

A ShiftElevates White Paper

The ADD-EM Method

A practical guide to AI adoption, operating model readiness, and measurable execution

For leadership teams moving from AI experimentation to responsible, practical, and measurable adoption.

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Executive Summary

AI adoption does not succeed because a tool is available. It succeeds when leaders connect the right use cases, workflows, governance, adoption practices, and measures of value.

The ADD-EM Method helps leadership teams move from scattered ideas and unclear execution to practical, responsible, and measurable progress. It is designed for organizations that need enough structure to move with confidence, without creating another slow, overly complex transformation program.

What this white paper covers

This paper explains the five stages of ADD-EM - Assess, Discover, Design, Execute, and Measure and Adapt - and how the method supports AI adoption, operating model clarity, governance, execution flow, and measurable outcomes.

The central idea

AI adoption should be treated as an organizational capability, not only a technology implementation. That means the work must be connected to how decisions are made, how workflows operate, how risk is governed, how people adopt new behaviors, and how leaders measure value.

ADD-EM provides a practical path for that work.

Where ADD-EM fits

- AI Adoption Readiness and Operating Model Assessment
- AI use case discovery and prioritization
- Workflow redesign and change enablement
- Strategic initiative and portfolio execution advisory

Why AI Adoption Gets Stuck

Many organizations already have AI interest, pilots, tools, and leadership attention. The challenge is that AI often gets introduced faster than the operating model can absorb it.

When that happens, the issue is usually not the technology alone. It is the way work is designed, decisions are made, risk is governed, and value is measured.

Pilots do not scale

Small experiments show promise, but there is no clear path to adoption, ownership, or repeatable value.

Teams have tools, but behavior does not change

Access to AI does not automatically create role clarity, workflow integration, or new ways of working.

Use cases are scattered

Ideas emerge across departments without shared decision criteria, prioritization, or governance.

Leaders cannot see value or risk clearly

Executive conversations become crowded with activity updates, but lack adoption signals, measurable outcomes, and risk visibility.

A better question

Instead of asking, 'Which AI tool should we deploy?' leaders should also ask, 'Where does AI fit in the way work actually happens, and what needs to change for adoption to create value responsibly?'

What ADD-EM Is

ADD-EM is a practical advisory method for moving from AI interest to responsible adoption and measurable execution. It helps leaders assess readiness, identify value opportunities, design the conditions for adoption, support execution, and measure what matters.

It is not a technology-first implementation checklist. It is an operating model and adoption method that keeps people, process, governance, and outcomes connected throughout the work.

Traditional AI path vs. ADD-EM path

Common traditional path	ADD-EM path
Technology-first	Business outcomes and operating fit first
Large-scale rollout before readiness is clear	Focused pilots and staged learning
IT or vendor-led	Leadership-led with cross-functional support
Focus on AI sophistication	Focus on decision quality, adoption, and value
Generic playbook	Adapted to organizational context
Activity reporting	Adoption, risk, value, and outcome signals

The outcome

A method that treats AI adoption as an organizational capability - one that needs alignment, readiness, governance, behavior change, and measurement to hold over time.

The Five Stages of ADD-EM

The stages are simple enough to explain, but structured enough to guide real advisory work. They can be used for an assessment, an advisory engagement, a pilot, or a broader operating model improvement effort.

A

Assess

Understand current state, readiness, constraints, risks, and operating model friction.

Typical outputs

Current-state findings, readiness view, risk and friction map, baseline observations.

D

Discover

Identify AI use cases, value opportunities, workflow gaps, adoption barriers, and decision points.

Typical outputs

Use case opportunity map, prioritization criteria, adoption and workflow insights.

D

Design

Shape workflows, governance, roles, adoption approach, and operating model changes needed for progress.

Typical outputs

Future-state design choices, governance guardrails, workflow changes, adoption approach.

How to read the stages

ADD-EM is not always linear. In real organizations, learning loops happen throughout the work. Discovery may reveal additional readiness gaps. Execution may surface governance questions. Measurement may require changes to the design. The method creates a practical rhythm for learning and adjustment.

The Five Stages of ADD-EM

The final two stages focus on turning advisory clarity into practical action, then using measurement to learn, adapt, and decide what should scale.

E

Execute

Support pilots, enablement, leadership rhythms, communications, and practical implementation planning.

Typical outputs

Pilot plan, enablement plan, leadership cadence, execution support, change actions.

M

Measure and Adapt

Define outcomes, adoption signals, risk indicators, value measures, and learning loops.

Typical outputs

Executive readout, value and adoption measures, risk signals, learning backlog, scaling recommendations.

The five lenses often used inside the method

Use Cases	Workflow Fit	People and Adoption
Where AI can create practical business value.	How AI fits into current work, decisions, and handoffs.	Readiness, skills, behavior change, and adoption barriers.
Governance and Risk	Metrics and Value	Operating Model
Policies, controls, compliance, and responsible use.	How adoption, outcomes, risk, and value will be measured.	How ownership, decision flow, and leadership rhythms support adoption.

Principles That Make ADD-EM Practical

The method is designed to help leaders make better decisions before scaling AI activity. These principles keep the work grounded in business value, adoption, and responsible execution.

Incremental over big bang

Start with focused use cases and pilots that prove value before scaling. This reduces risk and builds trust through learning.

Business outcomes over technology

Every AI initiative should connect to a business outcome, customer or employee value, risk reduction, quality improvement, or decision need.

Human-augmented over fully automated by default

AI should strengthen human judgment, not remove accountability. Human-in-the-loop controls are especially important in complex or regulated environments.

Transparent over black box

Teams need to understand how AI is being used, where its limits are, and what governance expectations apply.

Adaptive over rigid

The method supports learning loops. Findings should shape priorities, pilots, governance, and adoption plans as the work unfolds.

Aligned over siloed

AI adoption requires shared ownership across business, technology, governance, operations, and change leadership.

Sustainable over quick fix

The goal is lasting capability, not temporary excitement or isolated productivity gains.

How ADD-EM Supports ShiftElevates Advisory Work

ADD-EM is the method behind the way ShiftElevates helps leadership teams connect AI adoption, operating model clarity, governance, and execution flow.

Advisory area	How ADD-EM supports the work
AI Adoption Readiness and Operating Model Assessment	Creates a focused view of readiness, workflow fit, governance, adoption barriers, and measurable next steps.
AI Use Case Discovery and Prioritization	Helps leaders identify use cases and prioritize them by value, feasibility, risk, workflow fit, and adoption potential.
Workflow Redesign and Change Enablement	Connects tool adoption to roles, handoffs, decision points, enablement, behavior change, and operating routines.
Strategic Initiative and Portfolio Execution Advisory	Improves visibility, governance rhythm, tradeoff decisions, value realization, and alignment around strategic work.

Using ADD-EM as a conversation tool

The method gives leaders a shared language for discussing AI opportunities, readiness gaps, governance questions, adoption barriers, and value measures. It helps shift the conversation from 'What AI can we deploy?' to 'What change are we trying to create, and what needs to be true for it to work?'

Important note

This paper describes a practical advisory method. The depth, sequence, and outputs can be adapted based on organizational maturity, risk environment, leadership priorities, and the type of engagement.

Questions Leaders Can Use Now

These questions can help leadership teams begin diagnosing where AI adoption may need stronger operating model support.

- Which AI use cases are clearly connected to business value, risk reduction, quality improvement, or decision needs?
- Where are teams experimenting with AI without a shared prioritization model or governance rhythm?
- Which workflows would need to change for adoption to stick?
- Who owns adoption, risk, enablement, measurement, and ongoing improvement?
- What adoption signals would show that AI is changing behavior, not just increasing tool usage?
- What risks or compliance expectations need to be understood before scaling?
- What leadership decisions are currently delayed because value, risk, or readiness is unclear?

A practical next step

If these questions feel familiar, a focused AI Adoption Readiness and Operating Model Assessment can help clarify where AI fits, what needs to change, and how to move forward responsibly.

About ShiftElevates

ShiftElevates is a founder-led advisory practice focused on AI adoption readiness, operating model clarity, portfolio execution, change readiness, and measurable outcomes. The work behind ShiftElevates is grounded in 19+ years of enterprise transformation, consulting, portfolio execution, change readiness, and leadership enablement across complex and regulated environments.

Ready to connect strategy, adoption, and execution?

Schedule a strategy conversation to discuss where AI adoption, operating model friction, or execution gaps may be showing up in your organization.