

A JAYSON FORDE EXECUTIVE STRATEGIC TRAINING FRAMEWORK

Executive Training & Development, Organizational Transformation



How I Train, Develop & Build High-Performance, AI-Enabled
Teams of Managing Leaders

Assess · Develop · Govern · Measure · Automate · Scale

Designed & Created by Jayson Forde

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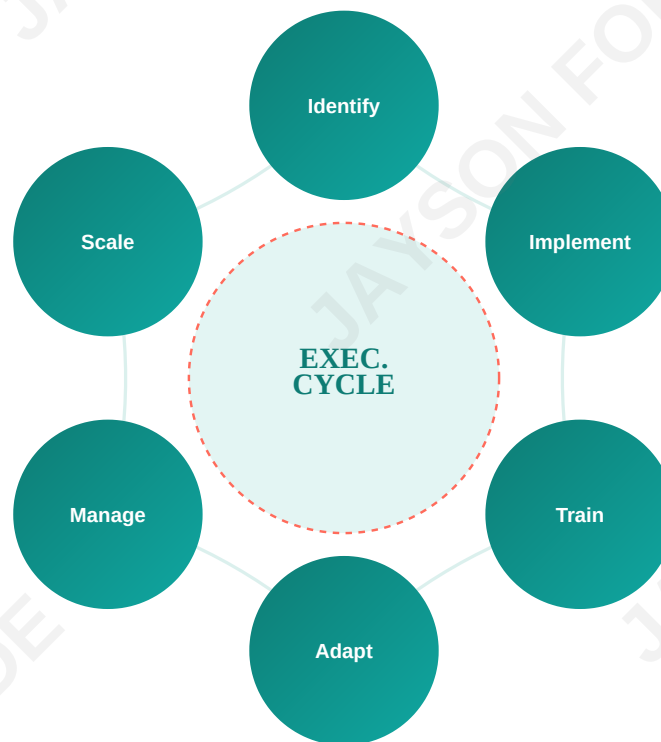
Director / RVP / VP Leadership · Executive Training, Development & AI Enablement

CONFIDENTIAL

MY TRAINING & DEVELOPMENT APPROACH

How I Train, Develop & Build High-Performing, AI-Enabled Teams

This is my enterprise training and development approach: how I **train, develop, and build** teams into high-performing, AI-enabled operations of managing leaders. Training is the intervention; development is the measurable change in capability, autonomy, accountability, and performance that follows, with AI woven in to streamline how the team works, communicates, tracks, and reports.



MY EXECUTIVE DEVELOPMENT CYCLE

THE OPERATING BELIEF

I do not use tenure as a proxy for maturity. **A long-standing team can remain reactive; a newer team can advance quickly when role clarity, leadership, governance, accountability, and the right AI-enabled workflows are strong.**

— THE TRAINING & DEVELOPMENT FRAMEWORK

How I Train, Develop & Build the Team

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|-----------|--|
| 01 | Identify Maturity & Diagnose the Gap
Assess at five nested levels; separate skill gaps from structural ones. |
| 02 | Develop the Individual & the Team
The actual mechanics of developing capability, not just naming phases. |
| 03 | Accountability & Ownership Systems
Who owns what, and how ownership is made visible and enforced. |
| 04 | AI Discovery & Automation
Assess where AI fits, then automate team tracking and reporting. |
| 05 | The AI Enablement Stack
NotebookLM, AI-assisted PM, Power Automate reporting, dashboards. |
| 06 | Governance & Measurement
The loop that sustains development and proves it in numbers. |
| 07 | Scale into Managing Leaders
From AI-assisted operators to self-governing managing leaders. |

— 01 · IDENTIFY

Five Nested Levels of Maturity

I assess at five nested levels so I can distinguish an individual skill problem from a team, leadership, project, or enterprise maturity problem.

1

Individual · Can this person perform?

Role knowledge, systems, SOP adherence, communication, accountability, AI-tool readiness.

2

Team · Can these people perform together?

Coordination, dependencies, trust, conflict resolution, shared accountability.

3

Manager · Can this leader create performance through others?

Delegation, coaching, workload, performance management, governance.

4

Project / Program · Can the group deliver complex work?

Scope, milestones, dependencies, risk, stakeholders, reporting.

5

Enterprise · Can functions operate as one system?

Cross-functional alignment, governance, change readiness, strategic outcomes.

01 · THE MATURITY MODEL

Seven Organizational Maturity Phases

PHASE	MY OBJECTIVE	MY INVOLVEMENT	DEVELOPMENT FOCUS
1. Reactive	Stabilize	Very High	Individual assessment, role clarity, foundational process and accountability
2. Structured	Standardize	High	SOP execution, systems, documentation, manager reinforcement
3. Aligned	Coordinate	Moderate	Dependencies, collaboration, stakeholder awareness, conflict resolution
4. Collaborative	Develop Autonomy	Moderate–Low	Delegation, decision rights, project ownership, peer accountability
5. Autonomous	Strengthen Ownership	Low	Independent execution, problem solving, process improvement
6. High Performing	Optimize	Strategic	Innovation, mentoring, AI-enabled cross-functional leadership
7. Enterprise Adaptive	Scale & Transform	Executive Oversight	Enterprise stakeholder management, program thinking, transformation readiness

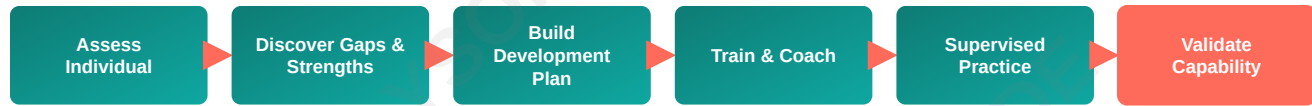
INVOLVEMENT FALLS AS MATURITY RISES

My leadership intensity is highest at Reactive and lowest at High Performing, shifting to strategic and executive oversight as the team earns autonomy. **The goal is a team that needs less of me and more of its own governance and AI-enabled systems.**

SECTION 02

Developing the Individual & the Team

The mechanics of how development actually happens, from assessing one person to lifting the whole team, not just naming a phase.



INDIVIDUAL DEVELOPMENT MECHANICS · ASSESS TO VALIDATE

I assess each person against their role, discover specific gaps and strengths, build a targeted development plan, train and coach against it, put the skill into supervised practice, and validate demonstrated capability before granting autonomy. The same logic scales to the team: I develop coordination, shared accountability, and the ability to operate with AI-enabled workflows.

ACCOUNTABILITY

- ◆ Each person has a named development plan with an owner and a review date.
- ◆ The manager owns coaching and the readiness decision, not HR paperwork.
- ◆ No autonomy is granted without demonstrated, validated capability.

MEASUREMENT

- ◆ Capability delta from baseline to post-development assessment.
- ◆ Time-to-readiness by role and by development track.
- ◆ Team coordination and rework measured before and after.

READINESS, NOT ATTENDANCE

Attendance does not prove readiness. I **validate demonstrated capability** in quality, timeliness, process adherence, judgment, communication, documentation, escalation, and outcomes, before a person or team advances.

SECTION 03

Accountability & Ownership Systems

A high-performing team runs on visible ownership. Everyone knows what they own, how it is tracked, and what happens when it slips.

ACCOUNTABILITY LAYER	HOW I ESTABLISH IT
Role & decision ownership	Every role has explicit outcomes, decision rights, and escalation paths, no ambiguity about who owns what.
Work ownership	Every assignment carries an owner, a status, a next action, and a due date, tracked in a shared, increasingly automated system.
Ownership of adoption	Managers own whether new standards and AI workflows are actually adopted, not just announced.
Peer accountability	As the team matures, accountability shifts from Director-driven to peer- and self-governed.
Escalation discipline	Issues are escalated with ownership intact, visibility is never lost in the handoff.

THE ACCOUNTABILITY PRINCIPLE

Accountability is not blame, it is **visible ownership plus a review cadence**. When ownership is explicit and tracked, coaching replaces chasing, and the team governs itself.

ACCOUNTABILITY

- ♦ Owner named on every role, workflow, and assignment.
- ♦ Managers accountable for adoption of standards and AI workflows.
- ♦ Escalations preserve ownership and visibility.

MEASUREMENT

- ♦ Percentage of work with a clear owner and due date.
- ♦ Adoption rate of new standards and AI workflows.
- ♦ Reduction in Director-driven follow-up (Dependency Index).

SECTION 04

AI Discovery & Automation

Where AI is needed, I discover it deliberately, mapping the workflow, finding the manual load, and automating team tracking and reporting so the team works efficiently.

I do not bolt AI on. I map the team workflow, find the manual and repetitive load, assess where AI genuinely fits, select the right tool, pilot it with human review, then automate and standardize it. The goal is a team that works and communicates efficiently with AI, and reporting that runs itself.



AI DISCOVERY-TO-AUTOMATION PATH

ACCOUNTABILITY

- ♦ A named owner runs each AI pilot and its human-review gate.
- ♦ Nothing client-facing ships without human review and approval.
- ♦ Automations are documented and owned, not shadow processes.

MEASUREMENT

- ♦ Manual hours removed per automated workflow.
- ♦ Reporting cycle time before vs. after automation.
- ♦ Adoption and accuracy of each AI-enabled workflow.

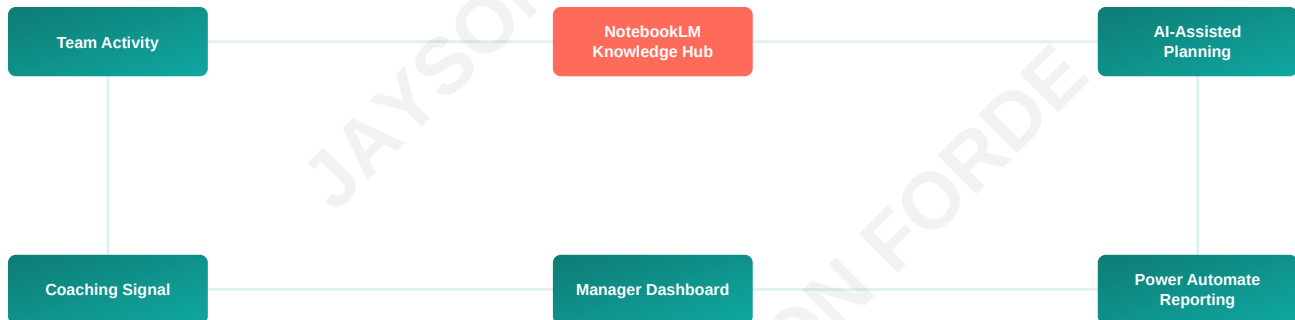
HUMAN-IN-THE-LOOP

AI drafts, accelerates, and reports; **people keep judgment, accountability, and the final decision.** Speed on the inputs, human governance on the output.

SECTION 05

The AI Enablement Stack

The concrete AI systems I put around the team so it communicates, tracks, plans, and reports efficiently, with accountability intact.



THE AI ENABLEMENT LOOP · ACTIVITY TO COACHING SIGNAL

NotebookLM Knowledge & Reporting Hub

A central **NotebookLM** hub holds SOPs, playbooks, account context, and team knowledge, and produces daily/weekly reporting so employees, managers, and leadership share one source of truth and a visible execution trail.

Automated Team Tracking

Team activity, assignments, status, and blockers are captured in a tracked system that reduces manual status-chasing and surfaces risk early.

Microsoft Power Automate Reporting

Power Automate flows compile status, KPIs, and exceptions into automated team reports and manager dashboards on a set cadence, no manual report assembly.

AI-Assisted Project & Account Management

AI drafts plans, next-actions, summaries, and account planning; the manager reviews and approves, raising throughput without losing judgment.

Training the Team to Work With AI

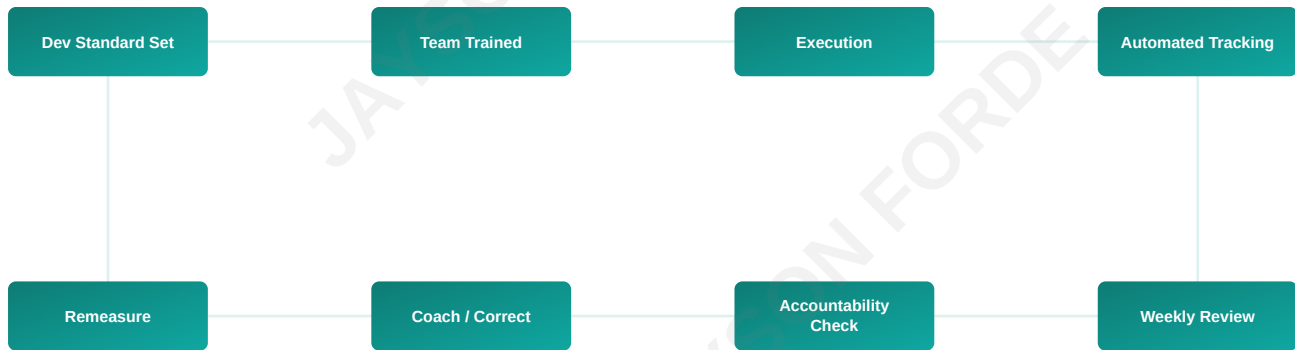
The team is trained to prompt, review, and communicate effectively with AI, so AI is a capability the team owns, not a tool a few people use.

SECTION 06

Governance & Measurement

The loop that sustains a high-performing team, and proves development in numbers instead of assuming it.

The Development Governance Loop



DEVELOPMENT GOVERNANCE · STANDARD TO REMEASURE, WITH AUTOMATED TRACKING

Measurement Logic



MEASUREMENT LOGIC · BASELINE TO ADVANCE/HOLD

THE DIRECTOR DEPENDENCY INDEX

A core maturity marker is the routine senior intervention required, for clarification, disagreement resolution, coordination, and ordinary decisions. **As capability and AI-enabled governance rise, routine Director dependency falls**, and automated tracking makes that decline measurable.

SECTION 07

Scaling Into Managing Leaders

The end state: not a trained team, but a self-governing, AI-enabled team of managing leaders who develop others and improve their own systems.



THE PATH TO MANAGING LEADERS

People progress from individual contributor, to AI-assisted operator, to workflow owner, to team lead, to AI-enabled manager, to managing leader, someone who develops other leaders, governs outcomes, and improves the team's systems and automations without constant oversight.

READINESS SIGNAL	WHAT IT PROVES
Self-governed accountability	Routine disagreements and assignments resolve without Director intervention.
Owned AI workflows	The team runs, reviews, and improves its own AI-enabled tracking and reporting.
Develops others	Managers coach and develop their people independently, growing the next leaders.
Improves the system	The team refines its own SOPs, automations, and standards over time.

THE END STATE

A high-performing, AI-enabled team that **needs less routine intervention, governs its own accountability, runs its own automated tracking and reporting, and develops its own managing leaders**, freeing leadership for strategy and enterprise transformation.