

AI STRATEGY · PLAYBOOK

Operational AI Playbook Template

For operations and functional leaders who need to embed AI into real workflows with clear ownership and quality control.

How to use this: Document each AI-assisted workflow that's become load-bearing to the business, then define ownership, quality standards, and review steps for each.

Workflow Inventory

List every AI-assisted workflow currently in regular use across the business, not just ideas.

Workflow	Function / Team	How AI is used in it	Currently owned by anyone?

Ownership and Quality Standard

For each workflow above, define who owns it and what 'good output' actually means.

Workflow owner (a named person, not a team):

What does an acceptable AI output look like for this workflow, specifically?

What would an unacceptable output look like, and how would we notice it?

Review Step Design

Calibrate the review step to the risk level of the workflow, not a blanket standard.

- ☐ Low-risk workflows: periodic spot-check of a sample of outputs
- ☐ Medium-risk workflows: review of outputs before external use, on a defined schedule

- ☐ High-risk workflows (customer-facing, financial, code to production): mandatory human review before every use
- ☐ Every workflow has a named person responsible for the review step, not 'whoever is free'

Failure Response Plan

What is the process when an AI-assisted output is found to be wrong after the fact?

Who needs to be notified, and within what timeframe?

How do we decide whether the workflow needs a tighter review step going forward?

Maintenance Rhythm

- ☐ Revisit the workflow inventory quarterly to add newly load-bearing use cases
- ☐ Retire or loosen review steps that have proven unnecessary based on evidence
- ☐ Confirm every workflow still has an active, named owner at each review