ENTERPRISE TRANSFORMATION · NOVEMBER 2026 · THIRD EDITION

The AI Transformation Loop Workbook

Six pages for running an AI transformation on two clocks. A companion to the article *Agentic AI Transformation Is Not a Program*.



Human clock

People change over weeks and quarters.
Pages 3, 4 and 6.

Machine clock

AI agents act in seconds.
Pages 2 and 5.

HOW TO USE THIS WORKBOOK

Page 2 today. List the agents already running.
Page 3 this week, with your team. Name the constraint.
Page 4 every week for 90 days. One practice.
Page 5 before any agent runs. One sheet per agent.
Page 6 on day 30, then every 90 days.

Ajay Pundhir
AI Strategist · Creator of the AI Readiness Canvas and MVG

The agent inventory

Nobody can govern an agent they have not named.

List every agent already running. Include the features a vendor switched on at renewal and the assistants a team connected to the CRM. Expect the list to be longer than the one IT keeps.

AGENT	WHAT CAN ITS CREDENTIALS TOUCH?	LOGGED?	STOP CONDITIONS WRITTEN?	OWNER, BY NAME
1		Y / N	Y / N	
2		Y / N	Y / N	
3		Y / N	Y / N	
4		Y / N	Y / N	
5		Y / N	Y / N	
6		Y / N	Y / N	
7		Y / N	Y / N	
8		Y / N	Y / N	
9		Y / N	Y / N	

> **Where to start.** Any agent that can do something that cannot be undone (delete data, move money, send a commitment to a customer) and has no written stop condition goes first. Fill in page 5 for it this month.

Inventory completed on _____ Completed by _____

Assess and focus

Find the constraint, then back it for 90 days.

1. Score the five pillars.

Run the AI Readiness Canvas (15 questions, askajay.ai/canvas) and write each pillar score here.

Strategic Alignment	__ / 5	**Data Infrastructure**	__ / 5
Talent & Culture	__ / 5	**Operational Processes**	__ / 5
Ethics & Governance	__ / 5		

2. Test the lowest score.

The lowest score is a first guess. The constraint is whatever most often stops a working AI system from reaching production, or from staying there. Ask: was this what blocked our last two launches?

Launch 1 _____ What blocked it _____

Launch 2 _____ What blocked it _____

If it was not the lowest-scoring pillar, the constraint is somewhere else, whatever the score says.

3. OUR CONSTRAINT

For the next 90 days, our constraint is _____

From _____ To _____ Accountable name _____

4. Focus.

The constraint gets the new money and the new attention. The other four pillars keep running and take on nothing new unless it serves the constraint. Write what each will do to support it.

Pillar _____ How it supports the constraint _____

Pillar _____ How it supports the constraint _____

Pillar _____ How it supports the constraint _____

Pillar _____ How it supports the constraint _____

Practice

One practice for the constraint, once a week, protected like a board meeting.

1. Pick the one practice that matches your constraint.

☐	Strategic Alignment	**The Weekly Alignment Check** 30 minutes. The top 3 roadmap items re-confirmed against the top 3 business problems.
☐	Data Infrastructure	**The Data Honesty Meeting** What do we claim to have, and what can we reach today without a six-week cleanup?
☐	Operational Processes	**The Weekly Inventory** Every AI system running, written down, owned by a name.
☐	Talent & Culture	**The Uncomfortable Upskilling** The 5 people whose decisions agents will touch, trained deeply before anyone else.
☐	Ethics & Governance	**The Monthly Stop** Once a month, the named owners decide whether any live system should be paused.

The Monthly Stop works only if a pause is a real option. Set no quota for pauses. After a year with no pause at all, ask whether the process ever had the power to stop anything.

2. Put it in the calendar.

Day _____ Time _____ Attendees _____

Same day, same time, same people. Run it yourself for the first three weeks.

3. Keep the record for 13 weeks.

Mark each week H for held or R for rescheduled. A rescheduled week counts as a missed one.

1	2	3	4	5	6	7	8	9	10	11	12	13

One thing the practice surfaced that we did not know _____

The Observability Layer

Four gates built before the agent runs.

Agent _____ What it does _____

AGENT DECIDES — ACTION LANDS



GATE 1

Permissions

- [ ] Credentials are scoped to its task
- [ ] Anything irreversible asks for a confirmation or a second key
- [ ] Backups live where the agent cannot reach them

GATE 2

Instrumentation

- [ ] Every decision is logged as it happens
- [ ] A person can query the log at any hour

Test: what did the agent decide at 2:47 on Sunday morning, and why? You should have the answer within minutes.

GATE 3

Stop conditions

Written before deployment and enforced by the system. At least one for every harm that cannot be undone.

HARM THAT CANNOT BE UNDONE	THE AGENT HALTS WHEN	HALTED WORK GOES TO (HUMAN QUEUE)

GATE 4

A named owner and a staffed pager

Owner, by name _____ On-call rotation _____

- [ ] The owner signed off the stop conditions
- [ ] The owner had a veto at design time
- [ ] The rotation has written authority to stop the agent without asking anyone first

Measure, then repeat

Three questions on day 30 and every 90 days, answered in a room and written down.

1 **Did the constraint move?**
Are systems getting to production that were blocked before?

2 **Did the practice happen every week?**
Or did it get rescheduled?

3 **What did the practice surface that we did not know before?**
Write it down. "Nothing" is an answer too.

> **Reading the answers.** If the constraint has not moved, the practice was rescheduled, or it surfaced nothing new, change the practice. On day 30, a constraint that has not moved yet is normal if the practice surfaced things the executive team did not know. Three faithful meetings that taught nothing mean the practice needs a redesign.

Next constraint _____ Next review date _____

THE QUESTION FOR YOUR NEXT EXECUTIVE MEETING

What are we doing on Tuesday, and who is watching the agent we shipped on Friday?

Take the Canvas.
15 questions. askajay.ai/canvas

Read the full argument and its sources.
askajay.ai/thinking/agentic-ai-transformation-not-a-program

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