
01 The decision

Hand over the judgement. Not just the files.

This is the reasoning you are buying. A fictional advisory firm is preparing for a partner's departure: no client data, no claimed results.

Illustrative recommendation: test whether a delivery lead can prepare a proposal without the partner, before expanding automation.

Why this scope

Knowledge gets stuck at the same point: the partner explains the need, finds a precedent, then resolves exceptions. The new lead must be able to reconstruct all three steps.

What would change the recommendation

If examples contradict each other or nobody can approve fees, begin with a shared rule and an accountable owner. Defer AI.

The decision for the owner

Authorize a trial on anonymized files. Name the person who resolves exceptions. Do not expand access at this stage.

02 The evidence

Every conclusion needs a route back to its source.

Illustrative evidence register: these items are invented to show the deliverable's structure, not to demonstrate a gain.

Reported fact · fictional interview E1

The partner says they review every proposal. That indicates perceived dependency; it does not establish average time or the quality of work in their absence.

Observation to obtain · requested item P1

Compare an anonymized request, its first draft and the approved version. Separate substantive corrections, missing rules and cosmetic edits.

Unknowns that remain open

Rework time, frequency of exceptions, backup availability, document rights and trial cost. No firm-wide score or ROI while this evidence is missing.

03 The alternatives

AI has to earn its place in the answer.

Three comparable options. The trial must reveal whether AI adds value beyond a better-organized process.

Continue as today

Keep partner approval. Defensible if cases are rare and succession is distant. Dependency remains; establish its cost before trying to remove it.

Improve without AI

Create a shared template, a precedent library and an escalation rule. Less setup; search and preparation remain manual. This is the trial's comparison condition.

Add an assisted draft

Use authorized precedents only, cite sources, expose gaps and require approval. Estimate setup, running and human review costs before committing.

04 The trial and next step

The handover works when the work survives without a prompt from you.

Proposed protocol for this fictional case: five anonymized files over two weeks, subject to sponsor agreement. These numbers define a trial; they are not results.

Who does what

The owner sets the boundaries. The delivery lead prepares with the template alone, then with assistance. The consultant compares versions. A named approver retains the decision and every external send.

Measure, continue or stop

Record preparation and correction minutes, substantive errors and calls to the partner. Continue only if no unsupported claim or critical error is accepted and total time falls against the template alone. Stop if access or approval cannot be controlled.

What you keep

The source register, rules, templates, corrections and the next decision. A human consultant reviews the final deliverable. You can run the trial with your own team or another provider.