L02 AI Delegation Decision Matrix Practice

Student Name: Jeran Kilpack
Course: ITAI 4373
Date of Submission: 9/6/2025
Scenarios Analyzed: A (Client Proposal Writing), B (Code Review Process), D (Customer Support Tickets)

Scenario A: Client Proposal Writing

1. Decision Matrix Analysis

Criteria	Score (1-5)	Justification
Risk Level (Financial)	5	Each proposal represents $50K–$500K, directly tied to company revenue.
Risk Level (Operational)	4	Proposal success directly impacts project pipeline and workload distribution.
Risk Level (Reputational)	4	Poor proposals can lose clients and damage credibility.
Task Complexity	5	Requires customization, pricing, technical details, and persuasive framing.
Human Expertise Required	5	Senior consultants must apply judgment, negotiation strategy, and client understanding.
Total Score	**23**	**Recommended Tier: 1**

2. Delegation Strategy

- **Recommended Tier:** Tier 1 – Human Decides, AI Informs (Slide 5)
- **AI Role:** Generate first-draft proposal sections, summarize client requirements, suggest pricing models, and provide competitive comparisons.
- **Human Role:** Finalize narrative, apply strategic positioning, ensure compliance with client expectations, and make judgment calls.
- **Implementation Approach:** Use AI to prepare structured drafts and background research. Consultants then review and refine to align with client relationships and strategy.

Scenario B: Code Review Process

1. Decision Matrix Analysis

Criteria	Score (1-5)	Justification
Risk Level (Financial)	3	Bugs can increase costs, but manageable with testing layers.
Risk Level (Operational)	4	Production issues can delay projects and disrupt workflows.
Risk Level (Reputational)	4	Defective code damages client trust.
Task Complexity	3	Review involves patterns, standards, and best practices — moderately complex.
Human Expertise Required	3	Professional experience improves judgment, but much can be automated.
Total Score	**17**	**Recommended Tier: 2**

2. Delegation Strategy

- **Recommended Tier:** Tier 2 – AI Recommends, Human Selects (Slide 6)
- **AI Role:** Flag potential issues (security vulnerabilities, style violations, performance bottlenecks) and rank severity.
- **Human Role:** Confirm issues, decide fixes, and approve final merge.
- **Implementation Approach:** Integrate AI-driven static code analyzers and recommendation tools into GitHub workflows, allowing humans to override or accept recommendations.

3. Sample Prompts

- **Basic Prompt:** "Review this Python code for performance issues and security vulnerabilities."
- **Advanced Prompt:** "You are a senior software engineer. Analyze the following code for:
    1. Security risks (SQL injection, XSS, authentication flaws)
    2. Performance inefficiencies
    3. Compliance with PEP8 standards Provide a severity-ranked list with recommended fixes. Format output as a markdown table with columns: Issue | Severity | Recommendation."
- **Prompt Analysis:** The advanced prompt applies *role-based prompting* (senior engineer), *constraints* (specific issues to analyze), and *format validation* (markdown

table). This ensures outputs are structured, actionable, and easy for human reviewers to evaluate quickly.

Scenario D: Customer Support Tickets

1. Decision Matrix Analysis

Criteria	Score (1-5)	Justification
Risk Level (Financial)	3	Retention affected by poor support, but impact per ticket is moderate.
Risk Level (Operational)	4	Delayed responses overwhelm teams and create bottlenecks.
Risk Level (Reputational)	4	Negative support experiences reduce client satisfaction.
Task Complexity	2	Many tickets are simple (password resets), though some require expertise.
Human Expertise Required	2	Basic training sufficient for most tickets; escalation for complex cases.
Total Score	**15**	**Recommended Tier: 2–3 hybrid**

2. Delegation Strategy

- **Recommended Tier:** Primarily Tier 3 – AI Acts with Guardrails, with selective Tier 4 for very low-risk issues (Slide 7–8).
- **AI Role:** Handle routine inquiries (resets, FAQs, ticket routing), provide suggested answers for mid-level issues.
- **Human Role:** Escalate and resolve high-complexity cases, oversee AI decisions, ensure client satisfaction.
- **Implementation Approach:** Deploy an AI chatbot integrated into the ticketing system with escalation protocols. Monitor AI responses in real time to ensure accuracy and compliance.

3. Sample Prompts

- **Basic Prompt:** “Respond to this customer ticket about a password reset.”
- **Advanced Prompt:** “You are a Tier 1 IT support agent. For the following support ticket, generate a professional, empathetic response. If the request matches a known FAQ (see context), provide the solution directly. If it indicates a complex

technical issue, flag it for human escalation. Format the output with: Suggested Reply | Escalation Required (Yes/No).”

- **Prompt Analysis:** This advanced prompt applies *constraints* (FAQ vs. escalation decision), *context integration* (reference to known FAQs), and *format validation* (structured reply). It ensures AI handles simple tasks while preserving a safety net for human oversight.

Reflection and Summary

Key Insights

Through this exercise, I learned that AI delegation is not about replacing humans but about aligning the right **tier of delegation** with business risk, complexity, and expertise requirements. Scenario A highlighted that high-stakes revenue activities must remain human-led, while Scenarios B and D showed that operational efficiency gains come from AI assistance and bounded autonomy. The most challenging categorization was Scenario D, since customer tickets vary widely in complexity and required a hybrid tier approach.

Implementation Challenges

TechFlow Solutions may face resistance from employees who fear job replacement, as well as challenges in maintaining quality and compliance. Change management (Slide 13) will be essential — transparent communication, skill development, and cultural transformation will build trust in AI tools. Ongoing monitoring and guardrails will reduce risks.

Personal Learning

This exercise deepened my understanding of how leaders must transition from **technical focus to strategic application** (Slide 3). Delegation decisions are as much about people and processes as they are about technology. I now see AI not just as a productivity tool, but as a driver of organizational transformation that requires human leadership to succeed. My remaining questions include: How can mid-sized firms balance cost with effective AI oversight, and what governance models best support hybrid tiers?
