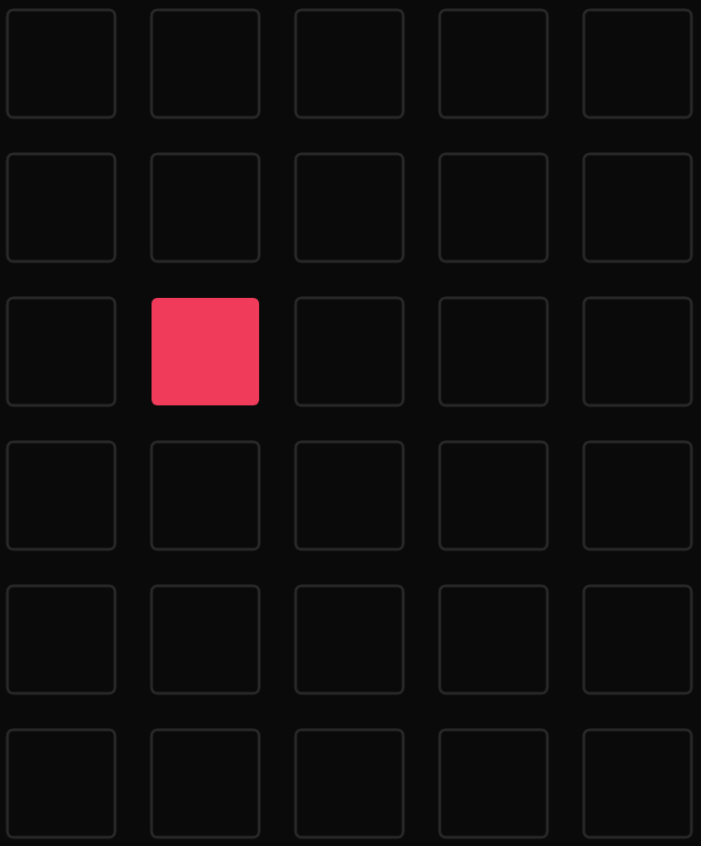
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HANDBOOK

One process at a time

A handbook for adding a small app next to your core systems.

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In short

01 **Start with whoever owns the problem.**

Pick a process someone feels every week and is willing to own.

02 **Measure it before you touch it.**

The baseline is the first deliverable. Without it, any result after is an anecdote.

03 **Your core systems stay the source of truth.**

The app reads what it needs and sends back what people complete. Nothing gets entered twice.

04 **People from outside sign without an account.**

Contractors, drivers and visitors sign by link or QR code, with no access to any internal system.

05 **AI proposes; a person approves.**

Whether it’s an assistant, a workflow or an agent decides where the control has to sit.

06 **Have the security answers ready.**

Who sees what, who did what, and where personal data goes.

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CHOOSING THE PROCESS

Start with whoever owns the problem

The right first process isn't the biggest one. It's the one with an owner who feels it every week and can say what better looks like.

- ☐ **It has an owner.**
  One person who lives with the problem and can make the call.
- ☐ **It happens often.**
  Weekly or more, so a change shows up within a quarter.
- ☐ **It runs on spreadsheets, email or paper today.**
  So there's room to improve it without touching the core system.
- ☐ **The result can be counted.**
  Days, hours, items, rework — not "better visibility."
- ☐ **People agree on how it works today.**
  If they don't, settle that first. An app won't.

AI amplifies whatever process it lands on

In a capable process it speeds things up. In a confused one it scales the confusion: automating an unclear process locks the ambiguity in.

The other side of the same fact: asking it about a messy process is also the fastest way to find where the mess is.

THE BASELINE

Write down the starting numbers before anything changes

Whoever measures first has the advantage over whoever buys first. These come from records you already keep.

Measure	How it's defined	Where it comes from
Cycle time	Request to done, in calendar days	Dates in email or the spreadsheet
Volume	Cases per week	The current log
Rework	Cases sent back or redone	Returns, comments, second versions
Effort	Hours per case, chasing included	A two-week time sample
Audit prep	Hours spent pulling evidence together when someone asks	The last audit or request

Each number gets an owner, a written definition and the date it was taken.

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DATA IN, DATA OUT

Your core systems stay the source of truth

SOURCE OF TRUTH

Your core systems

Staff records, payroll and contracts stay where they are. The app doesn't touch them.

Reads only what it needs: who's active, their area and role.

Sends back what people complete: signed records, answers and dates.

THE SMALL APP

One process, end to end

The forms, signatures and reminders for that process, on people's phones.

The connection is a file drop or an integration, agreed with your team. Nothing gets entered twice.

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SIGNATURES FROM OUTSIDE

People from outside sign without an account

Contractors, drivers and visitors sign by link or QR code from their own phone. Nobody from outside gets access to an internal system.

Contractor induction

Each person who comes in signs their own, not the contractor company on everyone’s behalf.

Driver acknowledgment

In the name of whoever is driving, with the date and what they were told at the gate.

Visitor record

Who came, when, to which area, and that they got the safety briefing.

Every signature is kept with the date, the time and who signed.

WHERE AI GOES

AI proposes. A person approves.

Assistant, workflow and agent are three different things, and the difference decides where the control has to sit.

	What it does	Where control sits
Assistant	Answers what you ask; you pick what happens next.	In the output: someone reads it before it's used.
Workflow	Runs steps somebody laid out in advance.	In the design: the steps, and which ones wait for sign-off.
Agent	Decides on its own what to do next to reach a goal.	In the limits: what it can touch, and what always waits for a person.

A hallucination doesn't look like an error. It looks like a correct output — which is why the approval step stays.

WHAT THE EVIDENCE SAYS

Measured in the task, the gains are real. Measured in the firm, they're still small.

+14%

Issues resolved per hour

5,179 customer-support agents with an AI assistant; +34% for novice and low-skilled workers.

Brynjolfsson, Li and Raymond, NBER w31161

78%

Of firms already use AI

Nearly 9,000 executives surveyed in seven countries. They average 2.1 hours a week with it.

NBER w34836, "Firm Data on AI," Revised October 2026

+0.2%

A year, so far

What executives in the same survey say AI added to labor productivity growth over the last three years. They expect 0.6% a year over the next three.

Two readings of the gap: organizational work, done one process at a time — or timing, since new technology often shows its gains years after adoption (Brynjolfsson, Rock and Syverson, NBER w25148).

MEASURING AFTER

Measure after with the same ruler

- [ ] **Same definition.**
  If the baseline counted calendar days, so does the follow-up.
- [ ] **Same source.**
  The same records, not the new app's own count.
- [ ] **Same length of period.**
  Two weeks against two weeks, away from holidays and quarter-end.
- [ ] **A date set in advance.**
  Decide when you'll look before you start, not when the numbers look good.
- [ ] **Room for a slow start.**
  The first weeks can be worse while people learn the new steps. Look again on the date you set.
- [ ] **The owner makes the call.**
  Keep it, adjust it or drop it.

SECURITY AND DATA

Questions worth having answered before you start

Whoever looks after security and data on your side will ask. It helps to have these answered on one page.

The question	What a good answer looks like
Who can see what?	Permissions by role. Each person sees their own; managers see their team.
Who did what, and when?	Every action is logged with who and when, and the log can't be edited.
Where does personal data go?	Only the fields the process needs, and it doesn't leave the agreed scope.
Who gets in, and how?	Staff sign in with their own access. People from outside sign by link, with no account.
What happens when someone leaves?	Access ends when your core system marks them as gone.
Which AI use is allowed?	What your AI policy says. AI proposes and a person approves; nothing changes on its own.

If you want a reference framework for the AI side, ISO/IEC 42001:2023 sets out a certifiable management system for AI.

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BEFORE YOU START

One page to check before anything gets built

- [ ] One process, with a named owner.
- [ ] Its baseline, written down with definition, source and date.
- [ ] The fields the app reads, and the ones it sends back, agreed.
- [ ] Who signs from outside, and how.
- [ ] Where AI proposes, and who approves.
- [ ] The follow-up date, set now.
- [ ] The security and data answers, on one page.

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Start with one

One process, one owner, one number written down before anything changes. Then the next one.

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