

PRESERVE EXPERTISE. BUILD WHAT COMES NEXT.

A PRACTICAL PLAYBOOK FOR TECHNOLOGY MANAGEMENT WORKFORCE READINESS

Talent, tribal knowledge, and workforce readiness are top of mind across the technology management industry. As experienced professionals retire or change roles and AI reshapes how work gets done, organizations must preserve critical expertise, develop talent, and strengthen the judgment needed to connect technology decisions to business outcomes.

The AOTMP Industry Leadership Committee developed this playbook to help organizations turn those priorities into meaningful action. It provides practical steps for identifying knowledge gaps, capturing expert reasoning, pairing complementary skills, validating AI-supported work, and measuring business value.

Start with one important workflow. Capture the expertise behind it, create a tested playbook that another colleague can use, and measure the results before expanding. The goal is not more documentation or more AI use. It is stronger capability, less dependence on individual experts, and better business decisions.

TAKE ACTION TO PURSUE SIX BUSINESS OUTCOMES

- **Continuity.** Reduce dependence on a single person for essential work.
- **Quality.** Make decisions, exceptions, and verification requirements explicit.
- **Capability.** Help colleagues develop expertise through real assignments.
- **Financial credibility.** Connect technology management work to measurable business value.
- **Business relevance.** Deliver solutions that address leadership's strategic priorities and reflect Voice of the Customer and customer experience.
- **Responsible adoption.** Use AI within approved boundaries without treating its output as authority.

You do not need an AI deployment to begin. Identifying dependencies, interviewing experts, and testing instructions can all be completed without AI.

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PRIORITIZE YOUR OPPORTUNITIES

List three to five workflows where expertise, staffing, or inconsistent results create concern. Consider critical operational, technical, or financial workflows reliant on experience and expertise. For each workflow, complete this checklist.

Business Importance

- ☐ Failure or delay could disrupt an important business activity.
- ☐ Improving this workflow directly supports a strategic issue identified by business leadership.
- ☐ Problems in this workflow negatively affect customer or stakeholder experience.
- ☐ Errors could affect financial accuracy, contractual obligations, or management decisions.
- ☐ The workflow creates recurring rework, escalations, or avoidable delays.

Knowledge Exposure

- ☐ One person holds most of the practical knowledge.
- ☐ Critical troubleshooting depends on a small number of top-performing practitioners.
- ☐ Important decisions require expertise across disciplines that is scarce or lacks adequate backup.
- ☐ Existing documentation omits reasoning, exceptions, or verification steps.
- ☐ Another colleague cannot complete the work confidently without expert help.
- ☐ A retirement, departure, role change, or supplier transition could expose the gap.

Readiness to Act

- ☐ An experienced practitioner is available to explain the work.
- ☐ A colleague is available to learn and test the instructions.
- ☐ Representative examples and reliable source evidence are accessible.
- ☐ Required permissions and approved tools are available.
- ☐ The workflow can be narrowed to a manageable pilot.

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Selection Rules

1. Count the checked items under business importance and knowledge exposure. More checks indicate a stronger reason to act.
2. Assess readiness separately. Do not let an easy but low-value workflow outrank an important dependency simply because it is convenient.
3. Select an important opportunity with sufficient access, people, and permissions to begin.
4. Assign an owner to resolve barriers for important opportunities that are not ready.
5. Treat an imminent departure or serious operational exposure as urgent, regardless of the checklist count.

Use this checklist as a discussion aid, not a validated risk scoring model.

FOLLOW THE ACTION STEPS

Step 1: Define the Pilot

Rationale

A specific workflow makes it easier to capture meaningful expertise and determine whether the effort helped.

1. Choose one workflow from your priority list.
2. Define its beginning and end.
3. Name the business consequence of errors or delays.
4. Confirm the leadership priority and customer or stakeholder need the pilot addresses.
5. Identify the expert, learning partner, and accountable owner.
6. Record how the work performs today.
7. Choose one business measure and one quality measure.

For example, narrow “improve invoice management” to “identify and validate recurring charges for disconnected services.”

Your output should be a short pilot brief containing the scope, leadership priority, customer or stakeholder need, people, permissions, baseline, measures, and target completion date.

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Step 2: Capture Expert Reasoning

Rationale

Instructions explain what to do. Reasoning helps another person recognize when the instructions do not fit the situation.

1. Select a recent completed activity, project, or incident with supporting evidence.
2. Ask the expert to walk through the case.
3. Record the session only with appropriate permission. Otherwise, take structured notes.
4. Ask what the expert noticed first and why.
5. Identify assumptions, exceptions, warning signs, and escalation triggers.
6. Ask the expert to review the captured explanation and resolve any gaps or inaccuracies.
7. Preserve the reviewed explanation and source evidence in an approved shared repository.

Use these questions during the conversation.

- What are you trying to determine?
- Which sources do you trust, and why?
- What makes a result look suspicious?
- When does the normal process not apply?
- What would a less experienced colleague overlook?
- How do you know the work is complete and correct?

Your output should be a reviewed case record that preserves both the steps and the reasoning.

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Step 3: Build a Usable Playbook

Rationale

Captured knowledge becomes valuable when another person can find it, understand it, and apply it.

1. Pair the expert with a colleague who brings complementary skills.
2. Convert the case record into concise instructions.
3. Use approved AI tools to help organize or draft the material only when permitted.
4. Require expert review of any generated content.
5. Separate standard steps from exceptions and escalation requirements.
6. Include source references, verification checks, an owner, and a review date.
7. Store the reviewed playbook and supporting material in the approved shared repository.
8. Where approved, connect an AI agent to the repository to help users find and apply relevant knowledge.

The playbook should contain the following elements.

- Purpose and expected business outcome.
- Required inputs and authoritative sources.
- Steps to complete the work.
- Decision rules and reasoning.
- Common exceptions.
- Verification requirements.
- Escalation conditions.
- Owner and review date.

Your output should be a working playbook supported by reviewed source material, not simply an interview transcript. Where an AI agent provides access to that knowledge, its answers remain subject to verification.

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Step 4: Test Understanding and Verification

Rationale

A document is not proof of knowledge transfer. A colleague must demonstrate that the instructions support sound decisions.

1. Give the learning partner a different representative case.
2. Ask them to use the playbook without continuous expert coaching.
3. Require them to explain their reasoning and identify supporting evidence.
4. Compare their results with expert-reviewed results.
5. Record missing instructions, misunderstood rules, and incorrect assumptions.
6. Revise the playbook and repeat the test where needed.
7. Identify situations the colleague must still escalate.

If AI supports the workflow, add a verification requirement before anyone acts on its output.

- Confirm that the input data covers the correct period and scope.
- Check material claims against authoritative evidence.
- Reconcile calculations and totals where relevant.
- Flag unsupported conclusions and unresolved exceptions.
- Name the person responsible for approval.

Your output should be a tested playbook and a clear statement of what the colleague can perform independently.

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Step 5: Connect Work to Business Value

Rationale

Technology management gains credibility when practitioners can explain the financial and operational significance of their work.

1. Confirm the strategic issue and customer or stakeholder need the pilot addresses.
2. Ask the appropriate finance partner to confirm the financial evaluation requirements that apply.
3. Build a business case stating the problem, options, expected benefits, costs, risks, assumptions, and implementation requirements.
4. Confirm that financial calculations and assumptions align with finance and leadership expectations.
5. Distinguish an identified opportunity from a validated result.
6. Record the effort required to create and maintain the playbook and any supporting knowledge agent.
7. Compare the pilot's result with the baseline, including the intended customer or stakeholder outcome.
8. State what will be delivered, who is accountable, and what dependencies remain.
9. Write a concise recommendation using business language.

For the disconnected service example in Step 1, distinguish a suspected billing error from a validated dispute, an approved credit, and a credit actually received. Track staff effort separately rather than presenting every improvement as realized savings.

Your output should be a concise business case and result statement explaining the strategic issue addressed, customer or stakeholder benefit, financial basis, delivery responsibilities, evidence of results, and unresolved limitations.

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Step 6: Establish Ongoing Ownership

Rationale

Knowledge preservation is incomplete if the material becomes outdated or the capability remains concentrated in one person.

1. Assign a playbook owner and backup.
2. Set a review date appropriate to the workflow.
3. Require updates after material process, contract, system, or policy changes.
4. Capture new exceptions when they occur.
5. Include the playbook in onboarding and cross-training.
6. Review whether the pairing revealed additional learning needs.
7. Share only approved examples with peers, vendors, or industry learning programs.

Your output should be an owned knowledge asset with a maintenance routine and a development plan for the people using it.

APPLY RESPONSIBLE BOUNDARIES

Before recording work or using AI, confirm the permitted approach with the appropriate internal owner.

1. Identify whether the material includes confidential, personal, contractual, or client information.
2. Confirm where it may be stored and who may access it.
3. Determine which tools and uses are approved.
4. Obtain required recording and data use permissions.
5. Define the human review needed before operational or financial action.
6. Document the approval conditions alongside the pilot.

If permission is unresolved, continue with approved manual capture or suitable fictional examples. Do not upload restricted information to an unapproved tool.

AI should support the workflow where useful. It should not be a prerequisite for preserving expertise.

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COMPLETE YOUR FIRST 30 DAYS

Week 1: Select & Prepare

- ☐ Assess three to five candidate workflows.
- ☐ Select one pilot and document its business importance.
- ☐ Confirm the leadership priority and customer or stakeholder need the pilot addresses.
- ☐ Assign the expert, learning partner, and owner.
- ☐ Confirm permissions and establish baseline measures.

Week 2: Capture & Draft

- ☐ Walk through one representative case.
- ☐ Preserve reasoning, transcripts, standards, and supporting evidence in an approved shared repository.
- ☐ Draft the playbook.
- ☐ Complete expert review.

Week 3: Test & Improve

- ☐ Have another colleague apply the instructions.
- ☐ Test reasoning, verification, and escalation decisions.
- ☐ Where applicable, test knowledge agent answers against expert-reviewed evidence.
- ☐ Correct gaps and repeat testing where necessary.
- ☐ Document remaining limitations.

Week 4: Measure & Sustain

- ☐ Compare results with the baseline.
- ☐ Explain the financial or operational value.
- ☐ Confirm that business case calculations and assumptions meet applicable finance requirements.
- ☐ Assess whether the pilot delivers the intended strategic and customer or stakeholder outcomes.
- ☐ Assign ownership and a review date.
- ☐ Identify the next learning need or workflow.

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Use the first 30 days to establish and test the capability. When business outcomes take longer to emerge, record the current evidence and set a follow-up measurement date. Consider the pilot complete when another colleague can perform the defined workflow, explain the reasoning, verify the result, and recognize when to escalate. The goal is not more documentation. It is less dependency and stronger decision-making.

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