Human-AI Workflow Blueprint

Knowledge from past projects never makes it to new teams

EXECUTIVE SUMMARY

This report examines a critical organizational challenge: knowledge from past projects never makes it to new teams.

Our analysis found that started as a quick fix during a major incident and somehow became permanent policy. 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: started as a quick fix during a major incident and somehow became permanent policy.*

- *A prior attempt to fix this didn't succeed — likely because root causes weren't addressed.*

- *The real goal is happier customers, 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 one-month pilot with a single team.

THE PROBLEM

> "Knowledge from past projects never makes it to new teams"

Why This Problem Matters

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

WHY IT PERSISTS

Started as a quick fix during a major incident and somehow became permanent policy. The consulting industry had different pressures then, and the process reflected that reality. The team believes leadership wants it this way, but leadership thinks the team prefers it. Meanwhile, people have built workarounds: shadow spreadsheets that actually run the process. The real goal is happier customers, but the process has become the focus instead.

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. Human relationships matter here.

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. The volume makes automation essential.

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. Patterns are clear and repeatable.

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.

MAKING IT HAPPEN

Change Management

Start with the lowest-risk application. Get leadership aligned before expanding.

Pilot Strategy

Run a one-month pilot with a single team. 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 "knowledge from past projects never makes it to new teams" 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?

Book a 30-minute call | Email us