Session 3 Handout: Leading the Change

FAST-09 AI for Managers and Leaders · 7formations · Instructor: Wadood Chaudhary · All examples fictional · Training, not legal advice

Why this session matters

Pew Research Center found in 2025 that U.S. workers were more worried than hopeful about AI at work. Tools don't fail in small businesses for technical reasons as often as they fail because people weren't told the rules, weren't trained, or felt watched. This session gives you the three things that make adoption stick: a one-page guideline, an honest conversation, and measures that respect people.

Key concepts

1. The one-page team AI use guideline

Heading	What it says
Approved tools	Named tools, work accounts only; new tools go through review
Never allowed	Employee records, customer personal information, PHI, pay data, bids, confidential drawings
Tasks	Encouraged / Allowed with a check / Off limits, with examples from your team
Who checks what	A named role per task type
Reporting mistakes	Same-day report to a named role; honest reports are not punished
Review date	When the guideline will be updated

It must be **consistent with the employer's policy and Massachusetts data law**. A data slip may trigger duties under G.L. c. 93H and the written information security program (201 CMR 17.00), which is why fast, blame-free reporting matters.

2. Talking with staff

- **Be honest** about what will and will not change. Don't promise "nothing will ever change."
- **Listen first.** Ask what worries them most.
- **Explain how AI-assisted work will be judged:** same quality standard; the sender owns it.
- **Train before you expect use.**
- **Invite ideas.** Experienced staff spot errors and good use cases fastest.

A simple structure for the change: Awareness (why), Desire (what's in it for the team), Knowledge (training), Ability (practice with support), Reinforcement (share results, fix problems). This is Prosci's ADKAR model.

3. Measure outcomes, not people

Good measures	Avoid
Team minutes per task, before and after	Keystroke or screen monitoring
Errors caught in review	Reading individual prompt histories
Customer callbacks or complaints	Leaderboards of AI usage
Two-line weekly self-report	Ranking people by "AI adoption"

Some admin tools report usage; Microsoft 365, for example, can conceal user names in its usage reports. Use team-level views and share results with the team.

4. The 90-day plan

Days	Focus
1-30	Guideline, training, one pilot, baseline
31-60	Measure, adjust, add a second use case
61-90	Review against targets; keep, change, or stop; update the guideline

Each step has an owner, a date, and a measure. The communication plan says what, who, when, and how questions are answered.

Worked example (fictional, Cape Harbor Inn)

Pilot 1: AI drafts replies to common guest emails from an approved FAQ; staff edit and send. Baseline 6.5 h/week; target 3.5 h/week with zero wrong policy statements sent. Kickoff at the Tuesday huddle, a weekly two-line update, open Q&A at week 6, results at day 90. Measures are team-level only.

Checklist

- ☐ Guideline fits on one page and matches employer policy.
- ☐ Never-allowed data listed specifically.
- ☐ Mistake reporting is fast and blame-free.
- ☐ Training scheduled before the pilot starts.
- ☐ Each pilot has a baseline, target, owner, and stop condition.
- ☐ Communication plan includes a way for staff to raise concerns.

Do and don't

Do	Don't
Name approved tools	Say "use whatever helps"

Do	Don't
Listen before explaining	Lead with a technology lecture
Measure the team's results	Monitor individuals
Plan in 30-day steps	Roll out everything at once
Schedule the day-90 decision	Let the pilot drift with no review