

Human-AI Workflow Blueprint

Documentation is scattered across 6 different tools

EXECUTIVE SUMMARY

This report examines a critical organizational challenge: documentation is scattered across 6 different tools.

Our analysis found that this process was designed when budget pressure was a real limitation. 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: this process was designed when budget pressure was a real limitation.*
- *A prior attempt to fix this didn't succeed — likely because root causes weren't addressed.*
- *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 2-week pilot with a single team.

THE PROBLEM

"Documentation is scattered across 6 different tools"

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

This process was designed when budget pressure 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. There's an unquestioned assumption that quality requires manual review at every step. Meanwhile, people have built workarounds: a 'special request' process that most work goes through. 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. 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. Consistency is the key value-add.

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. Judgment calls are frequent.

MAKING IT HAPPEN

Change Management

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

Pilot Strategy

Run a 2-week pilot with a single team. 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

- *While metrics aren't perfectly defined, you'll notice improvements in speed, quality, and team satisfaction.*
- *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 "documentation is scattered across 6 different tools" 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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