

The Proveo Guide to

Launching AI Initiatives

A practical guide to selecting, testing and improving AI workflows.



PREP

Leaders and baseline

TRAIN

Skills and safe use

APPLY

Audit the work

TRACK

Adoption and results

Why AI pilots need a clear starting point

Four questions to answer before a pilot

The task

What is done today, by whom and how often?

The baseline

How long does it take, and what makes an output usable?

The boundary

Which data, decisions and outputs need review?

The owner

Who will run the trial and make the next decision?

A promising AI experiment can stall when the use case proves unsuitable or the organization lacks the systems to support it. Excitement about a tool is a weak way to choose a project. Start with work that employees actually do and test whether AI helps.

Give people a way to find and try possible uses quickly. A baseline of realistic tasks can show where training or clearer rules are needed, while a workflow audit reveals opportunities that are worth a coordinated pilot.

A useful pilot ends with evidence for a decision, even when the answer is to stop.

STEP 1

Look at individual practice and shared workflows

Pursue two kinds of opportunity: small uses that employees discover in their own work, and larger workflows the team identifies together.

INDIVIDUAL PRACTICE

An employee improves a small task using an approved tool, a useful prompt or a custom assistant.

EXAMPLE

Draft a first reply to a customer question in an existing AI tool, then check it before sending.

HOW IT SPREADS

Good training and clear policies help colleagues discover useful applications themselves.

TYPICAL INVESTMENT

Usually no new system is needed; better prompts or a small custom assistant may be enough.

SHARED WORKFLOW

A team redesigns a shared or high-impact process, often with a dedicated tool, budget and owner.

EXAMPLE

Redesign how incoming requests are classified and drafted across an entire support team.

HOW IT SPREADS

A workflow audit reveals where a coordinated process could serve many people or save substantial effort.

TYPICAL INVESTMENT

This may justify dedicated technology, integration, budget and ongoing ownership.

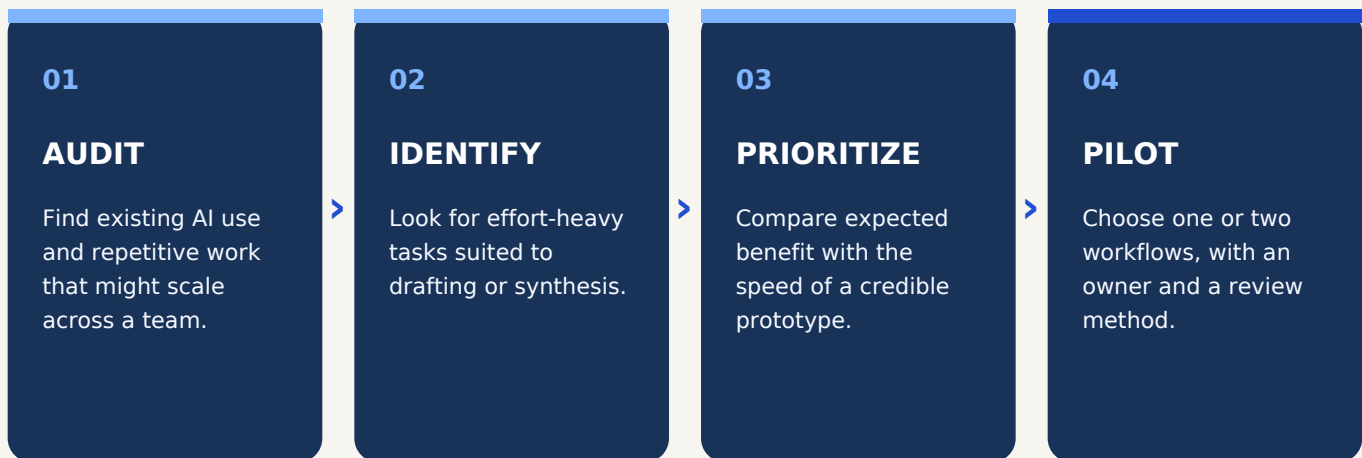
When to run a team pilot

If a use case crosses roles, touches sensitive information or needs a shared quality standard, give it a named owner and treat it as a workflow pilot.

STEP 2

Run a focused workflow audit

Ask the team's AI champions to review work people already do with AI and processes they have not yet tried. Move from a long list of ideas to one or two testable workflows.



What to decide before testing

1	Use case	One recurring task and a defined group of users
2	Speed to test	Aim for a prototype within 60 days and an initial proof in roughly 30 days
3	Safeguards	Data rules, human review and exception handling
4	Evidence	Compare time, cost or output quality with the existing process

A quick, narrow prototype lets you test the assumption before committing to a larger build.

STEP 3

Build a repeatable review habit

Repeat the workflow audit every three to four months as tools and the work change. Give each team time to discuss friction, present its priorities and learn from other teams' experiments.

Aim to leave with one larger shared workflow to improve and a few smaller uses employees can try themselves. Discussing the bigger opportunity often helps people notice quick individual wins as well.

Best practices

1

Look for friction

Ask which necessary task people dread or spend too long on. Start with the effort they actually want removed.

2

Manage what you build

Give every custom assistant or agent an owner for updates, versions, quality checks and user training.

3

Share wins and failures

Make it normal to discuss useful experiments and dead ends in team meetings. Open examples help others find good uses.

WHAT'S NEXT?

Measure what the pilots deliver

Once a workflow is running, compare it with the old way of working. Use what you learn to decide where to invest next and whom to equip to lead the work.

1 Track the return

Compare time, cost and output quality with the baseline, including the effort needed to review errors.

2 Equip your champions

Give the people leading AI projects practical training in building and managing custom assistants and agents.

3 Develop early adopters

Let interested colleagues test new uses, share what worked and help other teams apply the lessons.

WHERE PROVEO FITS

Start with a clear capability baseline.

Proveo uses realistic work tasks to show where teams are strong and where training will help. Pair that picture with your workflow results to choose the next initiative.

Measure skills and outcomes before scaling the next workflow.