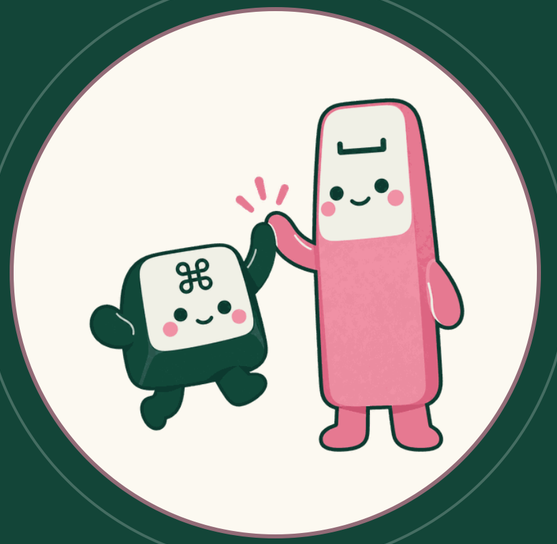
The Executive Language That Makes AI Work

In four hours you leave with three things: questions that test evidence, knowledge as an asset, and briefs for small tests.



01

Questions

how to find the evidence
and the gaps in a report

02

Knowledge

the structure and permissions
that preserve expert judgment

03

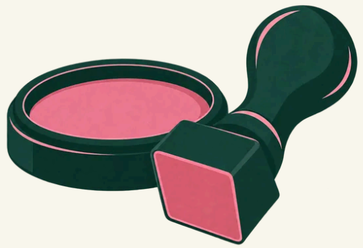
Execution

criteria for small tests
and scale-up decisions

The author's framework and application questions. Verify products and policies separately.

A well-written AI answer is not an answer I can approve

Fluent text can still lack evidence, an effective date, or an owner. Ask three questions before you approve.



01 **Evidence** is there a source that supports this claim?

02 **Timing** is it based on the approved version in force now?

03 **Accountability** who verifies it, and who acts on it?

EXECUTIVE TAKEAWAY

Before you approve, confirm the evidence, the timing, and the owner, one line each.

Separate three kinds of use

A working demo does not authorize internal use or execution. Separating the stages shows where to start.

01

Technical example

learn the structure with public and synthetic data

02

Internal use

verify accounts, features, and data permissions

03

Separate review

external processing, system writes, final decisions

EXECUTIVE TAKEAWAY

First ask which of the three stages a case belongs to.

Leave with three decision tools

A personal review memo, a knowledge card for the organization, and a departmental brief: three pages you can use tomorrow.

01

Personal

a review memo that separates conclusion, evidence, unknowns, and questions

02

Organization

a kickoff card naming the knowledge owner and review time

03

Execution

a 3-line departmental brief naming the task, the owner, and the review date

EXECUTIVE TAKEAWAY

Turn today's learning into one question for your department tomorrow.

Copilot is a work environment, not a model name

The same Copilot reads different data and uses different tools depending on the app, license, and admin settings.

01	**Model**	the same model family can differ by app, mode, and tool
02	**Connection**	document access depends on licensing and configuration
03	**KB screens**	actual account features have not yet been verified

EXECUTIVE TAKEAWAY

If a feature is missing, have the account, app, and settings checked first.

First demo: locate evidence before reading the summary

From today's real research report (public sources, Oct 7, 2026), we pull the decision and three claims with source sections.

01	**Summary**	a 3,842-character answer with zero source-section tags
02	**Decision**	pick the first task and owners, scale on evidence (§1, §8)
03	**Claims**	all three tagged with sections (§1, §2, §5, §6.1, §8)
04	**Unknowns**	first task, owners, test results, ROI (§8, §9)

EXECUTIVE TAKEAWAY

Before asking for a summary, decide which evidence would change your decision.

Ask what could change the conclusion

From the same real report: confirm, counter and execution questions that could shake its conclusions, each tied to a section.

01	**Confirm**	are the three candidate tasks really easier to verify? (§1, §8)
02	**Counter**	could the gain come from cleaning up knowledge and access, not AI? (§2, §3.3)
03	**Execute**	if business and security disagree, who decides? (§1, §8)
04	**Verdict**	AI marked all six unanswered; §5 and §9 partly answer one

EXECUTIVE TAKEAWAY

Require every report to state, in one line, what evidence would change its conclusion.

ROLE BOUNDARY

People: decisions and source checks / **AI**: claim extraction and draft questions

Keep conclusions, evidence, and unknowns separate

A memo from the same real report shows the layers of a decision once split into conclusion, evidence, unknowns and questions.

01
Conclusion
start with one support task, scale on verified results

02
Evidence
all five lines tagged (§3.1, §4.1, §4.4, §5, §8)

03
Unknowns
our accounts and data flows, baseline, ROI

04
Question
what evidence decides in 30 days? (§8)

EXECUTIVE TAKEAWAY

Record conclusions, evidence, unknowns, and questions in every review memo.

ROLE BOUNDARY

People: source checks, edits, and approval / **AI**: evidence-linked draft proposals

Real research report (public sources, Oct 7) / AI output pre-run on Oct 7, 10:48 KST (dry run, gpt-6.1-sol via API), no live call

From prompts to work environments v1 → v2 → v3 → v4

Do not stop at polishing one prompt. Add material, a work environment, and verification with updates, layer by layer.

STEP 01

v1 Prompt

state clearly what you are asking for

STEP 02

v2 Context

provide the material and audience the judgment needs

STEP 03

v3 Harness

define what AI may read, may write, and must not do

STEP 04

v4 Loop

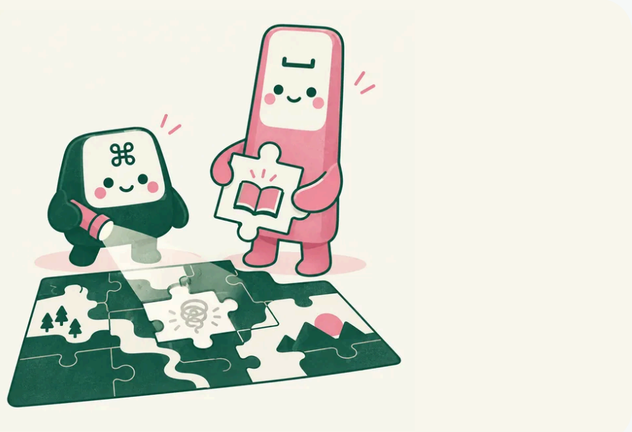
turn reviewed errors into updated rules and tests

EXECUTIVE TAKEAWAY

First ask which layer is missing in our own work.

v1: a request alone leaves gaps in the task

"Write a review memo and meeting questions for this issue." AI will produce text, but the task still has gaps.



01 **Issue** which report, and which part of it, is never stated

02 **Audience and purpose** who reads it and what they decide is missing

03 **Exclusions** nothing says what must not be answered

EXECUTIVE TAKEAWAY

Start by filling in the missing decision purpose in one request your team repeats.

v2: provide the material and the purpose together

Add material, audience, and output format to the same request. The background a decision needs matters more than volume.



01 **Material** one synthetic management review report

02 **Audience** executives who will ask verification questions in the meeting

03 **Format** four boxes for conclusion, evidence, unknowns, questions

EXECUTIVE TAKEAWAY

Before adding more material, decide which sources count as evidence.

v3: a harness defines the conditions for work

People set the working conditions; code and permission settings actually enforce the boundaries.

STEP 01

Read

designated synthetic files only

STEP 02

Assess

check approval, effective status, and scope first

STEP 03

Write

present a draft, then a person approves it

STEP 04

Prohibited

web browsing, sending email, executing tasks

EXECUTIVE TAKEAWAY

Invest in the work environment, not only in better prompts.

ROLE BOUNDARY

People: goals and criteria / **AI**: bounded drafts / **Code**: access and execution controls

v4: reviewed errors shape the next task's rules

Do not stop at fixing the answer. Update the criteria and test cases with each error found, so knowledge accumulates.



01	**Check evidence**	flag gaps and conflicts
02	**Human approval**	save only approved changes
03	**Failure log**	review the knowledge and rules again
04	**Retest**	after a change, recheck earlier test cases

EXECUTIVE TAKEAWAY

Assign rule updates and retesting, not just error correction.

ROLE BOUNDARY

AI: flag errors and propose fixes / **People**: approve changes / **Code**: test and log

Q1: why does our screen differ from an external demo?

The same service can look different by feature, account, data, and admin policy. Ask which difference it is.

01	**Features or permissions**	is the gap in what it can do, or what we may do?
02	**Accounts and data**	which account read which material?
03	**Follow-up owner**	if unresolved today, name who will confirm it

EXECUTIVE TAKEAWAY

Leave every open question with an owner who will confirm it.

The Executive Language That Makes AI Work

A 10-minute break, then back to your own work

> In 10 minutes: reading reports and asking better questions in meetings.



Define the purpose of your review in one sentence

Before handing a report to AI, write down today's decision in one sentence. The goal defines the evidence and the review criteria.

01	**Today's decision**	what must we settle on this issue today?
02	**Deferred**	what can wait until later?
03	**Evidence needed**	what must we confirm before deciding?

EXECUTIVE TAKEAWAY

Before asking for a summary, state today's decision in one sentence.

The newest version is not always authoritative

Two versions of a synthetic policy. A newer draft does not replace an approved version that is still in force.



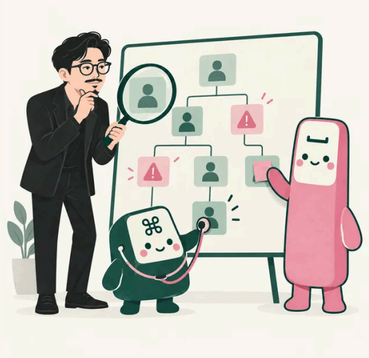
01	**A, approved**	approved and in force on the reference date
02	**B, revised draft**	newer, awaiting approval, not in force
03	**Check order**	approval, effective date, and owner before creation date
04	**If they conflict**	apply A; keep B as review material

EXECUTIVE TAKEAWAY

Ask that every search result show its approval status and effective date.

Do not smooth over conflicting evidence

Blending a conflict into one fluent sentence erases accountability. Show the difference and hand it to the owner.



01 **Conflict** the final reviewer differs, operations head vs. team lead

02 **Avoid** a blended answer such as "team lead or operations head"

03 **Assess** check approval status and effective conditions first

04 **Act** if still unclear, ask the owner to put it on hold

EXECUTIVE TAKEAWAY

Assign each policy an owner, approval and effective dates, and a link to its prior version.

ROLE BOUNDARY

People: certify the authoritative version / **Code**: check validity conditions / **AI**: explain differences among allowed sources

Synthetic cases are author-written examples, not actual AI outputs.

Give meeting questions three distinct roles

Splitting questions by role exposes the gaps in an issue. Prepare one verification, one challenge, and one execution question.

01

Verify

by what standard were missed requests recorded?

02

Challenge

is unclear ownership the cause, rather than the channel?

03

Execute

who receives exceptions, and by when?

EXECUTIVE TAKEAWAY

Require one verification, one challenge, and one execution question for every meeting paper.

Pause before saving the review memo

Separate reviewing the draft from finalizing the record. Only approved wording goes into the file.

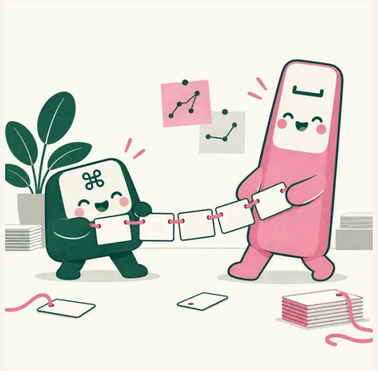
01	**Step 1, review**	check evidence, interpretation, and unknowns on screen
02	**Step 2, save**	store only approved wording in the designated file
03	**After saving**	reopen the file and compare it with the approved text

EXECUTIVE TAKEAWAY

Assign the right to draft and the right to finalize the record separately.

A good review is traceable, not simply long

A good review lets anyone who receives it reopen the source and confirm the reason for each judgment.



01 **Source link** does every claim point to a source section?

02 **Unknowns apart** are assumptions and unknowns recorded separately?

03 **Accountability** are the approver and next steps recorded?

EXECUTIVE TAKEAWAY

Design places for review, approval, and records alongside the generation screen.

ROLE BOUNDARY

AI: draft / **People**: revise and approve / **Save function**: record the approved wording

Search, selection, writing, and approval are different jobs

Split the work into four jobs instead of one model doing everything, and you can see which step to fix when something goes wrong.

STEP 01

Search

a retrieval tool (qmd) gathers candidate evidence

STEP 02

Selection

the judgment model Jev picks material that meets the criteria

STEP 03

Writing

a generative model drafts the answer with evidence numbers

STEP 04

Approval

people set the automation scope and own the exceptions

EXECUTIVE TAKEAWAY

For every AI project, ask who owns each of the four steps and how each is checked.

Synthetic cases are author-written examples, not actual AI outputs.

Using AI in claims payment: where must a person decide?

A pre-executed run on this lecture's financial and insurance AX case report, split into evidence cards, from search to approval.

01	**Search (qmd)**	keyword, semantic, and hybrid search gather candidate cards
02	**Selection (Jev)**	picks the cards that fit the question and scores them
03	**Writing**	every sentence carries the number of its evidence card
04	**Check and approval**	code verifies the citations, then a person approves

EXECUTIVE TAKEAWAY

Require every AI answer to carry evidence numbers that lead back to the source.

Good selection starts with eligible candidates

Screen dates, permissions, and approval status with code and rules first; Jev then judges relevance among what remains.



01 **Jev's job** assist relevance judgments among the remaining candidates

02 **If the answer is absent** redesign retrieval before blaming the model

03 **If uncertain** hold the case and hand it to the owner

EXECUTIVE TAKEAWAY

Define candidate scope and hold handoffs first; separate judgment from writing.

ROLE BOUNDARY

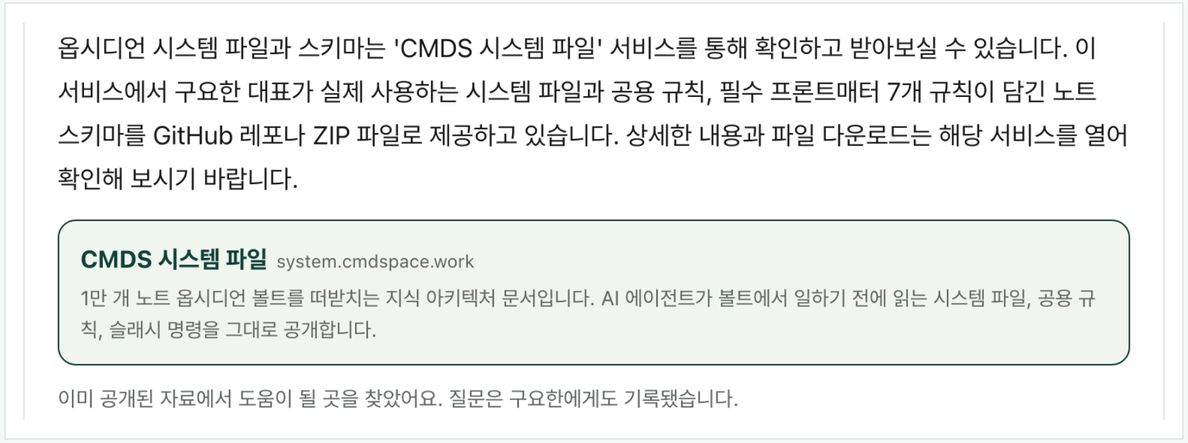
Code: explicit conditions / **Jev**: relevance / **People**: applicability and exceptions

Synthetic cases are author-written examples, not actual AI outputs.

Jev inputs and judgments
Our r4 study and its limitations

Ask CMDSPACE: separate selection from writing

A public question service I built. Jev selects, Gemini writes, and people own the scope and the exceptions.



Historical public screenshot. Actual response on 2026-10-02, with answer and evidence cards enlarged. Not a guarantee of current features or version.

01 People maintain the public cards and the answer scope

02 Jev and Gemini Jev selects the card, Gemini writes from it

03 Server checks input, routes holds to people, and flags logging failures

EXECUTIVE TAKEAWAY

Define the automatic response scope and exception owner first.

ROLE BOUNDARY

People: policies and improvement / **AI**: selection and writing / **Server**: checks and logs

Phone practice 1: send the same question twice

Open the practice page from the QR code, check your account, and send Material A with two different questions.

Scan with your phone camera to open the practice page.
labs.cmdspace.work/kb-insurance-ax-1007/practice/

01 **First question** Material A plus one line, 'summarize this'

02 **Improved question** role, purpose, material, request, and rules

03 **Compare** can you see the conclusion, evidence, unknowns, and questions?

EXECUTIVE TAKEAWAY

When you ask, set the slots first: conclusion, evidence, unknowns, and questions.

Phone practice 2: ask with a photo or by voice

If you have finished Mission 1, pick one of these. Check the words and numbers it captured against the original.

01	**Mission 2, photo**	copy the question first, then shoot this slide and send
02	**Mission 3, voice**	“A pilot where AI helps with call follow-up notes is coming to the meeting.”
03	**Then**	“Give me one check, one challenge, and one action question.”
04	**Synthetic sentence to shoot**	“As in the overseas case, AI notes cut handling time by 20%”

EXECUTIVE TAKEAWAY

Have photo and voice inputs checked against the original, too.

Q2: what changed between your two questions?

Two or three people share how their two questions differed; then we take questions on where this can be used at work.

01	**Share**	which condition changed the answer the most?
02	**Scope**	use company material only in accounts the company permits
03	**Who confirms**	list features, policies, and owners separately

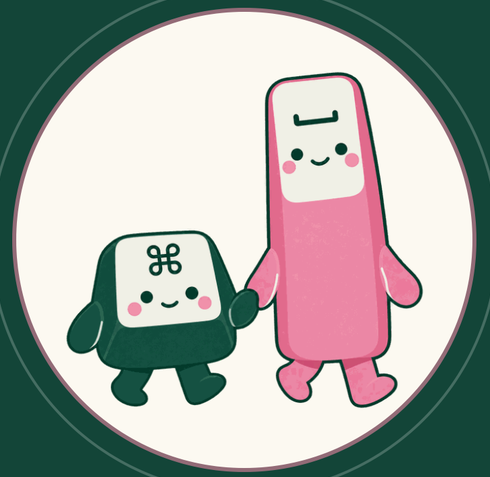
EXECUTIVE TAKEAWAY

Keep the question frame that worked as a shared standard for your team.

The Executive Language That Makes AI Work

In 10 minutes, we turn to organizational knowledge

Next: turning experts' decision criteria into organizational knowledge



The rules in people's heads keep work moving

Work runs on experts' unwritten criteria more than on documents. Start by finding where those judgments sit.



01 **Condition** work that comes with “send these to me”

02 **Exception** the reason someone says “this case is different”

03 **Owner** the person behind “they give the final sign-off”

EXECUTIVE TAKEAWAY

Find one task where questions keep landing on the same person.

Ask about decision points, not just descriptions

Instead of asking for a manual, ask about the moment a case went to B instead of A. That is where the criteria show.

01	**Signal**	What signal changes the route?
02	**Exception**	Which exception was hardest to call?
03	**Stop**	Without whose confirmation do you halt?

EXECUTIVE TAKEAWAY

Ask for one recent case where the choice split, not a description of the job.

Capture experience in four fields

Put what you heard in the interview into four fields: condition, rule, exception, owner. Then it can be reused.

STEP 01

Condition

a joint item that includes public disclosure

STEP 02

Rule

request operations review and disclosure review together

STEP 03

Exception

hold if disclosure status is unclear

STEP 04

Owner

the operations owner confirms the final route

EXECUTIVE TAKEAWAY

Mark each rule as an interview statement, document-checked, or approved.

Business teams must review correct answers and exceptions

Business owns the criteria, IT the build, security and compliance the permitted scope. None can stand in for another.

01

Business

set criteria and exceptions, review results

02

IT

build data connections, logging, and permissions

03

Security and compliance

confirm usable data and execution scope

EXECUTIVE TAKEAWAY

For one task, name who owns the criteria, the build, and the permitted scope.

Keep Word.
Add decision structure.

Keep approved originals as they are, build separate decision units for AI to use, and deliver the result as a Word memo.

01

Source

approved reports and policies, left unchanged

02

Derived

knowledge units with conditions, evidence, and exceptions

03

Output

delivered as a familiar Word review memo

EXECUTIVE TAKEAWAY

Require every derived knowledge unit to record which source version it came from.

Applicability matters more than filenames

Document metadata is a register: it tells you when, to whom, and with what authority a document applies.

01	**Accountability**	owner, review status, approval status
02	**Validity**	effective date, end date, applicable organization
03	**Provenance**	source, version, access classification

EXECUTIVE TAKEAWAY

Check that one key policy has a clear owner and effective date.

Frontmatter is a designed convention

The metadata block at the top of a file, called frontmatter, does not appear by itself. People design which fields it has.

01	**Body**	where the business rule or claim is read
02	**Metadata**	owner, approval, effectiveFrom
03	**Card example**	evidence level, scope, what it does not claim
04	**Same principle**	document properties in Word and SharePoint

EXECUTIVE TAKEAWAY

Ask whether our templates have a field for what a document does not claim.

Each claim must lead back to its evidence

Each summarized claim must lead back to its source section and approval record. Only then is it organizational knowledge.



01 **Operations owner review** linked to approved version, section 3

02 **Check before disclosure** linked to disclosure procedure, section 2

03 **Evidence card** linked to its report section and source link

04 **Source changes** linked memos are reviewed again

EXECUTIVE TAKEAWAY

Record the claim, source location, applicable conditions, and verifier together.

ROLE BOUNDARY

AI: proposes summaries and links / **People**: check against the source and confirm validity

Outdated knowledge must not quietly become the answer

When a source changes, an owner reviews the difference, and the linked knowledge and memos are updated with it.

01

Detect

check new approval and effective records on the source

02

Review

flag what differs from the existing rule

03

Update together

knowledge, test cases, and memos

EXECUTIVE TAKEAWAY

Name who approves and updates knowledge, and budget that expert time.

ROLE BOUNDARY

People: approve validity and decide scope / **AI**: propose change candidates / **Code**: check linked documents for consistency

LLM Wiki does not replace originals with summaries

Keep the originals intact, and store AI-organized knowledge and human review records in separate layers.

01

Sources

evidence kept unchanged

02

Organized knowledge

linked by AI, reviewed by people

03

Review memo

how it applies to our work, and its limits

EXECUTIVE TAKEAWAY

Check that every summary leaves a path back to its original source.

Search retrieves. Compilation organizes.

Search finds sources when a question arrives; compilation links recurring issues in advance. Each needs the other.



01 **Search** find candidate sources for this question

02 **Compilation** link recurring issues and rules in advance

03 **Review** check evidence and validity at the time of the question

EXECUTIVE TAKEAWAY

Compile recurring judgments in advance; verify changing facts when the question arrives.

Give agents limits at every step

Even when an agent chains steps on its own, put human approval between reading and execution.

STEP 01

Read

check candidates and evidence

STEP 02

Draft

flag conflicts and unknowns

STEP 03

Approve

save only to designated locations after a person confirms

STEP 04

Error

stop and hand off to a person

EXECUTIVE TAKEAWAY

Check an agent's rights to read, register, send, and pay separately.

Rules guide behavior. Permissions enforce boundaries.

A “do not” sentence only guides the AI. Permission settings are what actually block data access and sending.

01	**Read access**	actually restrict which folders and data the AI can read
02	**Write approval**	approve email and business-system writes separately
03	**Execution log**	record the evidence, the judgment, and who executed

EXECUTIVE TAKEAWAY

Name both who writes the rules and who verifies the permission settings.

When an error appears, the work must be stoppable

Missing evidence, conflicting sources, and insufficient permissions are different reasons to stop, each with its own owner.

01

Missing evidence

gather more sources, then reassess

02

Conflicting sources

ask the knowledge owner to decide

03

No permission

hand off to the authorized owner, never bypass

EXECUTIVE TAKEAWAY

Track whether reviewed knowledge and resolved exceptions build up, not answer counts.

ROLE BOUNDARY

AI: logs potential errors and reasons to pause / **People**: interpret and approve updates / **Records**: evidence for the next task

Q3: who should manage the knowledge?

Who connects business rules, IT implementation, and security controls within a single workflow?

01	**Source of truth**	who decides which document is current?
02	**Review time**	have you secured time from your experts?
03	**Return path**	where does the work go back to when an error occurs?

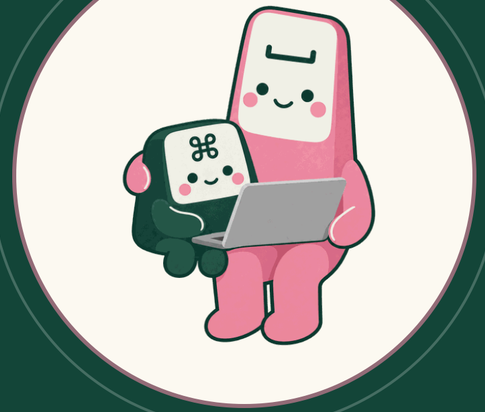
EXECUTIVE TAKEAWAY

Name the knowledge owner and the permission owner together.

The Executive Language That Makes AI Work

In 10 minutes, we turn to adoption decisions

> Next: workflow lessons from domestic and global financial cases, and your department's next action



Read the workflow, not just the performance figures

A company announcement shows features. It does not replace permission to use them here or independent proof of effect.



01 **Task** which judgment in which task does it support?

02 **Conditions** what data, consent, and review does it require?

03 **Decision** what does a person approve at the end?

EXECUTIVE TAKEAWAY

When a case is reported, ask first about the task, the conditions, and the human decision.

Korea has started too: giving agents jobs and permissions

In domestic announcements, read how owners, permissions and work history are attached before reading any numbers.

01	**KB employee IDs**	six AI agents with managed roles, permissions and work history (2026-09)
02	**KB event**	10 business teams designed agents in M365 Copilot, executives as mission sponsors
03	**Shinhan credit**	opinion drafting supported by analysis logic for 12 industries (2026-03)

EXECUTIVE TAKEAWAY

For each agent, ask who owns the work, what data it reads and who revokes access.

Morgan Stanley: supporting meeting follow-up

Announced on 2024-06-26, Debrief supports the path from a client-consented meeting record to follow-up drafts.

01	**Record**	key points and action items from a consented meeting
02	**Draft**	follow-up email drafts and CRM records
03	**Decision**	the advisor edits the email and decides whether to send it

EXECUTIVE TAKEAWAY

Look past the summary feature: confirm there is a review step after it.

Official announcement: 2024-06-26 / Feature description, not evidence of local approval or ROI

Morgan Stanley official announcement

Ask: does the meeting carry into the next task?

Look beyond summary speed: do consent, review, and storage responsibilities carry into the next task?

01	**Consent**	was recording and its permitted use agreed?
02	**Review**	who checks the follow-up draft?
03	**Record**	what is kept as the approved record?

EXECUTIVE TAKEAWAY

Pick one meeting and have the team find where follow-up work breaks off.

DBS: giving staff information to respond

In the 2024 annual report, CSO Assistant transcribes and summarizes calls and recommends solutions to service staff.

01	**Real time**	transcribes and summarizes the call as it happens
02	**Recommend**	suggests solutions inside the employee's workflow
03	**Scope**	supports service staff in Singapore, Hong Kong, India, and Taiwan

EXECUTIVE TAKEAWAY

Check where staff find the evidence when they hit an exception.

Ask: are experts' response criteria captured?

Before building AI that supports staff, decide which decision criteria to share.

01	**Criteria**	where are the rules and exceptions for recurring questions?
02	**Correction**	who fixes a wrong recommendation?
03	**Handoff**	can staff check the evidence and pass the case on?

EXECUTIVE TAKEAWAY

Name both who corrects recommendations and who maintains the criteria.

Allianz Nemo: agents process, people pay

Australia, July 2025: scope narrowed to food spoilage claims under AUD500 after natural-disaster power outages.

01	**Division**	7 agents support coverage, weather, fraud, amount and audit checks
02	**Scope**	small claims with clear conditions
03	**Approval**	the final payment decision stays with a person

EXECUTIVE TAKEAWAY

First decide which claim types to automate and where a person approves.

Read the denominator first

Adoption rates, deployment scale, expected values and self-reported accuracy are not the same level of evidence.

01	**98%**	Assistant adoption among Morgan Stanley Financial Advisor teams
02	**Up to 20%**	DBS expected cut in call handling time, at the time
03	**Over 90%**	Allianz EKA self-reported accuracy, sample undisclosed
04	**200,000+**	JPMorganChase deployment scale

EXECUTIVE TAKEAWAY

When you get a number, first ask what it was measured against.

Functions described in official company releases / not independent evidence or approval for KB

Morgan Stanley official release · DBS Annual Report 2024 · Allianz EKA · JPMorganChase 2024 letter

Choose a task before choosing a tool

Start with one task that recurs, has checkable evidence, and can be reversed if it goes wrong.



01 **Criteria** recurring, evidence-checkable, reversible

02 **Good starts** report reviews, approved-guideline search, post-consultation follow-up memos

03 **Exclude** final customer decisions and payment decisions

04 **Boundaries** write down data, users and output scope first

EXECUTIVE TAKEAWAY

Decide which judgment in which task AI will support, and who owns the result.

Assign knowledge owners and review time together

Asking for documents is not enough. Name who verifies the decision criteria and give them the time to do it.

01
Business owner
review and approve answers and exceptions

02
Expert time
interviews, case write-ups and initial review

03
Operating time
re-review after source changes and errors

04
Access check
IT, security and compliance confirm data and execution scope

EXECUTIVE TAKEAWAY

Name who approves and updates the criteria, and give them the time.

Budget for the work beyond the model

Put document cleanup, access reviews, testing and operations in the same table as license prices.



01 **Prepare** document cleanup and access-permission reviews

02 **Verify** build test cases and have the business team review them

03 **Operate** integration, logging and maintenance

04 **Compare** observe the current way over the same scope

EXECUTIVE TAKEAWAY

Ask for the cost of the whole workflow, not the model price list.

Quality shows in exceptions you cannot afford to miss

Judge quality by how it handles conflicts, gaps and out-of-permission requests, not by fluent normal answers.

01
Normal case
does it answer a well-sourced request correctly?

02
Conflict case
does it hold judgment when the approved version and a draft differ?

03
Gaps and access
does it hold when no answer source exists or access is denied?

04
Expected results
the business defines answers and holds before testing

EXECUTIVE TAKEAWAY

Before adoption, build the cases it should fail on, together with the business team.

Security approves connection, data and execution separately

Allowing a connection does not authorize data processing or automatic execution. Approve and test each one separately.



01 **Connection** approved accounts, services and outbound transfer paths

02 **Data** purpose, processing path and retention for customer, health and credit data

03 **Execution** separate read, draft, register, send, and pay rights

04 **Hidden instructions** text inside attachments is data, not a command (prompt injection)

EXECUTIVE TAKEAWAY

Ask for attack, error and shutdown test results, not just a smooth demo.

Decide whether to expand, maintain, or stop

Choose one of three outcomes from repeated tests and the burden on people, not from one good result.

01
Expand
quality criteria met and operating ownership secured

02
Maintain
valuable, but exceptions and effort need work

03
Stop
uncontrollable, unverifiable, or too burdensome

04
Stop at once
out-of-permission exposure, unapproved payment or sending

EXECUTIVE TAKEAWAY

Before testing, agree the conditions to maintain and stop, not only to expand.

30 days: establish a baseline for one task

Before any new tool, record today's time, review effort, and errors against the same yardstick.



01	**Pick one task**	report review, guideline search, or follow-up notes
02	**Name owners**	business, knowledge owner, reviewer, IT, security, compliance
03	**Baseline**	total time per case, review effort, and recurring errors today
04	**Test set**	agree in advance on permitted data and test cases

EXECUTIVE TAKEAWAY

Before any new tool, have the team measure today's total time per case.

60 days: run a small test within approved boundaries

In a limited environment approved for data use, compare the current approach with AI support side by side.



01 **Limit scope** only designated users, data, and tasks

02 **Test cases** normal, exceptions, outdated guidelines, permissions, attacks, outages

03 **Logs** keep evidence, unknowns, and reasons for holds

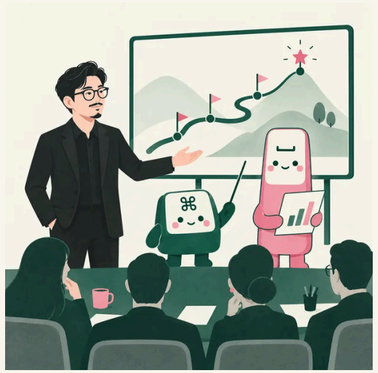
04 **Compare** business teams check against current results, with a separate judge where possible

EXECUTIVE TAKEAWAY

Require correct answers, exceptions, and stop conditions to be defined before testing.

90 days: review results and decide whether to expand

Weigh what improved against the burden that remains, on the same evidence, then expand, maintain, or stop.



01 **Gains** are evidence, review questions, and handoffs easier?

02 **Remaining burden** exceptions, rework, review and maintenance effort

03 **Root cause** the model, missing candidate data, or rules and permissions

04 **Agreement** business, security, and compliance decide on the same evidence

EXECUTIVE TAKEAWAY

Decide on evidence that the work changed, not on usage counts.

A departmental brief can start with three lines

Name the task, give time for review, and set a decision date. That is a working brief.

01	**Task**	document one recurring task, its decision evidence, and exceptions
02	**Ownership**	confirm the owner, review time, permitted data, and environment
03	**Checkpoint**	at the next review, recommend expanding, maintaining, or stopping

EXECUTIVE TAKEAWAY

Write down the task and the decision to change before naming any tool.

What we covered today must be designed before AI

Tools change. Reviewed knowledge, accountability, and test cases stay with the organization.

01

Individual

review evidence and questions, not just summaries

02

Organization

turn business teams' decision criteria into knowledge assets

03

Execution

design permissions, approvals, and error logs together

EXECUTIVE TAKEAWAY

Design it so that every use of AI strengthens the basis for judgment.

Final question: where should our department start?

Take one task and work through it in order: data, responsibility, approval, and evaluation.

01	**Scope**	can this task be broken down further?
02	**Review**	who checks the correct answers and the exceptions?
03	**Decision**	what will we look at in the first checkpoint?

EXECUTIVE TAKEAWAY

Choose one task you can verify rather than a plan to automate everything.

For unresolved questions, leave a route to verification

Turn questions left unanswered today into named owners and follow-up checks.

01	**Features**	the M365 administrator who knows the accounts and settings
02	**Data scope**	security and compliance owners decide permitted data and use
03	**Business rules**	the business owner decides criteria and exceptions

EXECUTIVE TAKEAWAY

Where there is no answer, name an owner to verify it instead of guessing.

Materials and next connections

Report, videos, demo kit, and practice: labs.cmdspace.work/kb-insurance-ax-1007/



Report & demo kit

labs.cmdspace.work/kb-insurance-ax-1007/

Practice & key takeaways

labs.cmdspace.work/kb-insurance-ax-1007/practice/

CMDSPACE

cmdspace.work

Speaker bio

bio.cmdspace.work