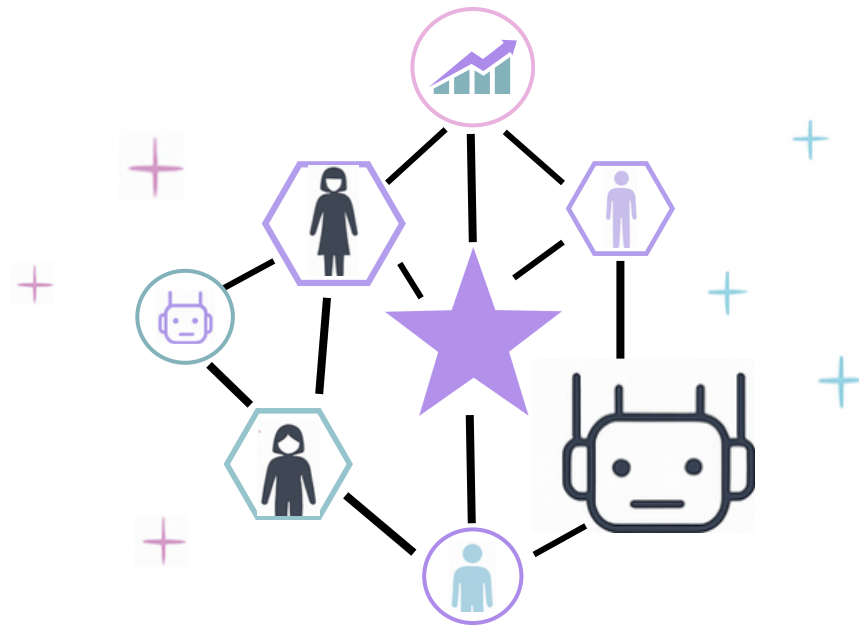


ORG DESIGN, **GROWTH** LEVER



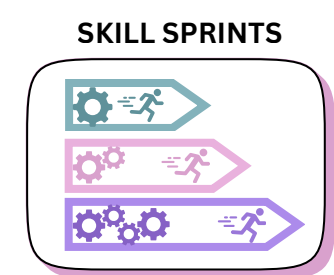
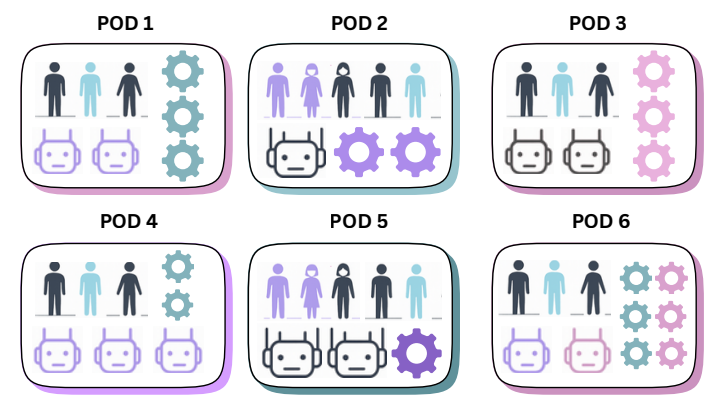
1. **One System, three loops**
2. **Legal Tech example**
3. **Work Charts**
4. **Skill Sprints**
5. **PIONERO demo**



ONE SYSTEM, THREE LOOPS

Growth initiative ⇌ Work Chart ⇌ Skill Sprint ⇌ KPI's

Synthetic Data Forge	Wealth Copilot	Secure Code Sentinel
AI-powered "forge" that fabricates privacy	An AI assistant that boosts AUM	Implement an AI-powered DevSecOps fabric
Synthetic Data Forge Initiative Create an AI-powered "forge" that fabricates privacy-preserving, statistically faithful synthetic data to replace sensitive information in test environments. Development leads to 1,000 employees. PODs: 10 AI Agent Services: 10 Key Person Roles: 10	Wealth Copilot Initiative: Wealth Copilot - an AI assistant that boosts advisors' Assets Under Management (AUM) by 10% in a global data infrastructure & analytics environment. PODs: 10 AI Agent Services: 10 Key Person Roles: 10	Secure Code Sentinel Initiative: Secure Code Sentinel - an AI-powered DevSecOps fabric that continuously scans, learns from, and handles every line of code - reducing exploitable vulnerabilities by 1-10% in a global data infrastructure & analytics environment. PODs: 10 AI Agent Services: 10 Key Person Roles: 10
Strategic & Governance KPI: Roadmap Planner Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Strategic & Governance Value Roadmap Planner Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Strategic & Governance Risk ROI Planner Agent CISO (sponsor), DevSecOps Program Director
Data & Signals VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Data & Signals Core Data Ingestion (AI Normalizer), Content Manager, Content Manager (over sponsor), Data Ingestion (AI Manager) rolling out the Copilot to 10,000 advisors.	Data & Signals Self-Learning SAST Agent, False Positive Filter CISO (sponsor), DevSecOps Program Director
Client 360 & Feature Store Entity Resolver, Feature Catalog Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Client 360 & Feature Store Entity Resolver, Feature Catalog Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Code Analysis Pod SLOM Generator, Supply Chain Zero Day Watcher CISO (sponsor), DevSecOps Program Director
Adviser & Personalization Engine LTM Advice Generator, Risk/Global Recommendations, Recommendation Planner VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Adviser & Personalization Engine LTM Advice Generator, Risk/Global Recommendations, Recommendation Planner VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Dependency Intelligence Pod Open Source Security Lead, Vulnerability Researcher VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
Scalability & Compliance Policy Sentinel, Disclosure Checker, Board of Truth Officer VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Scalability & Compliance Policy Sentinel, Disclosure Checker, Board of Truth Officer VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Runtime Threat Pod AI/ML Behavior Anomaly Agent, Out-of-Band Patch Recommendation VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
Channel Capabilities (Advisor & Client) Advisor Capital (advisors), Client Capital (products/stocks), Note Composer VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Channel Capabilities (Advisor & Client) Advisor Capital (advisors), Client Capital (products/stocks), Note Composer VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Real Team & Validation Auto-Exploit Generator, Attack Path Mapper VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
Integration & Workflow API Orchestrator, CRM/Case Sync, Doc Gen Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Integration & Workflow API Orchestrator, CRM/Case Sync, Doc Gen Agent VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Adversarial Pattern Detection: Model SLOM Agent Dark Team Lead, Red-Teamer v3 VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
ML Ops & Reliability Decision Logger, Explanation Generation, Redaction/PII Auditor VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	ML Ops & Reliability Decision Logger, Explanation Generation, Redaction/PII Auditor VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Compliance & Audit Pod Evidence Collector Agent, AI Explainability Logger VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
Trust & Auditability Decision Logger, Explanation Generation, Redaction/PII Auditor VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Trust & Auditability Decision Logger, Explanation Generation, Redaction/PII Auditor VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Developer Enablement Pod Secure Coding Coach Bot, Just-in-Time Fix Suggester VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge
Insights & KPI AUM Growth Analytics, Advisor Product Dashboard VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Insights & KPI AUM Growth Analytics, Advisor Product Dashboard VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge	Security & Insights Pod Vulnerability Heat Map Dashboard, Risk Assessment Calculator VP Data & AI (over sponsor), Program Manager - Synthetic Data Forge



cycles every week

LEGAL TECH

Growth initiative ↔ Work Chart ↔ Skill Sprint ↔ KPI's

Billing Narratives Co-Pilot - Legal Tech

Stop the 4-7 % revenue leakage that plagues law-firm invoices

PODS	AI Agent Services	Key Human Roles	Critical Skills	Target Human : AI Ratio*	Purpose / KPI's
1. Strategy & Compliance Governance	• Revenue-Leak Cost Modeler • LEDES / UTBMS Policy Sentinel	Program Director (Billing AI) Legal Billing SME Data Privacy Officer	Value-stream mapping e-billing regs & ethics Stakeholder storytelling	3 : 2	Define "+4-7 % realisation" OKR; encode client-specific billing rules & guardrails
2. Data & Rules Ingestion	• Time-Entry Parser • Client-Guideline Loader	Lead Data Engineer E-Billing Rules Analyst	Data mapping & ETL JSON / LEDES schema mastery	2 : 3	Stream 100 % timecards & guidelines into a unified feature store; <1 % packet loss
3. Narrative AI & Coding Engine	• LLM-Based Narrative Rewriter • Auto-UTBMS Coder • Vague-Term Filter	Lead NLP Scientist Prompt Engineer Billing QA Analyst	Legal NLP tuning Prompt & guard-rail design Billing QA protocols	3 : 5	≥95 % LEDES compliance; narrative acceptance ≥ 98 %; latency < 2 s
4. Integration & Billing Workflow	• API Gateway & Plug-in Generator • Real-Time Guideline Validator	Solutions Architect SaaS Partner Engineer	API design & auth SaaS billing stack expertise	2 : 3	One-click deployment into PMS / e-billing suites; zero invoice rejections
5. Adoption & Change Enablement	• In-App Coaching Bot • Feedback Loop Collector	L&D Lead Billing Ops Champion Change-Comms Manager	Adult learning design Enablement analytics	4 : 1	90 % lawyer adoption in 60 days; write-off rate ↓ 50 % first quarter
6. MLOps & Reliability	• Drift Detector • Retrain Orchestrator • Observability Dashboard	MLOps Engineer SRE	CI/CD for models Incident response	2 : 4	99.9 % uptime; MTTR < 30 min; auto-retrain on drift ≥ 3 %
7. Insights & KPI Analytics	• Realisation Lift Analyzer • Write-Off Tracker	Data Analyst Finance Partner	BI & storytelling ROI modeling	2 : 2	Weekly dashboard: trim %, write-off %, LEDES rejects; prove +4-7 % revenue recapture

Why it Matters

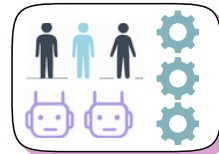
Stop the 4-7 % revenue leakage that plagues law-firm invoices. This AI-first initiative embeds a narrative-cleaning, LEDES-aware copilot inside every time-entry and billing workflow—so Legal-Tech SaaS providers can deliver crystal-clear, guideline-compliant bills and prove immediate ROI to clients.

Why CPO/HR/L&D Leaders Care

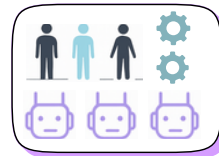
- Outcome-Pods aligned to "Zero Write-offs" KPI
- Roles + AI Agents, Skills, KPI's auto-mapped.
- No org-chart guesswork
- Critical-Skill Sprints ready in minutes



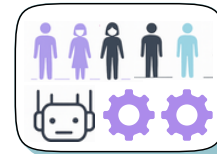
Strategy & Compliance



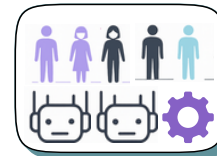
Narrative & Coding Engine



Data & Rules Integration



Integration & Billing Workflow



10-Day Micro Sprint - Example Billing Narratives, Critical Skills

Day	Activity	Modality	Asset Source*	Evidence
1	Kick-off stand-up: revisit current KPI deltas & top-3 skill targets	Live call / Async video	Internal	Commit sheet in LMS
2	Micro-course 1 (s. 30 min): "LEDES 101 refresher"	e-learning	LinkedIn Learning	5-Q quiz (80 % pass)
3	Pair-work: rewrite 5 legacy entries flagged for weak terms	On-the-job	In-product Copilot sandbox	Before/after diff logged
4	Micro-course 2: "Prompting Copilot for UTBMS accuracy"	Coursera bite	Coursera	Quick check-in poll
5	Solo challenge: clean a 20-line timecard under 10 min	Challenge	Product instance	System verifies compliance
6	15-min peer demo: share best prompt	Live / Teams	Internal	Peer votes
7	Slack pop-quiz (3 Q's)	Micro-quiz	Talent App	Auto-graded
8	Coach AMA: "Reducing write-downs through narrative clarity"	Live	Internal SME	Attendance check
9	Improvement sprint: apply skill to real matter invoice	On-the-job	Client file	Copilot logs
10	Retro & data check: did LEDES rejects fall?	Live	BI dashboard	Update Priority Scores



skills re-weighted
based on KPI shifts

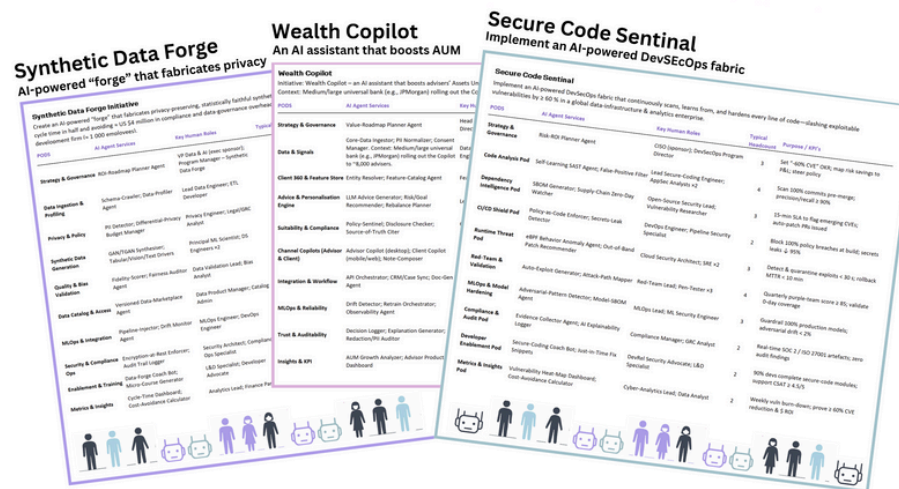


reaching4

WORK CHARTS

"Until now firms have been built around expertise siloed in functions.
But with AI-First, the org chart is replaced by a Work Chart—an
outcome-driven model where teams form around goals, powered by
agents that enable more impactful ways of working"

Microsoft WorkLab - 2025: The Year the Frontier Firm is Born



**Pods, Roles, AI
Agents, AI ↔ Human
ratios, Skills & KPI's**

SKILL SPRINTS

Phase 1: (Days 1-30) Foundation & Strategic Positioning

Objectives: Build deep knowledge of security posture metrics, and strategic alignment methods.

Key Skills to Build:

- **Security Metrics Mastery:** Understanding CVE backlog, and
- **AI-Driven Threat Detection:** Using AI tools to detect security
- **Strategic Communication:** Translating security posture

Learning & Actions:

1. Courses & Resources:

- "DevSecOps Essentials" (Cloud Security Alliance)
- MITRE CVE & CWE resources deep dive.
- AI in Secure Software Delivery (Pluralsight, Udacity)

2. On-the-Job:

- Conduct a baseline security posture review using
- Meet with Product & Engineering heads to align on brand trust).

3. Output:

- Strategic DevSecOps Fabric Map showing PCI



Phase 2: (Days 31-60) Applied Leadership & Program Execution

Objectives: Apply knowledge in live program steering, introducing based on incident/win patterns.

Key Skills to Build:

- **Dynamic Skill Re-weighting:** Adjusting skill priorities based on incident/win patterns → "Secrets Hygiene" moves to top priority).
- **Cross-POD Orchestration:** Coordinating AI Agents & Human
- **Executive Reporting:** Presenting security improvement

Learning & Actions:

1. Courses & Resources:

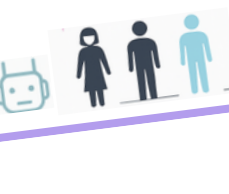
- "Advanced DevSecOps" (O'Reilly).
- Harvard Business Review articles on organization

2. On-the-Job:

- Implement incident-to-skill mapping (e.g., DA PODs).
- Initiate weekly Work Chart refresh — update skills list.

3. Output:

- First Skills Heatmap linked to active security



Phase 3: (Days 61-90) Optimization & Continuous Alignment

Objectives: Institutionalize continuous alignment between the Work Chart and 90-Day Sprints. Drive measurable improvement in security KPIs.

Key Skills to Build:

- **Metrics-to-Action Mastery:** Turning KPI deltas into sprint adjustments.
- **Cultural Leadership:** Embedding secure coding mindset into every role.
- **Adaptive Strategy Refresh:** Updating the DevSecOps strategy based on evolving threat landscape.

Learning & Actions:

1. Courses & Resources:

- "Leading Organizational Transformation" (MIT Sloan Executive Education).
- Secure Software Development Framework (SSDF) by NIST.

2. On-the-Job:

- Establish Continuous Alignment Cadence — bi-weekly review of Work Chart vs. current incident wins.
- Refresh skill sprints for impacted PODs; retire outdated priorities.
- Report to exec leadership with before/after KPI impact.

3. Output:

- Updated Work Chart + Skill Sprint Matrix showing security improvement trajectory.

