



Human Performance in an AI-Enabled World Workbook

Based on the Biz Bite: *Human Performance in an AI-Enabled World*

Presenter

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Clarity at Work

Video

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youtu.be/rGZGWJNrTQM



Watch video

How to use this workbook

This workbook helps employers think through AI as a leadership and people-practice issue, not just a technology purchase. Use it to define outcomes, set guardrails, support managers and employees, and test AI in one practical workflow before scaling it across the business.

Core idea: AI does not replace people. It exposes gaps in how we lead, develop, organize, and set standards for our people.

AI adoption roadmap

No.	Focus	What to do
1	Start with the outcome	Define what good looks like before choosing or expanding a tool.
2	Map the workflow	Clarify the current process, the ideal state, and who does what.
3	Set standards and guardrails	Define approved uses, off-limits uses, human review points, and data rules.
4	Support managers and staff	Help managers explain good use and help employees ask questions safely.
5	Protect human judgment	Keep high-stakes decisions human-led, especially hiring, discipline, pricing, and relationships.
6	Pilot and measure	Test one repetitive workflow, measure before and after, then decide whether to scale.



1. Find your current AI stage

Theresa describes AI maturity as a progression. A business may be at different stages by department, task, or role. Use this page for a practical gut check, not a formal audit.

Stage	What it looks like	Your evidence
1 - Curious	A few people are experimenting with AI tools, but there is no real plan.	Where are people experimenting?
2 - Assisting	Some people use AI for daily tasks, but use is ad hoc and standards are unclear.	What common tasks are already being supported?
3 - Integrated	AI is built into some workflows, with a policy and shared standard starting to form.	Which workflows have a clear standard?
4 - Transforming	Work is designed around the outcome, and AI is treated like another team resource within workflows.	Where is AI intentionally designed into work?

Your current stage

Done	Item
☐	We are mostly curious.
☐	We are mostly assisting.
☐	We are becoming integrated.
☐	We are transforming some workflows.
☐	Our stage depends on the department, task, or role.

Notes: Where are we now, and where do we want to move next?



2. Start with the outcome and work backwards

A faster tool placed on top of a broken process will not fix the process. Start by defining what good looks like, then work backward to decide where AI can help.

Worksheet item	Prompt	Your notes
Current problem	What is not working now? Be specific about delay, inconsistency, rework, cost, or frustration.	
Ideal outcome	What would good look like if this workflow worked well?	
Current workflow	What steps happen now, and where does work get stuck?	
People roles	Who owns the outcome, the standard, the AI direction, and the final review?	
AI fit	Where could AI assist without replacing judgment?	
Human review	Where must a person check quality, risk, tone, accuracy, or judgment?	

Outcome statement

Complete this sentence: We will know this AI-supported workflow is successful when...



3. Set practical AI guardrails

When leaders say nothing, employees will guess. That may lead to underuse, secret use, or risky use of public tools. A simple people-use policy helps people know where they are encouraged to experiment, what needs human review, and what is off limits.

Guardrail	Question	Decision / rule
Approved uses	Where do we encourage staff to use AI?	
Approved tools	Which tools have been reviewed and approved for company work?	
Off-limits uses	What must not be entered into AI tools, such as confidential client or employee data?	
Human review points	Which outputs must be checked by a person before use?	
Protected decisions	Which decisions stay human-led?	
Security and insurance	What data, privacy, cyber, or insurance questions need review before scaling?	

Leadership owns four things

Done	Item
☐	Policy: what is allowed, what needs review, and what stops here.
☐	Narrative: why we are using AI and what it means for people and roles.
☐	Standard: what good AI use looks like across teams.
☐	Model: leaders visibly use AI, share lessons, and show what safe use looks like.



4. Support managers and employees through adoption

Managers are the make-or-break layer in AI adoption. Employees also need clarity because many are caught between two fears: falling behind if they do not use AI, or using AI so well that they automate themselves out of a job.

Move	What it means	Your application
Name it	Say clearly that AI will change some work and that the organization will learn together.	What words will leaders use?
Sanction it	Show what is encouraged, what is off limits, and which tools are approved.	Where will people find the rules?
Protect it	Name the decisions that remain human-led.	Which decisions stay human?
Reward it	Make it safe to say: I used AI for this, or I am not sure this output is right.	How will we reinforce learning?

Manager support checklist

Done	Item
☐	Managers can explain why the AI change matters in plain language.
☐	Managers can describe what good AI use looks like for their team.
☐	Managers know which tools and uses are approved.
☐	Managers know when human review is required.
☐	Managers have a way to collect staff questions, concerns, and use cases.



5. Choose one workflow and prove the gain

Do not try to transform everything at once. Pick one repetitive, high-frequency, low-judgment workflow. Protect the judgment calls, standardize what good looks like, and measure before and after.

Pilot item	Prompt	Your notes
Workflow to test	What repetitive task hurts, slows people down, or creates rework?	
Current baseline	How long does it take now? What errors, delays, or frustration happen?	
AI-assisted process	How will AI assist with the first draft, summary, research, notes, FAQ, or routine communication?	
Human check	Who checks the output, and what standard will they use?	
Before/after measure	What will you measure to know whether it worked?	
Scale decision	What result would justify continuing, adjusting, or stopping?	

Good first-use examples

Done	Item
☐	Meeting notes or summaries.
☐	First-draft client replies, with human review.
☐	First-pass research, with source checking.
☐	Internal FAQs or onboarding guides.
☐	Routine communication drafts, with tone and accuracy review.



30-Day AI People-Readiness Action Plan

Use the next 30 days to move from scattered experimentation to clearer, safer, and more useful AI adoption.

Timing	Action	Owner / deadline
Week 1	Identify one workflow and define what good looks like.	
Week 2	Draft basic people-use guardrails: approved tools, off-limits uses, and human review points.	
Week 3	Meet with managers to explain the story, standard, and support expectations.	
Week 4	Pilot the workflow, gather feedback, measure early results, and decide the next step.	

Leadership meeting questions

Done	Item
☐	Do we have an AI people-use policy, not just a technical security policy?
☐	Can our managers explain good AI use without opening a complicated document?
☐	Have we talked honestly about what we expect to be different because of AI?
☐	Where are employees already using AI, formally or informally?
☐	What is one workflow we can test before scaling?

One commitment to act on this month
