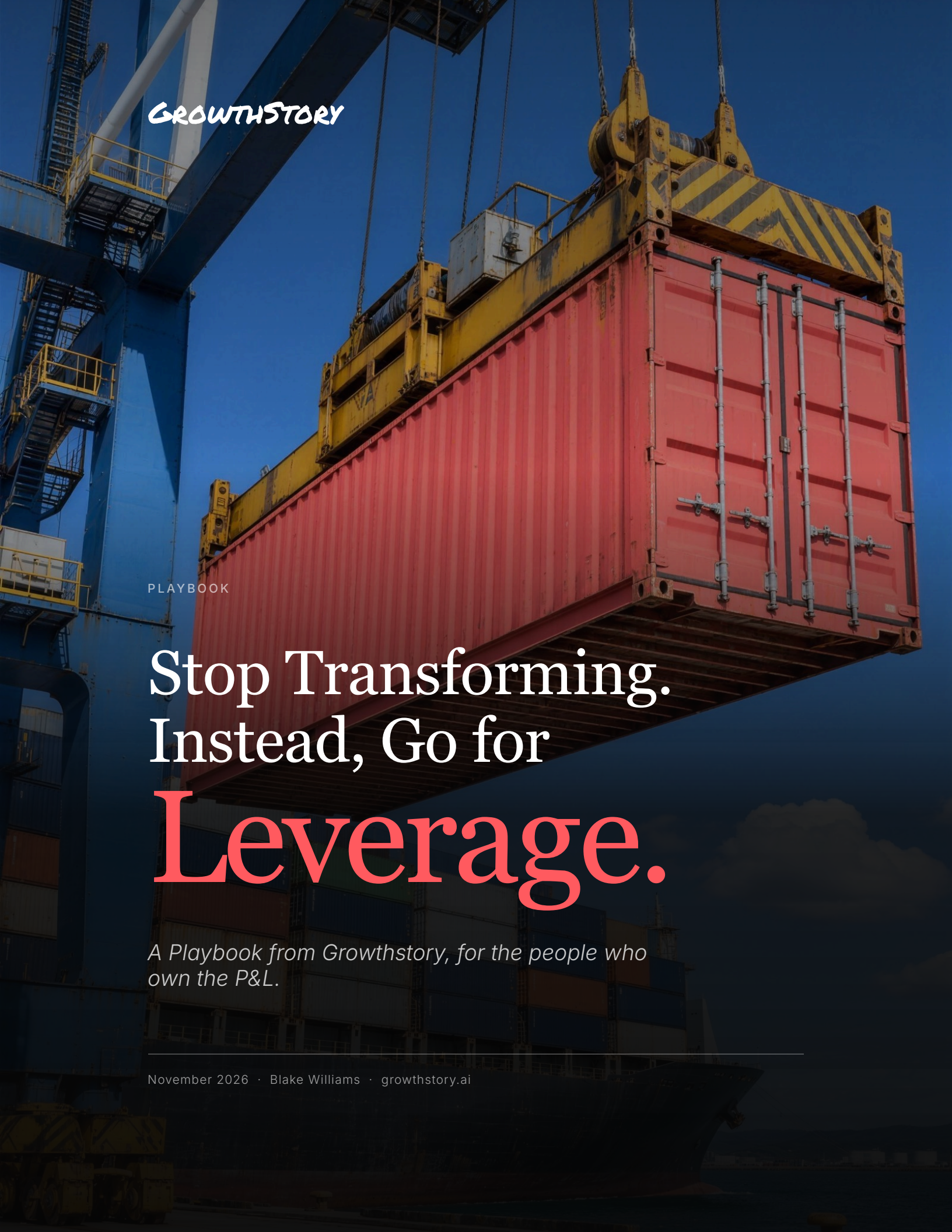


GrowthStory

PLAYBOOK

Stop Transforming. Instead, Go for Leverage.

A Playbook from Growthstory, for the people who own the P&L.

November 2026 · Blake Williams · growthstory.ai

Introduction

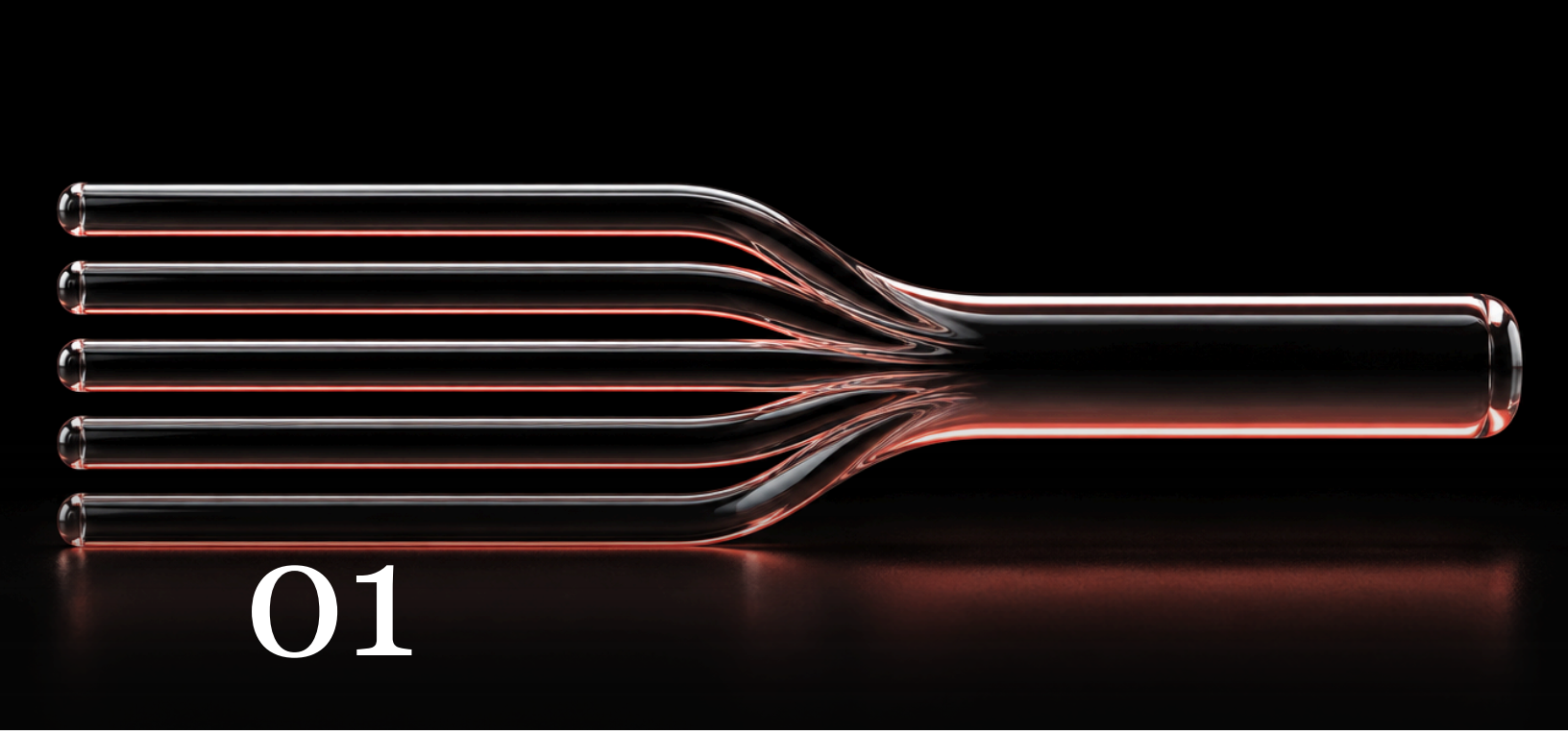
"Transformation" is a word for people who don't own a P&L. It lives in board decks and budget requests because it can mean anything, so nobody gets held to it.

We don't wake up wanting to transform. We wake up as the bottleneck. Every quote, exception, and judgment call routes back to the same three or four people. In the worst of these scenarios, the business declines work it could win because the leaders or throughput processes are maxed out, not because demand is soft. It's a crying shame for anyone who takes home a bonus or distributions.

> "We don't wake up wanting to transform. We wake up as the bottleneck."

That's the actual problem. Not "AI adoption." Not "digital maturity."
Your most important people need about ten times more leverage than they have, and the business needs a memory that doesn't walk out the door at 5pm.

This guide is opinionated. Some of the popular advice is right. A lot of it is a product pitch wearing a framework to make you second guess your instinct that it's noise. Here's what we've learned doing the work inside owner-led companies and corporate teams with board mandates. On site, with the mess included.



01

There aren’t five types of transformation. There’s one job.

The popular taxonomy splits the work into five buckets: systems modernization, org readiness, workflow optimization, AI augmentation, automation. It’s tidy. No executive has ever bought “organizational readiness.”

Five labels collapse into three asks once a person who signs for the work is in the room (Exhibit 1). Here’s what we actually want to buy:

1. **Leverage for the people who matter most.** We want our leaders to be in 1,000 rooms at once. See org-wide ops, live. Filter the noise and decide faster. Not because they have to, but because today they can, with less calorie burn doing it.

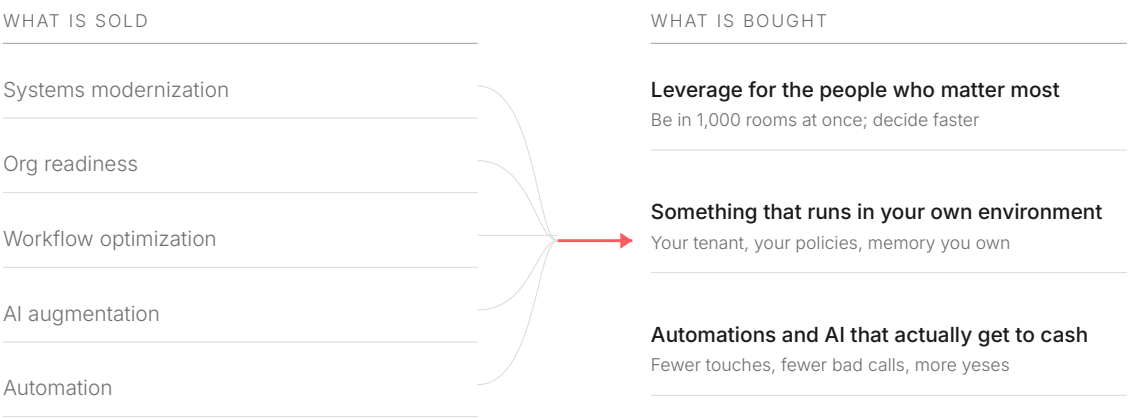
2. **Something that runs in your own environment.** Your tenant, your policies, your governance, your data. Memory the company owns, not a vendor. Regardless of which frontier model wins today, next quarter or next year.

3. **Automations and AI that actually get to cash.** Fewer touches per order, fewer bad calls, more bids you can say yes to, stronger planning across systems, relationships, and gaps.

Exhibit 1

The market sells five categories of work; an executive signs for three outcomes, and none of them is a category.

How the work is sold against what is bought, the taxonomy in common use and the asks it has to answer



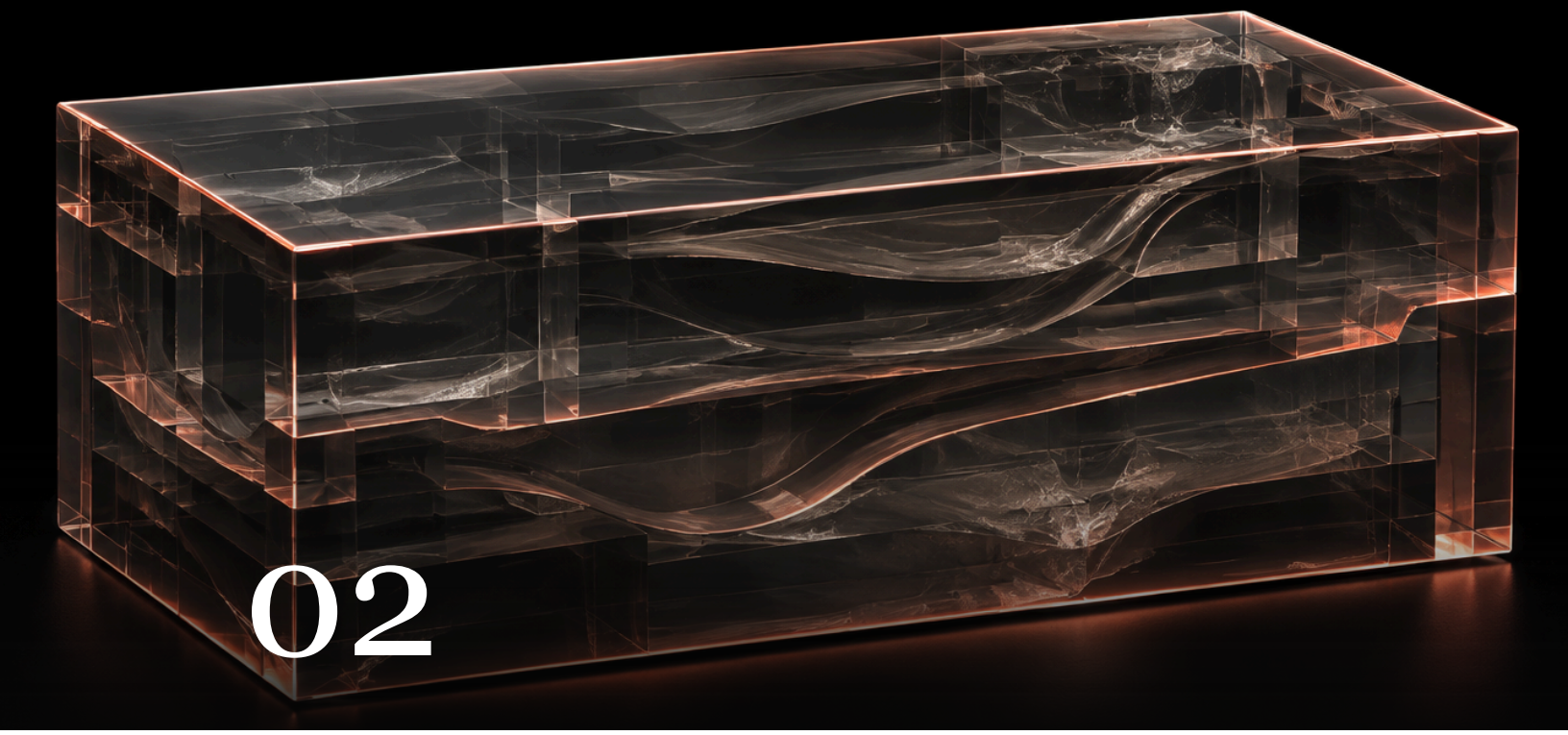
No category on the left is wrong; none of them is what a buyer is trying to get. The three on the right are the asks this guide is written against.
Source: Growthstory engagements with owner-led companies and corporate teams under board mandate, 2025–2026.

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Start where the routing happens, not where the slides do.

Where they're right: automation is the wrong place to start. Automating a process nobody has mapped just makes the confusion faster. The saying "doing dumb shit faster" is a saying for a reason, and that's the opportunity.

Where they're wrong: the answer isn't "start with training" or "start with a platform migration." Start with the workflow leaders touch. On day one. If the people everything routes through don't get relief first, you've missed the largest opportunity to let AI help your business run smarter, faster.



02

Context isn’t documentation. It’s operating memory.

You’ve seen the stat about how most AI pilots fail to show ROI. Everybody quotes it. The usual conclusion is “you didn’t document your processes.” Close, but shallow. Those pilots failed because the processes were documented half-assed: somebody wrote down the happy path and called it done.

The part the popular advice gets right: the happy path in a binder isn’t how work gets done. The real work is in the exceptions. The sticky pads. The workarounds forged over years of legacy-system use and multiple middle managers “managing” the fires in the gaps.
The builder who sends freedom unit dimensions to a mill that cuts metric. The PO that has to be retyped from a customer portal into your system every morning x50. The phone call the owner makes because nobody else knows the answer or has the instinct to make the right call.

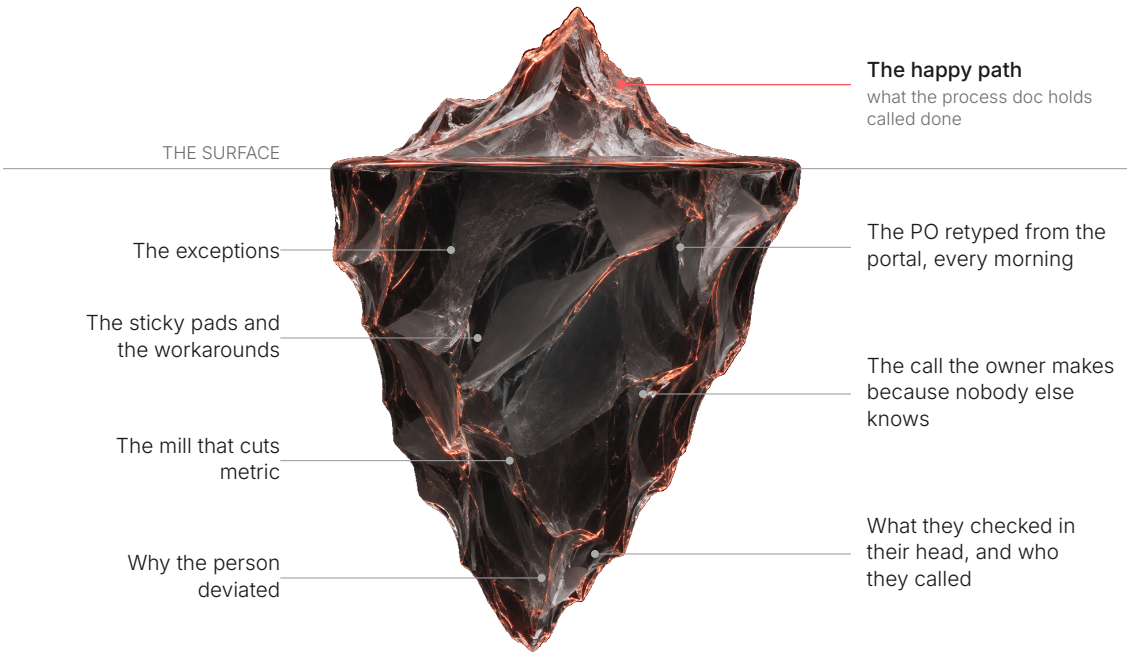
The part it gets wrong: a screen recording doesn’t capture that. Recordings show the clicks. They don’t show *why* the person deviated, what they checked in their head, or who they called. A click-path is great for training a new hire, but it’s razor-thin input for an agent.

What a process doc holds is the part of the work that behaves. Everything that decides an outcome sits under the line, and that is the part a pilot never saw (Exhibit 2).

Exhibit 2

AI pilots fail because someone called the tip done.

What a documented process captures against what running the work actually involves, the happy path above the surface and, below it, what decides the outcome



Illustrative. The shape shows the relationship between the documented path and the work around it; the areas are not measured quantities.
Source: Growthstory interview and trace work inside client operations, 2025–2026. Illustrative figure.

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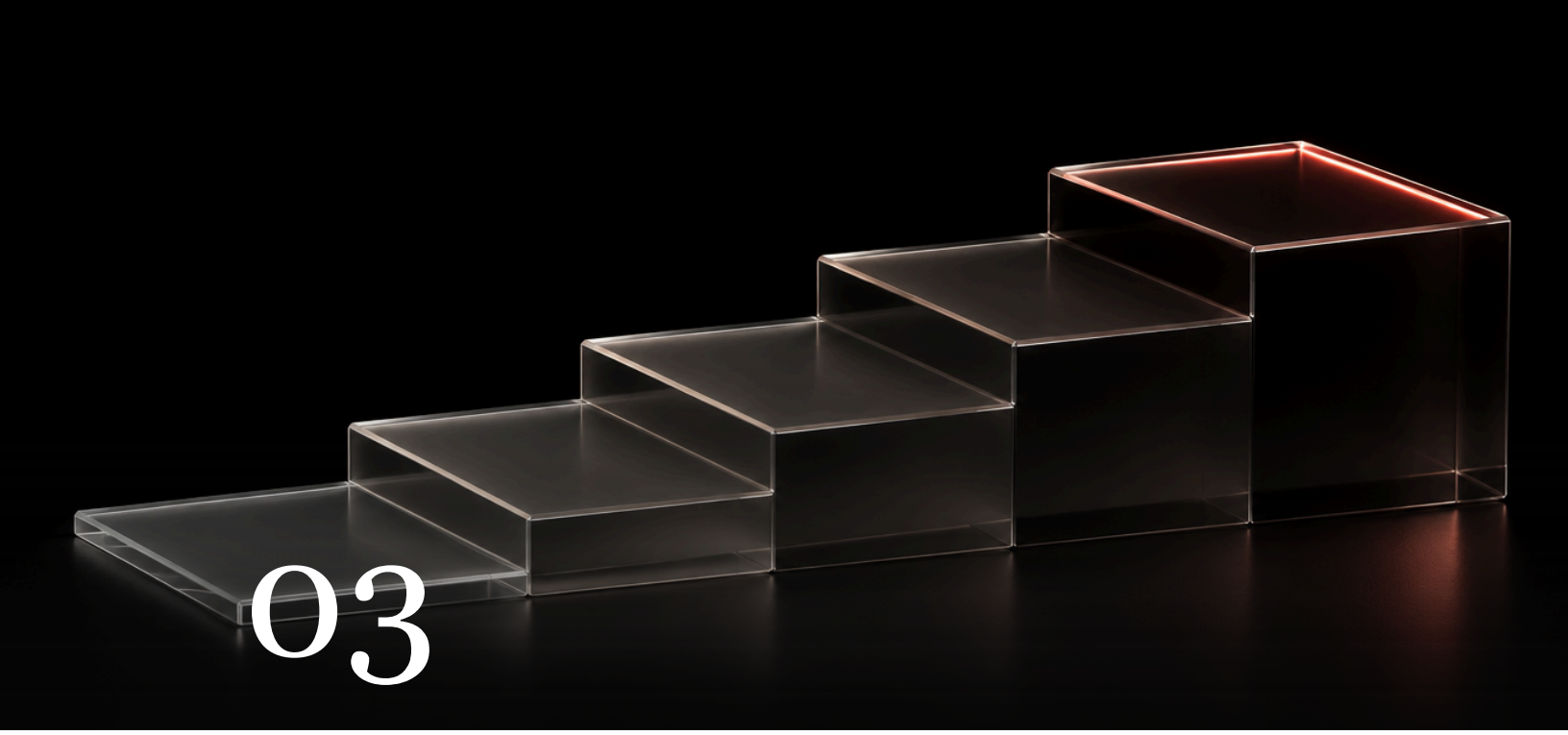
Real context is **triangulated**:

- **Interview** — the person walks through how they actually handle it, out loud, with the ugly cases.
- **Fan out —** the people around the workflow, inputs, WIP, outputs, and their perspectives, needs, wants, and frictions all create the context for true “how the work actually gets done” orientation.
- **Trace** — what the systems, inboxes and documents show really happened, who did what when, and what they said about it. How many times it got escalated and what the top 3 responses are.
- **Systems and data map** — what each step reads, writes and depends on.

Put that into a backend the company owns — entities, relationships, rules, every claim tagged with a confidence, reasons, and proof — and NOW you have operating memory.

That’s the difference. A process doc is the tip of the iceberg. Operating memory is the whole shape underneath it, and documentation falls out of it as a byproduct. AI pilots fail because someone called the tip done.

> “A click-path is great for training a new hire, but it’s razor-thin input for an agent.”



03

Maturity is per workflow, not per company.

Org-wide maturity scores are fun in a sales meeting and useless on Monday. Grading the whole company "L1" tells you nothing about what to build next.

A real business has 20 to 50 workflows worth touching, and every one of them sits at a different state. So we grade each workflow on its own ladder:

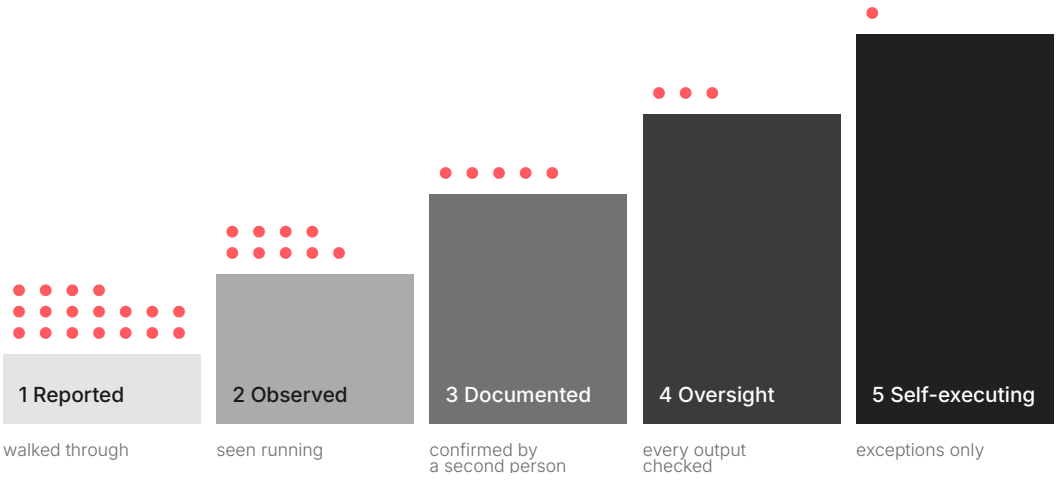
1. **Reported** — someone walked us through it and showed us the documents on screen.
2. **Observed** — we've seen it run in the actual systems and inboxes.
3. **Documented** — it's in operating memory, confirmed by someone other than the person who described it.
4. **Run with oversight** — an agent does the work; a human checks every output.
5. **Self-executing** — runs on its own under deterministic conditions, and only the exceptions route to a person.

Two things fall out of this. First, you can move one high-value workflow to step 5 while 40 others are still at step 1 (Exhibit 3). That's fine. That's the point. Second, the state is earned with evidence. A workflow doesn't get promoted because a vendor dashboard says you're "Level 3." This is how you trust the work that's getting done by agents.

Exhibit 3

One workflow can reach self-executing while most of the others are still only reported, because a rung is earned with evidence rather than granted to the company.

The per-workflow ladder and what earns each rung, five states, with an illustrative spread across a 20–50 workflow estate

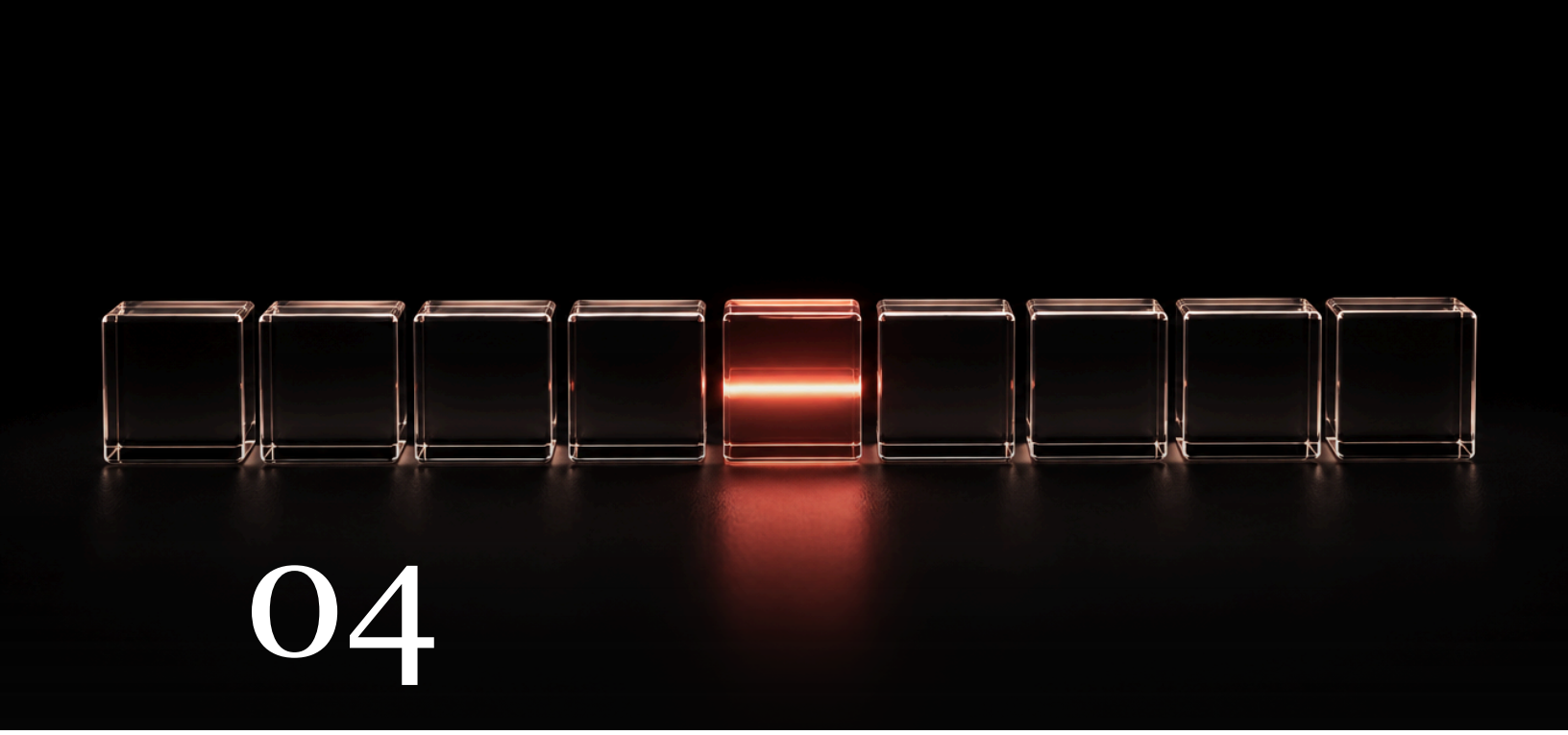


Illustrative. The ladder and the evidence at each rung are how we grade; the spread of workflows across the rungs is drawn to show the mechanism and is not a measured estate.

Source: Growthstory workflow grading, applied per workflow across client engagements, 2025–2026. Illustrative spread.

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And the honest part nobody puts in their framework: a lot of workflows get stuck between 2 and 4 on **access**, not on build. The system of record is on a plan tier with no API reads. The customer portal has no API at all. Security hasn't signed the policy yet. Plan for that from day one, because it's usually the longest pole in the tent.



04

Where to actually bet.

The standard list of “AI rollouts worth betting on” is mostly things your software vendors are shipping anyway. Summaries inside your CRM are a feature, not a program. Don’t pay any consultant for them, us included. Your business is a snowflake, and they’re shipping standards. You either adopt them or pile on more workarounds, and the cycle continues despite whatever marginal upgrade exists.

The same lists also say the smaller, company-specific opportunities beat the obvious ones. That part is right, and it's where we spend almost all our time. What it looks like in practice:

BET	WHAT IT LOOKS LIKE	WHY IT PAYS
The translation layer	Customer portals and POs reshaped into your system of record without people retyping them every morning	Gets back whole seats of labor without a layoff — people get repurposed to work that grows the business
The call that shouldn't happen	Spec checks (units, dimensions, selections) verified before the owner ever has to pick up the phone	Removes the owner from the loop instead of making the loop slightly faster
The owner's decision surface	Agents read the systems, inbox and documents; the phone shows only what needs judgment — approve, redirect, delegate	That's the leverage. The owner stops navigating five systems to find one answer
Prediction on the costly stuff	Change orders, rework and variance flagged per customer before they hit margin	This is where EBITDA points come from, not from summarizing meetings
Redaction before the model	Personal and restricted data stripped inside your own environment before anything reaches an AI	It's what gets security and legal to say yes, which unblocks everything else

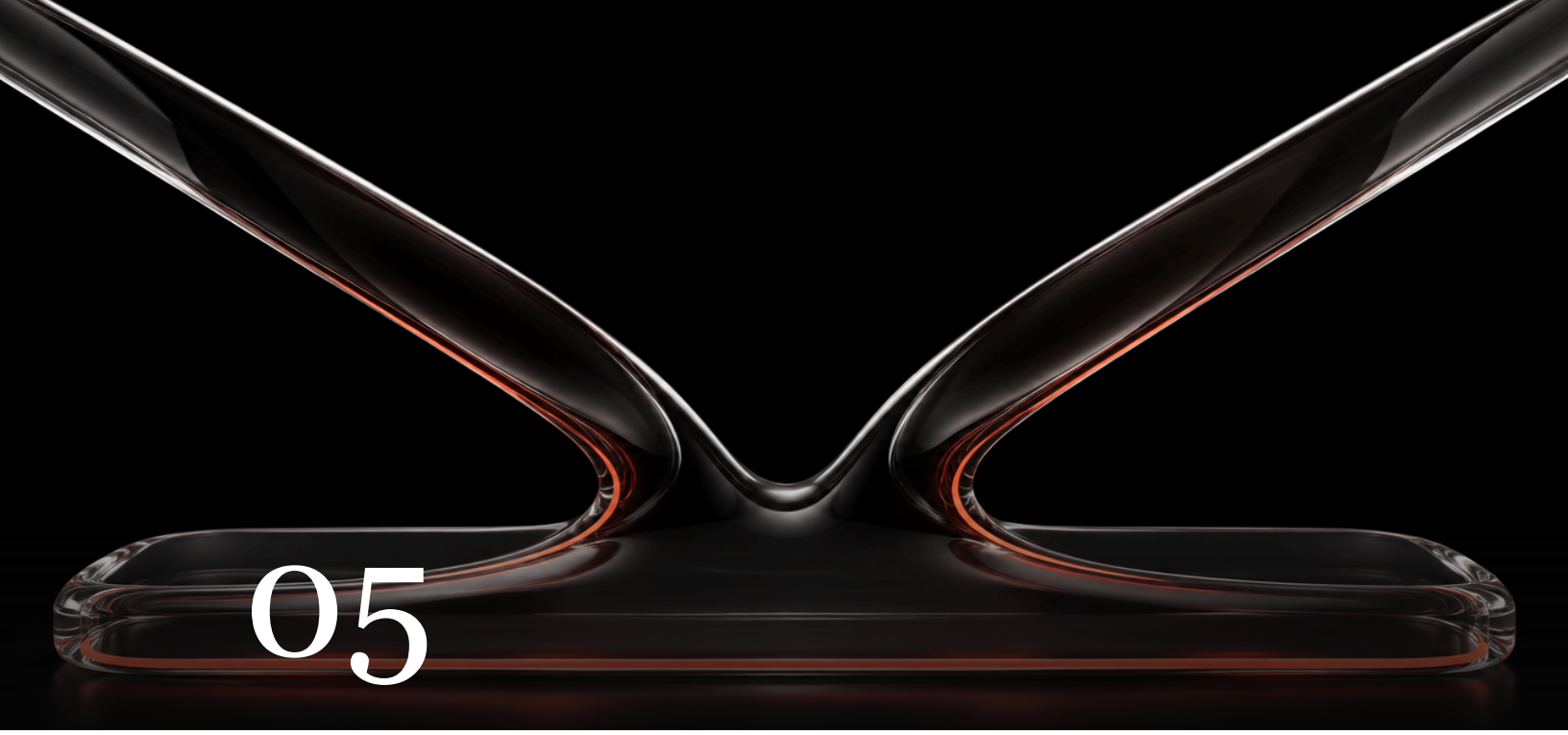
Two things to leave on the table.

Skip: dumping your shared drive into a chatbot and calling it a knowledge base. If the documents are wrong, you've built a confident liar.

Skip: "let everyone build their own agents" as a strategy. It's fine for individuals, but let's face it: 80% of people will never get beyond "check my email and calendar." It doesn't compound for the company, because nothing anyone learns ends up in shared memory. It's also why the copilot licenses you bought from the largest companies in the world moved EBITDA exactly zero points this quarter. Cancel them.

The point: you don't need AI spread evenly across the organization, because critical thinking and leadership are literally not evenly distributed. Put it where the leverage is. Just calling it like we see it (everywhere).

"Put it where the leverage is."



05

How we do it.

We're an operating partner: a consultancy that uses technology to speed up and support the execution. We're not a tool you license and then figure out alone. The work runs in four parts, in order, and you can stop after any of them (Exhibit 4):

1 **Interview** — we sit with your people, starting with the owner, and capture how the work really runs, exceptions included.

2 **Trace** — we check that against what your systems, inboxes and documents show actually happened.

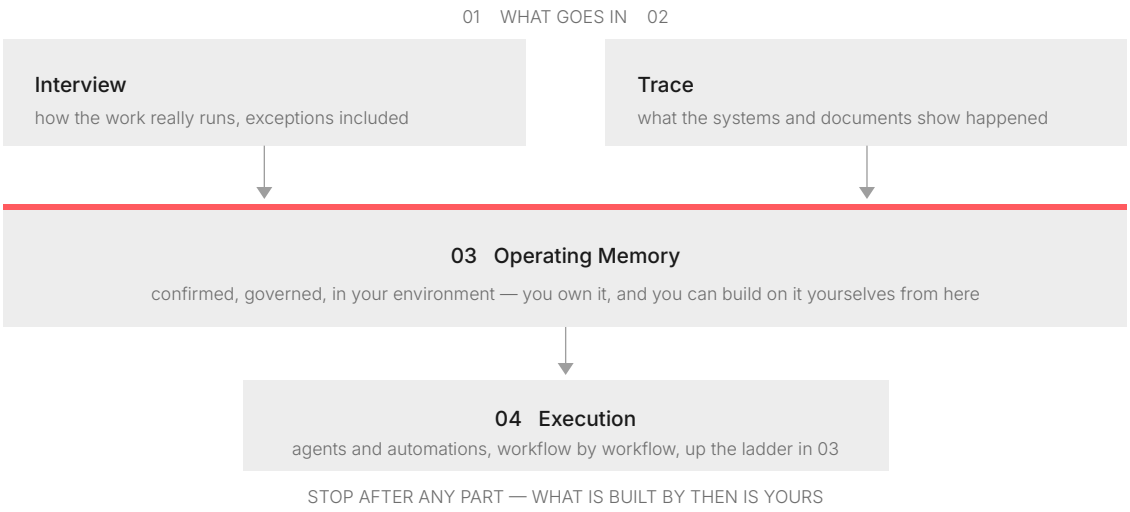
3 **Operating Memory** — it all goes into a confirmed, governed memory that lives in your environment. You own it. If you want to build on it yourselves from here, you can.

4 **Execution** — we build the agents and automations on top of it, workflow by workflow, up the ladder in section 03.

Exhibit 4

Two inputs build one memory the company owns, and everything we execute is built on top of it — so the engagement can stop after any part and still leave you something.

How a Growthstory engagement is structured, four parts in order, with what you keep at each stop



The order is fixed: nothing is built on a memory that has not been confirmed against the systems. The stopping points are not.
Source: Growthstory engagement model, 2026.

GROWTHSTORY

How an engagement runs.

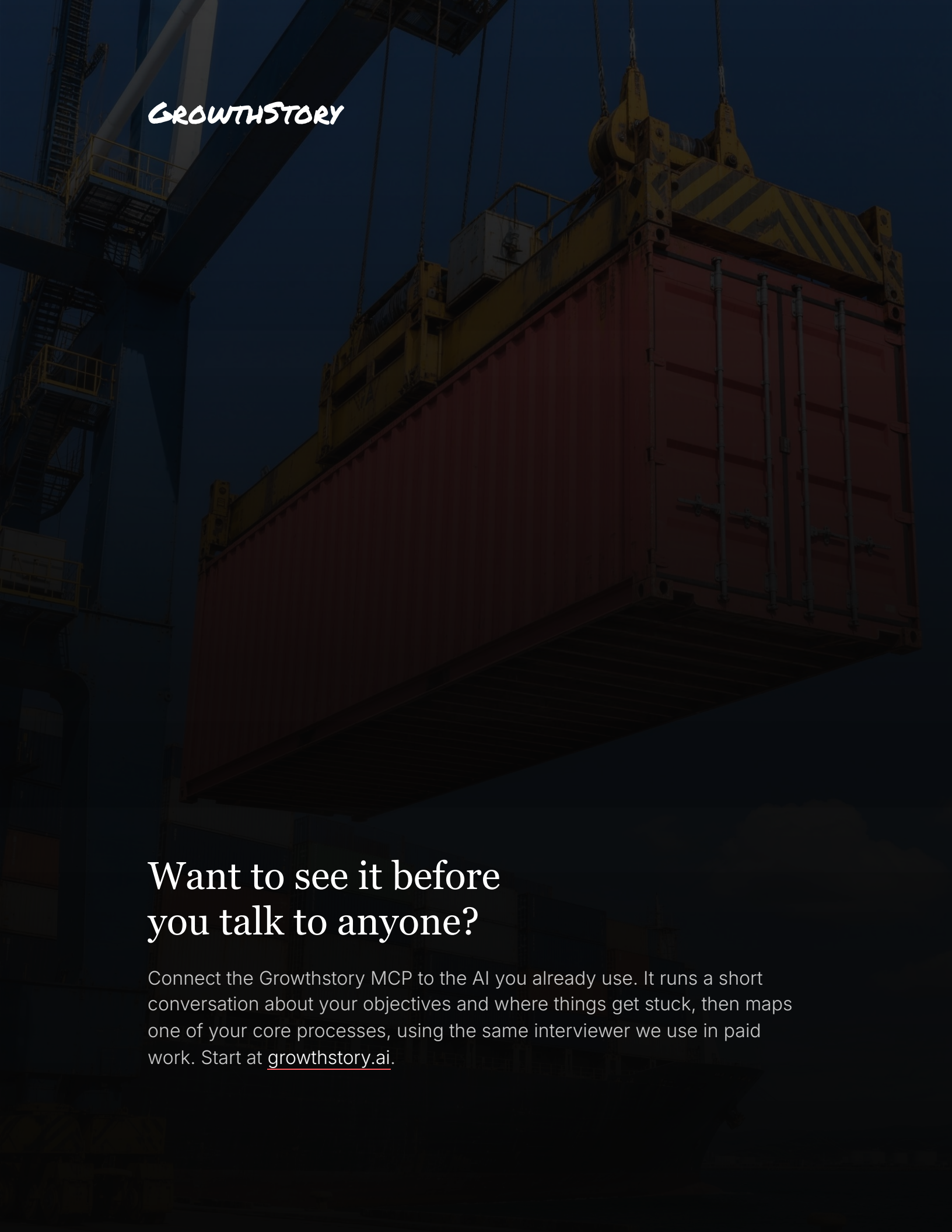
— **In the first 30 days, our operating partner leads are both feet deep.** Systems map, workflow map, scope, the data model and the build patterns. Nobody junior does discovery because they can't understand how your full business model runs, what the friction equates to, and then translate that into technical needs with prioritization and feasibility discernment.

— **The owner's workflow starts on day one.** Relief at the top buys the trust to do the harder work further down.

— **We pick a basket of early wins** on three things: payoff, how feasible it is right now, and how likely the team is to adopt it. Early wins are chosen partly to build morale for the harder work.

— **Outcomes, not hours.** No annual retainer for time. You set business-outcome targets, we hit them, and the relationship earns its next phase.

— **Your environment, your data.** It's built in your tenant, under your security policies, sending the model only the minimum context each step needs.



GrowthStory

Want to see it before you talk to anyone?

Connect the Growthstory MCP to the AI you already use. It runs a short conversation about your objectives and where things get stuck, then maps one of your core processes, using the same interviewer we use in paid work. Start at growthstory.ai.