

# The 8 Hour AI Playbook

Capture your progress and get everyone on the same page.

## ROLES

Champion

IT

Expert Staff

Prompt Engineer

Other

0h

### Identify

| Target Process                                                                              | Potential Impact                                                                                                                                         | Use Case Checklist                                                                                                                                              | Stakeholders                                                                                   |
|---------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Which processes are worth exploring? (e.g., heavy paperwork, variable work product quality) | Impact of.. <ul style="list-style-type: none"><li>Automating: Eliminating the repetitive/boring</li><li>Upgrading: Work outputs that are "wow"</li></ul> | <input type="checkbox"/> Routine?<br><input type="checkbox"/> Voluminous?<br><input type="checkbox"/> Data available?<br><input type="checkbox"/> Exciting ROI? | List key stakeholders who need to buy-in.<br><br>How can you address concerns they might have? |

2h

### Investigate

| Task Breakdown                              | What's Complex?                                                         | Solution Approach                                                                                                                        | Data Flow                                                                                          |
|---------------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| List out the steps involved in the process. | What is difficult?<br><br>Are any workarounds or frustrations involved? | <input type="checkbox"/> Are there off-the-shelf applications available?<br><input type="checkbox"/> Are APIs or integrations available? | Where does the data come from and where does it go?<br><br>What systems need to integrate with AI? |

4h

### Instruct AI

| Prompt Template                                                                                       | Examples                                                                                                | Checks                                                                                                                                                                      | Expected Output                                                                                 |
|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Write out the prompt(s), including variables for incoming data and <u>steps</u> the AI needs to take. | Provide examples of the types of inputs the AI will get, as well as outputs it would provide for those. | <input type="checkbox"/> Passes "New Colleague" Test?<br><input type="checkbox"/> Are there applicable roles<br><input type="checkbox"/> Guardrails for improving accuracy? | How should the output be structured so it can be used in the next step of the business process? |

6h

### Introduce

| Workflow Changes                        | Human Impact                                                                  | Monitoring                                                                                                                      | Success Metrics          |
|-----------------------------------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| How do workflows need to be redesigned? | How will roles be redefined?<br><br>What resistance to change might you face? | <input type="checkbox"/> Staff trained?<br><input type="checkbox"/> Staff supported?<br><input type="checkbox"/> Risks managed? | List key success metrics |

8h