

What AI should do and where it should stop

Practical rules for approvals, exceptions and responsibility in everyday AI workflows.

01 Separate preparing from committing

Reading a message, suggesting a label and drafting a reply are different from sending a promise to a customer. Each needs its own permission. For a first pilot, let AI prepare the work and keep outgoing communication under human approval.

02 Name the decisions that stay human

Prices, discounts, delivery commitments, accounting judgements and payments should have an explicit owner. Do not rely on a vague instruction to "be careful". Write down the actions the system may take and the actions it must escalate.

03 Treat incoming content as information

An email or attachment can contain misleading instructions. It must not be allowed to change the system's permissions, approve its own request or instruct an assistant to reveal unrelated data. Access should be limited to the workflow being performed.

04 Define what happens when the system is unsure

Missing documents, conflicting records, unavailable services and ambiguous requests need an exception path. A useful escalation names the problem, shows the source and says what decision is needed. It should not silently guess and mark the task complete.

05 Review what actually happened

Check the action record, draft quality, exceptions and unintended changes. Agree who responds to an incident and how the workflow is paused. The presence of an approval button alone is not evidence that a process is reliable.

[Read the current guide online](#)



Make it specific to your team.

A working sheet for a focused discussion. Keep sensitive information in your own systems.

01 Allowed preparation

List the reading, sorting and drafting actions AI may perform.

02 Human decisions

Who approves sending, pricing, commitments and changes?

03 Minimum access

Which inbox, records and tools are actually needed?

04 Exception route

What triggers escalation? Who receives it and by when?

05 Pause and recovery

Who can stop the workflow, review the record and resume it?

Put this into practice.

Keep this worksheet for your team. Remove client names and confidential details before sharing examples.

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