

**THE NEW  
TALENT  
PLAYBOOK**  
*Podcast*

**Action Kit**

**How WBN Is  
Becoming an AI-  
First Company**

Featuring Rob Levin

**Episode 7 - Season 5**

By Rob Levin, Creator of [Thenewtalentplaybookpodcast.com](https://thenewtalentplaybookpodcast.com)  
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You just listened to Rob Levin, co-founder of WorkBetterNow, share his company's journey from AI experimentation to full AI-first transformation. Rob reveals that becoming an AI-first company isn't about replacing humans, it's about redesigning workflows from the ground up so AI does the work and humans design, oversee, and optimize. His team has already saved 140+ hours per month in finance alone, and automated first-level IT support. This playbook will help you start your own AI-first journey today.

## **1. Assess Your Starting Point: Where Are You on the AI Journey?**

Rob emphasizes that WorkBetterNow's transformation began with understanding where they were and committing to intentional experimentation. Before diving into AI-first workflows, you need to honestly assess your current state. Are you dabbling? Experimenting? Or already transforming?

### **Your AI Maturity Self-Assessment:**

Check the statement that best describes your company today:

- Awareness Stage: We've heard about AI, but haven't really used it yet.
- Experimentation Stage: Some team members use ChatGPT or AI tools occasionally for specific tasks.
- Adoption Stage: We have AI tools deployed, but usage is inconsistent across departments.
- Integration Stage: AI is part of our workflows, but they're add-ons to existing processes.
- Transformation Stage: We're rebuilding workflows from the ground up with AI doing the work.

Based on where you are, what is ONE immediate action you can take this week to move forward?

## 2. Create Your Experimentation Culture

Rob's breakthrough insight: let the digitally native employees lead the charge. In early 2023, WorkBetterNow launched 'AI Show and Tell' sessions where team members shared what worked, what didn't, and what they learned. The message was clear: experiment, don't be afraid to break things, and learn together. This built curiosity and competence before rolling out formal initiatives.

### Your Experimentation Launch Plan:

Answer these questions to design your own experimentation phase:

- Who on your team is already using AI tools (even informally)?
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- What recurring tasks or workflows could be great early experiments?
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- How will you encourage sharing and learning? (e.g., weekly show-and-tell, Slack channel, monthly demos)
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- What guardrails do you need? (e.g., no client data, no proprietary info in public tools)
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### 3. Define What 'AI-First' Means for Your Company

Rob defines AI-first clearly: 'Any workflow that can be done by AI will be done by AI.' It's not about evolving existing processes; it's about rebuilding them from the ground up with AI doing the heavy lifting and humans designing, overseeing, and fixing. This mindset shift is the foundation of transformation, not just optimization.

#### The AI-First Mindset Check:

For each statement below, rate how true it is for your company today. (1 = Not at all, 5 = Completely)

Statement	Score (1-5)
We actively look for workflows that AI could own entirely.	
We're willing to rebuild processes, not just tweak them.	
Our leadership communicates that AI is about effectiveness, not just cost-cutting.	
We're investing in training our team to manage AI, not just use it.	
We measure AI success by outcomes and hours saved, not just 'adoption.'	

What's your lowest score? That's your biggest opportunity. What is one action you can take to improve it?

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## 4. Build Department-by-Department Transformation

Rob's team didn't roll out AI-first company-wide in one swoop. Each department identified their workflows, built AI-first versions, and reported results. Finance automated 140+ hours/month. IT deployed an AI chatbot for first-level support. Recruiting, sales, and talent coordination all built custom workflows. **The key: start with tangible, measurable wins in each area.**

### Your Department Transformation Map:

For each department, identify one high-impact workflow to transform first.

Department	Current Manual Workflow	AI-First Version (What Would AI Do?)
Finance		
Operations		
Sales/Marketing		
HR/Recruiting		
IT/Support		

## 5. Prepare Your People for the Shift

Rob made a critical commitment early: 'We're not looking to do any layoffs.' The goal isn't to eliminate jobs, it's to elevate them. As WBN grows, they'll need less headcount because AI handles execution. But humans are transitioning from doing the work to designing and managing AI systems. This requires retraining, new skills, and clear communication about what's changing and why.

### Your People Transition Plan:

How will you support your team through this shift?

- Communication: How will you explain the AI-first vision to your team in a way that reduces fear and builds excitement?
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- Training: What training or upskilling will you provide so people can move from 'doers' to 'AI overseers'?
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- Reassurance: What commitments can you make about job security, growth, or new opportunities?
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- Measurement: How will you track not just efficiency gains, but also employee confidence and engagement with AI?
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***"Any workflow that can be done by AI, any process that can be done by AI will be done by AI. And it's not about evolving, it's really about building that workflow from the ground up where AI is doing the work and humans are both designing that AI process... as well as overseeing the work."***

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