

Designing an AI & Automation Portfolio That Puts People First

Lessons from Duke University

Brian Moynihan

*"On or about December 1910,
human character changed."*

— Virginia Woolf

*On or about November 2022,
it changed again.*



Something changed.

- Not just tools, but the work itself
- Whole systems need to be revamped
- Most organizations feel it but don't know how to handle it



Who I Am

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Director, AI & Automation Projects

Duke University, Provost's Office

Focus: enterprise systems, workflows, human-centered AI

Building AI & automation portfolio across HR, finance,
and business processes



Author, innovation community builder, geek

The challenge isn't AI capability.

It's how we organize around it.

The SHOT Framework

A way to see the whole system



Strategy

Why does this organization exist?



Humans

Are people aligned and engaged?



Operations

How does work happen within and across teams?



Tactics

How can we personally empower every employee?

SHOT in Practice

S Strategy

Data access, governance, direction

H Humans

Trust, fear, alignment

IQ/EQ/AQ – knowledge, emotion, adaptability

O Operations

Workflows within and across teams and systems

T Tactics

Use of AI tools & AI literacy

The H is the Hardest

The human layer is the hardest part, but is crucial

- Different risk tolerances
- Fear about job impact
- Disagreement about what "good" looks like

*Every new technology
affects the entire socio-
technical environment.*

A Different Kind of Work

AI work behaves differently

01

Requirements evolve
during development

02

Users learn
as they see prototypes

03

Technology is changing
underneath you



Orchestra vs. *JAZZ*

AI work behaves more like jazz than orchestration

Orchestra (Traditional IT)	Jazz (AI Work)
Planned, sequential	Iterative, adaptive
Stable requirements	Continuous feedback
Separated teams	Small, high-context teams

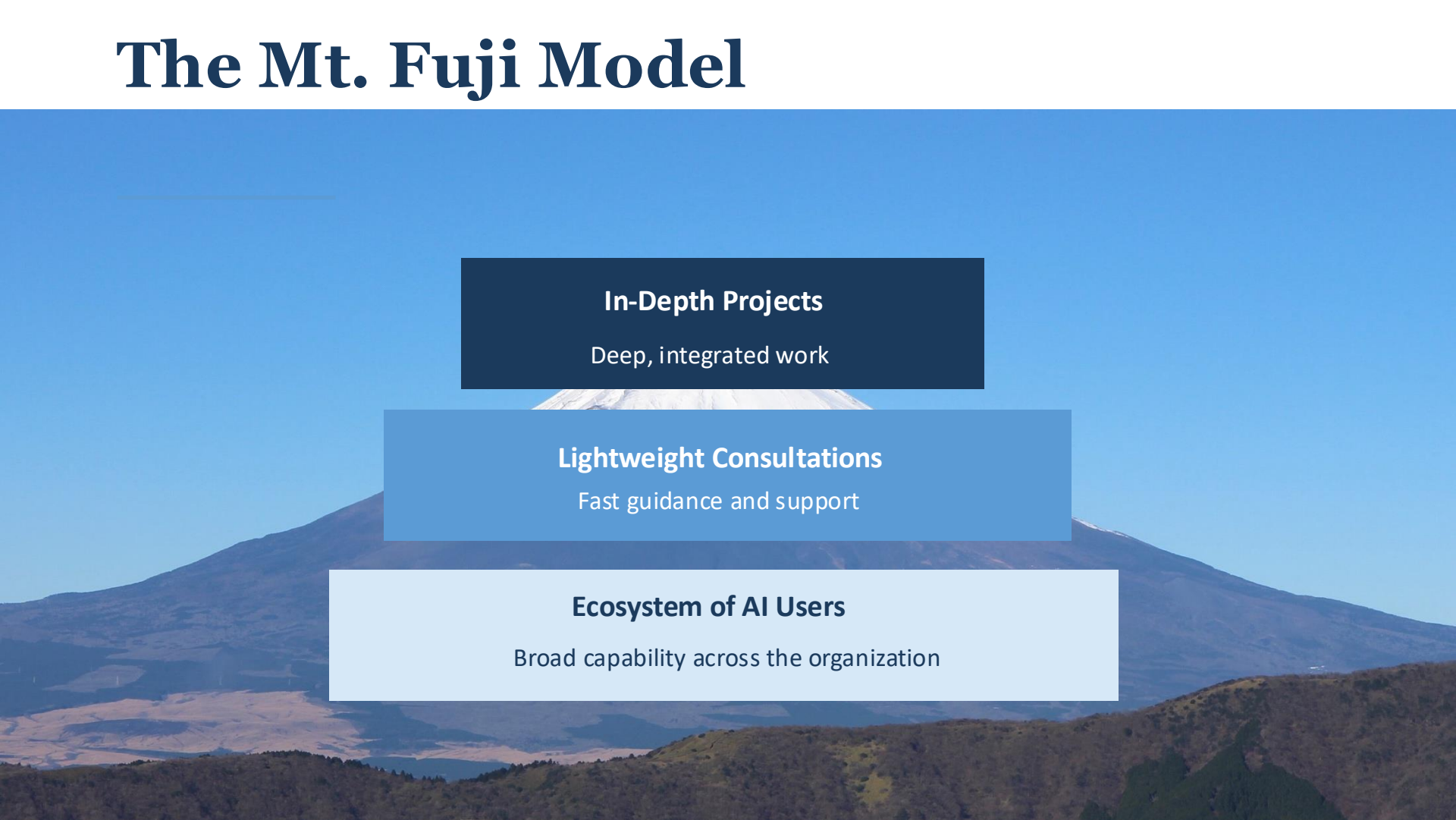
See: "Organizational Jazz" by Tom Winans, John Seely Brown, Ann Pendleton-Jullian

Control doesn't disappear.

It moves — from upfront planning to continuous coordination.



The Mt. Fuji Model

The background of the slide is a photograph of Mount Fuji under a clear blue sky. The mountain's snow-capped peak is visible in the distance, partially obscured by the text boxes. The foreground shows dark, forested hills.

In-Depth Projects

Deep, integrated work

Lightweight Consultations

Fast guidance and support

Ecosystem of AI Users

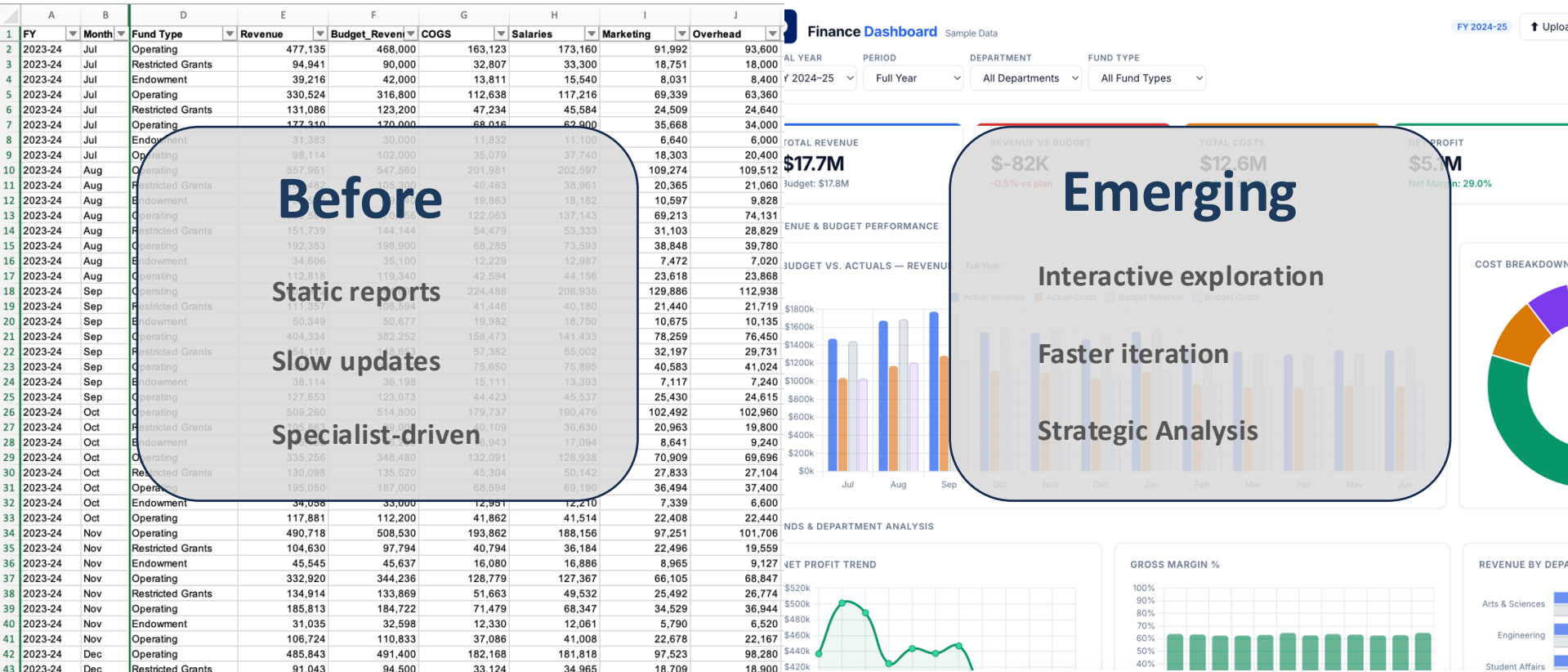
Broad capability across the organization

Not just a project function.

A capacity-building system
for the organization.

Example: Financial Data Access

Note: This is synthetic data



Before

Static reports

Slow updates

Specialist driven

Emerging

Interactive exploration

Faster iteration

Strategic Analysis

Why This Matters

Fast prototyping and development

Control over feature set

Personalization to user context

Continual deployment

More people can ask better questions

Faster path from question to insight

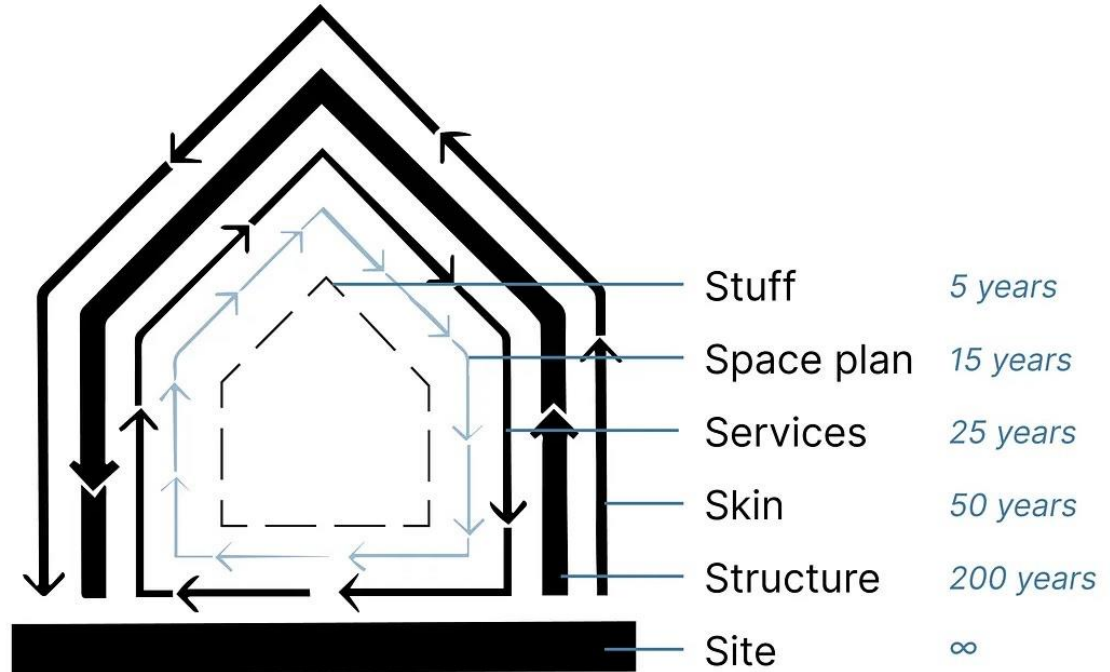
New forms of analysis become possible

The Time Scale Problem



The Time Scale Problem

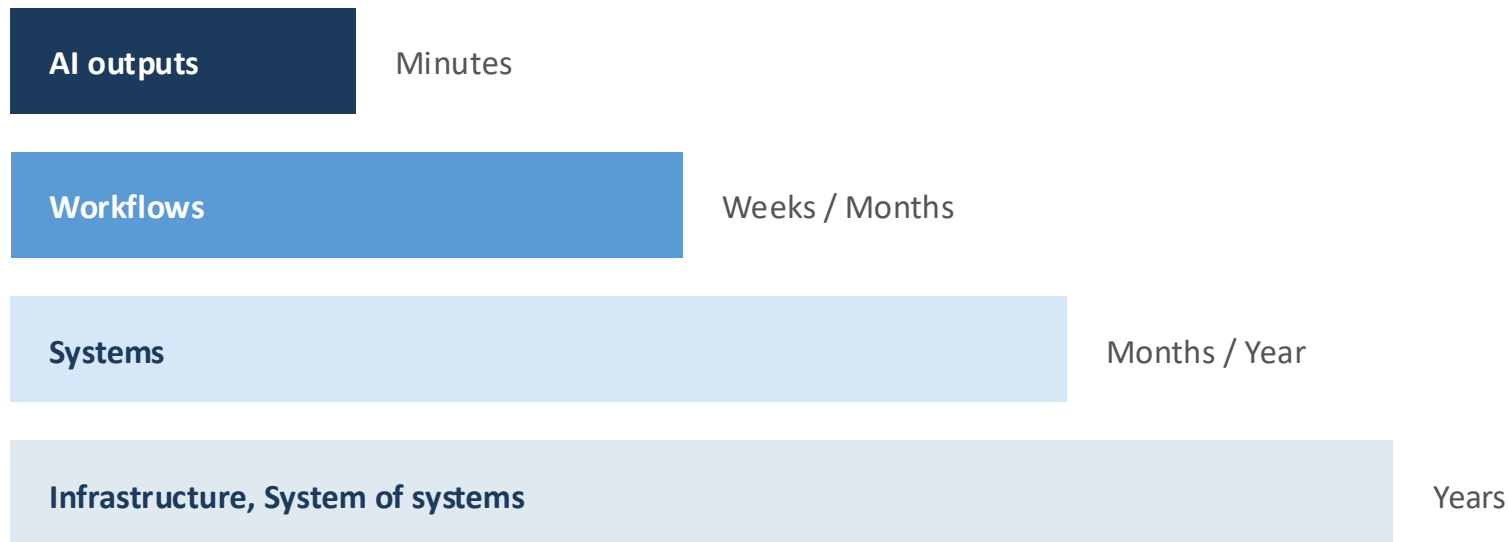
Different layers move at different speeds



Stewart Brand,
How Buildings Learn

The Time Scale Problem

Different layers move at different speeds



Most frustration = time-scale mismatch

Lessons from the field

01 Alignment is ongoing, not a step

02 Data access takes longer than expected

03 Every role is shifting with AI processes, not just developers

04 Success is harder to define than you think

Don't think of this as adopting tools.

Think of it as redesigning
how work happens.

What This Moment Asks of Us

- 01** Start with real work
- 02** Stay close to people
- 03** Build while things are still changing

*"Writing is like driving a car at night in the fog.
You can only see as far as your headlights, but
you can make the whole trip that way."*

— E. L. Doctorow

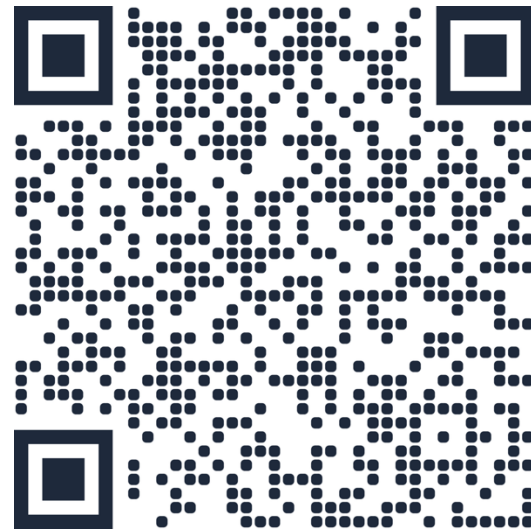


You don't need to see the whole road.

But you do need a way to move forward
while it's still being built.

Thanks!

Brian Moynihan



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