

# Human-AI Workflow Blueprint

**Board reporting is a manual scramble every quarter**

## EXECUTIVE SUMMARY

*This report examines a critical organizational challenge: board reporting is a manual scramble every quarter.*

*Our analysis found that was built around a specific person's skills who left 3 years ago. Previous attempts to fix this addressed symptoms rather than root causes. We've designed a 3-part human-AI collaboration model to transform this workflow.*

### Key Findings

- *Universal consensus confirmed — this isn't one person's complaint, it's a shared organizational pain point.*
- *Root cause identified: was built around a specific person's skills who left 3 years ago.*
- *Multiple previous fix attempts addressed symptoms rather than the underlying structural issues.*
- *A 3-part human-AI collaboration model can transform this workflow using delegating, supervising, approving modes.*

### Recommended Approach

*We recommend a 3-part collaboration model focused on data gathering and initial analysis, communication and stakeholder updates, quality assurance and compliance. AI fully handles 1 outcome within defined guardrails. 1 outcome runs on AI with human oversight. Humans lead 1 outcome with AI assistance. Run a 30-day pilot with the morning shift.*

## THE PROBLEM

"Board reporting is a manual scramble every quarter"

### Why This Problem Matters

Universal agreement:

*This isn't one person's complaint — it's a shared organizational pain point that everyone recognizes.*

Strategic importance:

*This problem is important to the organization's core objectives and outcomes.*

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Measurable impact:

# WHY IT PERSISTS

*Was built around a specific person's skills who left 3 years ago. The nonprofit industry had different pressures then, and the process reflected that reality. There's an unquestioned assumption that quality requires manual review at every step. Meanwhile, people have built workarounds: scripts that automate parts nobody talks about. Several workarounds have created informal power structures people want to protect.*

## THE SOLUTION

### Target Outcomes

1. Data gathering and initial analysis
2. Communication and stakeholder updates
3. Quality assurance and compliance

### Human-AI Collaboration Model

#### 1. Data gathering and initial analysis Delegating Mode

##### AI handles:

*Collects data from multiple sources, runs initial analysis, flags anomalies*

##### Human handles:

*Validates findings, adds context AI can't access, makes final calls*

**Why: AI excels at this type of work. Patterns are clear and repeatable.**

#### 2. Communication and stakeholder updates Supervising Mode

##### AI handles:

*Drafts communications, maintains consistency, handles routine updates*

##### Human handles:

*Reviews for tone, handles sensitive messages, manages relationships*

**Why: Routine enough for AI with this type of work. Patterns are clear and repeatable.**

#### 3. Quality assurance and compliance Approving Mode

##### AI handles:

*Runs all standard checks, compares against requirements, documents findings*

##### Human handles:

*Reviews exceptions, makes judgment calls, signs off on final output*

**Why: Quality requires this type of work. Human relationships matter here.**

# MAKING IT HAPPEN

## Change Management

*Start with the team that feels the pain most. Get operations aligned before expanding.*

## Pilot Strategy

*Run a 30-day pilot with the morning shift. Measure before and after, then scale based on results.*

## Continuous Improvement

*Track error rates weekly. Feed human corrections back to improve AI recommendations. Review collaboration modes monthly and adjust based on what's working.*

## How You'll Know It's Working

- *You identified clear metrics during our conversation — track these weekly and compare against your baseline.*
- *For delegated tasks like "data gathering and initial analysis", measure volume handled and exceptions flagged.*
- *For approval workflows, track review time and approval rates.*

## NEXT STEPS

*You identified "board reporting is a manual scramble every quarter" as a critical organizational challenge.*

*We traced its origins and found it was designed for constraints that no longer apply.*

*The 3-part solution assigns 1 delegating, 1 supervising, 1 approving collaboration modes to match each outcome with the right human-AI balance.*

*Start with the pilot approach outlined above, then scale based on what you learn.*

Share this with your team

*This blueprint was designed for collective action. Share it with stakeholders who need to understand the problem and the path forward.*

Ready to implement?

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