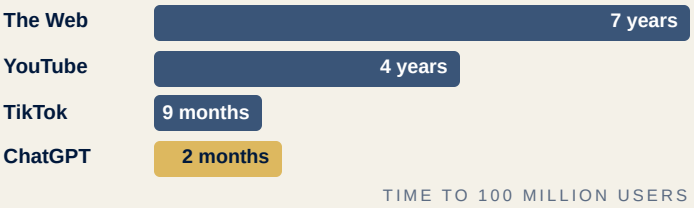
SOUND FINANCIAL FIELD NOTES · ONEACCORD AI WORKSHOP · DAY 2

AI is a *people* project.

Adopting AI is a **change-management problem,** not just a tech rollout. Sagecliffe, Columbia River Gorge · Nov 10, 2026

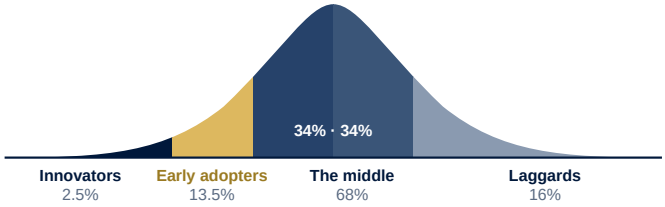
1 The race got shorter.



TIME TO 100 MILLION USERS

Your team didn't sign up for this race. **If you sprint ahead alone, you finish alone.**

2 Bring your early adopters.



Leaders are usually out front. **Link arms with a few early adopters first;** the middle moves when it sees peers moving.

3 Change is felt before it's understood.

ADKAR · WHAT PEOPLE NEED

- **A** **Awareness** of why
- **D** **Desire** to take part
- **K** **Knowledge** of how
- **A** **Ability** to actually do it
- **R** **Reinforcement** so it sticks

SCARF · WHAT'S AT RISK

- **S** **Status** · "Does my role shrink?"
- **C** **Certainty** · "What's next?"
- **A** **Autonomy** · "Do I still decide?"
- **R** **Relatedness** · "Am I still in?"
- **F** **Fairness** · "Is this fair?"

Training covers one letter. **Desire and safety cover the rest.**

4 Ground before you launch.

ENDING — Name what's changing

NEUTRAL ZONE — Old is gone, new isn't clear

NEW BEGINNING — Identity, purpose, first step

- **Name the ending** — What will stop or shift
- **Honor what mattered** — Credit the old way's wins
- **Clarify what remains** — Values, people, promises
- **Mark the transition** — A clear "from here on"

Silence in the messy middle gets filled with rumor.

5 Lead your agents like teammates, too.

RULE 1
Name the mode
Create: explore ideas. **Execute:** finish the task, no tangents.

RULE 2
One question at a time
With **3+ options** and the reasoning, so you never scroll back four pages.

RULE 3
Verify who's asking
Public or risky actions need the human's OK, not just another agent's request.

RULE 4
Protect the network
Accept only people you've met. Unknown? The agent asks, "How did we meet?"

Voice note → finished recap video: ~10 minutes, 2 rounds of edits Context first, then speed.

6 Seven moves, one system.

A	L	I	G	N	E	D
Assess	**Lead**	**Ignite**	**Ground**	**Navigate**	**Embed**	**Deliver**
Know the terrain	Leader goes first	Create movement	Endings first	Work the middle	Make it stick	Measure value

The ALIGNED change framework presented by Nick Anderson of OneAccord. Most leaders jump straight to **Ignite**.

✓ Try it this week

1. **Spend 30 minutes** planning the people side before you announce any AI change.
2. **Pick 2–3 early adopters** to go first with you.
3. **Say what's ending,** and what isn't.
4. **Give your agent two rules:** name the mode; one question at a time.

With gratitude to **Nick Anderson**, **J.R. Covey** *and the* **OneAccord** *team for two days of practical, generous teaching.*

"The tools are going to change every six months. Leading people through change won't."

— PAUL ADAMS, SOUND FINANCIAL GROUP

sfgway.com

Presented by Nick Anderson at OneAccord's Nov 10, 2026 AI workshop. Models: ADKAR (Prosci), SCARF (David Rock), Transitions (William Bridges), Diffusion of Innovations (Everett Rogers). Summarized by Paul Adams. Educational only.