



AI Strategy Curriculum Guide

A facilitator's path for moving a leadership team from broad AI interest to a short list of owned decisions.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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56

AT A GLANCE

A facilitator's path for moving a leadership team from broad AI interest to a short list of owned decisions.



This guide explains how to run the Halden & Company AI Strategy learning path: four modules called Frame, Map, Choose and Sequence, plus a closing decision workshop. For each module it gives goals, a timed session plan, working outputs, facilitation notes, prework, common sticking points and signs that the learning landed. It also covers role-based tracks, written-out exercises, assessment beyond attendance, a sample six-week cadence and ways to keep the work alive afterward. Use it to run the program internally or to judge what an outside facilitator should deliver.

WHO IT IS FOR

Business owners, executives, operating leaders and technology sponsors who will run or sponsor a strategy program, and the facilitators who will lead it.

TIME TO USE

50 minutes to read; six weeks to run



What you will have at the end

- A clear picture of who the program is for and what must be true before it starts
- A timed plan for each of the four modules with outputs a facilitator can check
- Exercises written precisely enough to run without a consultant in the room
- A way to measure learning and decision quality, not attendance
- A cadence and a sustainment routine that outlast the six weeks

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PROGRAM OVERVIEW

Who the strategy path is for and what it assumes

01



The path is built for leadership teams that need a few well-chosen decisions, not a longer list of technologies.

The AI Strategy curriculum follows one idea: strategy should make the next decision easier. It is a business-led path, so the people in the room are those who own outcomes, budgets and workflows. Technology staff attend as contributors, not as the audience. The typical shape is four facilitated modules and a decision workshop, run over about six weeks, with short work between sessions.

Who it is for

- Leadership teams and business owners who keep hearing about AI and want a focused response
- Operating leaders who already see scattered experiments and need a common map
- Technology sponsors who must compare requests from several functions
- Teams preparing to scale who need decision rights and portfolio guardrails before spend grows



Prerequisites

Three things need to be true before the first session. First, a sponsor with real authority must attend every module, because the roadmap will assign owners and ask for time. Second, the group must be small enough to talk: six to twelve people works. Third, someone must be able to describe how two or three core workflows actually run today. You do not need a data platform, a vendor shortlist or any technical background. You do need willingness to leave tool selection until Module 3.

STARTING POINT	WHAT TO EMPHASIZE	WATCH FOR
Starting from zero	Shared language, business questions, safe boundaries	Pressure to name a tool in week one
Already experimenting	A common opportunity map and clear ownership	Defending existing pilots instead of comparing them



STARTING POINT	WHAT TO EMPHASIZE	WATCH FOR
Preparing to scale	Decision rights, portfolio guardrails	Repeating a score as the decision comparison rules


NOT LEGAL ADVICE

This guide is educational. Where a module touches regulation, privacy, employment or contracts, align the outputs with qualified counsel and the law that applies to your business and jurisdictions.


WORKING QUESTION

Who in your leadership team has the authority to say yes to the roadmap, and will that person attend all four modules?


MODULE 1: FRAME

Leadership alignment

02

The first module produces one strategic question and the criteria for judging any answer.

Goals

- Agree what the business wants to improve and why now
- Name what must remain true for customers, employees and the business
- Write success criteria that a skeptical colleague would accept
- Separate the strategy question from tool curiosity


Session plan (120 minutes)

TIME	ACTIVITY	OUTPUT
0-15	Sponsor opens: why this program what decisions it will inform	Stated purpose
15-40	Silent writing, then round-robin: the one thing AI should help us improve	Individual statements
40-70	Cluster statements and debate until three candidate questions remain	Candidate questions
70-95	Write must-remain-true constraints for people, customers and the business	Constraint list
95-115	Draft success criteria for the leadership question	Draft criteria
115-120	Assign prework for Module 2	Owners and dates

Working outputs

- A one-sentence strategic question
- A list of must-remain-true constraints
- Three to five success criteria with a named reviewer for each
- A first draft of the Leadership AI Charter

Facilitation notes

Open with the sponsor, not the facilitator. People calibrate to what the most senior person says, so ask the sponsor to speak last during the writing round and first during the closing. Keep the vocabulary plain. If someone says transformation, ask what would be different on a Tuesday. Park every tool name on a visible list called Later and promise to revisit it in Module 3.

Pework

- Each participant writes three sentences: where work feels slow, repeated or inconsistent in their area
- Sponsor collects any existing AI-related requests, pilots or policies in one folder
- Facilitator interviews two or three leaders for fifteen minutes each to hear the unpolished version

Common sticking points

- The question is too broad, such as use AI to grow. Push for a measurable area of the business
- The group lists risks only. Ask for the upside in the same sentence

- One loud voice sets the frame. Use written input before discussion
- The constraints are generic. Ask which one would make you stop a project



How to tell it landed

- Anyone in the group can restate the question without notes
- At least one constraint was uncomfortable to write down
- The sponsor can name the first decision the program will inform
- The Later list exists and nobody objected to it

WORKING QUESTION

If a colleague read your strategic question tomorrow, could they tell what you would stop doing because of it?

MODULE 2: MAP

Workflow opportunity mapping

03

Make work, friction, information and affected people visible before any solution is compared.

Goals

- Describe three to five workflows as they actually run
- Locate delay, rework, hard-to-find information and inconsistent quality
- Identify who is affected by a change, including people outside the room
- Build a long list of candidate points of friction, not solutions



Session plan (150 minutes)

TIME	ACTIVITY	OUTPUT
0-15	Recap the question and constraints; confirm the workflows to map	Scope for the day

TIME	ACTIVITY	OUTPUT
15-60	Pairs map one workflow each on a wall: steps, handoffs, information used	Workflow maps
60-90	Mark friction with colored dots: delay, rework, search, inconsistency	Marked maps
90-115	Walk the maps as a group; people who do the work correct the leaders	Corrected maps
115-140	List affected roles and what they would gain or lose	Stakeholder notes
140-150	Pick the friction points to carry into evaluation	Candidate list

Working outputs

- A workflow opportunity map covering three to five workflows
- A list of friction points tagged by type
- A short note on information sources and who owns them
- A candidate list of eight to fifteen opportunities

Facilitation notes

The map is only as honest as the people drawing it. Invite at least one person who performs each workflow, even if they are not on the leadership team, and have them check the drawing. Leaders tend to map the process as designed. Ask what happens when the customer calls twice, when the key person is away or when the data is wrong. Those exceptions are usually where the value and the risk both sit.

Pework

- Each owner chooses one workflow and brings a recent real example, anonymized where needed
- Collect the documents, systems and spreadsheets each workflow touches
- Facilitator books fifteen-minute conversations with two frontline staff per workflow

Common sticking points

- The group jumps to solutions. Move the idea to the Later list and return to the friction
- Maps stay at the department level. Ask for the actual handoff and who receives it
- Frontline voices are missing. Pause and schedule the interviews
- Every step is marked as friction. Limit each person to five dots

How to tell it landed

- A frontline participant corrected a leader's version of the process
- Friction points are described as events, not opinions
- Each candidate names the information it depends on
- The list includes at least one item nobody expected to see

WORKING QUESTION

Which workflow on your map would surprise the person who designed it if they watched it run for an hour?

MODULE 3: CHOOSE

Use-case evaluation

04

Compare opportunities on several dimensions without pretending one score decides.

Goals

- Evaluate candidates on value, feasibility, readiness, information, risk, ownership and adoption effort
- Make trade-offs explicit and record why an option was chosen or set aside
- Select a small portfolio: one or two to test, a few to prepare, the rest to park
- Allow the tool conversation to begin, but only for chosen use cases

Session plan (150 minutes)

TIME	ACTIVITY	OUTPUT
0-20	Agree the seven evaluation lenses and what high, medium and low mean for each	Shared rubric

TIME	ACTIVITY	OUTPUT
20-70	Small groups rate five candidates each, writing one sentence of evidence per rating	Rated candidates
70-100	Cross-review: another group challenges each rating	Adjusted ratings
100-130	Discuss the top six as a whole, looking at dependencies and people impact	Short list
130-145	Choose test, prepare or park for each	Portfolio
145-150	Assign an owner for each decision record	Owners record



Working outputs

- A use-case portfolio with a status for each candidate
- A decision record per chosen use case: reason, owner, assumptions, what would change the decision
- The rubric, kept for later reuse



Facilitation notes

Scores are a conversation aid. When two groups rate the same item differently, the disagreement is the finding. Ask what each group assumed about the data, the people or the review burden. Be strict about evidence: a rating without a sentence behind it should be lowered or struck. Treat responsible-use conditions as gates rather than points, so a high-value idea with an unacceptable information risk does not win by averaging.



Pework

- Facilitator circulates the rubric and a worked illustrative example two days ahead
- Owners gather volume, time or error information for their candidates, estimates are fine if labeled
- Technology sponsor lists the systems and data each candidate would need

Common sticking points

- Ratings cluster at the top because everyone likes their own idea. Force a ranking within each group
- The group wants a single total. Keep dimensions separate on the page
- Feasibility is judged by whoever knows the technology best. Ask the process owner too



- Parked ideas feel like rejection. Record the condition that would reopen them

How to tell it landed

- Every chosen use case has a named business owner, not a sponsor group
- Reasons for parking items are written down
- Someone changed their mind during cross-review
- The portfolio is small enough to fund attention for

WORKING QUESTION

Which of your top candidates would you still choose if the technology cost nothing, and which only looks good because it is novel?

MODULE 4: SEQUENCE

Roadmap and governance

05

Choose the first learning moves, the owners, the decision points and the evidence that will tell you to continue, pause or redesign.

Goals

- Convert the portfolio into a 90-day learning roadmap
- Name owners, decision points and the evidence required at each
- Outline decision rights: who approves, who is consulted and who can stop work
- Agree how the group will review the roadmap after the program ends

Session plan (150 minutes)

TIME	ACTIVITY	OUTPUT
0-20	Review the portfolio and the original question	Confirmed focus

TIME	ACTIVITY	OUTPUT
20-60	Build the 30, 60 and 90 day roadmap on a wall, one lane per use case	Draft roadmap
60-90	Define evidence and a continue, pause or redesign test for each first move	Decision tests
90-120	Write decision rights: approve, consult, inform, stop	Governance outline
120-140	Stress test: what would make this roadmap fail in week three	Risk list
140-150	Confirm owners and the first review date	Commitments

Working outputs

- A practical 90-day learning roadmap
- A decision-rights and governance outline
- An evidence list for each first move
- The completed Leadership AI Charter

Facilitation notes

Resist the urge to make the roadmap long. A 90-day plan with three owned moves beats a two-year plan nobody can check. Write evidence in advance, because teams that decide what counts after the fact tend to find support for what they wanted. Ask for decision rights in plain sentences, such as the finance lead approves spend above a stated limit, and keep them short enough to fit on one page.

Pework

- Owners confirm capacity with their managers before the session
- Finance or operations provides the rule for approving small spend
- Counsel or a risk lead lists any legal or contractual limits on the information involved

Common sticking points

- Owners are named without time to do the work. Ask what they will stop doing
- The roadmap is all tools and no learning. Add the question each step must answer
- Governance becomes a committee. Limit it to the smallest group that can decide
- Nobody wants to own stopping. Name a person who can pause work

How to tell it landed

- Each roadmap item has an owner, a date and a piece of evidence
- Decision rights fit on one page
- The group can say what would cause them to pause
- A review date is in everyone's calendar

WORKING QUESTION

For your first move, what evidence would you accept in 90 days as a reason to stop?

ROLE-BASED TRACKS

Tailoring the path for executives, managers and practitioners

06

The same four modules serve different people differently, so decide who attends what before you schedule.

The core cohort for the four modules is the leadership team. Managers and practitioners join selected parts. This keeps decisions with the people accountable for them while making sure the work reflects reality. Do not run three separate programs. Run one program with different depths of participation and a shared set of outputs.

ROLE	ATTENDS	FOCUS AND CONTRIBUTION
Executives	All four modules and the decision workshop	Own the question, constraints, decision rights and the final roadmap
Managers	Module 2 in full, Module 3 evaluation, Module 4 roadmap review	Describe workflows accurately, supply evidence, commit capacity
Practitioners	Module 2 interviews and a Module 4 reality check	Correct the maps, flag exceptions, test whether ideas fit daily work

ROLE	ATTENDS	FOCUS AND CONTRIBUTION
Technology sponsor	All modules as contributor	Advise on feasibility, information and integration without leading



Executive track

Executives need fewer tools and more judgment. Their prework is a short conversation with someone who does the work. Their stretch task is to write a decision record for one use case that they would be comfortable explaining to the board. The risk is delegating to a delegate: if executives send deputies to Modules 1 and 4, decisions will return for approval and stall.

Manager track

Managers translate. They know how work really moves and who will be affected. Give them a one-page brief before Module 2 and ask them to bring one practitioner's view that differs from their own. After Module 4 they run a 30-minute team conversation using the roadmap summary, then report back what questions arose.



Practitioner track

Practitioners are not trainees in this program. They are the source of truth about process. Offer two touchpoints: an interview before Module 2 and a one-hour review of the shortlist before Module 3 closes. Tell them plainly how their input will be used and what it will not be used for.

WORKING QUESTION

Which role is missing from your current attendee list, and what will you get wrong without them?



EXERCISES

Four exercises a facilitator can run as written

07

Each exercise has instructions, materials and a clear output so that someone other than a consultant can lead it.

Exercise 1: The one-sentence question (Module 1, 45 minutes)

01 Write alone

Give each person a card. Ask them to complete: We should use AI to help us improve ___ because ___. Allow five silent minutes.

02 Pair and merge

Pairs combine two cards into one sentence, keeping only what both agree on.

03 Group and vote

Post sentences on a wall. Each person gets three dots. Discuss the top three until one sentence remains.

04 Test

Ask: what would we stop doing if this were true? If nobody can answer, rewrite.

Exercise 2: Friction walk (Module 2, 60 minutes)

01 Draw

A pair draws one workflow from trigger to finished result, including each handoff and each document or system used.

02 Mark

Each participant has five dots in four colors: delay, rework, hard to find, inconsistent. They place them on any map.

03 Walk

The group visits each map. The person who performs the work explains the dots in two minutes.

04 Capture

The scribe writes each cluster as an event, such as: the quote waits two days for pricing approval.

Exercise 3: Cross-review rating (Module 3, 50 minutes)



01 Rate

Each group scores its candidates from 1 to 3 on seven lenses and writes one sentence of evidence per score.

02 Swap

Groups exchange sheets. The reviewing group may change any score but must write why.

03 Reconcile

Where scores differ by two points, the original and reviewing groups talk for five minutes and record what each assumed.



04 Gate

Mark any candidate that fails a responsible-use gate. It cannot enter the test list until the gate is resolved.

Exercise 4: Pre-mortem on the roadmap (Module 4, 30 minutes)

01 Imagine failure

Tell the group it is day 90 and the roadmap failed. Each person writes three reasons on separate notes.

02 Cluster

Group the notes and name the top five causes.



03 Mitigate

For each cause, write one action, one owner and one date, or accept the risk in writing.

ILLUSTRATIVE EXAMPLE

A leadership team's Module 1 sentence might read: we should use AI to help us shorten the time from customer inquiry to first useful reply because slow replies lose winnable work. It names an area, a reason and something measurable.



WORKING QUESTION

Which exercise would reveal the most disagreement in your team, and are you ready to work through it?

ASSESSMENT OF LEARNING

Measuring what changed beyond attendance

08

A strategy program has worked if decisions got better, not if people sat through slides.

Attendance and satisfaction scores tell you the sessions ran. They do not tell you whether the leadership team now decides differently. Measure across four layers: understanding, decision quality, ownership and follow-through. Set baselines in week one, record again at the end and again at 90 days. Keep the instruments short and use the same questions each time.

LAYER	WHAT TO MEASURE	HOW
Understanding	Can people explain the question, constraints and rubric in their own words	Two-minute spoken or written recall, scored against a checklist
Decision quality	Are decision records complete, with evidence and reasons for rejection	Review five records against a simple completeness test
Ownership	Does each roadmap item have a named owner with time set aside	Check calendars and role descriptions
Follow-through	Were review dates held and decisions made on schedule	Count held reviews and decisions against the plan

Signals worth watching

- Fewer requests to buy a tool before a business case exists
- More workflow-level language in leadership meetings
- Parked ideas revisited because a stated condition changed, not because of enthusiasm

- Frontline staff reporting that they were asked and heard
- Time from idea to decision falling without the evidence getting thinner

AVOID VANITY MEASURES

Do not report the number of use cases identified as success. A long list may signal weak filtering. A short list with owners and evidence is the stronger result.

Collect numbers only if you can explain how you will use them. Label estimates as estimates. If you do not have a baseline, say so and rely on the qualitative checks above, which are credible when they are specific.

WORKING QUESTION

What would you see in a leadership meeting six months from now that proves the program changed how decisions are made?

SAMPLE CADENCE

A six-week schedule that fits around normal work

09

The program fits in six weeks if the work between sessions is small and clearly assigned.

WEEK	SESSION OR TASK	WHO
1	Kickoff interviews and prework; Module 1 Frame (120 minutes)	Sponsor, executives, facilitator
2	Workflow prework and frontline interviews	Managers, practitioners
3	Module 2 Map (150 minutes)	Executives, managers, practitioners

WEEK	SESSION OR TASK	WHO
4	Module 3 Choose (150 minutes)	Executives, managers, technology sponsor
5	Decision records drafted; course check on information limits	Owners, risk lead
6	Module 4 Sequence and decision workshop (150 minutes plus 60-minute close)	Executives, owners

Running the cadence

- Hold the same weekday and time so the program becomes routine
- Send a one-page recap within 24 hours of each session with decisions and tasks
- Keep a visible log of open questions and the Later list
- If a week slips, slip the whole schedule rather than skipping a module
- Reserve a 30-minute sponsor check-in after week 3 to remove blockers

The compressed alternative is two full days with a week between, but compressing reduces the time for prework and frontline interviews, which is where the best material comes from. Choose compression only if the sponsor can hold the room and the prework is complete.

WORKING QUESTION

What in your calendar for the next six weeks will compete with this program, and who will protect the time?

SUSTAINING THE WORK

Keeping the strategy alive after week six

10



The roadmap is a hypothesis. Review it on a schedule so it stays useful.

Programs fade when the next quarter's urgent work arrives. Prevent that by building review into existing leadership routines rather than creating a new committee. A 30-minute standing item in the monthly leadership meeting is enough if it has an agenda, an owner and authority to change the plan.

01 Monthly review

Owners report evidence against the decision test for each use case. The group decides continue, change, pause or stop.

02 Quarterly refresh

Revisit the strategic question, constraints and Later list. Add new friction points and retire stale ones.

03 Annual reset

Rerun Modules 1 to 3 in a shorter form with new members and updated conditions.



04 Ongoing record

Keep decision records in one shared place so new leaders can see what was chosen and why.

Sustainment checklist

- A named owner for the charter and the roadmap
- A standing agenda item with dates for the next three reviews
- A single location for decision records
- A path for new ideas to enter the portfolio
- A trigger for revisiting the plan, such as a major regulatory change or a failed pilot



Halden & Company offers free assessments at halden.company/assessments to help you see where you are starting, and you can reach the team at halden.company/contact if you want

help running the path.

WORKING QUESTION

Who will notice first if the monthly review stops happening, and what will they do about it?

30 / 60 / 90

A first quarter that produces evidence

11

Use the next 90 days to run the four modules, make the first owned decisions and set a review rhythm.

First 30 days: ground it

- Confirm the sponsor and the cohort of six to twelve people
- Collect existing AI requests, pilots and policies in one folder
- Run Module 1 and publish the one-sentence strategic question
- Schedule frontline interviews for Module 2

Days 31 to 60: test it

- Run Modules 2 and 3 and publish the opportunity map
- Complete decision records for chosen use cases
- Agree responsible-use gates with counsel or a risk lead
- Name one owner per first move

Days 61 to 90: decide

- Run Module 4 and issue the 90-day roadmap
- Hold the first monthly review with evidence
- Decide continue, change or pause for each first move
- Schedule the quarterly refresh

GLOSSARY

Terms used in this publication

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TERM	MEANING
Strategic question	A single sentence stating what the business wants to improve with AI and why.
Must-remain-true	A constraint on people, customers or the business that any AI use must respect.
Workflow map	A drawing of how work actually moves, including handoffs, information and exceptions.
Friction point	A place where work is delayed, repeated, hard to find or inconsistent.
Use-case portfolio	The set of candidate AI uses with a status of test, prepare or park.
Decision record	A short document capturing a choice, its reasons, assumptions and what would change it.
Gate	A condition that must be met before a use case can proceed, regardless of its score.
Decision rights	Clear statements of who approves, consults, is informed and can stop work.
Pre-mortem	An exercise that imagines future failure to expose causes while there is time to act.
Leadership AI charter	A short shared statement of purpose, constraints, ownership and review rhythm.



A note on use

This guide is an educational resource, not legal, technical or financial advice. Adapt it to your organization and confirm legal and regulatory points with qualified advisers.

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TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

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