

L5.AI



ACT®

Accelerated Customer Transformation

The L5 Methodology for AI Operated Enterprises

April 2026

I5.ai

AI. Operated.

SECTION 1

THE AI OWNERSHIP GAP

The AI Ownership Gap

Most organizations have made the investment. The platform is purchased. The executive signed off. AI is on.

The question nobody has a clean answer for: what is it producing?

AI ownership in most organizations follows a predictable arc. L5 tracks it across five levels.

"Are you piloting AI, have you implemented AI, or are you actually operating AI for outcomes?"

Most organizations cannot answer that question cleanly. That is the gap ACT is built to close.

	LEVEL 1 PILOT	LEVEL 2 USE	LEVEL 3 BUILD	LEVEL 4 GOVERN	LEVEL 5 AI OPERATED
WHAT THE ORGANIZATION HAS	Explore	Productive	Adopted	Tracked	Outcomes
THE EXECUTIVE QUESTION	Bought	Siloed	Sprawl	Drift	Proven

Every word from Level 1 through Level 4 is a question without a good answer in a board meeting. Proven at Level 5 is the only word in that row that is unambiguously good news.

LEVEL 1 — PILOT

Budget allocated, platform selected, proof of concept underway. Nothing running in production yet. The spend needs to justify itself.

LEVEL 2 — USE

Individuals are productive. The value is trapped inside individual workflows. The organization has productivity gains at the individual level. It does not have organizational outcomes. This is where most of the market is.

LEVEL 3 — BUILD

Agents are being built across workflows. No inventory. No governance. No visibility into what each agent is doing or whether it is doing it well. Sprawl has begun.

LEVEL 4 — GOVERN

The picture exists. Governance is in place. Measurement is happening. But without active operation, agents degrade. They drift from their original performance. Tracking is not operating.

LEVEL 5 — AI OPERATED

Every agent is accountable. Operations run every week. Outcomes compound. A production system with a proven track record.

Most organizations today are between Level 1 and Level 3. AI is on. The platforms are purchased. The outcomes are not showing up. ACT gives leaders a framework to name where they are, what each level costs to stay at, and what the next level produces. The conversation with leadership changes from defending spend to presenting a roadmap.

"Do you know every agent running in your organization right now, what each one is doing, and what outcome it is accountable for?"

Almost always, the answer is no.

SECTION 2

THE METHODOLOGY

ACT®: Built Around the Drive

ACT, Accelerated Customer Transformation, is L5's methodology for closing the gap between where an organization is on the maturity curve and Level 5. L5 has run over 600 engagements across industries, sizes, and platforms. ACT is what that experience produced, codified into a repeatable framework that gets sharper with every Drive.

An internal team sees one environment. L5 sees hundreds. The best practices from January are already being revised. An internal team cannot keep pace with a landscape that shifts this fast while also running their operations. L5's team does this every day as their only job.

Three motions. Each serves a different buyer state. Each has a defined output. Together they form a path from wherever an organization is today to Level 5.

ASSESS	ONBOARD	OPERATE
Tells you where you are	Gets you live	Keeps it running
One week. Fixed scope.	One use case per Drive.	Recurring subscription.
Business case + roadmap	Live in production	Outcomes compound weekly

The engine inside every motion is the Drive.

A drive in football moves the team down the field. It does not always score. A drive in golf starts the hole. It does not finish it. An L5 Drive is a unit of progress. Every Drive follows a structured framework and ends with something defined and real. Done is defined before the Drive begins. The scope varies. The discipline does not.

THE DRIVE FRAMEWORK

D DISCOVER	R REALIZE	I ITERATE	V VALIDATE	E ENABLE
Scope the work. Understand the current state. Identify what this Drive will move forward.	Build it. Configure it. Wire it. Get the output into the environment.	Test it. Collect feedback. Refine before it goes live.	Confirm the outcome in a live environment. Measure against the objective.	Hand off what was built. Confirm adoption. Set up the next Drive.

"Every week L5 runs a Drive. The customer sees the outcome."

SECTION 3

MOTION ONE

Assess

An organization between Level 1 and Level 3 faces a specific problem. Leadership is asking what AI is producing. There is no clean answer yet. The spend needs justification. The roadmap needs structure. The business case needs to exist before anyone commits further.

Assess is the entry point. One week. Fixed scope. Assess is available as a defined service package with fixed deliverables.

L5 scores the organization across people, process, and platform. Every dimension of how AI is enabled, deployed, and measured today. The output is not a deck. It is the business case the buyer needs to take to their leadership, and the roadmap that justifies what comes next.

A note on Assess: L5 is actively positioning the maturity assessment in sales conversations. The methodology is defined and the framework is built. The standalone Assess engagement is early in its formal delivery track record. This paper describes the methodology as designed, not a ten-year history of standalone assessments.

L5 scores the organization across people, process, and platform. The maturity scorecard shows exactly where you are, what it is costing you to stay there, and what to fix first.

YOU WALK AWAY WITH

- AI maturity scorecard
- Prioritized improvement roadmap
- Business case with estimated impact, built to take to leadership
- A scoped plan and an SOW for what comes next. Not a deck.

THE ONE-WEEK DRIVE

D DISCOVER	R REALIZE	I ITERATE	V VALIDATE	E ENABLE
Stakeholder interviews. Platform audit. Workflow and integration inventory.	Maturity scored across people, process, and platform. Gaps mapped. Opportunity sizing completed.	Roadmap sequenced. Priorities stress-tested. Business case drafted.	Findings reviewed with the organization's team. Roadmap confirmed.	Scorecard delivered. First Onboard Drive scoped. Team aligned on what comes next.

"You leave with a roadmap. Every Drive in your plan has a defined objective and a defined outcome."

The business case built during Assess does more than justify the next phase. It gives leaders the language to manage their stakeholders through the entire journey. Each level of the maturity model is framed with what that level produces and what risk the organization carries without progressing further. When a leader returns to their CFO or board after the first set of Drives, they are not defending an open-ended investment. They are reporting progress against a roadmap that was shared before work began, with the next level clearly defined and the cost of staying put clearly named.

The Assess Drive ends with a roadmap sized to reality and a first Onboard Drive ready to start. Some organizations move directly into Onboard the following week. Others complete onboarding across multiple Drives. Either way, the scope is known before committing.

SECTION 4

MOTION TWO

Onboard

An organization that knows what it needs but has not gotten a use case live in production sits between implemented and operating. The platform is purchased. It may be configured. But nothing is running with real users producing real outcomes.

Onboard gets the first use case live. Not a pilot. Not a sandbox. A Drive that ends with something the organization's team is running in production. Onboard is available as a defined service package with repeatable scope per use case.

Each use case is one Drive. Additional use cases follow the same pattern until the platform is fully operational.

ONBOARD BY THE NUMBERS

55 → 7

Days. Average ClickUp onboarding compressed in 2024 by applying Drive discipline.

YOU WALK AWAY WITH

- Live use case in production
- Configured workflows and routing
- Trained users and admins
- Validated integrations
- Next Drive backlog ready

EACH DRIVE

D	R	I	V	E
DISCOVER	REALIZE	ITERATE	VALIDATE	ENABLE
Discovery meetings to document current workflows and capture requirements.	Configure platform. Build workflows. Wire integrations. Embed knowledge.	Test in staging. Collect feedback. Refine before go-live.	Live testing with the organization's team. Fixes applied same day.	User training complete. Adoption confirmed. Next Drive backlog set.

"Not a pilot. Not a sandbox. A Drive that ends with something your team is running."

L5 has delivered hundreds of Onboard engagements across ClickUp, Zendesk, Outreach, and Workday. Without the Drive discipline, timelines naturally expand. Scope drifts. Onboarding that should take weeks stretches into months. The Drive framework exists because L5 learned what happens without it.

Real requirements surface after real use. Every Drive in production reveals new opportunity: higher deflection, faster resolution, an agent that drifted because no one was watching. Operate is how organizations capture everything production reveals.

SECTION 5

MOTION THREE

Operate

AI is live. But live and compounding are not the same thing. Most organizations that have implemented AI are not operating it. The platform is on. Outcomes are inconsistent. No committed partner is running the system toward a defined destination every week.

Operate is the recurring managed subscription. It is the destination for every engagement. Operate is available as a defined service package with structured weekly deliverables and quarterly re-assessment built in. L5 runs Drives on the organization's platform every week. Agent operations, knowledge management, integration maintenance, governance, outcome measurement.

Smart license bundle is part of Operate. When L5 holds the license relationship alongside Operate, one contract covers platform and operations together. No split accountability. The customer has one party responsible for whether the platform works and whether outcomes are being delivered. Two separate contracts mean two separate parties to blame when something goes wrong.

OPERATE AT SCALE

L5 currently operates over **100 recurring engagements on ClickUp alone**, managing platform operations, workflows, and outcomes on a weekly cadence. The model is proven at scale. L5 is expanding it to Zendesk, Workday, and Outreach as those practices mature.

Quarterly re-assessment gives leaders a stakeholder communication tool. Every quarter they can show leadership exactly where the organization sits on the maturity curve, what the last quarter's Drives produced, and what the next quarter targets.

EVERY DRIVE

D DISCOVER	R REALIZE	I ITERATE	V VALIDATE	E ENABLE
Backlog prioritized. This Drive scoped. Dependencies confirmed.	Drive output in production. A new agent, a workflow change, a content update, a gap closed.	Changes tested. Performance compared to baseline. Adjustments made.	Outcome verified in live environment. Metrics updated.	Change adopted. Next Drive backlog set. Scorecard updated.

"Every week L5 runs a Drive. We act before you ask."

TRANSPARENCY

L5 operates with full transparency on what each Drive delivers and what it does not.

Project sponsors and their leadership teams know before work begins what the outcome is, what the next Drive targets, and what is still being built. That clarity makes it easier for sponsors to report progress, set expectations with their CFO or board, and make the case for the next funding tranche.

A significant portion of every production AI system is the ongoing operational work that keeps it healthy: fixing automations that break, resolving permission drift, maintaining template integrity. This is not a limitation. It is what running a production system actually requires. Every Drive starts with done defined. No surprises. No scope ambiguity.

What AI Operated Is Not

L5 is not a managed service provider. Three structural differences.

- **Outcome commitment, not activity commitment.** L5 commits to outcomes in the SOW and measures against them after every Drive. An MSP bills for hours or tickets.
- **Proactive Drive cadence, not reactive support.** An MSP waits for a ticket. L5 already ran the Drive. Every week: backlog, delivery, measurement, next Drive scoped.
- **Quarterly maturity re-assessment.** Every quarter, L5 re-scores the organization against the original roadmap. The engagement has a destination, not just a duration. Every Drive closes the gap between where the organization is and Level 5.

"An MSP waits for your ticket. L5 already ran the Drive."

L5 is not a systems integrator. The implementation is the entry point. The ongoing operation is the product.

L5 is not a productivity tool layer. Horizontal AI tools make individuals faster. L5 makes business processes run on AI, accountable for outcomes, at the system level.

SECTION 6

THE OPERATING AGREEMENT

FAIR

L5's customers choose a company that most of their peers have not heard of. That is a bet. L5 built FAIR because that bet has to pay off structurally, not just on promises.

FAIR is not a values poster. It is the bilateral agreement L5 holds with every customer, partner, and team member. It is documented before work begins.

F

FLEXIBILITY

L5 adapts to how organizations operate. Constraints are real. The methodology adjusts without compromising outcomes. Three services, multiple entry points, scope that fits reality.

A

ACCOUNTABILITY

L5 owns its deliverables. The customer owns theirs. This is named in the SOW before work begins. Half of failed implementations fail because the customer side did not hold up their end. L5 names this upfront. It is also why L5 engagements succeed where others stall.

I

INTEGRITY

Proof over claims. Real timelines. Real numbers. L5 positions appropriately. This white paper does not claim a track record it does not have. Where ACT is proven through hundreds of engagements, L5 says so. Where it is still being refined, L5 says that too. AI is still young and evolving. Saying what is still forming is not a weakness. It is the only credible position in a market where everyone else is overpromising.

R

RESPECT

Non-negotiable in both directions. L5 has ended customer relationships over disrespect to its team. This signals how much L5 values its people. It tells prospective partners what kind of relationship this is. Premium partners set terms.

SECTION 7

IN PRACTICE

AI Operated in Practice

The methodology is only as credible as the operations behind it.

Why These Platforms

L5 operates on platforms chosen for a specific reason: each one is purpose-built for its domain and each one has strong native AI capabilities.

Zendesk is built for service delivery. IT support, HR requests, finance inquiries. These are repeatable, high-volume processes. Repeatable work is exactly where AI agents perform best. Automating ticket deflection, routing, knowledge surfacing, and resolution tracking produces measurable outcomes because the work is structured enough to measure.

Workday is the gold standard for system of record. HR and financial data require a highly trusted source. AI agents on Workday help ensure platform data stays reliable and complete. Workday has rolled out an AI interface that makes it significantly easier to interact with the platform, addressing years of underuse that came from ERP systems being too complex for most users to navigate.

ClickUp is where L5 operates internally and where over 600 customer engagements have run. Work management, delivery operations, professional services automation. L5's own operating discipline runs on ClickUp, which means the team knows the platform at a depth that only comes from using it every day while simultaneously operating it for hundreds of customers.

Outreach drives pipeline and sales engagement, bringing AI-operated sequencing to the revenue side of the organization.

Every platform L5 works with supports integrations across the stack. Each does what it does best and hands off to another platform better suited for the next job. The architecture is deliberate: no single platform tries to do everything.

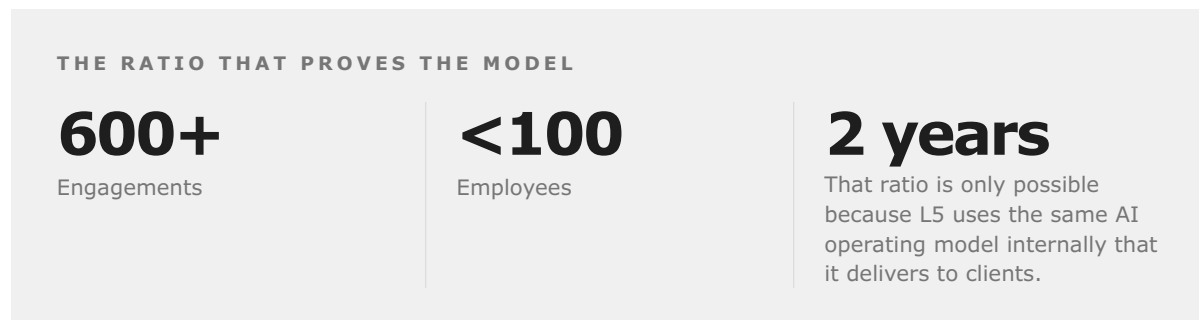
L5 is constantly evaluating new platforms as AI capabilities evolve. NinjaOne, which complements Zendesk for endpoint and IT operations management, is one L5 is actively considering as a next platform partnership.

How L5 Operates

Internally, every engagement is tracked in ClickUp. Every Drive has a backlog, a scope, and a measured outcome. The operating rhythm is not theoretical. It is the same system L5's team uses every day across every customer environment. L5 is building AI agents on its own

platforms, integrating systems for automated employee onboarding, and running Zendesk implementations that compete head-to-head against ServiceNow and win on speed, simplicity, and outcome commitment.

The AI agent engagements follow the ACT pattern naturally. Agent deployment is Onboard: a Drive that ends with an agent live in production. Agent advisory services are Operate: ongoing Drives that monitor, tune, and improve the agent over time. The methodology was not imposed on this work. It was extracted from it.



The model scales through capability, not headcount. That is also what customers need. They are not looking to add people. They are looking for a partner who already built the model that makes more people unnecessary.

Services and Accelerators

L5 is building services as product: repeatable, defined packages for Assess, Onboard, and Operate. Each package has fixed scope, fixed deliverables, and a clear definition of done. The packages capture what L5 has learned from hundreds of engagements and make it available as a starting point rather than a blank page.

L5 is also building accelerators: marketplace apps and frameworks that capture industry best practices and L5's thought leadership. Accelerators reduce time-to-value during Onboard by providing a configured foundation instead of building from scratch. During Operate, they become part of the operating baseline. Each accelerator is a piece of L5 IP that compounds across every customer who uses it.

AI is still young and evolving. No one has figured it all out yet. L5 is defining the future as it builds the present. The methodology is being forged in live engagements, not designed in isolation. That is the difference between an operator and a consultant. A consultant delivers a recommendation and leaves. An operator runs the system, learns from it, and makes it better every week.

SUMMARY

The Path to Level 5

The gap between where most organizations are and where AI can take them is not a technology gap. The platforms exist. The agents exist. The investment has been made.

The gap is operational. Who runs the AI after it is turned on. Who monitors the agents. Who tunes them when they drift. Who measures the outcomes. Who runs the next Drive.

ACT is L5's answer. A maturity model that names the problem directly. A framework built around the Drive as the unit of progress, with done defined before it begins. Three motions that structure the engagement from assessment through ongoing operation. An operating agreement that holds both sides accountable. A team that does this every day, across hundreds of environments, constantly building and rebuilding what works.

The maturity model does one more thing. It changes the internal conversation about AI investment. Instead of open-ended spend with no clear destination, each level represents a defined outcome with a defined cost of staying short. Leaders who use the ACT framework to communicate with their stakeholders do not get caught defending why they are not done. They present a roadmap where every level was defined before work began, every Drive produced a measurable result, and the next level is clearly scoped. That is how a bet on an emerging technology becomes the decision that defined how an organization runs AI.

The path from wherever an organization is today to Level 5 starts with one Drive.

READY TO FIND OUT WHERE YOU STAND?

Schedule your Assessment

[Book a Drive →](#)

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