

For advanced profiles

REFACTORING THE FIRM

INO Pilot Blueprint

A practical playbook to identify one protected flow, define the first INA, and measure early progress with confidence.

How to launch your first INO pilot

The safest way to begin an Intelligence-Native transition is not with a reorg. It is with a protected pilot: one bounded flow where you can prove that a new operating logic reduces friction and increases visibility.

Ideal audience	Transformation leaders, strategy teams, innovation leaders, COOs, CIOs, and operating executives
What this blueprint covers	Protected flow selection, first INA design, pilot boundaries, and early progress metrics
Best time to use it	After the INO Readiness Test shows Transition Phase or Emerging INO signals

STEP 1

Identify one protected flow

Choose a flow that is strategically relevant, visible enough to matter, narrow enough to control, and painful enough to justify change.

Good first-pilot candidates

- Campaign approval workflow
- Product launch preparation
- Customer onboarding
- Internal decision routing
- Insight-to-action process
- Compliance review flow

Avoid in the first pilot

- Entire-company transformation
- Politically explosive areas
- Highly entangled enterprise-wide architecture
- Mission-critical flows with zero tolerance for learning

Selection question

Where is coordination pain high, but pilot risk still manageable?

STEP 2

Define your first INA

Your first Intelligence-Native Artifact should be concrete, bounded, valuable, and able to move across functions or systems without losing context.

Field	What to define
INA name	A specific object of work, not a vague initiative
Outcome linked	The measurable result this artifact exists to progress
Current state	Draft, review, pending legal, approved, committed, etc.
Required inputs	Data, documents, dependencies, signals, and constraints
Routing logic	What happens next, under which condition, and who can decide
Review gates	Which moments require explicit human review or sanction
Owner / steward	Who monitors the flow and corrects structural issues
Completion signal	What counts as committed, complete, or ready for handoff

STEP 3

Set pilot boundaries and governance

A first pilot should prove flow without creating uncontrolled risk. Boundaries are what make the experiment safe and credible.

Pilot boundary checklist

- One clear business outcome
- One defined workflow
- One INA or a small family of linked INAs
- A limited team, usually 4–8 people
- A fixed time window, usually 30 to 45 days
- Explicit rules for autonomy, escalation, and human takeover

Governance questions

- What can the system do autonomously?
- What must remain human-approved?
- What data sources are in scope?
- What triggers escalation?
- Who owns monitoring, review, and exception handling?

STEP 4

Measure early progress

Do not start with vanity metrics. Start with movement, friction, and visibility. The point of the pilot is to prove that work can flow with less coordination overhead.

Track these first

- Decision latency
- Number of handoffs
- Number of status meetings removed
- Cycle time
- Rework frequency
- Visibility of current state
- Exception rate
- Human override rate

Optional emerging metrics

- Proto-OFI baseline
- Time from signal to action
- Artifact-based commits
- Percentage of work linked to a clear outcome
- Stakeholder confidence in the new flow

What success looks like in 30 days

- The work became more visible
- Fewer updates depended on meetings
- Decision-making became faster
- Ownership became clearer
- One part of the organization experienced lower coordination friction
- The team can imagine scaling the model

Next move

If the pilot proves value, the next conversation should be strategic rather than tactical: what is the right scaling path, and where should the second protected flow live?

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