

The Collaborative Intelligence OS: 5 Stages for Transformation

Instructions: Use this to audit your current AI projects. For Consultants, use this to structure your SOWs and move from selling "hours" to selling "Stages."

The "Golden Thread" Strategy – Most AI projects fail because they are treated as isolated experiments. The CCI Lifecycle connects **Diagnosis** directly to **Value**. It creates a golden thread of data that runs from the first client meeting to the final renewal, ensuring that what was promised in Stage 1 is exactly what is measured in Stage 5. **The Workflow Map:**

STAGE	THEME	THE HUMAN GOAL (The Why)	THE AI PARTNER (The How)	KEY OUTPUT (The Artifact)
1. DISCOVER	<i>Diagnosis</i>	Identify the Cognitive Jam (Process Bottleneck). Stop Solutioneering and find the friction.	SCA Co-Pilot	The AI Opportunity Roadmap (Defining the Scope)
2. DESIGN	<i>Strategy</i>	Deconstruct the workflow using IWD & EPOCH Scoring. Decide what to Automate vs. Elevate.	Workshop Facilitator	The Workflow Blueprint (The Future State Design)
3. BUILD	<i>Engineering</i>	Configure the clean room Agent and Guardrails. Ensure Data Sovereignty.	SAA Co-Pilot	The Digital Teammate (The Configured Agent)
4. ADOPT	<i>Psychology</i>	Train the user and redesign the human role. Navigate the "J-Curve" of friction.	Enablement Coach	The Role Charter (The New Job Description)
5. MANAGE	<i>Economics</i>	Measure ROI and optimize performance using Total Value Management (TVM).	CSC Co-Pilot	The Quarterly Value Review (The Dividend Report)