

The AI Transformation *Loop Workbook*

A six-page companion to the article
"Agentic AI Transformation Is Not a Program"



Four steps. One observability layer. Repeat forever.

HOW TO USE THIS WORKBOOK

Print it. Fill it in. Not in one sitting.

Page 2 today. Page 3 with your team this week.

Pages 4–5 over the next 90 days.

Page 6 when you come back for the next loop.

Assess

Where are you actually?

1. Run the Canvas.

15 questions. 8 minutes. No email required.

askajay.ai/canvas

2. Record your pillar scores.

From the Canvas result, write each pillar score (1–5) and identify the lowest.

Strategy	Is AI connected to your business strategy?	<input type="text" value="_/5"/>
Data	Can your data teams access what AI needs?	<input type="text" value="_/5"/>
Technology	Do you know every AI system running right now?	<input type="text" value="_/5"/>
People & Culture	Do the right 5 people have the AI capability?	<input type="text" value="_/5"/>
Governance	Has your governance stopped a deployment?	<input type="text" value="_/5"/>

3. YOUR CONSTRAINT

My weakest pillar is: _____

*This is where your first loop starts. Not the easiest pillar. Not the one you want to work on.
The constraint is where transformation begins, and constraints shift as you move them.*

One thing to remember:

In the agentic era, the Data and Governance pillars are where most agentic initiatives live or die.

If either scored below 3, that is almost certainly your first-loop constraint — regardless of the math.

4. Commit.

Date I confirmed this with my team: _____ Accountable name: _____

Focus

The weakest pillar is the only pillar for 90 days.

The declaration.

Read this aloud to your team. Then write it on a slide.

For the next 90 days, the only pillar that matters to our AI transformation is:

write the pillar name here

The other four pillars are on hold. They will be reassessed on:

date, 90 days from today

Signed: _____

Why focus matters.

A steering committee sees five pillars, authorizes 47 initiatives, distributes budget evenly, and produces symmetric mediocrity.

Every pillar moves a little. No pillar moves enough to matter.

You are picking one. The board will be uncomfortable. Good. That is the signal you have focus.

REMEMBER

A program allocates. A practice delivers.

The program holds the ceiling — capital, board oversight, multi-year bets.

The Tuesday practice moves the floor — how people actually work.

Practice

One practice. Every Tuesday. Protected like a board meeting.

Find the row for your weakest pillar. That is your practice for the next 90 days.

STRATEGY WEAKEST

The Weekly Alignment Check

30 minutes. Top 3 AI roadmap items re-confirmed against top 3 business problems.

Catches strategy drift — because agents drift silently.

DATA WEAKEST

The Data Honesty Meeting

One hour. What data do we claim to have? What can we actually access without a 6-week cleanup?

Surfaces the gap before your agents exploit it.

TECHNOLOGY WEAKEST

The Weekly Inventory

Every AI system running, written down, owned by a name. Includes agents bought without IT knowing.

If fewer than 3x what IT claims, it's a wish, not an inventory.

PEOPLE & CULTURE WEAKEST

The Uncomfortable Upskilling

5 people whose decisions matter. Not 5,000 in company-wide training. Go deep with the 5.

The 5 are the ones agents will argue back with. Pick them accordingly.

GOVERNANCE WEAKEST

The Monthly Stop

At least one deployment stop per quarter. Not in committee — an actual system paused in production.

If governance never stops anything, it isn't governing. It's documenting. See MVG.

MY PRACTICE

My weekly practice is: _____

Scheduled: every _____ day at _____ time

Measure

Three questions every 90 days. Plus the Observability Layer check.

The three questions.

1	Did the weakest pillar score improve on the Canvas? <i>Yes / No. If no, the practice is not moving the number.</i>	<input type="button" value="Yes"/> <input type="button" value="No"/>
2	Did the practice actually happen every week? <i>Not "mostly." Every week. Rescheduling counts as not happening.</i>	<input type="button" value="Yes"/> <input type="button" value="No"/>
3	What did the practice surface we didn't know before? <i>Write it here. If the answer is "nothing," the practice is a ritual — redesign it.</i>	<hr/>

If any answer is "no" or "nothing" — the practice is theater.

Kill it. Design a sharper one. Score moves last. Awareness moves first.

The Observability Layer check.

If you have agents in production, answer these too. Any "no" is a red flag.

<input type="checkbox"/>	Instrumentation Every agent decision logged, queryable, reviewable — in real time. Not weekly reports.
<input type="checkbox"/>	Thresholds Three pre-written stop conditions per agent. Written BEFORE deployment. Auto-stop, no meeting.
<input type="checkbox"/>	Named Escalation One human, 24/7, documented authority to pull the plug. Not a committee. One name.

***“The agents that survive 2026 will not be the smartest.
They will be the most watched.”***

Come back for the *next loop.*

The organizations that transform in 2026 will not have the biggest agentic AI programs.

They will have the smallest practices, done consistently, with the clearest observability on the agents that are already shipping.

The question is not:

"What is our agentic AI transformation strategy?"

The question is:

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

WHAT TO DO NEXT

- 1 Take the Canvas.**
15 questions. 8 minutes. No email required. → askajay.ai/canvas
- 2 Subscribe to The Brief.**
Weekly. Tuesdays. Original thinking on AI governance and transformation. → askajay.ai
- 3 Want a second pair of eyes on your loop?**
I take a small number of direct advisory engagements. → hello@aiexponent.com

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