

## EXECUTIVE SUMMARY

*This report examines a critical organizational challenge: inventory transfers between stores take 5 days of paperwork.*

*Our analysis found that emerged from a compliance requirement that has since been updated, but the process wasn't. Previous attempts to fix this addressed symptoms rather than root causes. We've designed a 5-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: emerged from a compliance requirement that has since been updated, but the process wasn't.*
- *Multiple previous fix attempts addressed symptoms rather than the underlying structural issues.*
- *The real goal is reduced risk, but the current process has become an end in itself.*
- *A 5-part human-AI collaboration model can transform this workflow using delegating, supervising, approving, consulting modes.*

### Recommended Approach

*We recommend a 5-part collaboration model focused on data gathering and initial analysis, communication and stakeholder updates, quality assurance and compliance. AI fully handles 2 outcomes within defined guardrails. 1 outcome run on AI with human oversight. Humans lead 2 outcomes with AI assistance. Run a one-month pilot with one use case.*

## THE PROBLEM

"Inventory transfers between stores take 5 days of paperwork"

## 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.*

Measurable impact:

*The dysfunction has clear indicators that will show when improvement occurs.*

Previous attempts:

*There have been multiple efforts to fix this before — suggesting the root cause hasn't been addressed.*

## WHY IT PERSISTS

*Emerged from a compliance requirement that has since been updated, but the process wasn't. The retail industry had different pressures then, and the process reflected that reality.*

*The belief that 'this is how it's always been done' has prevented anyone from questioning it. Meanwhile, people have built workarounds: scripts that automate parts nobody talks about.*

*The person who manages this process has built their role around its complexity. The real goal is reduced risk, but the current process has become an end in itself.*

## THE SOLUTION

### Target Outcomes

1. Data gathering and initial analysis
2. Communication and stakeholder updates
3. Quality assurance and compliance
4. Process coordination and scheduling
5. Documentation and knowledge capture

# 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. Consistency is the key value-add.**

## 4. Process coordination and scheduling

Delegating Mode

### AI handles:

*Manages calendars, resolves conflicts, sends reminders, tracks completion*

### Human handles:

*Handles escalations, makes priority decisions, manages exceptions*

**Why: AI excels at this type of work. Consistency is the key value-add.**

## 5. Documentation and knowledge capture

Consulting Mode

### AI handles:

*Suggests templates, organizes information, maintains consistency*

### Human handles:

*Provides expertise, validates accuracy, decides what matters*

**Why: Human judgment needed for this type of work. Human relationships matter here.**

## MAKING IT HAPPEN

### Change Management

*Start with the highest-volume use case. Get IT aligned before expanding.*

### Pilot Strategy

*Run a one-month pilot with one use case. Measure before and after, then scale based on results.*

### Continuous Improvement

*Track satisfaction scores 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 "inventory transfers between stores take 5 days of paperwork" as a critical organizational challenge.*

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

*The 5-part solution assigns 2 delegating, 1 supervising, 1 approving, 1 consulting 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.*

Ready to implement?

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