

What work could you hand off to a digital colleague?



Break down one recurring task. Decide where your digital colleague can help. Don't forget the human part.

Before deciding where AI belongs, understand how the work actually gets done today.

01 · START WITH ONE TASK

What is one recurring task you do?

What outcome are you trying to achieve?

Client meeting preparation · Monthly reporting · Reviewing documents · Responding to inquiries · Creating proposals

02 · BREAK DOWN THE PROCESS

Put the steps in order, as the work happens today.

STEP	WHAT DO YOU DO?	WHAT INFORMATION DO YOU NEED?	TOOL / SYSTEM	HUMAN DECISION?
1				☐
2				☐
3				☐
4				☐
5				☐
6				☐

Does this reflect how the work actually happens?

Add, remove, or reorder steps until the workflow feels accurate. Then circle 1–2 steps that feel:

Repetitive

Slow

Manual

Information-heavy

Frustrating

REDESIGN THE WORK

Where does each part of your work belong?

 **DIGITAL COLLEAGUE**

Works with information

Research · Draft · Summarize · Analyze · Compare · Extract · Organize

YOU

Provide direction and judgment

Direct · Review · Decide · Approve · Adjust · Communicate

03 · RETHINK THE FRICTION POINTS

Take the steps you circled on page 1.

STEP TO IMPROVE	WHAT COULD YOUR DIGITAL COLLEAGUE DO?	WHAT DO YOU NEED TO REVIEW OR DECIDE?

Example: Preparing for a Client Meeting

CURRENT PROCESS

- 1 Review recent emails
- 2 Check CRM notes
- 3 Research recent company updates
- 4 Pull together key talking points
- 5 Decide meeting priorities

WHAT TO HAND OFF

Digital colleague: Review emails, CRM notes, and recent company updates. Create a concise briefing with key themes, open questions, and possible discussion points.

WHAT STAYS HUMAN

You: Verify the briefing, decide what matters most, choose the meeting strategy, and lead the relationship.

Don't Forget the Human Part!™

AI can help execute the work. You still provide the direction, context, judgment, and accountability.