

AI Business Process Transformation Lab
USC Marshall Center for Effective Organizations
2026

EXECUTIVE SUMMARY

Why Now?

Organizations are under pressure to move beyond AI hype to real adoption that delivers business value and ROI. Those that can successfully transform their business processes now will reduce risk, improve efficiency, and gain durable competitive advantage.

What Is the Lab?

A one-year, invitation-only consortium of **8-10 industry-leading companies** partnering with USC Marshall’s Center for Effective Organizations (CEO). The Lab combines:

- **Four 2-day, in-person quarterly labs** structured around peer-to-peer collaboration, research insights, and problem-solving on AI-enabled business processes – Starting June 23-24, 2026
- **Eight virtual, organization-specific sessions:** tailored advising to your company’s unique challenges

The lab will address three aspects that are critical to ensuring AI success:

- **Can it be done?** The technical requirements, including data quality, controls, governance, risk management, and analytics/forecasting/generative tools
- **Should it be done?** The strategic, operating model, legal, ethical, etc. issues
- **Can/will the people do it?** Do people in the organization have the right skills, support, motivation, and rewards? Issues include culture, ways of working, fear of technology and change, territoriality, and how people are valued and maintain employability

What matters is both the individual elements underpinning each, and the interconnections among them that can get in the way of AI implementation having the intended business impacts.

Why This Lab vs. Consulting/Vendor Programs?

| Consulting Firms | AI Vendors | USC-CEO Lab |
|--|--|--|
| Proprietary frameworks | Tech-first, tool-centric, narrow scope | Independent, evidence-based systems approach |
| High-cost projects repeated uniformly across clients | No expertise in organization design | Decades of organization design diagnosis and impact |
| ROI tied to upselling services | ROI tied to product adoption | Bespoke solutions that improve org performance |

What You Get

- **Practical Outcomes:** Faster adoption cycles, reduced transformation risk, and measurable business process improvements
- **C-Suite Impact:** Direct linkage to growth, operational efficiency, talent strategy and risk management
- **Exclusive Access:** Leading researchers who know how to solve organizational challenges including Alexis Fink, Alec Levenson, Jennifer Deal, and John Boudreau

Investment

- Non-Sponsor: Full program (Labs + Virtual Advising): \$175K / Labs only: \$75K
- Sponsor: Full program (Labs + Virtual Advising): \$155K / Labs only: \$65K

Participation is limited to 10 organizations. To learn more details and secure your company's seat, contact Alec Levenson at alevenson@marshall.usc.edu or 310-991-7215, or Jennifer Sparks Taylor at sparksj@marshall.usc.edu or 323-309-0039.

Timing

- Meeting 1: June 23-24, 2026 at UPS Headquarters, Atlanta, Georgia
- Meeting 2: October 20-21, 2026 at WD-40 Headquarters, San Diego, California
- Meeting 3: January 2027 TBD
- Meeting 4: April 2027 TBD

What is the value of partnering with the Center for Effective Organizations (CEO)?

CEO is a trusted partner to companies that lead their industry globally. CEO's unique blend of research and hands-on problem-solving sets it apart from two very different sets of partners that organizations turn to for help:

- The big strategy and HR consulting companies
- Academics and university centers

CEO combines the best of both of those worlds, providing a unique blend of the best consulting frameworks and applications, with scientific knowledge grounded in over a century of management and organizational behavior research.

What CEO's client's value

- CEO is more credible than consulting firms because it is independent and research-grounded
- CEO is the authority in organizational systems, design and change
- CEO offers practical, nuts-and-bolts solutions, not theoretical frameworks or hype
- CEO accelerates clarity and reduces risk in fast-moving, ambiguous operating environments

Client quotes

- "Consultants tell my leaders whatever they want to hear. CEO listens to what the issues really are, finds the root causes, and helps us design solutions that address the systemic challenges. Whether it's a job design, team dynamics, or business process alignment problem, CEO's research scientists always provide the best value for the time and money spent." *CHRO of a leading global consumer products company*
- "CEO helps people think about the big, complex problems leaders haven't yet thought about." *Senior Organizational Effectiveness Executive, Diversified Manufacturing*
- "CEO offers a very practical way to get at solutions. It's not academic or theoretical, it's nuts and bolts: what worked, what didn't, and why...but grounded in research" *SVP, HR, Logistics*
- "We look to CEO for reliable and rigorous research to cut through the noise so we can apply and solve the complex challenges we are facing." *CHRO, Financial Services*
- "We want a trusted partner who can help us fact-check rapidly evolving issues — especially in areas like performance management and AI — and who can quickly distill the top five things we need to pay attention to. Speed matters more than ever." *Senior Talent Executive, Healthcare*

AI BUSINESS PROCESS TRANSFORMATION LAB DETAILS AND FAQs

A call to action

Many organizations today are struggling to effectively transform to capitalize on the new AI-enabled capabilities that are available now. After the initial surge of adoption and hype, the inevitable next phase of adjustment, learning and concerns about ROI has arrived. The organizations that can most effectively navigate this next stage of adoption will build durable competitive advantage.

In this lab, we are bringing together a cohort of leading organizations from across different industries to learn together and build new practices, business structures and organizational processes. The cohort collaboratively will address real-time, real-world challenges, working through potential solutions and considerations as a group. The collective expertise from the industry and research worlds combined together will identify and launch approaches to AI adoption that are rooted in the science of organizational behavioral and systems design. Working together, the collaboration will produce more effective, lasting solutions.

In-person lab experiences

The lab will convene a small group of industry-leading companies that do not directly compete. Over the course of a year, there will be four (4) in-person lab experiences, one per quarter, consisting of two days each time. All organizations are invited to send up to five (5) participants to each lab. At the in-person labs, the researchers and participating organizations will jointly:

- Share how AI is being adopted, its impacts, how the organization and workforce has to adapt, and emerging best practices across organizations
- Work collaboratively to problem-solve challenges facing each participating organization, and chart a course to implement the changes
- Incorporate actionable insights on AI and technology adoption and impact from both research and practice on strategy execution, organizational behavior, and organizational capability building

The agenda for each lab will be designed jointly with the participating organizations to ensure maximum value and learning that builds from previous meetings. Based on research and experience with previous technological shifts, core topics to be addressed are likely to include:

- End-to-end business process workflow design
- Systems integration and optimization
- Roles and responsibilities for middle and upper management
- KPIs, performance management, and career paths
- Other wraparound issues including data governance, safety, ethics, and more

Though the exact agendas cannot be determined ahead of time, the themes are expected to cover the following topics:

- **First in-person lab: The art of what is possible**
 - What does research say about how to design work around tasks rather than jobs?
 - How to build new organizational capabilities that leverage disruptive technology?
 - The participants will spend the majority of time in the lab working on applying the lessons from research and past technology disruptions to their operating models, organizational designs and workflows.
 - Featured speakers:
 - John Boudreau: Work Without Jobs (content based on his book with Ravin Jesuthasan)

- Alec Levenson: Building organizational capability (content based on upcoming book with Johanna Anzengruber)
- **Second in-person lab: The Human-Machine Workflow**
 - Automating and augmenting human-performed tasks with AI overcomes bottlenecks at certain points in the workflow, while creating potential new bottlenecks elsewhere
 - What are the ripple effects in the system on the adjacent tasks, jobs, teams and business processes?
 - Featured speakers:
 - Alexis Fink: Lessons from decades of practice implementing new technologies and operating models
 - Second speaker and topic to be determined, based on design criteria developed jointly with the participating organizations
- **Third in-person lab: Leading and managing during disruptive change**
 - What happens to power dynamics within an organization when a new technology disrupts known ways of working and has the potential for vast productivity increases?
 - How can leaders create the environment their staff need to embrace new technologies and leverage the potential productivity improvements?
 - Featured speakers:
 - Jennifer Deal: Generational and power differences at work
 - Second speaker and topic to be determined, based on design criteria developed jointly with the participating organizations
- **Fourth in-person lab: Activation and change management**
 - Interdependencies in the work across teams create complexities that have to be directly addressed, including managing competing KPIs, and shifts in decision rights
 - Ripple effects in the system create knock-on impacts on performance management, accountabilities, and rewards which will undermine success if unaddressed
 - Featured speakers:
 - Alec Levenson and Alexis Fink: systems diagnosis and solution design
 - Second speaker and topic to be determined, based on design criteria developed jointly with the participating organizations

Organization-specific virtual meetings

In addition to the in-person labs, there is the option to also have up to eight (8) organization-specific virtual meetings. These meetings will:

- Address the business process challenges of that organization through coaching and advising, and partnering to identify AI's role in potentially transforming the business processes
- Include only members of that organization, along with one or more CEO researchers; if a subset of organizations have similar issues, virtual meetings for that subset can also be convened if desired by all parties

FAQs

Why Participate?

The AI Transformation Lab’s goals are to support organizations as they transform business processes to win in the AI era, by enabling AI adoption to drive real business impact.

The USC Marshall Center for Effective Organizations (CEO) has cutting edge, research-based expertise evaluating and helping leading global organizations adopt new technologies in ways that maximize integration, buy-in and productivity enhancement. The Lab will help you develop better ways for your organization to use AI to improve business processes. The Lab’s format and peer network will help prime your organization for accelerated experimentation and learning cycles that transform business processes.

What is the unique value of the Lab? What differentiates it from other consortia of companies being convened by consulting companies and AI vendors?

Consulting firms and AI vendors often prioritize their bottom-line over their clients. CEO uses evidence-based knowledge from the management and organizational behavior domains to diagnose and design actionable solutions tailored to the operating model, history and culture of each client.

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How long is each in-person Lab meeting?

Two days.

How many of my people can participate in the Lab?

Each organization can send five people to the in-person meetings. Continuity across meetings will help maximize organizational learning, so you are encouraged to have a core group that attends most meetings. However, schedule conflicts are inevitable. And the broader the group that attends the in-person meetings, the greater the ability to spread the learnings throughout your organization. An ideal mix will have a core set of people who attend 3-4 in-person meetings, plus a larger group that attends 1-2 in-person meetings where topics are most suited to them.

The virtual meetings will be structured for your organization’s specific needs, with no pre-set limit on the number of people from your organization who in principle might attend. The meeting invitation list will be determined by the issues being addressed, and the appropriate people who should be involved.

What is the role of the in-person versus virtual meetings?

Over the course of the four quarterly in-person meetings, the approach will include scoping where organizations are in AI adoption, what they have tried or thought about trying, what has worked, what hasn't, learnings to date, beliefs about useful future directions, and framings of shifts they are working on and experiences with them. The final meeting will include summations of what has worked, what hasn't, what comes next, and experiences everyone can learn from.

The organization-specific virtual meetings will address the bespoke challenges facing each organization that are not common across organizations. During the first 1-2 months of the Lab, each organization, partnering with its research partner from CEO, will identify the core business processes to be addressed. The researchers will combine the information gathered across organizations, dividing the business processes into two groups: the ones with enough commonality to be addressed in the in-person sessions, and the bespoke ones best addressed in the organization-specific virtual meetings. The subsequent meetings – both in person and virtual – will address the work design, motivation, and productivity implications of adopting AI for the business processes, leveraging our collective knowledge about how previous technological changes have impacted work design at the job, team, business process, unit, and enterprise levels.

How many organizations will participate in the Lab?

The minimum is six. The maximum is ten.

What if we want a CEO researcher to attend our organization-specific meetings in person?

The pricing for the Lab allows for a CEO researcher to attend your organization-specific meetings virtually. Depending on the need and timing, a CEO researcher may attend one or more of your organization-specific meetings in person at an additional cost.

ABOUT CEO

The Center for Effective Organizations (CEO) brings over 45 years of experience in helping companies build more effective organizations. We have a team of world-renowned researchers and consultants working on subjects ranging from organization design, employee resource groups, diversity, equity and inclusion, leadership development, future of work, and strategic analytics. CEO distinguishes itself from other applied research centers and consulting organizations by partnering with organizations to rigorously assess the relevant and strategic issues facing them, applying proven interventions guided by that assessment, and evaluating the effectiveness of the engagement. CEO is supported by our sponsors which include large and mid-sized companies that join the network.

CEO researchers leading the lab

Dr. Alec Levenson



Alec Levenson is director and senior research scientist at the Center for Effective Organizations, Marshall School of Business, University of Southern California.

His action research and consulting work with companies optimize organization performance through the scientific application of organization design, job design, human capital analytics and strategic talent management. Three areas of primary focus include:

- (a) Optimizing the operating model to improve strategy execution and organizational performance
- (b) Talent management practices for the new generation of workers and world of work
- (c) Integrating analytics and OD to improve decisions around talent and work design

Dr. Levenson's work with companies combines the best elements of scientific research and actionable knowledge that companies can use to improve performance. He draws from the disciplines of economics, strategy, organization behavior, and industrial-organizational psychology to tackle complex talent and organizational challenges that defy easy solutions. His recommendations focus on the practical changes organizations should take to make lasting improvements in critical areas. He has trained HR professionals from a broad range of Fortune 500 and Global 500 companies in human capital analytics and operating model optimization.

He is the author of *Workforce Analytics: A Global Perspective* (with Martin Edwards, Dana Minbaeva and Mark Huselid), *Strategic Analytics: Advancing Strategy Execution and Organizational Effectiveness*, *What Millennials Want From Work* (with Jennifer Deal), and *Employee Surveys That Work*. His research has been featured in numerous academic and business publications, and in the *New York Times*, *Wall Street Journal*, *The Economist*, *CNN*, *BusinessWeek*, and many other news outlets.

Dr. Alexis Fink



Alexis Fink is a senior research scientist at the Center for Effective Organizations, Marshall School of Business, University of Southern California, and a seasoned technology executive and scholar. Her corporate career spans senior roles at Microsoft, Meta, Intel and BASF, most recently as VP of People Analytics and Workforce Strategy at Meta. She has spent her career leading through technical and organizational transformations. She’s recognized as a thought leader in Future of Work, People Analytics, AI activation, leadership and organizational change.

She is a prolific author, including a comprehensive book on People Analytics, *Investing in People: Financial Impact of Human Resource Initiatives*, and the definitive book on employee sensing, *Employee Surveys and Sensing: Driving Organizational Culture and Performance*.

Alexis is Past President of the Society for Industrial and Organizational Psychology (SIOP). She is well-recognized for her impact on the field of Industrial and Organizational Psychology, having been elevated as a SIOP Fellow and awarded SIOP’s Distinguished Service Award in 2019. An industry thought leader, she leads the People Analytics Board at the Institute for Corporate Productivity (i4cp), has been an Affiliated Research Scientist USC’s Center for Effective Organizations (CEO) for many years, and was Chair of the IT Survey Group, an industry consortium dedicated to employee surveys. Alexis earned her PhD in Industrial-Organizational Psychology at Old Dominion University.

Dr. Jennifer J. Deal



Jennifer J. Deal is a senior research scientist at the Center for Effective Organizations, Marshall School of Business, University of Southern California, and a contributor to *The Wall Street Journal*’s “Experts” panel on leadership. Her action research focuses on the intersections of leadership and growth strategy, including focuses on global leadership and generational shifts affecting long-term growth.

Before coming to CEO, Dr. Deal was at the Center for Creative Leadership for 23 years, helping leaders around the world more effectively address the challenges they face. In addition to her academic and popular press writing in areas such as on generational strategy, digital transformation, employee engagement, global management, and women in leadership, in 2002 Jennifer co-authored *Success for the New Global Manager* (Jossey-Bass/Wiley Publishers). Her second book *Retiring the Generation Gap* (Jossey-Bass/Wiley Publishers) was published in 2007. Her third book entitled *What Millennials Want from Work* (McGraw Hill Publishers) was co-authored with Alec Levenson in 2016.

An internationally recognized expert on generational differences, she has spoken on generational strategy on six continents (North and South America, Europe, Asia, Africa, and Australia). Her work has been featured in such media outlets as the *Wall Street Journal*, *New York Times*, *The Economist*, *The Guardian*, *Harvard Business Review*, *strategy+business*, *Forbes*, *South China Morning Post*, *Globe and Mail*, and *Training Development Magazine*.