FOR ANYONE JUST HANDED THE AI BRIEF

Five things to check before you *pitch* an AI idea

Being handed responsibility for AI adoption is a big, vague task with no obvious starting point. These five questions are a way to interrogate what's true in your organisation before you start the work of gathering and testing use cases.

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How does the work flow?

1

Start here. You can't redesign a workflow you do not fully understand.

Can the team say where their time goes??

If people can’t articulate this, there is no basis for identifying where AI could help.

Where do the files you use live?

AI cannot reach data scattered across shared drives, desktops and email.

Is there role consistency?

Two people doing the same job differently means a prompt that works for one will not work for the other.

Are outputs in readable formats?

Locked files and legacy templates can break use cases the moment someone tries them at their desk.

Does the workflow depend on any physical steps?

In-person handoffs and wet signatures can create structural points where AI just can't participate.

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i **Could a step be removed, rather than automated?**
Elimination comes before automation - making an unnecessary step faster with AI still leaves you with an unnecessary step.

Can AI reach what it needs?

2

Access to a tool is not the same as access to the data the tool needs to be useful.

Is core data in an accessible system?

A specialist platform with no integration means AI cannot reach working data without manual extraction.

Are there approved workarounds where needed?

If the primary system cannot connect, teams need a sanctioned alternative.

Has regulated data been reviewed?

HR, financial and clinical data may be technically reachable but legally off-limits in a prompt.

Is the data structured enough to use?

Scanned documents and inconsistent naming conventions can block AI even when access is available.

Are workarounds genuinely sustainable?

If it won't survive real workload, it won't survive rollout.

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If any of these feel outside your remit, flag them to IT before going further.

Does everyone know what they're allowed to do?

3

If you can't answer any of these yourself, that is not a failure - it is a gap to escalate.

Is there a clear list of approved tools?

Without a definitive list, employees default to doing nothing.

Do people know what data is off-limits?

Without guidance, people apply the most cautious interpretation - usually meaning not prompting at all.

Is there a clear answer if something goes wrong?

If nobody knows what happens when AI output is wrong, the implicit policy is to avoid AI where it matters.

Have managers been briefed separately?

A manager privately uncertain about AI communicates that without saying a word.

Are high-risk decisions explicitly excluded from AI judgement?

The safest rule for biased or high-stakes decisions is that AI never makes the call alone.

Is there anywhere to share what you learn?

4

As you explore AI, you will learn things that work well, and what to avoid.

Is there a shared space for what's working?

Without somewhere to post it, useful discoveries stay with the person who made them.

Have early adopters been given a role?

The person quietly using AI well is your best asset. Without a role, they stay isolated.

Is there a running prompt log?

A simple record of what's been tried stops teams repeating the same experiments months apart.

Are there regular short check-ins?

Not training sessions. Ten minutes in a team meeting to share one thing that worked.

Is learning building adaptability, not just AI skills?

AI tools change weekly. Adaptability is a distinct capability built through iteration and shared mistakes.

Do you know what success would look like?

5a

Agree with your stakeholders what a good outcome looks like before you go any further.

Can you describe what good looks like for this workflow?

The metric should reflect the outcome: faster approvals, fewer errors, shorter response times.

Have performance expectations been updated?

If the old ways are still what gets noticed, people will keep using them.

Has good AI-augmented work been defined?

If nobody has described what it looks like, there's nothing for a manager to recognise or reward.

Is behaviour change being tracked?

Completion data tells you someone sat through something - not whether anything changed on Monday.

Is the organisation prepared for a dip before the gain?

Early AI use often costs more time than it saves. A plan that doesn't expect this will read it as failure.

Do you know what success would look like?

5b

And two more things worth agreeing on before you start.

Is judgement being measured, not just output?

A clear accountability model (such as a RACI) keeps responsibility visible when AI supports a decision. Without it, judgement weakens while output appears unchanged.

Is the productivity gain being celebrated, not just measured?

Name what the saved time is for - sharper outcomes, strategic work, or more time spent with people, not screens.

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Five honest answers will tell you *more* than months of training.

If you found gaps as you went through this, that's the point.
Now you know exactly what to raise, and with whom.

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