



AI Change Management and Training Plan

A worksheet for planning how people learn, adopt, review, and improve AI-supported workflows.

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Map training needs, workflow changes, communication, feedback loops, resistance risks, and review habits so architecture becomes operating behavior. Use this guide to make the operating choice explicit, test it with evidence, and record who owns the next decision.

BEST USED WHEN

Teams rolling AI-supported workflows out to staff.

WHO SHOULD BE IN THE ROOM

Include the workflow owner, a person who performs the work, a reviewer with authority to approve or stop it, and the relevant data or tool owner.

CANADIAN CONTEXT

Confirm applicable federal, provincial, territorial, sector, professional, contractual, accessibility, and bilingual-service requirements. Use this workbook as operational preparation, not legal advice.

A five-step working rhythm

01

Start doing

Which new behavior should users adopt?

02

Stop doing

Which manual workaround, copy-paste habit, or shadow process should end?

03

Review behavior

How should users inspect, approve, correct, or escalate AI output?

04

Training

What does each role need to understand before launch?

05

Feedback

How do users report weak outputs, missing context, or workflow friction?

Build the working record

Complete one record for one workflow. Write enough to support a decision, not a generic technology wish list.

PROMPT	YOUR WORKING NOTES
01 Workflow changing	
02 Audience	
03 Adoption owner	
04 Start doing	
05 Stop doing	
06 Review behavior	
07 Decision, owner, evidence, and review date	

Train proposal reviewers

STARTING FRICTION

Consultants need a consistent way to check AI drafts rather than assuming polished text is approved.

WORKFLOW MAP



AI-SUPPORTED ROLE

Prepare role-specific practice cases, guidance, and feedback summaries from approved workflow rules. Flag uncertainty around start doing.

HUMAN AUTHORITY

Managers train staff, observe real use, correct habits, and decide when adoption can expand. Resolve the start doing question for this case.

PILOT MEASURE

Track trained roles, correct use, workarounds, feedback closure, and review quality. Record start doing exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Train front-line staff

STARTING FRICTION

Staff need to know when the assistant can answer and when to hand a question to a manager.

WORKFLOW MAP



AI-SUPPORTED ROLE

Prepare role-specific practice cases, guidance, and feedback summaries from approved workflow rules. Flag uncertainty around stop doing.

HUMAN AUTHORITY

Managers train staff, observe real use, correct habits, and decide when adoption can expand. Resolve the stop doing question for this case.

PILOT MEASURE

Track trained roles, correct use, workarounds, feedback closure, and review quality. Record stop doing exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Train summary operators

STARTING FRICTION

Preparers and reviewers need distinct habits for checking sources, figures, and client-facing language.

WORKFLOW MAP



AI-SUPPORTED ROLE

Prepare role-specific practice cases, guidance, and feedback summaries from approved workflow rules. Flag uncertainty around review behavior.

HUMAN AUTHORITY

Managers train staff, observe real use, correct habits, and decide when adoption can expand. Resolve the review behavior question for this case.

PILOT MEASURE

Track trained roles, correct use, workarounds, feedback closure, and review quality. Record review behavior exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Before the pilot grows

Use these prompts to test whether the proposed workflow can operate responsibly in its Canadian business context.

01

Start doing

Affected roles are mapped. Name the owner and the operating decision before selecting a tool.

02

Stop doing

Training is tied to actual workflow behavior. Record the approved sources, permissions, and missing information.

03

Review behavior

Review habits are practiced. Test this boundary with representative and adverse cases.

04

Training

Feedback has an owner and path. Preserve review, escalation, and correction evidence.

05

Feedback

Resistance risks are named without blame. Set a measurable stop condition and the next review date.

06

Readiness to proceed

AI adoption is a workflow change, not a software announcement. People need clarity on what changes, what stays human, and how feedback improves the system.

CANADIAN REFERENCE POINTS

Office of the Privacy Commissioner of Canada - Privacy and artificial intelligence
priv.gc.ca/en/privacy-topics/technology/artificial-intelligence/

Government of Canada - Artificial Intelligence guidance, principles, and policy
canada.ca/en/services/science/innovation/artificial-intelligence.html

General operational guidance only. Confirm applicable legal, privacy, cybersecurity, professional, contractual, and regulatory requirements with qualified advisors.