ZUMWALD
AND COMPANY

"Communicate Strategically: Drive Results"

Workshop for the Leadership Now Cohort

Sept. 10, 2026 | 9 a.m. – 12 p.m.

Richard W. Schwartz Center for Innovation

FICTIONAL EXAMPLE FOR USE IN CLASS ONLY

SITUATION:

Local company employees at Winsupply sometimes **need help with routine support questions** — such as setting up WISE access for a new employee, finding a form, running a new WinReport, updating their Pricing Matrix, clarifying a process in Sourcing Services or locating customizable marketing materials.

Today, local company employees often **email or call someone they know**. That can work, but it can also mean they:

- Contact the wrong team
- Wait for a handoff
- Repeat their question to several people

RECOMMENDATION:

Pilot an **AI-enabled Support Hub**: one simple place where local company employees can:

- Ask a question in plain language
- Receive an answer from the Procedure Manual and other approved internal resources whenever possible
- Be routed to the right human support person when needed

The intent is to make existing support easier to access without replacing human help or adding unnecessary bureaucracy.

FIRST: AIM FOR IMPACT

AIM ELEMENT	CLASS EXAMPLE
Audience	**The president and vice president of the Support Services Group and the senior vice president of IT.** *Discuss in class the analysis of this audience.*
Intentions	**Gain approval to run a six-month pilot project** with a small group of volunteer local companies.
Message	**"We should pilot a simple AI-enabled Support Hub** to help local company employees get routine answers faster, connect with the right human expert when needed, and spend less time navigating internal processes so they can stay focused on customers and growth."

SECOND: LEAD WITH THE BOTTOM LINE

Construct the Bottom-Line Ladder: four sentences, bottom line upfront:

[POINT]
Because local company employees are finding it more difficult to navigate support services quickly, I recommend piloting an AI-enabled Support Hub: one simple place to ask routine support questions or request help.

[PAYOFF]
The Hub will help local company employees get routine answers faster, connect with the right human expert when needed, and spend less time navigating internal processes so they can stay focused on customers and growth.

[PROOF]
In a recent sample of 100 local company requests, 30 went first to the wrong team, 20 required a handoff between teams, and 25 involved information already available in the Procedure Manual, training materials or other support documents.

[PROPOSAL]
I am asking for approval to pilot the Hub with 10 volunteer local companies for six months, using approved internal information and a clear option to connect with a human whenever a request is complex, urgent or sensitive.

THIRD: IDENTIFY THE LEADER'S PRIORITIES AND LIKELY QUESTIONS

LEADER'S PRIORITY	LIKELY QUESTION
A clearly defined problem	"What is happening now?"
The local company experience	"Will this make it easier for local companies to get help, or make people deal with a bot?"
Cost and capacity	"What will it cost, and will it create more work for our teams in support services?"
Risk and trust/safety	"What happens if the AI gives a wrong answer or receives sensitive information from the employee?"
Metrics	"How will we know whether to continue?"

FOURTH: DO THE BUILDOUT — ADDRESS THE LEADER'S LIKELY QUESTIONS IN CLEARLY DEFINED SECTIONS

Leader's likely question: *What is happening now?*

THE PROBLEM

Local company employees have support available, but they do not always know where to begin. A routine question may go first to the wrong person, require several emails or be handed from one team to another. The result is time away from customers and unnecessary work for both local companies and support teams.

Leader's likely question: *"Will this make it easier for local companies to get help, or make people deal with a bot?"*

HOW THE HUB WOULD WORK

A local company employee can type a question in plain language, such as: "How do I set up WISE access for a new counter employee?" The Hub searches the Procedure Manual and other approved internal guidance. It either provides the relevant steps and links, gathers the non-sensitive details needed to submit a request to the right support team, or connects the employee with a support services team member. At any point, the employee can ask for a person.

Leader's likely question: *What will it cost, and will it create more work for our teams in support services?*

COST AND CAPACITY

The six-month pilot will cost $50,000 and require 40 staff hours a week shared across the internal project leader, IT lead and participating support teams. To manage this workload, we will limit the pilot to 10 local companies and three routine request types and delay a lower-priority document-update project; no additional headcount is needed.

Leader's likely question: *"What happens if the AI gives a wrong answer or receives sensitive information from the employee?"*

GUARDRAILS

The Hub will answer only from a defined set of approved, maintained internal sources. It will not make decisions, approve payments, change records or ask employees to enter passwords, payment information or other sensitive personal information. If a request requires sensitive details, the Hub will route the employee to the appropriate person or secure process.

If the Hub is uncertain — or if a request is complex, urgent or sensitive — it will route the request to a human owner, along with any non-sensitive information the employee has already provided. A person remains responsible for judgment, exceptions, sensitive matters and the local company relationship.

Leader's likely question: *How will we know whether to continue?*

MEASURES AND NEXT DECISION

Measure	What Success Looks Like
Ease of getting help	Local company participants rate the experience at least 4 out of 5.
Time to first response	Routine questions receive an immediate approved answer; requests needing human help receive clear ownership within one business day.
Repeat contacts	Fewer employees need to explain the same problem more than once.
AI quality	Support teams find that answers are useful and accurate, or correctly routed to a person.
Team capacity	Support team backlog and time to first human response remain within pilot thresholds established upfront.

After six months, we will review local company feedback, response data, AI answer quality and the workload on support teams. Leadership can then decide whether to expand the Hub, improve it and continue the pilot, or stop it.

THE FINAL COMMUNICATION TO THE LEADER: BOTTOM LINE UPFRONT WITH THE BUILDOUT

EMAIL SUBJECT LINE: Request for approval to pilot an AI-enabled Support Hub

EMAIL MESSAGE BODY:

Because local company employees are finding it more difficult to navigate support services quickly, I recommend piloting an AI-enabled Support Hub: one simple place to ask routine support questions or request help.

The Hub will help local company employees get routine answers faster, connect with the right human expert when needed, and spend less time navigating internal processes so they can stay focused on customers and growth.

In a recent sample of 100 local company requests, 30 went first to the wrong team, 20 required a handoff between teams, and 25 involved information already available in the Procedure Manual, training materials or other support documents.

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Thank you for your time, and I look forward to your response.

FIFTH: RESPOND TO PUSHBACK AND MAINTAIN EXECUTIVE PRESENCE

Leader's pushback: "I understand the idea, but this is not the right time. Support services teams already have too much on their plates. I do not want to add an AI pilot that creates more work and distracts people from serving local companies."

What the leader is really concerned about: Capacity, competing priorities and the risk that an initiative intended to help local companies will instead burden the support services teams they depend on.

HOW TO APPLY THE LARA METHOD TO THE LEADER'S PUSHBACK: LISTEN → AFFIRM → RESPOND → ADD

LISTEN

Your response: *Let the leader finish. Do not interrupt to explain that the pilot requires "only" 40 hours a week or insist that AI will save time. Listen for the underlying concern: protecting current support of local companies.*

AFFIRM

Your response: "That is a fair concern. We should not add a pilot if it compromises the support that local companies need today."

RESPOND

Your response: "We do not yet know how the pilot would affect team workload, which is why we propose keeping the scope narrow. Before launch, we will establish each participating team's baseline backlog and service levels and review them weekly during the pilot."

ADD

Your response: "If the backlog grows or our response times get worse beyond an agreed limit, we will pause the pilot, fix the problem and then decide whether to continue. I am asking today for approval to proceed with that safeguard in place."