



The New Playbook for Executives

How to Lead in the AI Era

AI is changing how companies run. If you're in charge, your job isn't just to approve tools - it's to change how your team works. That means knowing what AI can do, what it can't, and how to move fast without losing control.

Here's your playbook →

01 Get Your Whole Team Using AI – Not Just IT

AI works best when everyone knows how to use it. Not just your engineers. Start small. Pick simple tasks like writing call summaries or searching for past customer questions. Give those tasks to AI, then have your team compare results to their own work.

For example: Schedule one day a week where AI takes call notes instead of your agents. After a few weeks, compare KPI's to the days agents took their own notes. You might notice improvements, and it builds trust with your agents. People stop worrying AI will replace them—and start seeing how it can save time and reduce errors.



Executive Tip: Put AI into the hands of your frontline staff and managers. Some of the best use cases come from people closest to the work.

02 Know When to Replace Tasks and When to Assist People

AI has two main jobs:

Automation

Fully takes over a task (like logging CRM notes)

Assistance

Supports your team in real time (like giving rebuttals on live calls)

Use automation for work that never changes. Use assistance for work that needs judgment, empathy, or human creativity.



Executive Tip: If a mistake could hurt your brand, keep a human in the loop.

03

Focus Your People on What AI Can't Do

AI is great at answering questions and doing repetitive tasks. It's not great at building trust, understanding emotions, or solving complex problems. Give your people more of the work where humans win: building relationships, negotiating deals, handling sensitive issues. That's where they're most valuable—and where AI still falls short.



Executive Tip: Let AI handle the first draft, the data entry, or the prep work. Free up your people to think and connect.

04

Update Your Org Chart for an AI-Powered Team

AI isn't just another tool. It changes job roles.

You'll need people who

Write prompts and train AI

Check the AI's work

Review patterns AI finds in calls and chats

You might not need as many people doing basic tasks - but you will need more people overseeing how AI works and fixing issues fast.



Executive Tip: Don't just bolt AI onto old teams. Assign clear owners. Build new workflows. Treat it like you would a new hire

05

Move Faster Than the Competition

AI can find answers, surface problems, and guide reps in seconds.

If your team is still digging through dashboards or waiting for reports, you're behind.



Cut onboarding time



Reduce decision-making cycles



Respond to customers quicker

Speed isn't a bonus anymore. It's how you win



Executive Tip: Track how fast your team learns, sells, fixes problems, and makes decisions. If those numbers don't improve, your AI isn't working.

06

Use AI to Make Smarter Decisions, Not Just More Data

Most leaders are drowning in dashboards. AI should give you answers, not more work.

The best systems let you ask questions in plain English:

- Why did sales drop last week?
- Which reps missed compliance?
- What are customers complaining about most?

You shouldn't need an analyst to get these answers. AI can surface trends, spot problems early, and recommend action.



Executive Tip: If you're still waiting for weekly reports, you're moving too slow. Use AI tools that give you real-time answers.

07

Train Your Managers to Run AI-Driven Teams

AI boosts productivity—but only if managers know how to use it. They need to:

- Know what AI can and can't do
- Set clear expectations for how people work with AI
- Coach reps using data AI surfaces

Most managers were trained to do the work themselves. Now, they need to guide a mix of people and AI.



Executive Tip: Think of AI like a team member. Managers should know when to delegate to it—and when not to.

Bottom Line

Use AI to Speed Up the Right Work

AI is a tool. Not a strategy. The companies that win will:

- Use AI to reduce low-value work
- Train their people to use AI confidently
- Move faster than competitors
- Keep humans in the jobs that matter most



Key Takeaway: Don't wait until AI is perfect. Start now. Get specific. Move fast. Make your team better than they've ever been.