

A JAYSON FORDE OPERATIONAL BLUEPRINT

STRATEGIC
EXECUTIVE

AI Operations, Process Design & Adoption

My Core Executive Playbook for Building AI Operations and Making Teams Adapt to Them

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The deepest playbook in my system, and the core of my career direction. How I design and build AI-powered operations using the BPM lifecycle and an enterprise automation stack, and how I close the loop by driving the adoption and adaption that makes the team run on it. Iron-clad: the build and the adoption together.

Jayson Forde

AI Operations · Process Design · Automation Architecture ·
Adoption & Adaption

CONFIDENTIAL

THE TWO HALVES OF THE MASTERY

Build the Operation, Then Make It Stick

This is my core operating discipline. The first and larger half is the build: designing and automating AI-powered operations with a rigorous process-design methodology. The second half is the closing engine: the adoption and adaption lifecycle that makes the team actually run on what was built. A system nobody adopts is not an operation; it is a demo.

HALF ONE · THE BUILD (PRIMARY)

AI Process Design & Automation

Model the process on the BPM lifecycle, find the automation opportunities, and build them with an enterprise AI and automation stack under human-in-the-loop governance.

HALF TWO · THE CLOSING ENGINE

Adoption & Adaption

Drive the operational adoption lifecycle so the team learns it, uses it, and adapts to it, and the gains hold in production.

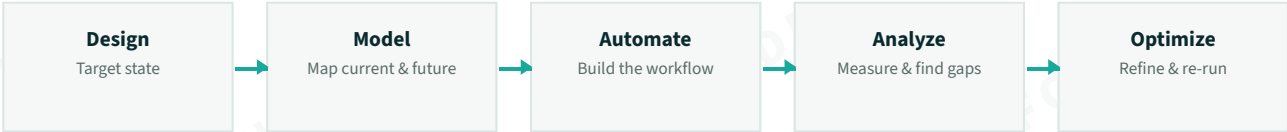
THE GOVERNING BELIEF

AI operations are designed with discipline and adopted with intent. **The build creates the capability; the adoption engine makes it the way the work is done.** Neither half stands alone.

— **HALF ONE · THE METHODOLOGY SPINE**

The BPM Lifecycle, AI at Every Stage

Every AI operation I build runs on the business-process-management lifecycle, with AI applied at each stage. It is a disciplined loop, not a one-time project: design the process, model it, automate it, analyze it, and optimize it, then run the loop again.



STAGE	WHAT I DO	HOW AI ASSISTS
Design	Define the target operating state and the outcome the process must produce.	AI drafts target-state options and surfaces best-practice patterns.
Model	Map current-state and future-state workflows step by step.	AI accelerates process mapping and gap identification.
Automate	Build the automation across the operator stack with human gates.	AI executes the repetitive inputs; humans keep judgment.
Analyze	Measure throughput, quality, and cost against the baseline.	AI summarizes performance data into decisions.
Optimize	Refine the workflow and re-run the loop.	AI recommends the next optimization from the data.

Grounded in Lean, Six Sigma, and TQM discipline: remove waste, reduce variation, and build quality into the process rather than inspecting for it after.

— HALF ONE · FINDING WHAT TO AUTOMATE

Automation-Opportunity Identification

Not every task should be automated, and automating the wrong one wastes trust and budget. I score each candidate against a repeatable standard before a single workflow is built, so effort goes where the return and the fit are real.

SCREENING CRITERION	THE QUESTION IT ANSWERS
Volume & repetition	Is this frequent and rule-based enough that automation compounds?
Standardization	Is the process stable enough to automate, or does it need redesign first?
Human-judgment weight	How much must stay a human decision, and where does the gate sit?
Data readiness	Is the input data clean and accessible enough for reliable output?
Risk & stakes	What is the cost of an error, and what review does that demand?
Return	What time, cost, or quality gain does the automation actually produce?

THE DESIGN RULE

Redesign before you automate. **Automating a broken process just makes the mess run faster.** The process is fixed on the BPM lifecycle first, then the automation is built on top of a process worth scaling.

— HALF ONE · THE ENTERPRISE AUTOMATION STACK

What I Build With

These are the tools I deploy for deep enterprise AI operations, each with a defined role in the build. The stack is the means; the process design is what makes it an operation rather than a pile of integrations.

WORK & ORCHESTRATION**Asana & ClickUp**

Where the operation lives: tasks, ownership, stages, and status, the systems of record that make the workflow visible and trackable.

CONNECTIVE AUTOMATION**Zapier**

The connective tissue: triggers, routing, notifications, and syncs that move work between tools without manual handoffs.

INTELLIGENCE & MEMORY**NotebookLM**

Turns scattered inputs into structured, searchable operational summaries and digests the team can act on.

GENERATIVE ENGINES**Claude · ChatGPT (OpenAI) · Google Gemini**

The reasoning and generation layer: drafting, analysis, summarization, and decision support across the workflow, applied with judgment and always behind a human gate for anything client-facing or high-stakes.

STACK DISCIPLINE

The tools are chosen per workflow, not by fashion. **Orchestration holds the work, automation moves it, memory makes it searchable, and the generative engines accelerate it, under governance at every gate.**

— HALF ONE · THE BUILD WORKFLOW

From Opportunity to Governed Production

The build itself runs as a disciplined sequence, from a screened opportunity to a governed, measured production workflow, with human-in-the-loop control designed in, not bolted on.



CONTROL	WHAT IT GOVERNS	HOW IT WORKS
Human-approval gate	Anything client-facing or high-stakes.	AI drafts and prepares; a named person approves before it ships.
Responsible-use standard	Data handling and what AI must not decide.	Clear rules, accuracy checks, and defined limits on autonomy.
Pilot validation	Whether the build is ready for production.	Run on real work at limited scale; measure before full rollout.

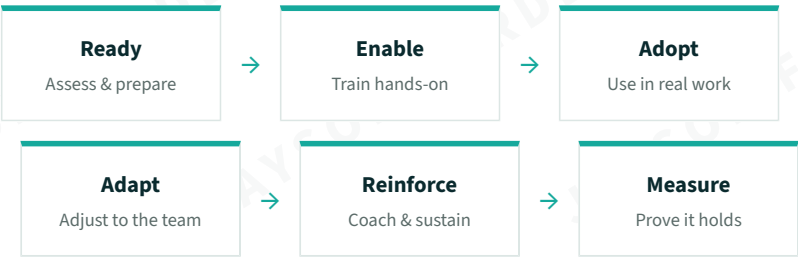
THE GOVERNING LINE

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

— HALF TWO · THE CLOSING ENGINE

The Adoption & Adaption Lifecycle

A built operation that no one adopts produces nothing. This is the closing engine: the operational lifecycle that moves a team from aware to fluent, and makes sure they adapt to the new way of working until it is simply how the work gets done. This is operational adoption, distinct from the org-wide change program.



STAGE	WHAT HAPPENS
Ready	Assess the team's readiness and prepare the ground before rollout, no surprise launches.
Enable	Hands-on training in the new AI-assisted workflow and the tools behind it.
Adopt	The team uses the workflow on real work, with the old workaround removed so there is no fallback.
Adapt	The workflow is tuned to how the team actually works, and the team adapts its habits to it, a two-way fit.
Reinforce	Coaching, peer proof, and leadership backing keep adoption from sliding back.
Measure	Adoption depth and productivity gain are measured so the operation is proven, not assumed.

— HALF TWO · MAKING ADAPTION STICK

Adoption Is a Two-Way Fit

Adaption is the difference between a tool a team tolerates and an operation a team owns. The workflow adapts to the team's real work, and the team adapts its habits to the workflow. When both move, the operation holds.

ACCOUNTABILITY	MEASUREMENT
A named owner drives adoption for each AI-enabled workflow, not just its build.	Adoption rate: how many use it, and depth: how much it changes the work.
The workflow is tuned to the team; the team is coached to the workflow.	Time-to-fluency and drop-off rate after launch.
Reinforcement continues until the new way is the default, then a cadence sustains it.	Sustained-usage and productivity gain over time, on real usage.

THE IRON-CLAD OUTCOME

An AI operation that is **designed with process rigor, built on a governed enterprise automation stack, adopted by a team that adapts to it, and proven in numbers.** The build creates the capability; the adoption engine makes it permanent. Together they are my core operating mastery, and the direction of my career.

This is my deepest and most detailed executive playbook. It sits beside the AI Transformation suite: transformation runs the org-wide change program; this playbook designs the AI operations and drives the team-level adoption that makes them run.