

AI that fits the work

A practical onboarding example

Illustrative project: a small property business wants help drafting responses to common inquiries. The assistant uses approved service information and public property details; a person reviews every reply before sending.

1. Choose one useful task

Begin with inquiry drafts, not every process in the business. Record the owner, intended users, approved sources, and what a good response must include.

2. Set the boundaries

Keep personal, financial, and confidential client information outside the pilot. Define who can update the knowledge, who reviews output, and which actions always need human approval.

3. Build a small pilot

Use a controlled set of approved questions and answers. Make unknowns visible. The assistant drafts; the team decides and sends.

Start small enough to test, useful enough to matter, and clear enough for someone else to run.

4. Test ordinary and difficult cases

Check correct questions, missing details, conflicting information, and requests outside scope. Use a fixed test set and keep a record of errors and corrections.

5. Onboard the people

Provide a short guide, a live walkthrough, and examples of when to use the assistant, when to verify an answer, and when to stop and ask a person.

6. Review before expanding

Compare the pilot against the original criteria. Improve the source material and workflow first. Expand only when the owner accepts the results.

What the client receives

A one-page workflow brief; approved-source index; access and review rules; pilot assistant configuration; test checklist; team quick-start guide; review schedule.

How acceptance is defined

Example acceptance criteria: correct answers use the approved source; unsupported answers say what is missing; private data is excluded; every external reply requires human review. These are proposed criteria, not a report of a completed client deployment.

Method and scope

Adapted by John Alexiou for BuzzBot from AURELIUS-POLIS. Enterprise Implementation Framework and Validation Framework, P0091-P0096 and P0131-P0134. Prepared 12 October 2026. This client-facing adaptation does not replace the source framework or certify an implementation.

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