

# Human-AI Workflow Blueprint

**Feature requests from sales never make it to the roadmap**

## EXECUTIVE SUMMARY

*This report examines a critical organizational challenge: feature requests from sales never make it to the roadmap.*

*Our analysis found that this process was designed when regulatory requirements was a real limitation. Previous attempts to fix this addressed symptoms rather than root causes. We've designed a 4-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: this process was designed when regulatory requirements was a real limitation.*
- *Multiple previous fix attempts addressed symptoms rather than the underlying structural issues.*
- *The real goal is faster delivery, but the process has become the focus instead.*
- *A 4-part human-AI collaboration model can transform this workflow using delegating, supervising, approving modes.*

### Recommended Approach

*We recommend a 4-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 runs on AI with human oversight. Humans lead 1 outcome with AI assistance. Run a 2-week pilot with the morning shift.*

## THE PROBLEM

"Feature requests from sales never make it to the roadmap"

### Why This Problem Matters

Universal agreement:

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

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Strategic importance:

## WHY IT PERSISTS

*This process was designed when regulatory requirements was a real limitation. The original team built what made sense at the time. The tech startup 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: shadow spreadsheets that actually run the process. The real goal is faster delivery, but the process has become the focus instead. The real goal is faster delivery, 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

### 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. The volume makes automation essential.**

#### 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. Judgment calls are frequent.**

#### 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.**

### 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. Human relationships matter here.**

## MAKING IT HAPPEN

### Change Management

*Start with the lowest-risk application. Get the affected team aligned before expanding.*

### Pilot Strategy

*Run a 2-week pilot with the morning shift. Measure before and after, then scale based on results.*

### Continuous Improvement

*Track throughput 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 "feature requests from sales never make it to the roadmap" as a critical organizational challenge.*

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

*The 4-part solution assigns 2 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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