



AI ADOPTION · CLIENT GUIDE

Getting started with AI

A practical guide to using AI inside the business: what it is, what it takes and where to begin.

ABOUT THIS PACK

What this pack is for

1

Understand AI

Explain what AI is in practical terms, what it does well and where its output needs checking.

2

Map how it is used

Give you a simple way to describe each use of AI: how far it reaches and how much AI does.

3

Know what it takes

Set out the foundations every use needs, and what more is needed as AI takes on more.

4

Choose where to start

Help you pick one or two worthwhile trials and put them in place with confidence.



In scope: AI used inside the business to improve how work gets done.



Out of scope: AI as a product or service the business sells to customers.

AI is already in the business



It is already happening

People use Copilot, ChatGPT and similar tools to draft, summarise and research, often on their own initiative.



It is uneven and unmanaged

Use varies by person and team. Few leaders know which tools are in use, what information goes into them or how output is checked.



Where to begin is unclear

Advice ranges from prompting tips to large technology programmes. It is hard to tell what fits a business of your size.

The useful questions are where AI adds value, how far to take it and what needs to be in place first.

What AI is, in practical terms

Most business AI tools are built on large language models, which work with language, documents and data. In practice, they do three things.



Generate

Produces drafts, summaries, ideas and options from a brief.

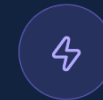
For example drafting a proposal, summarising a meeting



Interpret

Reads and makes sense of documents, messages and data.

For example extracting invoice details, classifying enquiries



Act

When connected to business systems, carries out defined steps.

For example updating a customer record, routing a support ticket



Know its limits. AI can be confidently wrong and only knows what it is given. Check its output in proportion to the cost of an error.

Four levels of AI involvement

LEVEL	WHAT IT MEANS	EXAMPLE	WHO IS IN CONTROL
1 · Assist 	A person asks AI for help with a task	Draft an email, summarise a document	The person decides what to use
2 · Augment 	AI contributes to a workflow; people review its output	Analyse enquiries and recommend responses	People review before anything happens
3 · Execute 	AI carries out agreed steps within systems	Classify enquiries, update records, route exceptions	Rules set the limits; people handle exceptions
4 · Coordinate 	AI handles connected steps within set boundaries	Investigate an order delay across systems	People approve consequential actions

Breadth is how far one use case reaches: one person's task, one team or system, several functions or the whole business. Neither more depth nor more breadth is automatically better.

Mapping breadth against depth



● In use today ○ Opportunity *Illustrative example*

Using the map

- 1 Plot each use case by how far it reaches and how much AI does.
- 2 Moving right needs joined-up data. Moving up needs more control.
- 3 Further is not automatically better. Choose the position each task needs.

A CoveOps organising model, not an industry standard.

READINESS

A readiness check for every use case

AREA	THE QUESTION	MINIMUM FOR ANY USE	AS YOU GO FURTHER
Process	Is the work and its purpose clear?	A short brief: the problem, the benefit and a success measure	A mapped process, agreed rules and exception routes
Data	Can AI use the right information?	Clear rules on what can and cannot be shared	Quality data, shared definitions and a central data store
Systems	Does it have the right tools and access?	An approved tool with business accounts and settings	Integrations between systems and secure AI access
People	Who uses it, checks it and owns it?	Practical training, a checking habit and a named owner	Data owners, ownership across teams and support for change
Controls	What can it do without asking?	A short AI use policy	Permissions, approval limits, logs, monitoring and recovery

BEYOND THE MINIMUM

Where the effort goes

NARROW · ONE TASK, TEAM OR SYSTEM

BROAD · ACROSS FUNCTIONS

DEEP
AI acts

Workflow automation

Enquiry routing

AI acts inside one process, so the effort is defining that process and controlling what AI can do.

Process

Controls

Systems

Connected operations

Order delays

AI acts across teams and systems, so every area matters, plus ownership agreed across functions.

All five areas

SHALLOW
AI assists

Everyday assistance

Email drafting

The minimum checklist is enough: an approved tool, a use policy, training and a checking habit.

Minimum only

Connected insight

Business-wide insight

AI only advises, but needs trustworthy, joined-up data. Often more work than it looks.

Data

Systems

Drafting a customer email

- THE PROBLEM**
Routine customer emails are written from scratch, and quality varies by person.
- WHAT AI DOES**
Drafts the email from a short brief: who it is for, the key points and the tone.
- WHAT A PERSON STILL DOES**
Checks facts, tone and any commitments before sending, and owns what goes out.

WHAT MUST BE IN PLACE	HOW TO PUT IT IN PLACE
An approved tool	Choose a business-grade tool and set up accounts and data settings
Clear information rules	Issue a short AI use policy, with examples of what can and cannot go into a prompt
Basic user skill	Run practical training on real emails and share example briefs that work
A checking habit	Provide a short checklist: facts, figures, tone and any promises made

 **How to judge success:** less time to a first draft, light edits, and no errors reaching customers.

Reading and routing customer enquiries

THE PROBLEM

Enquiries are sorted by hand, so urgent ones wait in the queue.

WHAT AI DOES

Identifies subject and urgency, creates or updates the record and routes it to the right team.

WHAT A PERSON STILL DOES

Handles uncertain or sensitive cases, and reviews routing during the trial.

WHAT MUST BE IN PLACE

Defined categories and rules

HOW TO PUT IT IN PLACE

Map the current process; agree categories, priorities and escalation rules

Usable enquiry data

Check formats and history are consistent enough to work from

System access

Set up a controlled connection to the CRM or ticketing system

Exception handling

Set a confidence level below which a person decides

A safe introduction

Trial on past enquiries, then go live with human approval and track errors



How to judge success: faster first response, routing accuracy tracked over time, fewer misrouted enquiries.

Business-wide insight for leaders

- THE PROBLEM
Leaders piece the picture together from separate reports, so issues surface late.
- WHAT AI DOES
Draws on sales, finance, operations and service data to summarise performance, flag risks and suggest where to look.
- WHAT A PERSON STILL DOES
Tests the conclusions, asks follow-up questions and makes the decisions.

WHAT MUST BE IN PLACE	HOW TO PUT IT IN PLACE
Agreed measures	Agree the handful of measures that matter, and one definition for each
Reliable source data	Check each system's data is complete and current; fix the gaps that matter
Joined-up data	Bring the data together, often in a reporting layer or data warehouse
Access controls	Limit sensitive data, such as pay or customer details, to those entitled
Data owners	Name an owner for each source who answers for its quality

 **How to judge success:** issues spotted sooner, less time assembling reports, and conclusions that hold up when checked.

Investigating an order delay

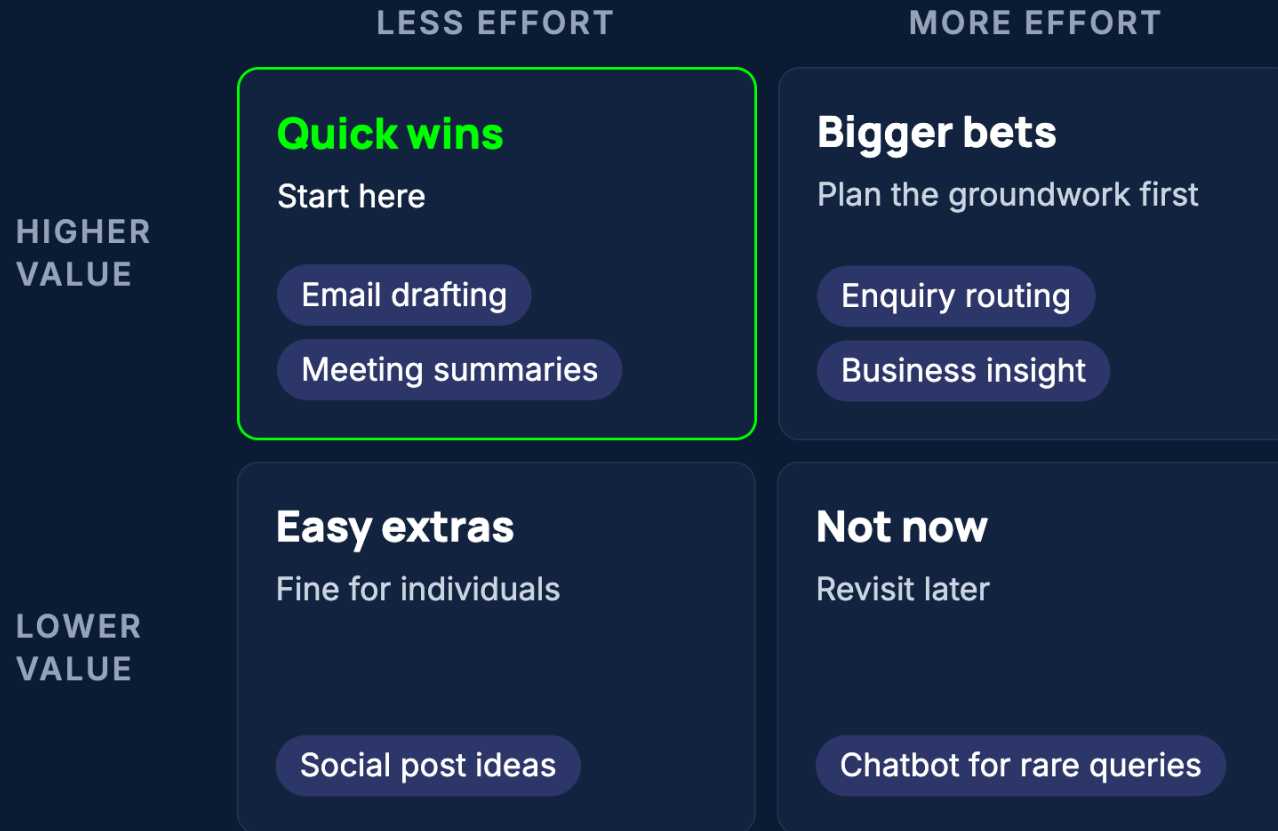
- THE PROBLEM
Finding out why an order is late means checking several systems and chasing people.
- WHAT AI DOES
Checks order, stock and delivery data, finds the likely cause, then proposes or takes permitted steps.
- WHAT A PERSON STILL DOES
Approves consequential actions, such as refunds or supplier changes, and owns the outcome.

WHAT MUST BE IN PLACE	HOW TO PUT IT IN PLACE
Reliable records across systems	Confirm which system is authoritative for what; fix the data gaps that matter
Agreed resolution rules	Define permitted actions and the thresholds that need approval
Controlled access	Connect systems with the minimum permissions needed
Ownership and monitoring	Name an owner, log every action and review the log regularly
Recovery	Test what happens when things fail, and keep a manual fallback

 **How to judge success:** less time to resolve, every action logged and correct, customers updated sooner.

WHERE TO START

Choose where to start



💡 Top tip: the minimum for any AI use

- ✓ **An approved tool**
Business accounts, with your data kept out of model training
- ✓ **A one-page AI policy**
What can be shared, which tools to use, and check before use
- ✓ **Practical training**
One session on real tasks: good briefs and how to check output
- ✓ **A named owner**
Someone to ask, who keeps the policy and tool list current

NEXT STEPS

What to do next

1

See what is happening

Ask each team which AI tools they use, for what, and with what information.



2

Put the minimum in place

An approved tool, a one-page AI policy, practical training and a named owner.



3

Trial one or two quick wins

Write a short brief for each, name an owner and agree how success will be judged.



How CoveOps can help: an AI review that maps current use, puts the minimum in place and identifies the trials worth running.