementation</b></p> <p>Recovery: Pause. Re-brief the replacement completely. Reconfirm success metric and timeline. Do not assume context transferred.</p>
<b>■</b>	<p><b>Executive Sponsor disengaged after kickoff</b></p> <p>Recovery: Request a 15-minute check-in. Present one concrete result. Reconnect the work to the outcome they cared about at kickoff.</p>
<b>■</b>	<p><b>Team still running old process in parallel with new system</b></p> <p>Recovery: Remove the old process. Parallel running is a transition trap. The team will always default to familiar unless the old option is gone.</p>
<b>■</b>	<p><b>Training was skipped to save time</b></p> <p>Recovery: Stop go-live. Run training now. Every team that goes live without training becomes a resistance story that spreads to other teams.</p>

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## 90-DAY QUICK START TRACK

For organizations with an urgent mandate. Three phases. Ninety days. Minimum viable actions for maximum early impact. The human side is non-negotiable even in the fast track.

Phase	Timeframe	Minimum Viable Actions	Non-Negotiable Gate
<b>CONNECT</b>	Days 1-30	Connect top 2 tools. Capture baseline. Name pilot owner. Complete pre-survey. Communicate the why.	Baseline documented. At least one tool live. Pre-survey sent and reviewed.
<b>ACTIVATE</b>	Days 31-60	Train pilot team. Run automated status pilot. Measure against baseline. Celebrate first win. Collect feedback.	First automated report generated. Before/after comparison shared. Team adoption above 60%.
<b>PROVE</b>	Days 61-90	Map one program to a business outcome. Present Prevention Proof to leadership. Run post-survey. Document ROI.	Outcome Mapping complete. ROI documented. Post-survey results reviewed. Leadership briefed.

Download all five ExecutelQ practitioner frameworks at **ExecutelQ.ai/UMD-Resources** including the Business Case Calculator, Visibility Gap Audit, and Quick Win Prioritization Matrix. For advanced implementation support, custom frameworks, and hands-on delivery — visit ExecutelQ.ai.

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