

LEADERSHIP WHITEPAPER

AI Decision Intelligence for Services Leaders

Put AI assistance inside an accountable decision process.



A practical working document

Use the examples and review tools to make the next decision clearer. Start with one engagement, one owner and evidence your teams can verify.

IN THIS EDITION

- 01** Context and risk signals
- 02** Recommendations and priority
- 03** Automation and explanations
- 04** Human review and value
- 05** Worked example and review tools

FRAMEWORK / 1

Connected context

A connected decision needs evidence, ownership and a clear handoff.

01 Connected context

Start with the relationships between opportunity demand, skills, assignments, projects and financial outcomes. An isolated data point rarely explains a services decision. The useful context is the chain showing how a change in one team's plan affects the others.

REVIEW POINTS

- Linked records
- Shared definitions
- Business context

02 Risk signals

Use operational signals to focus attention on potential delivery, capacity and revenue issues. Distinguish observed facts from forecasts and make uncertainty visible. Teams need to understand why a warning matters before they can decide how to respond.

REVIEW POINTS

- Signal source
- Risk driver
- Forecast confidence

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 2

Resource recommendations

A connected decision needs evidence, ownership and a clear handoff.

03 Resource recommendations

Compare staffing options using requirements, availability and relevant experience. Make the constraints behind a recommendation available to the manager. Final assignment decisions should account for delivery commitments and human context that may not be captured completely in data.

REVIEW POINTS

- Requirements
- Availability
- Manager review

04 Action prioritization

Give each recommendation an accountable owner and a practical next step. Prioritize by operational impact rather than presenting every alert as urgent. A useful assistant should help teams move from interpretation to a decision that can be reviewed afterwards.

REVIEW POINTS

- Impact
- Action owner
- Next step

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 3

Workflow automation

A connected decision needs evidence, ownership and a clear handoff.

05 Workflow automation

Identify repeatable handoffs with clear prerequisites, approval rules and exception paths. Automate only after those rules are understood. An automated task that moves incomplete information faster can create additional reconciliation work for the receiving team.

REVIEW POINTS

- Entry criteria
- Approval rules
- Exception handling

06 Explainable outputs

Keep the evidence and assumptions behind a forecast or recommendation available. Leaders should be able to distinguish a transaction-backed figure from an estimate. Explanations help users challenge a result and correct the underlying data when it is incomplete.

REVIEW POINTS

- Evidence
- Assumptions
- Reviewability

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 4

Human accountability

A connected decision needs evidence, ownership and a clear handoff.

07 Human accountability

Define which actions need review and which can follow an approved rule. Changes affecting staffing commitments, commercial terms or employee information deserve clear ownership. Discuss permissions and approval boundaries during the implementation design.

REVIEW POINTS

- Approval boundary
- Permissions
- Accountable reviewer

08 Measure operational value

Evaluate whether AI-assisted decisions become earlier, clearer or easier to execute. Track the resolution of exceptions and the quality of the underlying data. Avoid treating the number of generated alerts or assistant conversations as proof of improved business performance.

REVIEW POINTS

- Resolution time
- Decision quality
- Data quality

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

WORKED EXAMPLE

Evaluate usefulness, not just volume.

Illustrative scenario - not a customer result or a product performance claim.

In an illustrative review of 100 alerts, 30 prompt an action, 50 provide relevant context without an action, and 20 are incorrect or stale. Review actionability, incorrect alerts, review time and missed issues separately. These counts are examples, not product accuracy results.

30

Prompt an action

50

Provide context

20

Incorrect or stale

Actionability, accuracy and time are different measures

A useful alert still needs an accountable reviewer

Define

State the period, population, units and calculation.

Verify

Trace the number to source records; date the evidence.

Act

Assign an owner and state what would change the decision.

IMPLEMENTATION

A practical 30 / 60 / 90-day cadence.

Start with a bounded workflow. Extend only when the handoffs can be explained and repeated.

01

DAYS 1-30

Establish the baseline

Choose one workflow and one accountable sponsor. Map inputs, owners and exceptions. Agree the decision to improve and capture a baseline using current records.

Output: a workflow map, owner and baseline.

02

DAYS 31-60

Run a bounded pilot

Use the same definitions in recurring reviews. Test missing data and exception paths. Track whether teams can explain decisions and complete handoffs without additional reconciliation.

Output: a tested handoff and exception log.

03

DAYS 61-90

Decide what to extend

Review evidence with participating teams. Resolve recurring gaps before broadening scope. Document ownership, training needs and the conditions required for the next rollout.

Output: an agreed expansion or improvement plan.

WORKING SESSION

Use one engagement as the test case.

A 45-minute review for the people who own the handoffs.

00-10 min**Frame the decision**

Describe the engagement and the next commitment. State the decision, deadline and assumptions.

10-25 min**Review the evidence**

Walk through dated demand, capacity, delivery commitments and financial context. Identify missing or contradictory records.

25-35 min**Resolve the handoff**

Agree who supplies each missing input and who can approve the next action. Keep facts and estimates separate.

35-45 min**Commit and review**

Write the action, owner and due date. Define the evidence to check at the end of the session.

PREPARE BEFORE THE SESSION

Bring one real engagement, its source records and the people who can approve the next handoff.

REUSABLE WORKSHEET

Record the decision and its basis.

Complete this page together. Keep assumptions visible and commit to a dated review.

Decision / engagement

What decision must be made, and by when?

Evidence / source records

Which records support it? Include dates and definitions.

Assumptions / missing information

What is uncertain or still needs validation?

Action / accountable owner

Who will do what, and who approves the handoff?

Review / outcome

What evidence will show whether the action helped?

REVIEW & NEXT STEPS

Make the framework part of the operating rhythm.

The value is in the decision that follows the review.

01 Before the review

Check that the evidence covers the same period and population. Confirm owners, units and approval status.

02 During the review

Investigate exceptions and changing assumptions. Do not combine estimates with confirmed transactions or treat activity as an outcome.

03 After the review

Publish the decision, rationale, owner and next review. Retain enough context for the receiving team to understand the handoff.

Bring your operating challenge to Clousys.

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