



The AI Litmus Test: When to Ship, When to Skip

A Practical Framework for Deciding Where AI Belongs

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Build Together. Lead Together.

Leaders are under pressure to “do AI”

Teams are already experimenting

The risk is moving faster than the process



WHY THIS MATTERS

AI Is Moving Faster Than Most Organizations Can Govern

AI is not just a technology decision.
It is a leadership, process, people, and risk decision.

The question is not “Can we use AI?”
The better question is: “Should we use AI here?”

Today, we’ll build a practical way to answer that.

Small businesses are adopting AI quickly
Productivity gains are showing up now
Speed can become a competitive advantage

THE OPPORTUNITY

AI Gives Smaller Teams Big- Company Leverage

AI is no longer just a Fortune 500 advantage.

Smaller teams can now automate follow-up, customer response, scheduling, training, reporting, and administrative work that once required larger staffs.

The leadership challenge is deciding where AI creates leverage — and where it creates risk.

Small Business

Smarter tools. Bigger impact.
Real leverage.



Small Team. Big Ambitions.



Customer Response
Faster response
happier customers



Marketing
Reach more people
grow your brand



Bookkeeping
Accurate books
less stress



Scheduling
Stay organized
save time



Analytics
Better insights
smarter decisions



Workflow Automation
Smarter workflows
more done



EQUAL LEVERAGE.
LIMITLESS POTENTIAL.

Big Business

More resources. More people.
Same need for efficiency.



Large Team. Global Reach.

AI Levels the Playing Field



Faster Response
Serve customers instantly
and consistently.



Smarter Workflows
Automate the busywork.
Focus on what matters.






More Leverage
Do more with less.
Compete and win.

THE CATCH

AI Does Not Fix Broken Workflows



-  AI amplifies what already exists
-  Strong process = faster improvement
-  Weak process = faster failure



AI can create leverage—
but only when the foundation is strong.

If your workflow is unclear, inconsistent, or owned by nobody, AI will expose that weakness—faster.

- AI follows the process you give it.
- If the process changes every time, so will the output.
- If the data is messy, the decisions will be messy.
- If ownership is unclear, accountability disappears.

Before you bring in AI, fix the workflow.
Stable process beats clever technology.



Build Together. Lead Together.

AI IS A CAPABILITY Not a Strategy



AI does not tell you what to build. Leaders do.



Strategy comes from leaders



Priorities come from the business



Process determines whether AI works



People define what 'good' looks like

AI can help organizations move faster, respond faster, and reduce repetitive work — but it is not the plan.

The real leadership question is not, 'How do we use more AI?'

It is, 'Where does AI support the work we are already trying to improve?'

GOOD FIT vs. BAD FIT

AI Works Best in the Right Places—and Fails in the Wrong Ones

GOOD FIT

Repeatable, Measurable, Reviewable Work


- REPEATABLE** Work happens often and follows a consistent pattern.
- MEASURABLE** Clear inputs, outputs, and success metrics exist.
- REVIEWABLE** A human can check, edit, and approve the output.
- LOW TO MODERATE RISK** Mistakes are manageable and reversible.
- CLEAR OWNERSHIP** Someone owns the process end to end.
- PRACTICAL VALUE** AI saves time, reduces rework, or improves quality.

VS.

BAD FIT

Vague, Risky, Unstable, or Unowned Work

- VAGUE OR UNCLEAR** The work is fuzzy, inconsistent, or frequently changes.
- HIGH RISK** Mistakes can harm people, violate policy, or create legal exposure.
- SENSITIVE DECISIONS** Impacts on hiring, performance, pay, discipline, or promotions.
- POOR DATA QUALITY** Data is incomplete, outdated, biased, or untrusted.
- NO CLEAR OWNER** Nobody owns the process or the outcome.
- NO WAY TO MEASURE** No baseline, no metrics, no way to know if it works.

 **AI amplifies what you give it.** Use it where the work is clear—and pause where it is not.

THE LEADERSHIP QUESTION

Is the Work Ready for AI?

Before you automate, ask five simple questions.

If you cannot answer “yes” with confidence, fix the work first.

Is this work ready for AI?

1 

Is the work repeatable?

- Happens often
- Follows a consistent pattern
- Not one-off or highly variable

2 

Are the rules clear?

- Steps, decisions, and exceptions are defined
- Rules are documented and understood
- People agree on how the work is done

3 


Can we measure success?

- Clear metrics exist
- Quality and outcomes can be measured
- We know what “good” looks like

4 


Is the data safe and usable?


- Data is accurate and complete
- We have the right to use it
- Low privacy, security, and compliance risk

5 


Is a human reviewer in the loop?

- A person can review and approve the output
- Accountability is clear
- There is a plan if AI gets it wrong

 **AI is a force multiplier** when the work is clear. Use this test **before you ship a pilot.**

 **4–5 Yes**
SHIP a pilot

 **2–3 Yes**
FIX first

 **0–1 Yes**
SKIP for now

YOUR THREE LEADERSHIP CHOICES

Ship, Skip, or Fix First

Use the Litmus Test (Slide 8) to decide where to take action.



SHIP: RUN A PILOT

The work is ready for a small, low-risk pilot.

- ✓ 4–5 “Yes” answers on the Litmus Test
- ✓ Clear process, good data, and human review
- ✓ Low to moderate risk with recoverable impact
- ✓ Defined success metric and timeline



EXAMPLES

Interview scheduling assistant, policy Q&A bot, meeting summaries, ticket routing, content drafts



FIX FIRST: IMPROVE THE WORK

The opportunity exists, but the foundation needs work.

- ! 2–3 “Yes” answers on the Litmus Test
- ! Unclear rules, messy data, or no owner
- ! Process inconsistency or exceptions unknown
- ! Stabilize the work, then reassess



FOCUS AREAS

Document the process, clarify rules, clean up data, assign ownership, define metrics



SKIP: NOT READY (YET)

The risk is too high or the work is not ready for AI.

- ✗ 0–1 “Yes” answers on the Litmus Test
- ✗ High risk, sensitive, or regulated decisions
- ✗ No reliable data or no human oversight
- ✗ Unclear value or no way to measure



EXAMPLES

Performance ratings, promotions, discipline decisions, legal advice, pay decisions, sensitive cases

★ Good leaders don't automate broken work. They build the right foundation first—then scale what works.

TWO SAFE PLACES TO START

Low-Risk Pilots That Deliver Quick Wins

Start small. Prove value. Build confidence. Scale what works.



1. INTERVIEW SCHEDULING ASSISTANT

Save time. Improve candidate experience.



WHAT IT DOES

AI drafts candidate emails, proposes interview times, and handles follow-ups.



HUMAN ROLE

Recruiter reviews, approves, and sends the message.



WHY IT'S SAFE

Low risk, repeatable, clear rules, and easy to measure.



SUCCESS METRIC

Time to first interview, response time, candidate satisfaction.



Why it works: High volume, low risk, clear outcome. Leverages AI for speed—keeps humans in control.



2. HR POLICY Q&A BOT

Answer common questions. Free up HR time.



WHAT IT DOES

AI answers employee questions using approved HR policies and handbook.



HUMAN ROLE

HR reviews early answers and oversees the source content.



WHY IT'S SAFE

Uses approved content only, cites the policy source, human oversight.



SUCCESS METRIC

HR email volume reduced, answer accuracy, resolution time.



Why it works: High volume, structured answers, clear guardrails, measurable impact.



Start with one. Learn fast. Keep the human in the loop. Let results guide your next step.

GOVERNANCE WITHOUT THE BINDER

Simple Guardrails. Clear Ownership. Real Accountability.

You don't need a 100-page policy to use AI responsibly—just the right guardrails.

6 ESSENTIAL GUARDRAILS FOR EVERY AI PILOT

<p>1</p>  <p>BUSINESS OWNER</p> <p>Name one owner who is accountable for the pilot's goals, outcomes, and decisions.</p>	<p>2</p>  <p>APPROVED DATA SOURCE</p> <p>Use only data we have the right to use, from trusted and approved sources.</p>	<p>3</p>  <p>HUMAN REVIEW</p> <p>A qualified person reviews and approves outputs before they are used or shared.</p>
<p>4</p>  <p>AUDIT TRAIL</p> <p>Log prompts, sources, responses, and decisions for transparency and traceability.</p>	<p>5</p>  <p>QUALITY & BIAS SPOT-CHECKS</p> <p>Test for accuracy, completeness, fairness, and bias on an ongoing basis.</p>	<p>6</p>  <p>KILL SWITCH</p> <p>The ability to pause or stop the pilot immediately if something isn't working as expected.</p>

★ Start simple. Document the basics. Improve as you learn. Govern for value—not for paperwork.

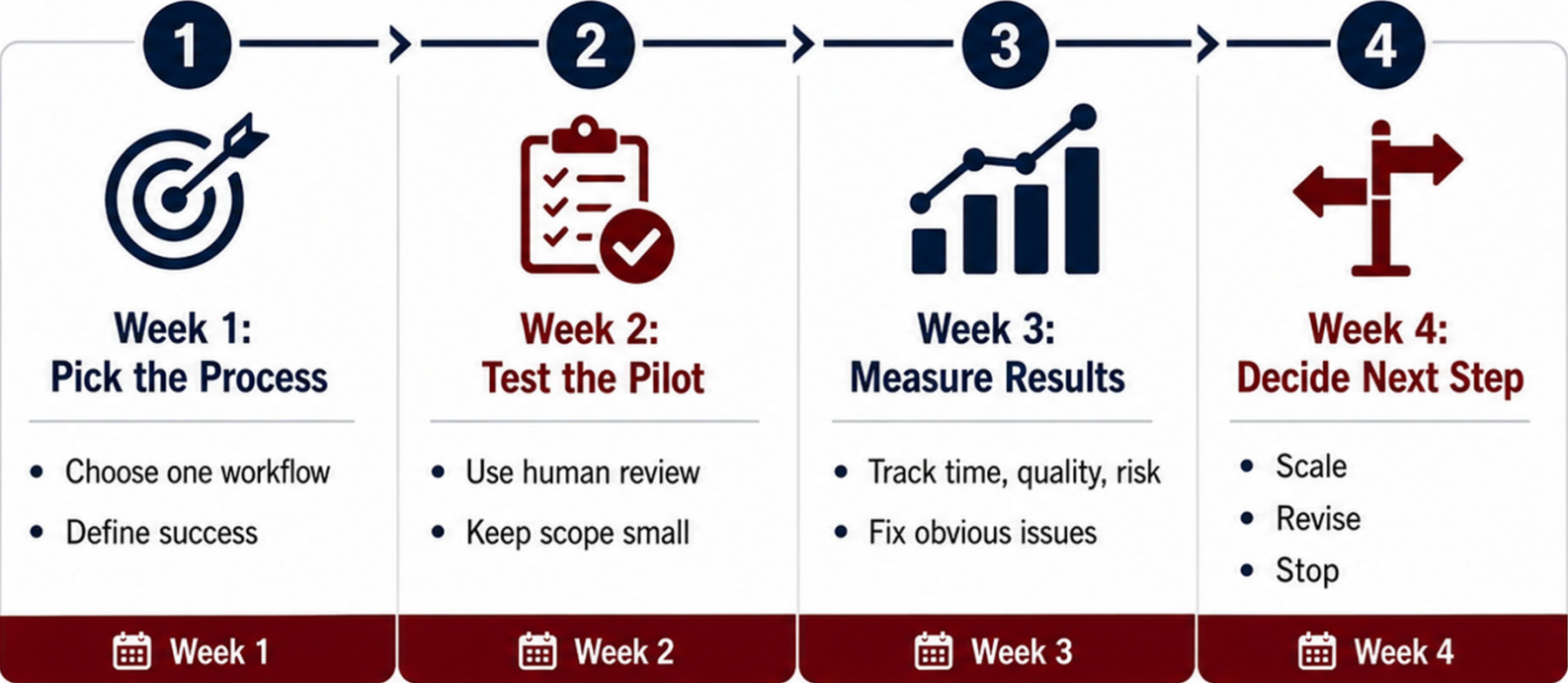
LIGHTWEIGHT GOVERNANCE, STRONG PROTECTION

- ✓ Protects people, data, and the business
- ✓ Builds trust with employees and customers
- ✓ Improves quality and reduces risk
- ✓ Supports compliance and legal defensibility
- ✓ Creates a repeatable model for future scale
- ✓ Keeps humans in control of important decisions

 Good governance doesn't slow you down. It helps you move forward with confidence.


WHAT TO DO IN THE FIRST 30 DAYS

A Simple Pilot Blueprint Leaders Can Use Right Away



 **Start small. Learn fast.**

Do not begin with enterprise-wide transformation. Start with one safe, measurable pilot. Let the results guide the next move.

 The goal isn't perfection. The goal is progress. **One smart step today creates momentum for tomorrow.**

THANK YOU

Let's build practical AI decisions together.

Questions, ideas, or follow-up conversations are always welcome.



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Build the process. Build the guardrails. Then build the AI.

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