# The Productivity Dip:
# Why Better Ways of Working Feel Worse Before They Feel Better

## Opening Note

One of the most persistent challenges in transformation is not deciding that a better way of working exists. It is helping people make the transition from a familiar process to a new one while the business continues to move at full speed. That tension is becoming especially visible as organizations introduce AI, analytics, automation, modern enterprise systems, and other capabilities that promise greater productivity but require employees to change how everyday work is performed.

A conversation with a former co-worker helped crystallize this issue for me. I stopped by a branch and ran into Ben, an experienced electrical-distribution professional who had been selected for an AI pilot focused on product identification and quote preparation. When I asked how the pilot was going, he told me he had not tried the tool yet because he was simply too busy. Earlier that day he had received a customer quote request containing almost 100 items and had worked through it the way he always had. From his perspective, that was exactly why he did not have time to experiment with the new AI tool being piloted.

The conversation changed when the customer pressure was removed. The quote was already complete, which meant Ben had both the original request and an answer he trusted. I suggested that he run the completed request through the pilot AI tool and compare the result with what he already knew was right. That turned the experiment from a gamble on live customer work into a controlled learning exercise. It also reframed Ben's experience as an asset. His product knowledge, customer knowledge, and ability to spot a wrong or incomplete match were exactly what the pilot needed in order to improve and why he was selected as a pilot participant to begin with.

That story is a useful window into the problem this whitepaper addresses. The employee who says, 'This takes longer. I'm faster without it,' may be making an accurate observation about the early stage of a new practice. The first uses can require more time, more concentration, more verification, and more tolerance for mistakes than the mature process. In an AI pilot, the solution itself may also still be immature. The leadership challenge is to distinguish that normal learning cost from a poor design, create safe ways to practice, and keep expert feedback connected to improvement.

This whitepaper introduces the Productivity Dip as a practical leadership model for understanding that transition. It is written primarily for functional leaders and managers whose teams are being asked to use new AI-enabled tools. The objective is not merely to increase tool usage. It is to help leaders move people through the difficult middle of adoption so that the business can reach the productivity, quality, capacity, customer, and ROI benefits that justified the change in the first place.

The paper is intentionally broader than AI even though AI-assisted product identification and quote preparation serves as the dominant example. The same principles apply to ERP adoption, analytics, automation, process redesign, data discipline, digital tools, and nearly any transformation that asks experienced people to stop relying exclusively on a familiar method and begin building competence in a different one.

Thank you,

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## Executive Summary

Organizations routinely invest in new technologies and processes because they expect a better outcome: faster work, improved customer responsiveness, fewer manual steps, better decisions, stronger consistency, or greater capacity. Yet adoption often moves much more slowly than the business case suggests because the old way of working has an advantage that is easy to underestimate. People already know how to do it, and experienced people may know it exceptionally well.

The Ben story makes the tension concrete. An experienced inside salesperson can identify products and prepare a complex customer quote using years of accumulated knowledge, familiar systems, customer shorthand, cross-references, and judgment. Leadership may see an AI-assisted product-identification tool and reasonably expect the future process to become faster and more consistent. The employee experiences the early pilot differently: additional steps, uncertain matches, more verification, greater cognitive load, and the possibility that a mistake will create rework, embarrassment, or an upset customer.

- Leadership is looking at the future state and saying, 'This will save time.'
- The employee is living in the transition and saying, 'This is taking longer.'
- Both can be true.

That tension becomes even more important in an AI pilot because the solution may not yet have the product data, customer language, cross-references, operating rules, correction history, and business context required for mature performance. Not every AI system literally retrains itself from each user interaction. Improvement may come through better product data, retrieval, matching rules, prompts, configuration, training examples, or model tuning. What matters operationally is that expert corrections are captured and converted into improvements rather than disappearing as silent human repair.

Research provides useful support for this practical observation. Brynjolfsson, Rock, and Syverson describe a broader Productivity J-Curve in which general-purpose technologies require complementary investments in skills, processes, organizational capabilities, and other intangible assets before productivity benefits are fully realized. At the behavioral level, the COM-B framework emphasizes that behavior depends on capability, opportunity, and motivation. The Four Stages of Competence provide an additional coaching lens for why people can feel less capable while learning a new practice. These frameworks address different questions, but together they reinforce the same leadership point: willingness alone cannot compensate for missing skills, insufficient time, poor workflow design, weak reinforcement, or lack of trust.

The role of leadership must therefore be complete across levels. Senior leaders create direction, investment discipline, governance, and permission to learn. Functional leaders translate that direction into specific workflows, use cases, measures, and operating tradeoffs. Frontline managers make the change real by protecting practice, reinforcing safe use, surfacing friction, capturing corrections, and deciding whether the new behavior is becoming better work. A breakdown at any one of those layers can stall adoption even when the technology itself is capable.

Successful adoption is a managed transition from awareness to personal proof, from personal proof to repetition, and from repetition to normal work. Leaders need practical ways to diagnose resistance, create bounded learning capacity, use small wins, involve experienced employees as designers and teachers, measure whether the learning curve is improving, and decide when to continue, refine, pause, or scale. The leadership challenge is not simply to persuade people to use the new thing. It is to create the conditions in which the better behavior has a realistic chance to survive long enough to become the easier and more valuable behavior.

**If the new way of working requires time to learn, but the organization never creates time to learn it, leadership has not really asked people to change. Leadership has asked them to add.**

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## Ben and the AI Pilot: The Productivity Dip in Real Work

Ben had been selected to participate in an AI pilot designed to assist with product identification and quote preparation. He was exactly the kind of person a pilot like that should want: more than two decades in the business, deep product familiarity, strong customer knowledge, and enough pattern recognition to know when a proposed match simply does not look right. Yet when I asked how the pilot was going, he had not used the tool. His explanation was straightforward: he was too busy.

Earlier that morning, a customer had sent a quote request with almost 100 line items. Ben processed the request using the familiar method and completed the quote. To him, the experience reinforced the objection. He had live customer work to get out the door, and a new tool that might be slower or wrong did not feel like a productivity solution. It felt like additional work and additional risk.

In hearing this from Ben, I offered an idea for him to consider. The lower-risk path was to separate learning from the live customer commitment. Because the original quote was already finished, Ben could rerun the same request through the pilot tool with the pressure removed. He could compare the AI-assisted product matches with the completed quote he already trusted, identify where the tool performed well, mark what it misunderstood, and explain why a suggested match was incomplete or wrong. The completed work became a safe test case rather than a customer-facing experiment.

This matters because early AI pilots can be objectively slower before they become faster. The employee is learning a new workflow at the same time the pilot team is still improving the solution. Product attributes may be incomplete, customer shorthand may not map cleanly to manufacturer part numbers, cross-reference data may be missing, units of measure may be inconsistent, and the system may not yet reflect the exceptions an experienced salesperson understands instinctively. The employee may also reasonably fear that a wrong match could create rework, expose weak product knowledge, delay the quote, or send the customer down the wrong path.

The expert's corrections are therefore not noise around the pilot. They are part of the pilot's value. Depending on how the solution is designed, those corrections may improve product data, retrieval, matching rules, prompts, configuration, training examples, or model training and tuning. The important distinction is that the system does not become better simply because an expert silently fixes every weak output. The learning has to be captured, classified, and converted into a better workflow and a stronger information foundation.

The leadership failure in this story was not that Ben lacked work ethic or curiosity. Leadership had chosen the pilot and functional leaders had selected participants, but the final mile had largely become an email and an instruction. The conversation I had with Ben was the conversation a frontline manager should have been having: why the pilot matters, how to experiment without putting live customer work at unnecessary risk, what good participation looks like, how feedback will be used, and what evidence will tell us whether the tool is actually improving. That is the management work required to cross the Productivity Dip.

| Dimension | Current mature process | Management expected future state | Employee early-pilot reality |
|---|---|---|---|
| **Speed** | Fast because the expert has years of fluency and shortcuts. | Faster identification and quote preparation with less manual search. | Often slower at first because the user must learn, verify, and correct the new workflow. |
| **Accuracy** | Known and trusted within the expert's experience, with familiar failure modes. | More consistent matches, fewer misses, and better use of structured product knowledge. | May be uneven while data, rules, retrieval, or model behavior are still being refined. |
| **Cognitive load** | Relatively low for routine work because much of the process feels automatic. | Less searching and mental assembly for routine line items. | Higher because every step and output requires conscious attention and judgment. |
| **Customer risk** | Managed through familiar judgment and known escalation habits. | Lower risk through consistency, traceability, and better decision support. | Can feel higher because a wrong match could create rework, delay, embarrassment, or customer frustration. |
| **Verification and rework** | Built into familiar habits and often invisible. | Less manual checking once confidence and controls are established. | More parallel checking until the new result earns trust. |
| **Role of expertise** | Expert personally performs much of the identification and judgment. | Expert judgment is amplified and reused across more work. | Expert also becomes tester, validator, teacher, and source of correction data. |
| **Time horizon** | Optimized for today's transaction. | Optimized for repeatable future capacity, quality, and scale. | The transition cost is experienced now while the benefit is still being earned. |

## The Hidden Cost of Changing How Work Gets Done

Most transformation business cases compare the current process with the future process. They estimate how much faster a task could become, how many manual steps could disappear, how much information could be made visible, or how much capacity could be created. That comparison is necessary, but it leaves out the period between the two states. Employees do not move instantly from current performance to future performance. They have to learn their way across.

The old process enters that transition with years of accumulated advantage. Even when it is clumsy, experienced employees know how to navigate it. In product identification and quoting, that advantage can include customer shorthand, manufacturer naming conventions, cross-references, application knowledge, pack quantities, units of measure, trusted product sources, and the instinct to recognize when a match is technically possible but commercially or operationally wrong. These capabilities are rarely visible in a process map, but they are part of the real operating system of the business.

A new process temporarily removes some of that fluency. An experienced salesperson who can work a quote almost reflexively may suddenly have to prepare the request differently, interpret an unfamiliar confidence score, inspect source evidence, correct a proposed item match, decide when the tool should be ignored, and document why. Tasks that once required little conscious thought now demand attention. The person may temporarily run the old and new approaches in parallel because the new answer has not yet earned enough trust to stand on its own. What leadership sees as duplication may be the employee's rational way of protecting the customer while the pilot matures.

This is why organizations can underestimate the cost of change even when the technology investment itself is well planned. They budget for licenses, integrations, consulting, implementation, and training, but they often fail to budget for the temporary loss of fluency that occurs inside everyday work. The cost appears in slower execution, additional verification, more questions, small mistakes, duplicated effort, and the mental burden of having to think about work that used to feel automatic. None of those outcomes should be ignored, but neither should they be mistaken immediately for evidence that the change is failing.

The better management question is whether the temporary cost is producing increasing capability. If cycle time begins to fall with repeated use, corrections become less frequent, support dependence declines, trust improves, and the same failure modes stop repeating, the organization is probably investing in a normal learning curve. If the process remains slow, the same product-matching errors recur, expert corrections are not converted into fixes, customer risk remains unbounded, or employees cannot explain why the tool produced an answer, the issue may be the design rather than the learner. Leaders need enough measurement and feedback to distinguish the normal cost of learning from a poor design that deserves to be refined or stopped. A practical diagnostic later in this paper makes that distinction explicit.

## The Productivity Dip and the Change Gap

The Productivity Dip is a practical way to describe the period in which a new method has greater long-term potential but lower short-term fluency. It is not a claim that every change follows the same mathematical curve. It is a leadership model that makes a common operating reality visible: people often become temporarily less efficient when they begin learning a better way to work.

The Ben example makes the curve easier to see. The mature manual process begins at a relatively high level because the employee already knows how to identify products, interpret the customer's request, and build the quote. The AI-assisted process may have much greater long-term potential, but its first uses begin lower. The employee must learn the workflow, the pilot solution must be tested against real product language and exceptions, and every questionable match requires review. For a period of time, the experienced employee may be completely right when he says, 'I am faster without it.' The comparison is not yet mature manual performance versus mature AI-assisted performance. It is mature manual performance versus an immature new practice.

The new approach becomes attractive only after enough learning and improvement have occurred for the productivity curves to cross. The user becomes faster at operating the new workflow, the solution becomes better grounded in the product and customer context, recurring defects are corrected, verification becomes more targeted, and managers remove unnecessary steps. Before that crossover, the old method often feels safer and faster. The distance between introduction and crossover is the Change Gap. It is the most vulnerable period in adoption because the organization has already incurred the disruption of change but has not yet realized the full benefit.

Research at the organizational and economic level provides a useful parallel. Brynjolfsson, Rock, and Syverson (2021) describe a Productivity J-Curve in which technologies such as AI require complementary investments in business-process redesign, human capital, and other intangible capabilities before measured productivity gains

emerge. Their model operates at a different level than an individual employee learning a workflow, so the two concepts should not be treated as identical. The important connection is that technology value does not materialize simply because the technology is available. Value depends on the complementary capability required to use it well.

Organizations already accept this logic in physical operations. A new production line requires installation, commissioning, training, debugging, and process tuning before it reaches steady-state performance. Knowledge work should not be held to a magical standard in which a license is activated on Monday, training occurs on Tuesday, and full productivity is expected on Wednesday. Learning is part of implementation. The goal is to design the transition so the dip is manageable and the path to greater fluency is visible.

**The goal is not to eliminate the Productivity Dip. The goal is to make it shallow enough, short enough, and safe enough that people remain engaged until the new practice begins to outperform the old one.**

## Why 'I Don't Have Time' Is Often Rational

Few phrases frustrate transformation leaders more than 'I don't have time.' It can sound like avoidance, especially when the business has clearly communicated that the new capability matters. Sometimes it is an excuse. More often than leaders admit, however, it is an accurate description of the employee's operating reality. Ben's nearly 100-line quote request is a good example. The customer need was immediate, the familiar process was dependable, and the pilot carried an unknown time cost. Choosing the old process protected today's commitment.

Consider what happens when someone begins the day with customer issues, open orders, supplier follow-up, reports, meetings, and an inbox that will continue filling regardless of what the transformation team has planned. Leadership introduces a new technology and asks the employee to spend time experimenting with it. The employee may believe the technology is important and still face an immediate tradeoff: every hour invested in learning is an hour that another visible responsibility is not being completed. Current work carries deadlines, customers, and manager expectations. Future capability carries a promise.

This creates a competition between current performance and future capability, and current performance usually wins because the consequences are immediate. The customer is waiting now. The late order needs attention now. The report is due today. The manager is asking for an answer this afternoon. Under those conditions, choosing the familiar process can be a rational attempt to protect today's commitments rather than evidence that the employee rejects the future.

Organizations make the problem worse when they say learning is important but treat it as extracurricular. 'Use it when you have time' sounds supportive, yet it effectively places the new practice behind every established responsibility. The employee learns quickly that transformation is encouraged only after the real work is done. Since the real work is rarely done, experimentation becomes sporadic and the organization interprets low activity as weak motivation.

The leadership response is not to remove accountability or create unlimited experimentation time. It is to make the investment explicit. Protected learning capacity can be modest: 20 minutes in a weekly meeting, one recurring process-improvement task, a short working session around a real customer problem, or manager-approved time to redesign a task that is performed repeatedly. The amount matters less than the signal. When capacity is created, employees hear that learning the new way is part of the job. When no capacity is created, they hear that the new way should be learned on top of the job.

## Adoption Is More Than Motivation

Organizations often treat adoption as a communication problem. Leaders explain why the initiative matters, describe the competitive threat, demonstrate the technology, and assume that people who understand the case will change their behavior. Communication is necessary, but behavior requires more than agreement.

The COM-B model developed by Michie, van Stralen, and West (2011) provides a useful diagnostic. It proposes that behavior depends on capability, opportunity, and motivation.

- Capability includes the knowledge and skills required to perform the behavior.
- Opportunity includes the physical and social conditions that make the behavior possible.
- Motivation includes both deliberate intention and more automatic influences such as habit, emotion, and identity.

The framework is valuable because it prevents leaders from treating every adoption problem as a failure of attitude.

An employee may be motivated to use a new tool and still lack one of the other conditions required for the behavior. In an AI-assisted product-identification pilot:

- An experienced salesperson may want the pilot to succeed but have no protected time to test it, no confidence in the product data behind it, no clear instruction about when to use it, or no practical explanation of how corrections will improve the solution.
- Another employee may assume the new capability is aimed at less experienced people and conclude that it is not relevant to someone who already knows the products.
- A manager may say experimentation matters while continuing to reward only today's throughput.

All of these situations can produce the same visible outcome: the person keeps working the old way.

The practical implication is that leaders should diagnose before they persuade. Ask whether the person is unwilling, unable, unsupported, uncertain, or overwhelmed. Look for workflow barriers, missing permissions, poor data, competing measures, manager behavior, and confidence gaps. Motivation matters, but motivation cannot compensate indefinitely for a system that makes the desired behavior difficult.

Klein and Sorra's work on innovation implementation makes a related distinction. Adoption is not the same as implementation. An organization can decide to acquire an innovation without achieving consistent, high-quality, and committed use. Implementation effectiveness depends on the environment surrounding the behavior and on whether the innovation fits the values and needs of the people expected to use it. That is why a launch can be successful while the actual operating change remains weak.

| What you hear | What may actually be happening | Leadership response |
|---|---|---|
| 'I do not have time.' | Current workload leaves no practical opportunity to learn or experiment. | Create bounded learning capacity and remove or defer lower-value work where possible. |
| 'The old way is faster.' | The employee is comparing current fluency with early-stage learning effort. | Measure the transition over repeated uses and shorten the path to personal proof. |
| 'I do not trust it.' | Data, output quality, source authority, or prior experience has not earned confidence. | Make verification easy, fix high-value trust gaps, and show limitations rather than hiding them. |
| 'This does not fit my job.' | The change has been explained as technology rather than connected to real workflow friction. | Start with an actual task, customer need, or operating problem. |
| 'My manager still wants the old report.' | The daily reinforcement system contradicts the transformation message. | Align manager expectations, measures, and requests with the desired behavior. |

## The Learning Curve Underneath Adoption: Four Stages of Competence

Another useful lens makes the cognitive side of the Productivity Dip more explicit. The Four Stages of Competence describe a progression from not yet recognizing what a new skill requires, to becoming aware of the gap, to performing the skill deliberately, and eventually to performing it with much less conscious effort. The model is commonly associated with Noel Burch at Gordon Training International in the 1970s, although an earlier published four-level formulation appeared in Martin Broadwell's 1969 work. It is best used as simple coaching language, not as a precise scientific law or a label to attach to a person.

That last point matters in an experienced workforce. Ben can be deeply competent in electrical distribution and still be at an early competence stage with a new AI-assisted quoting workflow. Calling an expert 'incompetent' without that context would be insulting and counterproductive. The framework is useful only when it describes competence in the new practice, not the value or capability of the employee as a whole.

In the first stage, unconscious incompetence, the employee does not yet know what the new practice requires or where the difficult parts will be. Once the person begins testing the workflow, conscious incompetence appears: the gaps become visible, and the employee now knows what must be learned. This is often the most uncomfortable point because awareness rises before fluency does. Conscious competence follows when the person can perform the new work correctly but must concentrate, verify, and think through the steps. With enough repetition and a stable workflow, parts of the process can eventually reach unconscious competence, where the new behavior feels natural and requires far less mental effort.

The leadership implication is important. Movement from unconscious incompetence to conscious incompetence can feel like performance getting worse even though learning is actually occurring. The employee sees more problems

because the employee now understands them. Leaders should not mistake that awareness for regression. At the same time, they should not use the framework to excuse a bad tool indefinitely. Competence should rise with practice, and the solution should improve as recurring defects are corrected. If neither trend appears, the problem deserves intervention.

| Stage | What it means in the new workflow | Leadership response |
|---|---|---|
| **Unconscious incompetence** | The employee does not yet know the tool's limits, the new steps, or what good participation requires. | Create relevance, show the workflow, and start with a safe, bounded comparison. |
| **Conscious incompetence** | The employee sees what is difficult, where the tool misses, and how much learning remains. | Normalize the discomfort, protect practice time, coach the work, and capture corrections. |
| **Conscious competence** | The employee can use the new process but must work deliberately and verify heavily. | Drive repetition, remove friction, improve the solution, and track whether support and rework decline. |
| **Unconscious competence** | The proven parts of the workflow become natural and require much less conscious effort. | Standardize what works, retire obsolete steps, preserve judgment for exceptions, and keep measuring quality. |

## Confidence, Identity, and Professional Expertise

The operational barriers to adoption are only part of the story. Meaningful change can also challenge confidence and identity, especially for experienced employees who have spent years becoming highly competent in the current environment.

Expertise creates value because experienced people recognize patterns that are difficult to document. They know which supplier commitment deserves skepticism, how a customer describes a product differently from the manufacturer, why a particular system message is misleading, or when an exception is legitimate rather than careless. Other employees rely on them because they can connect formal information with operating reality. Over time, that capability becomes part of how the person understands professional value.

A new technology can unsettle that identity. When an organization says that AI can identify products, recommend matches, summarize technical information, analyze a report, or retrieve knowledge, an experienced employee may hear that the knowledge accumulated over a career is becoming less valuable. Others will react more quietly: 'I have been doing this for 20 years. I already know how to do it,' or, 'This is going to slow me down.' Those statements can contain pride, habit, rational risk assessment, and a real fear that a new process will make an expert look less competent before it makes the work better.

The wrong response is to dismiss that concern or frame the expert as someone who needs to get out of the way. A stronger response is to make expertise central to designing and training the new practice. Ask experienced people to define what good output looks like, identify the exceptions the technology is likely to miss, explain customer terminology and application context, test product matches, and help determine which decisions can be standardized and which still require judgment. In a pilot, a correction from an expert should be treated as learning evidence, not as proof that the expert is resisting the tool.

This framing changes the role of the expert from defender of the old process to co-designer of the new one. It also improves the solution. AI and automation can process information quickly, but operating expertise provides the context, risk judgment, and exception knowledge needed to apply that information responsibly. In many organizations, the greatest transformation opportunity is not to reduce the value of expertise but to make more of that expertise reusable across the business.

Confidence matters for less-tenured employees as well. People avoid behaviors that repeatedly make them feel incompetent. If training emphasizes everything the technology can do, employees can leave with a stronger sense of how much they do not know. Early adoption experiences should therefore be designed to create competence quickly. Completing one useful task with the new approach is often more motivating than watching a sophisticated demonstration of twenty possibilities.

### The Expert Adoption Paradox

Field experience shared during Michael Delgado's PowerTalk at NAED National adds an important nuance to the Ben story. The discussion described some of the fastest early adoption at Werner Electric Supply coming from less-tenured employees who did not yet have years of ERP shortcuts or the same depth of product knowledge as senior employees. The AI-assisted workflow helped those employees close part of the knowledge and navigation gap, so the personal value could become visible quickly.

Experienced employees can face the opposite starting point. Their current-state fluency is already high, which means a new AI-assisted process must compete against a method they have optimized through years of repetition. The expert may therefore experience less immediate benefit and more disruption, even while possessing the product, customer, and exception knowledge the pilot most needs. The employees who experience value fastest are not necessarily the same employees who contribute the most to making the solution accurate, trusted, and scalable.

That distinction should change how functional leaders staff and manage a pilot. A team composed only of enthusiastic early adopters can produce encouraging usage while missing subtle quality problems. A team composed only of deeply experienced skeptics can create excellent validation but struggle to generate early momentum. Strong pilots deliberately combine complementary roles and make the contribution expected from each role explicit.

| Pilot role | What to look for | Primary contribution |
|---|---|---|
| **Power user / early adopter** | Credibility with peers, curiosity, willingness to experiment, and enough workflow knowledge to use the tool responsibly. | Creates early proof, identifies usability friction, demonstrates practical value, and helps the next group see how the new workflow can work. |
| **Expert validator** | Deep product, customer, process, and exception knowledge, even if the person is not naturally an early technology adopter. | Challenges accuracy, identifies hidden rules and edge cases, explains why a result is wrong, and helps convert expert judgment into reusable organizational learning. |
| **Frontline manager** | Operating authority, proximity to the work, and responsibility for team performance. | Creates bounded learning capacity, removes barriers, reinforces expectations, captures recurring feedback, and decides when the practice is ready to become normal work. |

Leaders also need to address the questions employees may be asking privately about what the change means for their role. In his PowerTalk, Michael Delgado also addressed employee concerns about job security, career implications, customer ownership, and compensation. The exact answers will differ by company and use case, so blanket reassurance can be as damaging as silence if leaders cannot support it. Functional leaders should be as concrete as possible about what is changing, what is not changing, where human judgment remains required, who owns the customer relationship, how performance expectations may evolve, and whether compensation or role design is affected. Unanswered questions about personal impact can become adoption barriers that another training session will not solve.

## From Acceptance to Adoption

Adoption is often discussed as though employees move from not using a practice to using it. In reality, sustainable adoption usually develops through a sequence of smaller transitions. Understanding those transitions helps leaders avoid the common mistake of expecting regular usage immediately after awareness or training.

The journey begins with awareness: the person understands what the change is. Awareness becomes relevance when the employee can see how the change connects to a problem, task, customer need, or frustration that matters in everyday work. Relevance needs permission, particularly when experimentation requires time or creates the possibility of an imperfect result. The next step is first use, when the employee applies the new practice to something real rather than a training exercise.

First use is important, but it is not yet adoption. The pivotal transition occurs when the employee experiences personal proof. In Ben's case, the first useful proof did not have to be that the tool completed a live quote faster. It could be more modest: the tool correctly identifies a meaningful portion of the completed request, exposes where customer shorthand creates ambiguity, or makes several routine lines easier while clearly signaling where expert review is needed. The Aha Moment occurs when the employee sees enough credible value to choose the new approach again, not because leadership asked, but because the employee can see how the practice could become useful.

Repetition then converts isolated success into capability. The employee learns where the approach works, where it does not, what information is required, and how much verification is appropriate. Cognitive effort declines as the process becomes familiar. Research on habit formation reinforces the importance of repetition in a consistent context. Lally and colleagues (2010) found substantial variation in how long automaticity developed across behaviors and individuals, which is a useful reminder that a workshop or a few successful uses should not be expected to make a new practice feel natural immediately.

Eventually the behavior reaches routine. At that point the employee is not continually deciding whether to use the new approach. It has become part of how the work is performed. Some employees then move beyond routine to advocacy, helping others adopt the practice, improving the workflow, and contributing ideas for adjacent opportunities. The organization has crossed from individual experimentation into organizational capability.

**The goal of adoption is not permanent motivation. The goal is to make the better behavior increasingly normal until the new practice earns the same fluency advantage the old practice once had.**

## Practical Strategies for Crossing the Change Gap

### Start with the Work, Not the Technology

One of the fastest ways to create resistance is to begin with a long demonstration of features. Employees may leave impressed by the technology and overwhelmed by the number of things they are now expected to learn. A stronger starting point is the work itself. Ask where time is being consumed, where customers wait, where information is repeatedly searched for, where mistakes happen, where people reenter data, where reports require manual reconciliation, or where employees rely on unofficial steps because the formal process does not support the decision.

Once the friction is visible, connect the new practice directly to it. The employee should be able to see a simple chain: this is the problem I experience, this is the different behavior, and this is the result we are trying to improve. That sequence creates relevance before training begins. It also prevents the transformation team from treating technology adoption as the goal. The goal is a better workflow, with the technology serving as one possible enabler.

### Design the First Use to Be Small and Real

Broad instructions such as 'use AI more,' 'adopt the new platform,' or 'find ways to automate your work' are too vague to become reliable behavior. A useful first step is tied to a recognizable situation. For example, an inside salesperson might be asked to use an approved AI tool when a customer email contains several questions or action items. A buyer might use a new exception view when a supplier acknowledgment changes beyond an agreed tolerance. A manager might use an analytics dashboard before building a manual spreadsheet for the weekly meeting.

This approach resembles the logic of implementation intentions studied by Gollwitzer and Sheeran (2006), in which people connect a specific situation with a planned behavior. In workplace terms, the pattern is simple: when this situation occurs, try this action. The employee does not need to understand every capability of the tool. The person needs a clear trigger, a bounded task, and enough support to complete the first attempt successfully.

### Use Crawl, Walk, Run, Fly to Build Confidence

Small wins should be designed, not merely celebrated after they happen. A Crawl, Walk, Run, Fly progression gives leaders a simple way to increase exposure only as evidence and confidence improve. It is a practical sequencing device for a single work practice, and it fits especially well when a team is learning an AI-assisted workflow that still requires expert validation.

The key is that each stage earns the next one. Leaders should not jump from a demonstration directly to broad live use, and they should not hold a proven workflow in permanent pilot mode. The scope, risk, and degree of reliance should expand as the employee, the process, and the solution demonstrate that they are ready.

| Stage | Product-identification and quote example | What earns the next stage |
|---|---|---|
| **Crawl** | Rerun completed customer quotes through the tool and compare with known-good answers. No live customer risk. | Useful matches, understandable misses, and a reliable way to capture expert corrections. |
| **Walk** | Use the tool on limited live work, such as a defined product family, with expert verification of every match. | Improving cycle time and accuracy, declining repeat defects, and clear escalation for uncertainty. |
| **Run** | Make the workflow the normal first pass for defined quote categories while tracking speed, corrections, and customer rework. | Stable quality, targeted rather than universal verification, manager reinforcement, and trusted data/rules. |
| **Fly** | Scale to broader use with governed product data, confidence thresholds, source traceability, and human attention focused on exceptions. | Sustained business value, controlled risk, and evidence that the workflow is better than the process it replaced. |

### Create Protected Learning Capacity

If learning matters, it has to exist somewhere in the operating rhythm. Protected capacity does not require removing people from productive work for days. It can be a 20-minute experimentation period in a recurring team meeting, a manager-approved block to redesign one repetitive task, or a short working session built around an actual customer or

operational problem. What matters is that the organization makes the investment visible instead of expecting employees to hide learning inside already overloaded schedules.

Leaders should also be explicit about tradeoffs. If a new practice requires meaningful time to learn, what work will be delayed, simplified, delegated, or stopped during the transition? Without that conversation, transformation becomes additive. Employees hear that the new capability will create capacity someday while experiencing an immediate increase in workload today. Credibility improves when leaders acknowledge the tradeoff and make room for it.

## Build Competence Through Guided Accomplishment

Training should produce something useful, not merely exposure. Instead of showing employees a catalogue of features, ask them to bring real work. Completed work is especially valuable in early AI pilots because it provides a known-good comparison without putting a live commitment at risk. Ben's completed quote was a better learning asset than a generic training example because he knew the customer request, knew the correct product choices, and could explain why the pilot output was right or wrong. The output of a guided session might be a customer response, a quotation, a supplier exception analysis, a cleaned dataset, a meeting summary, a pricing review, or a draft procedure. The employee should leave with both a useful result and clearer evidence about where the new process can help.

This matters because competence is motivating. Self-determination research emphasizes competence, autonomy, and relatedness as important conditions for higher-quality motivation at work. A person who feels capable is more likely to continue experimenting than someone who repeatedly feels confused or dependent on an expert. Early onboarding should therefore be judged partly by whether employees can complete a meaningful workflow with decreasing assistance, not simply by whether they attended training.

## Preserve Agency While Maintaining Standards

Some changes must be mandatory. Safety procedures, cybersecurity controls, financial controls, regulatory requirements, and enterprise data standards are obvious examples. But when the objective is discovery and process improvement, excessive control can reduce ownership. Leaders can define the business outcome, risk boundaries, approved tools, and nonnegotiable controls while still allowing employees to help determine how the workflow should change.

A useful leadership posture is, 'Here is the problem we need to solve, here are the boundaries we need to respect, and we want the people closest to the work to help determine the better method.' That approach communicates trust while preserving accountability. It also produces better design because frontline employees see process friction, exceptions, and customer consequences that may not be visible to the project team.

## Use Peer Proof to Make the Future Believable

Employees expect leaders and technology teams to promote a transformation initiative. That does not make leadership communication unimportant, but it limits its persuasive power. Peer examples are different because they come from someone who experiences the same systems, customers, workload, and constraints. A colleague who says, 'I tried this yesterday and it saved me 20 minutes,' makes the future feel much more attainable than a polished demonstration from someone outside the workflow.

Organizations should create simple mechanisms for these stories to travel. A team meeting can begin with a five-minute question: What did someone try differently this week? The example does not have to be impressive. In fact, the Crawl-stage story of an experienced salesperson rerunning a completed quote and finding a few areas where the tool helped can be more credible than a polished demonstration of a future state nobody has experienced. As the wins accumulate, peer sharing turns isolated proof into social proof and makes experimentation part of normal work rather than the hobby of a small group of enthusiasts.

Once credible users exist, use them to help onboard the next wave. A vendor, IT team, or transformation leader can explain the features, but a peer can translate the change into the language of the local workflow, show exactly how the work is being performed, and speak candidly about where the tool still requires judgment. In the PowerTalks session, Delgado and Mauermann specifically described co-presenting training with power users so the next group hears from colleagues who have already worked through the practical objections. Peer-led onboarding should not replace structured training, but it can make the new practice far more believable.

### Make Responsible Experimentation Safe

Learning produces imperfect attempts. If every unsuccessful attempt is treated as evidence of poor performance, employees will quickly learn that experimentation is risky. Psychological safety research, including Edmondson's work on team learning, helps explain why people need enough interpersonal safety to ask questions, admit uncertainty, and surface mistakes while learning.

Safety does not mean lowering standards or tolerating careless execution. Leaders should distinguish between a controlled experiment that reveals a limitation and an avoidable error that reaches a customer because basic review was skipped. A manager can say, 'I expect you to verify the output before it becomes a customer commitment, and I do not expect your first attempt with the new process to be perfect.' That combination creates permission to learn and clarity about accountability.

### Keep the Win Connected to the Person Who Created It

When an employee identifies a problem, catches a recurring defect, or helps create a better approach, the organization should resist the urge to immediately turn the improvement into an anonymous corporate initiative. Keep the contribution visible. If an experienced salesperson's correction improves how the product-identification workflow handles customer shorthand or a recurring cross-reference, let that person explain the learning to peers. Recognition sends a message about what the culture values, and peer ownership makes the solution more credible to people doing similar work.

This is also a practical way to broaden participation. Employees are more likely to contribute ideas when they see that useful observations from the front line can influence how the company operates. Recognition should focus on business improvement, curiosity, responsible experimentation, and collaboration, not simply on who used the newest technology first.

### Retire Old Work When the New Process Is Proven

A transformation loses credibility quickly when every new process is layered on top of every old process. Employees are told that a new tool will save time, but the legacy report, spreadsheet, email routine, or approval step remains permanently in place. The organization now has more work, not better work.

During transition, parallel processes may be necessary to validate results and manage risk. They should not become the permanent design by default. Once the new process is trusted and the required controls are in place, leaders need an explicit decision about what can be stopped, simplified, or retired. Permission to stop is one of the clearest signals that the organization is serious about replacing work rather than continuously adding to it.

## Leadership Is the Adoption Operating System

Through the NAED PowerShift® conversations, there is an important point that applies directly to the Productivity Dip: leadership is the operating system for AI maturity. Leadership involvement looks different at different levels, and treating the layers as interchangeable is a mistake. This whitepaper is written primarily for functional leaders and managers because they sit closest to the translation from strategy into work, but adoption becomes fragile when senior leaders, functional leaders, or frontline managers leave their part of the system incomplete.

- Senior leaders own direction and accountability. They decide why the capability matters, which outcomes deserve attention, how much risk is acceptable, what capacity can be protected for learning, and whether pilots will be judged by evidence rather than activity.
- Functional leaders own translation. They select meaningful workflows, define the expected business value and change-management lift, engage the right experts, align measures, and make the tradeoffs required to move from a pilot to an operating practice.
- Frontline managers own reinforcement. They turn the change into daily behavior by making experimentation legitimate, coaching review quality, capturing friction, recognizing useful learning, and challenging legacy work when the new approach is proven.

IT and data teams remain essential partners, particularly for architecture, security, access, integration, product data, source authority, monitoring, and scale. But the business must own the workflow, meaning, value, decision rules, human review, and adoption. An AI-assisted product-identification pilot cannot be handed to IT as though product judgment and customer workflow were technical requirements someone else can define.

| Leadership layer | Primary adoption responsibility | What failure looks like |
|---|---|---|
| **Senior leaders** | Set strategic intent, risk posture, investment discipline, governance expectations, and permission to learn. | The organization hears urgency but receives no priorities, tradeoffs, or capacity. Activity expands without decisions. |
| **Functional leaders** | Translate strategy into a defined workflow, business owner, measures, expert involvement, and change plan. | A tool or pilot is pushed downstream without enough connection to the real work or a clear definition of value. |
| **Frontline managers** | Reinforce the behavior, protect bounded practice, coach verification, surface friction, and capture corrections. | Employees receive an email or training session but default to the old process when customer and workload pressure returns. |

## Proof First, Expectation Second

The leadership posture should change as evidence accumulates. Early in a pilot, the primary job is to create bounded learning, understand friction, improve the solution, and establish credible proof. This is the period when leaders should be careful about forcing usage simply to make an adoption metric look better. A weak workflow does not become valuable because management mandates it.

The opposite mistake is leaving a proven practice permanently optional. Michael Delgado's PowerTalk described this progression clearly: power users create initial proof, a second wave of adopters spreads the practice, and leadership eventually takes a more active role in driving ongoing adoption. Once the workflow has demonstrated value, material defects have been addressed, risk is controlled, and credible peers are succeeding with it, functional leaders and managers have earned the right to raise the expectation. At that point the question shifts from, 'Can this work?' to, 'What is still preventing this from becoming the normal way we do the work?'

This sequence matters because accountability without proof creates justified resistance, while proof without accountability can leave the organization stuck in permanent pilot mode. Leaders should earn the mandate with evidence, then use the mandate to normalize the better practice.

## Frontline Managers: Where Adoption Lives or Dies

Employees learn what is truly important from repeated managerial behavior. If the organization says that a new analytics platform is the standard but managers continue asking for personal spreadsheets, the spreadsheet remains the standard. If leadership encourages AI experimentation but managers never ask what employees are trying, no time is created for learning, and performance measures reward only current throughput, employees receive a clear message about which priority will win when the day becomes busy.

Managers do not need to become the deepest technical experts. Their job is to make the desired behavior legitimate, visible, and connected to performance. They should know which workflows the team is trying to improve, what responsible use looks like, where people are getting stuck, and what evidence would demonstrate that the change is working. They should also be willing to remove friction, escalate barriers, and challenge old work that no longer adds value.

The most effective reinforcement often comes through ordinary questions rather than formal program management. A manager can ask where someone tried the new approach, what worked, what made the attempt difficult, what should be changed, and whether another person on the team could benefit from the learning. Those questions make experimentation part of the operating conversation. They also surface problems early, before the project team mistakenly interprets low use as resistance.

Managers are also best positioned to connect individual experiments to business priorities. A champion or curious employee may discover an interesting capability, but the manager can determine whether it addresses a meaningful pain point across the team, whether the workflow should be standardized, and whether the improvement deserves broader investment. The Ben story illustrates the gap clearly: enrolling an expert in a pilot created potential, but management still had to create the practical bridge between the pilot and the work. Champions create energy. Managers convert energy into operating change.

- Where did you try the new approach this week, and what happened?
- What made the new process easier or harder than the old one?
- What is preventing you from using this more, and which of those barriers should we remove?
- What result would convince us that this is worth continuing?
- What old step can we remove if this new practice proves reliable?
- What did you learn that someone else on the team should know?

# Practical Examples from Distribution Work

## Product Identification and Quote Preparation: Make Expert Feedback Part of the Pilot

An electrical distributor receives customer quote requests that may contain manufacturer part numbers, customer shorthand, incomplete descriptions, prior-project language, legacy catalog references, or line items that require application judgment. An AI-assisted product-identification workflow can create real value by accelerating the first pass, surfacing candidate matches, retrieving supporting product information, and focusing the experienced salesperson on ambiguous lines. But early pilot performance may be slower than the established manual process because the employee is learning the workflow while the pilot is still exposing gaps in product attributes, mappings, cross-references, and context.

The adoption design should make that reality useful. Begin with completed quotes, then move into bounded live work with full human verification, capture every meaningful correction, and classify why the correction was needed. A wrong match caused by missing product attributes is a different problem from one caused by ambiguous customer language, an outdated cross-reference, weak retrieval, or a poor instruction. The expert's job is not merely to fix the answer and move on. The pilot team needs the reason for the correction so the solution becomes less dependent on silent human repair over time.

## Inside Sales: Turning a First Use into Personal Proof

An inside salesperson receives a long customer email containing several product questions, requested quantities, delivery concerns, and follow-up actions. The existing process works because the salesperson is experienced: read the message several times, make notes, search prior correspondence, open the relevant systems, and draft the response. The process may be time-consuming, but it is familiar and reliable.

A weak AI rollout would demonstrate a long list of features and ask the salesperson to 'use AI more.' A stronger onboarding behavior is much narrower: when a customer email contains several questions or requested actions, use the approved AI tool to extract and organize those actions before drafting the response. The employee tries it on a real message, sees that the tool surfaces a question buried deep in the email, and realizes that the preparation step took only a few minutes. That is personal proof. The employee now has a reason to choose the behavior again when the same trigger appears.

## Purchasing: Use Expertise to Improve the Exception, Not Just the Tool

A buyer may spend significant time reviewing acknowledgments, supplier portals, emails, spreadsheets, and system screens to identify the few orders that actually require intervention. A new workflow promises to consolidate the information and generate alerts. The technology is launched, but the alert volume is too high and the buyer quickly concludes that the new system creates more work than it saves.

Additional training will not solve that problem. The better response is to involve experienced buyers in defining what truly deserves attention. Which date changes matter? Which suppliers behave differently? When should an exception be escalated? What level of uncertainty is acceptable before someone contacts the supplier? The new process should use expert judgment to reduce low-value review activity and direct human attention toward meaningful exceptions. The adoption goal is not 'use the new system.' It is 'spend less time searching and more time acting on the situations that matter.'

## Financial Analysis: Do Not Automate Distrust

A finance employee has produced a monthly variance workbook for years. The workbook is complicated, but the employee understands the calculations and trusts the result. Leadership introduces a modern analytics environment and expects the team to begin using a dashboard instead. On the first review, one number does not reconcile. The employee returns to Excel and begins maintaining both processes.

The failure is not simply resistance to analytics. Trust has not been earned. A stronger implementation selects one recurring analysis, reconciles the new environment against the trusted method, resolves differences openly, and involves finance in validating the business definitions. As confidence grows, the organization formally retires the corresponding manual step. That final decision matters. Without it, employees remain responsible for both confidence-building and legacy production, which turns transformation into duplication.

### Branch and Operations Management: Make the Experiment Bounded

Managers themselves are often overlooked in adoption efforts even though their work contains many repetitive preparation tasks. A branch manager may assemble reports, review open issues, search email, and create notes before a weekly staff meeting. An AI or analytics workflow might help summarize performance changes, identify exceptions, organize unresolved actions, or prepare better discussion questions.

Instead of asking the manager to adopt the technology broadly, create a bounded experiment: use the approved workflow to prepare the next four weekly meetings, compare preparation time and discussion quality, and decide at the end of the month whether the practice should continue. A bounded test lowers the psychological cost of commitment, creates a clear evaluation point, and generates evidence that can be shared with other managers.

## Is This Normal Learning, or Is the Design Failing?

Leaders need a disciplined answer to one of the hardest questions in the Productivity Dip: when should they stay the course, and when should they admit that the new process is not working? Patience is necessary because learning takes time, but patience without evidence can become an excuse for poor design. The practical standard is trend. A healthy learning curve should show some combination of decreasing cycle time, fewer repeat corrections, lower support dependence, better confidence, clearer exception handling, and improving business usefulness as people gain experience.

The most important signal is not whether mistakes occur. Mistakes are expected in bounded learning. The stronger question is whether the organization is learning from them. If an experienced salesperson corrects the same product-matching defect week after week because the feedback never reaches the product data, rule, retrieval, configuration, or model-improvement process, the pilot is not experiencing a normal learning cost. It is repeating a design failure. Likewise, if the employee becomes faster but accuracy deteriorates or customer rework increases, the workflow has not crossed the gap in a way the business should scale.

| Signal | Normal learning pattern | Design warning | Leadership action |
|---|---|---|---|
| **Cycle time** | Early use is slower, then time falls across comparable repetitions. | Time stays flat or worsens after enough supported practice to learn the workflow. | Continue while the trend improves; refine steps or scope when it does not. |
| **Accuracy and corrections** | Errors become less frequent or shift toward rarer, more complex exceptions. | The same material errors repeat, especially on routine work. | Classify root causes and fix recurring data, rule, retrieval, or workflow defects. |
| **Support dependence** | Users need less coaching and can judge output quality more independently. | Users remain dependent on experts or project staff for ordinary cases. | Improve training or simplify the design; do not scale dependency. |
| **Verification effort** | Review becomes more targeted as trust and confidence thresholds improve. | Employees must fully redo the old process to validate every output indefinitely. | Define what can be trusted, what requires review, and what must remain human. |
| **Customer and business risk** | Issues are contained in bounded testing and decline as controls improve. | Rework, wrong commitments, customer complaints, or material exposure persist or increase. | Pause or narrow the use case until risk is controlled. |
| **Feedback conversion** | Expert corrections are captured and visibly improve the solution or workflow. | Experts silently repair outputs and the organization repeatedly relearns the same lesson. | Create a correction log, assign owners, and review recurring causes on a fixed cadence. |
| **Employee choice** | People begin choosing the new method for the situations where it is genuinely better. | Usage requires constant pressure because the workflow produces little credible personal value. | Revisit the use case, value hypothesis, workflow fit, or tool choice. |

A simple decision rhythm keeps this practical.

- Continue when the learning trend is improving and risk is controlled.
- Refine when the value hypothesis remains credible but recurring barriers are identifiable and fixable.
- Pause or stop when quality is weak, risk cannot be bounded, the same defects repeat without improvement, or the workflow still creates more burden than value after a fair test.
- Scale only when the evidence shows that the process, people, and information foundation can support broader use.

One useful management question from Michael Delgado's PowerTalk is, 'What's preventing you from using this tool more?' Used correctly, that question is not an accusation. It is a diagnostic prompt that can surface workflow, data, training, technology, and management improvements.

A pilot is a decision tool, not a commitment to defend the original idea. Stopping weak work is not a failure if the organization learned why it was weak. Continuing a poor design because too much effort has already been invested is the more expensive failure.

## Where Adoption Efforts Break Down

Most weak adoption efforts do not fail because employees were never told that change was important. They fail because the operating environment continues to reward the old behavior. The organization announces a transformation, but established workload remains untouched, managers keep asking for the same outputs, and employees are expected to learn through whatever time happens to be left. The official message says the future matters; the daily system says today's work matters more. Employees respond to the system they experience, not the presentation they attended.

Another common failure is confusing exposure with implementation. Training may create awareness without creating relevance, competence, or repetition. A person can complete a course, understand a demonstration, and still have no clear idea when the new behavior should replace the old one. When the first real opportunity appears, the employee defaults to the familiar method because the workflow trigger was never defined and no personal proof has been established. This is why adoption needs to be designed around real work, not measured primarily through training completion or license activation.

Organizations also weaken adoption when they celebrate activity instead of usefulness. Login counts, prompts submitted, dashboards viewed, or agents created may help leaders understand whether people are interacting with a platform, but activity is not the same as value. High usage of a poor workflow can waste more time, just as low usage may reveal that a tool does not fit the work. The measure that matters is whether the behavior produces a better process and whether the better process produces a meaningful business outcome.

A fourth breakdown occurs when every legacy process remains available indefinitely. During learning, employees may need the old method for verification, but permanent duplication protects the incumbent behavior from ever losing its advantage. If the new process becomes reliable, leadership needs to decide what can be retired. Without that removal, the promised productivity benefit is consumed by the requirement to keep both worlds alive.

Finally, many organizations over-rely on volunteer champions or allow leadership layers to substitute for one another. Champions are valuable because they create curiosity, peer support, and practical examples, but they cannot substitute for management. A senior leader can create urgency without translating it into functional priorities. A functional leader can select a pilot without preparing frontline managers to reinforce it. A frontline manager can be supportive but still lack the authority to retire old work or resolve cross-functional barriers. When the organization treats any one layer as the entire adoption strategy, enthusiasm eventually collides with operating reality.

## A 90-Day Path from First Use to Normal Work

A useful adoption effort does not need to begin as a large transformation program. The first 90 days should be treated as a controlled progression from relevance to proof, from proof to repetition, and from repetition to normalization. The purpose is to create evidence quickly while protecting the organization from scaling a practice that has not yet demonstrated value.

- During the first 30 days, focus on one or two meaningful workflows where employees experience clear friction. For an AI-assisted product-identification pilot, that could mean defining which quote types and product families are in scope, establishing the current manual baseline, and using completed quotes as safe comparison cases. Deliberately include credible early adopters who can generate proof and experienced validators who can challenge product accuracy and edge cases. Define the user, desired improvement, required product data and knowledge, human review standard, and specific behavior being tested. Managers should stay close to the first uses and capture what makes the work easier or harder. The objective during this phase is not broad adoption. It is credible personal proof and a visible correction loop.

- During days 31 through 60, the emphasis shifts toward repetition, limited live use, and social proof. The team should move from completed-work comparisons into bounded customer work where risk is manageable and human verification remains strong. Recurring product-matching defects should be assigned to owners, workflow triggers should become more specific, and successful users should begin helping teach the next wave. Managers should ask what is preventing greater use and distinguish fixable system barriers from normal learning friction. The important signal is whether users are becoming faster and more confident, whether the same errors are declining, and whether employees are beginning to choose the new approach without one-to-one reminders.

- During days 61 through 90, successful practices should move into the normal operating system. Expand only the parts of the workflow that have earned confidence, document the required review and escalation rules, define ownership for recurring data and knowledge defects, and retire obsolete steps where the new process is proven. For product identification, the team should know which categories can use the AI-assisted first pass routinely, which matches require expert verification, which measures will demonstrate ongoing value, and what conditions would trigger refinement or rollback. This is also the point where leadership expectations should become more explicit for the parts of the workflow that have demonstrated value. At the end of 90 days, the question is not whether the pilot generated activity. The question is whether the practice is becoming better work and whether the organization is ready to manage it as normal work.

| Phase | Primary focus | Evidence to look for |
|---|---|---|
| Days 1 to 30 | Relevance, first use, and personal proof | Employees can name a real task that improved and explain why the new approach was useful. |
| Days 31 to 60 | Repetition, peer proof, and workflow refinement | People begin choosing the new behavior without one-to-one reminders, and recurring barriers are being removed. |
| Days 61 to 90 | Normalization, ownership, and removal of obsolete work | The practice is documented, measured, reinforced by managers, and increasingly treated as normal work. |

## Measure Adoption Through Business Usefulness

Organizations need evidence that the transition is “worth the trip”. Measurement should therefore follow the logic of the change rather than defaulting to whatever usage data the platform makes easiest to collect. A useful measurement chain connects behavior, process improvement, and business outcome.

Behavior measures show whether employees are attempting the new practice. Process measures show whether the work itself is improving. Business measures show whether those improvements matter. For example, the organization may observe that inside salespeople are using a new workflow for complex customer requests. That is behavior. If preparation time and missed action items decline, that is process improvement. If customers receive faster, more complete responses and employees create additional selling capacity, that is business impact.

Capacity and competence should also be measured during the transition. Leaders need to know whether employees have access to the required tool and information, whether managers are creating opportunities to learn, whether support needs are declining, and whether people can complete the workflow independently. In a product-identification pilot, useful measures can include quote-preparation cycle time, first-pass match accuracy, expert correction rate, repeat-defect rate, verification time, customer rework, and the percentage of corrections that are converted into an owned improvement. These indicators help explain why business outcomes are or are not emerging.

The strongest adoption scorecard is therefore balanced. It does not celebrate activity in isolation and it does not wait for a lagging financial measure before learning anything. It shows whether the conditions for adoption exist, whether the behavior is occurring, whether the process is improving, and whether the improvement produces enough value to justify continued investment.

| Measure category | What it answers | Examples |
|---|---|---|
| Capacity | Did we create a realistic opportunity to learn and use the practice? | Access, protected learning time, manager-led practice, required data availability. |
| Behavior | Are people actually trying the new behavior in the intended workflow? | First uses, repeat uses, workflow-trigger frequency, relevant active users. |
| Competence | Are people becoming more capable and less dependent on support? | Independent completion, reduced help requests, confidence, output quality. |
| Process | Is the work itself becoming better? | Cycle time, rework, errors, manual steps, response time, interruptions. |
| Business outcome | Does the improvement matter to the organization or customer? | Sales, margin, service, capacity, customer experience, cost, risk reduction. |

**Do not measure whether people touched the tool. Measure whether the behavior improved the process and whether the improved process created business value.**

## The Leadership Contract

Meaningful change creates an implicit contract between leadership and employees. Leadership is asking people to invest attention, effort, and sometimes professional discomfort in learning a better way. Employees should reasonably be able to ask whether the organization will create the conditions that make that investment possible.

Leadership's side of the contract begins with clarity. Senior leaders must make the priority and risk boundaries credible. Functional leaders must translate the strategy into a workflow that is specific enough to own and measure. Frontline managers must make time and permission for learning visible in daily work. Across all three levels, leadership must listen when employees identify weaknesses in the design, ensure expert corrections become organizational learning, and remove obsolete work when the new process proves itself. If leaders ask employees to tolerate the Productivity Dip but do not provide those conditions, the contract is one-sided.

Employees also have responsibilities. They need to approach the change with curiosity, participate in learning, exercise responsible judgment, share what works and what does not, and remain engaged long enough to evaluate the new practice fairly. They should not use every early difficulty as proof that the old way was better, just as leadership should not use every slow start as proof that employees are resistant.

This reciprocal expectation is stronger than a generic call to embrace change. It recognizes that transformation requires effort from the people doing the work and disciplined support from the people leading it. Neither side can outsource its role. The organization earns credibility by creating the conditions for change, and employees earn influence by engaging seriously with the opportunity to improve how work gets done.

## Conclusion: Build the Capability to Change How Work Gets Done

Every meaningful improvement asks people to give up some familiarity before they receive the full benefit. Fluency can fall, experienced employees may temporarily feel slower or less certain, and teams may need to invest time in experimentation before the return becomes visible.

That entry price is why transformation cannot be managed through communication or training alone. People need the capability and opportunity to practice the new behavior, enough motivation and confidence to continue when the old method still feels easier, managers who reinforce the change, peers who make the possibilities believable, and feedback that separates normal learning friction from genuine design problems.

Organizations that manage this well build more than adoption of a particular AI, analytics, automation, or enterprise tool. They develop a repeatable discipline for changing how work gets done. Employees become better at identifying friction and testing alternatives, managers become better at protecting the transition and removing barriers, and leaders become better at distinguishing resistance from capability, opportunity, trust, or design problems.

The critical leadership question is not, 'How do we get people to use the new thing?' It is, 'How do we help people cross the period when the better way still feels harder than the old one, while knowing when the design itself needs to change?' The Ben story contains the full challenge: an expert employee, real customer pressure, a new workflow that may initially be slower, legitimate concern about a bad result, and a manager's opportunity to turn completed work into safe learning.

When leaders capture expert feedback, improve the solution, expand through small wins, and raise expectations only after proof exists, reluctance can become participation and participation can become capability.

**Better work has an entry price. Leadership must make the investment visible and worth crossing.**

## Research and Further Reading

The Productivity Dip and Change Gap are practical leadership models used in this whitepaper to connect several established bodies of research with the day-to-day reality of organizational adoption. The Four Stages of Competence are included as a supporting coaching lens. The model is commonly associated with Noel Burch at Gordon Training International, while an earlier published four-level formulation by Martin Broadwell appeared in 1969. The sources below provide the research and practitioner foundation for the concepts discussed throughout the paper.


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8. Broadwell, Martin M. 1969. 'Teaching for Learning (XVI).' The Gospel Guardian 20(41): 1-3.

9. Adams, Linda. 'Learning a New Skill is Easier Said Than Done.' Gordon Training International. The article identifies the four learning stages used by GTI and credits former GTI employee Noel Burch with developing the model.

10. Delgado, Michael (Canals), and Fred Mauermann (Werner Electric). 2026. 'From Unknown to Need-to-Have Tools: Lessons in Successful AI Adoption.' PowerTalks, NAED National. Practitioner discussion of problem-led use-case selection, power users, peer-led adoption, management accountability, ongoing training, and continuous workflow improvement.

## Appendix A: Adoption Diagnostic

Use this diagnostic when a new practice is not gaining traction. The objective is to identify the primary barrier before assuming the problem is motivation. A single workflow may have several barriers, but the team should identify the few conditions most likely to prevent repeated use.

| Diagnostic area | Questions to test | Evidence of a problem |
|---|---|---|
| Relevance | Can the employee explain which problem the new practice solves in the workflow? | The change is described as a tool, platform, or corporate initiative rather than a useful work outcome. |
| Capability | Can the employee complete the workflow with acceptable quality and decreasing assistance? | Repeated confusion, heavy support dependence, or inability to judge output quality. |
| Opportunity | Does the person have time, access, data, permissions, and manager support to perform the behavior? | Learning is consistently deferred, access is incomplete, or current workload crowds out practice. |
| Motivation | Does the employee believe the new practice is valuable enough to choose again? | The person sees little personal or customer value, distrusts the result, or feels threatened by the change. |
| Manager reinforcement | Does the manager ask for, recognize, and use the new behavior? | The old report, old workflow, or old expectations continue to dominate daily work. |
| Personal proof | Has the person experienced a useful result personally? | Training is complete, but there is no real example the employee can point to as valuable. |
| Removal | Has obsolete work been reduced once the new practice is proven? | Employees maintain both old and new processes indefinitely. |
| Learning trend | Across repeated uses, are time, corrections, support dependence, and trust moving in the right direction? | The same errors recur, support does not decline, or the workflow remains slower with no visible improvement. |

## Appendix B: Manager Reinforcement Guide

Managers do not need a separate transformation meeting for every initiative. The strongest reinforcement often comes from integrating a small number of questions into existing operating conversations. Use the questions below selectively and connect them to a real workflow rather than asking them as a generic innovation checklist.

- Where did the new practice make the work better this week?
- Where did it make the work harder, slower, or less trustworthy?
- What did you have to do manually that we expected the new process to remove?
- What is preventing you from using this more, and is that barrier one we should remove?
- What information, permission, or support was missing?
- What did you learn that another person on the team could reuse?
- What result would justify expanding the practice?
- What old step can we stop if the new process is now reliable?
- Is this a training problem, a workflow problem, a data problem, a capacity problem, or a motivation problem?
- Which expert corrections are repeating, and who owns converting them into an improvement?
- Is the team experiencing normal learning friction, or is the same design problem persisting?

## Appendix C: 90-Day Adoption Planning Template

This template is intended for a single workflow or narrowly defined behavior. Keeping the scope specific makes it easier to learn quickly, measure value, and determine whether the practice should be refined, scaled, or stopped.

| Planning element | Decision to capture |
|---|---|
| Workflow and user | What specific task or decision is changing, and who performs it? |
| Current friction | What time, delay, rework, risk, customer issue, or frustration are we trying to improve? |
| New behavior | What exactly should the employee do differently, and what situation should trigger the behavior? |
| First-use support | What training, data, access, example, or guided practice is required for the first successful attempt? |
| Protected capacity | Where will the time to learn and practice come from? |
| Personal proof | What result would make the employee choose the new approach again? |
| Manager reinforcement | What will managers ask, measure, recognize, or stop requesting? |
| Business measure | What process and business outcomes will show whether the practice is useful? |
| Removal decision | What old step can be retired if the new approach proves reliable? |
| 90-day decision | At the end of the period, will we stop, refine, standardize, or scale? |
| Correction and learning loop | How will expert corrections be captured, classified, assigned, and converted into improvements to data, rules, retrieval, configuration, training, or the model where applicable? |
| Learning-versus-design trigger | What evidence will tell us the team is improving normally, and what evidence will trigger refinement, pause, or stop? |

## Appendix D: Leader Language and Actions for Moving Adoption Forward

Employees rarely experience a new practice in the same way leadership does. Leaders may see the future-state benefit, while employees experience the immediate learning effort, uncertainty, risk, and disruption required to get there. When an employee says, "I do not have time," "the old way is faster," or "I do not trust it," the leader's first responsibility is not to win an argument. It is to understand what is behind the statement.

Some objections identify legitimate weaknesses in the tool, workflow, data, training, or implementation. Others reflect the normal discomfort of moving from a highly familiar process into one that still requires deliberate thought. Still others persist after the organization has established that the new practice works and removed the meaningful barriers. Those situations require different leadership responses.

The language leaders use matters because it signals whether the organization wants compliance, learning, or real operating improvement. The examples below are not scripts that must be repeated word-for-word. They are starting points for conversations that help employees move from reluctance toward safe experimentation, personal proof, repetition, and ultimately adoption.

### When the employee says, "I do not have time."

This is one of the easiest objections to dismiss and one of the most important to investigate. If the employee's workload genuinely leaves no room to learn, motivation will not create capacity. The old process will continue winning because it protects today's customer commitments and deadlines.

**A leader might say:**

> **"I believe you. I do not want you experimenting with this while a customer is waiting if that creates unnecessary risk. Let's find something you have already completed and run it through the new process after the pressure is off. We can compare the results without putting the customer or your workload at risk."**

> **"If we are serious about asking you to learn this, we need to make some room for that learning. What can we defer, simplify, or temporarily reduce so you can give this a fair test?"**

**Leadership action:** Create bounded, visible learning capacity. Do not tell people to experiment "when they have time" and then leave every existing responsibility untouched.

### When the employee says, "I am faster without it."

For an experienced employee, this may be completely true today. The mistake is comparing mature performance in the old process with beginner performance in the new one and assuming that comparison represents the future state.

**A leader might say:**

> **"Right now, you probably are faster without it. You have years of experience with the current process and very little experience with this one. I do not expect your first few attempts to outperform something you have practiced for years. What I want to know is whether the gap begins to close as you use it, and what we need to change if it does not."**

> **"Let's not judge this on one transaction. Let's compare the next ten appropriate examples. Are you getting faster? Is the output improving? Are the corrections becoming smaller? If none of those things are happening, we may have a design problem rather than a learning problem."**

**Leadership action:** Measure the trend across repeated uses rather than comparing one early attempt with years of accumulated expertise.

## When the experienced employee says, "I do not need this."

This is where leaders need to recognize the Expert Adoption Paradox. Less-experienced employees may experience an immediate productivity benefit because the technology compensates for knowledge or system-navigation gaps. Highly experienced employees may initially see less personal benefit because they already perform the work efficiently. That does not make their participation less important. It may make it more important.

**A leader might say:**

> **"You may not need this tool today to do the work well. That is exactly why we need you involved. You know what a correct answer looks like, you know the exceptions, and you know where a less-experienced person might accept something that looks right but is not. Your job in this stage is not simply to use the tool. It is to help us determine whether the tool deserves to become part of the process."**

> **"The question is not whether the technology can replace what you know. The question is whether what you know can help us build a better way for everyone else to work."**

**Leadership action:** Give experts a clearly defined role as validators and co-designers. Ask them to identify bad matches, edge cases, customer terminology, hidden product rules, and situations where human judgment remains essential.

## When the employee says, "I do not trust it."

Trust should be earned, not demanded. If the technology is still in a pilot, distrust may be useful information. Employees closest to the work may be detecting inaccurate product matches, incomplete data, unsupported assumptions, or exceptions that were not anticipated during implementation.

**A leader might say:**

> **"You should not trust it blindly. I do not want you to. Show me where you do not trust it and why. Let's separate the errors that can be corrected from the situations where the tool may simply not be appropriate."**

> **"For now, your expertise is the control. Compare its answer with yours, record the differences, and tell us what it would need to understand to get that decision right next time."**

**Leadership action:** Make verification easy and capture corrections systematically. If experts repeatedly correct the same problem but those corrections never reach the team responsible for data, configuration, workflow rules, retrieval, prompting, or model improvement, the pilot is wasting its most valuable learning.

## When the employee says, "What if it makes a mistake?"

The correct response is not, "Do not worry, it will not." Early-stage technologies will make mistakes. The adoption design needs to account for that reality.

**A leader might say:**

> **"It probably will make mistakes while we are learning where it performs well and where it does not. That is why you are still responsible for reviewing the result before it becomes a customer commitment. We are testing whether this can help you do the work better, not removing your judgment from the process."**

> **"During the pilot, a mistake you catch is not necessarily a failed experiment. It may be exactly the information we needed to improve the process. A mistake we fail to learn from is the bigger problem."**

**Leadership action:** Define explicitly where human review is required, which errors are acceptable during controlled experimentation, and which outcomes would create unacceptable customer, safety, financial, or operational risk.

### When the employee says, "I tried it once and it did not work."

One unsuccessful attempt is evidence, but it is not a conclusion. The right response is to understand what failed before deciding whether the problem is learning, design, data, or the suitability of the use case itself.

**A leader might say:**

> **"Good. Let's understand exactly why it failed. Was the information incomplete? Was the product data wrong? Did the tool misunderstand the request? Was the workflow poorly designed? Or was this simply a task the tool should not be doing? The answer determines what we do next."**

**Leadership action:** Classify failures. Determine whether the cause is training, data, configuration, workflow design, access, technology capability, or an inappropriate use case.

### When the employee says, "I do not know where to start."

Broad instructions such as "use AI more" leave the employee responsible for inventing both the use case and the learning process. A useful first step should be tied to a recurring situation and a bounded behavior.

**A leader might say:**

> **"Do not try to learn everything this tool can do. Let's choose one recurring piece of work where we already know what good looks like and start there."**

> **"The next time this specific situation happens, use the new process for this one step. Keep everything else the same."**

**Leadership action:** Define a trigger and a bounded first use. For example, when a complex product-identification request arrives, use the tool for the initial product-matching pass and have the experienced employee validate the result.

### When the employee says, "This is going to slow down the customer."

That concern deserves respect, particularly during an early pilot. The answer is not to force live customer work into an experiment before the process has earned enough trust.

**A leader might say:**

> **"Then we should not make the live customer transaction our first experiment. Let's use completed work until we understand the process better. Once we have enough confidence, we can move into bounded live use with full review."**

**Leadership action:** Reduce the size and consequence of the first experiment rather than demanding a leap from zero use to full production.

### When the employee says, "My manager still wants the old report or process."

This is not primarily an employee adoption problem. It is a leadership alignment problem. Employees respond to the operating system they experience, not the transformation message they heard.

**A leader might say:**

> **"Then we need to fix that. We should not tell you to adopt a new process while continuing to measure you or request work as though nothing changed."**

**Leadership action:** Align what managers request, measure, discuss, and recognize with the desired behavior. If the old artifact is temporarily required for verification, make that temporary condition explicit and define what evidence will allow it to be retired.

## When someone asks, "Why are we doing this?"

Avoid answering with "because AI is important." The better answer begins with the work, the customer, and the capacity the organization is trying to create.

**A leader might say:**

> **"We are not doing this because we need more AI. We are doing it because too much of your day is spent on work that prevents you from doing the things customers and the business need most. We are testing whether this can give some of that capacity back."**

**Leadership action:** Keep the business problem visible throughout the pilot. If the original pain is no longer relevant, reconsider the initiative rather than forcing technology into a workflow that does not need it.

## When the employee asks, "What does this mean for my job?"

Do not offer reassurance that leadership cannot guarantee. Functional leaders should answer as specifically as they can and distinguish what is known from what is still uncertain.

**A leader might say:**

> **"I want to answer that as specifically as I can rather than give you a generic promise. Here is what we believe will change, here is what we believe will remain yours, and here is what we still do not know. What we do know is that your knowledge is important to determining how this process should work."**

**Leadership action:** Communicate what is known, what is unknown, and when decisions will be made. Where applicable, address customer ownership, decision authority, performance expectations, compensation implications, and which skills are likely to become more important.

## Use Crawl, Walk, Run, Fly to Reduce the Risk of Starting

For pilots that affect live customer or operational work, the size of the first step matters. The Crawl, Walk, Run, Fly progression gives leaders a practical way to increase exposure only as the solution earns confidence. It is especially useful when an employee's objection is less about the technology itself and more about the consequence of getting something wrong while the customer is waiting.

| Stage | Leader approach |
|---|---|
| Crawl | Use completed transactions or known-good examples. There is no live customer risk, and the employee can compare the new output with an answer already known to be correct. |
| Walk | Use the new process on selected live work with complete expert verification before anything reaches the customer. |
| Run | Once quality and workflow performance are proven, make the new process the normal starting point for defined categories of work while continuing to measure corrections and business results. |
| Fly | Expand into more complex work only when the data, controls, user capability, confidence thresholds, and evidence justify it. |

## When Encouragement Should Become Expectation

A pilot cannot remain voluntary experimentation forever. Early in the journey, the leader's job is to create relevance, reduce risk, support learning, capture feedback, and establish evidence. Once the organization has demonstrated that the new process creates value, corrected material design problems, provided appropriate training and access, and established that peers can perform the work successfully, the leadership posture should change.

Michael Delgado’s PowerTalk at NAED National described a similar progression: early users and peer proof created credibility, but broader deployment eventually required active management attention, ongoing training, usage review, and manager accountability.

**At that point, a leader can appropriately say:**

> **"We have spent time testing this. We have listened to the problems and corrected the ones that needed to be corrected. We now have people doing this successfully, and we have evidence that the process is better. We will continue improving it, but this is no longer simply an experiment. This is becoming the way we expect this work to be done."**

Leaders should not force adoption before the new process earns credibility, but they should not allow proven practices to remain permanently optional simply because some employees prefer the familiar method.

> **Proof should precede expectation. Once proof exists, expectation becomes part of leadership.**

## Leader Strategies That Increase the Odds of Adoption

- **Create safe first uses.** Completed work, known-good examples, limited-scope transactions, and reversible experiments allow people to learn without putting live customer commitments at unnecessary risk.
- **Protect learning capacity.** Make time visible rather than asking employees to hide experimentation inside already overloaded schedules. If learning is part of the job, the operating rhythm needs to reflect it.
- **Use the right people for the right pilot roles.** Power users create momentum. Expert validators challenge accuracy and expose exceptions. Managers connect learning to operating priorities and remove barriers.
- **Make expert feedback actionable.** Do not allow employees to repeatedly correct the technology silently. Capture what was wrong, why it was wrong, and who owns turning that feedback into an improvement.
- **Create personal proof before asking for broad behavior change.** The first objective is not high usage. It is helping employees experience a credible moment when the new method makes the work better.
- **Let peers teach peers.** Once credible employees succeed, involve them in onboarding the next group. A colleague who can demonstrate the actual workflow often makes the future more believable than a vendor or corporate presentation.
- **Measure learning as well as outcomes.** Ask whether cycle time is improving, corrections are declining, support dependence is falling, trust is increasing, and repeated expert feedback is being incorporated.
- **Remove the old work when the new work earns the right to replace it.** Employees will not believe a productivity promise if every new process is permanently layered on top of the previous one.

## The Point for Leaders to Remember

Employees do not need leaders to dismiss every objection or sell them harder on the technology. They need leaders who can tell the difference between a legitimate problem that needs to be fixed, a normal learning cost that needs to be supported, and reluctance that needs to be challenged once the evidence is clear.

The objective is not to eliminate discomfort from change. It is to create enough safety, capacity, relevance, evidence, and reinforcement that employees are willing to keep moving through the Productivity Dip.

Sometimes the right leadership response is, "You are right, we need to fix that." Sometimes it is, "You are right, this is slower right now. Let's see whether that changes as you learn." And sometimes, after the organization has done the work and the evidence is established, it is:

> **"We have proven this is the better process. Now we need to make it the way we work."**

That progression is what turns a pilot into adoption.