Category

Data & AI

AI Assistants & Copilots Design, Deployment & Governance Playbook

Designing an AI assistant that knows the boundaries of what it should help with

- Practitioner
- Intermediate
- Template Included

- Administrator
- 20 December 2021
- 3 minute(s)

Overview

A framework for designing, deploying, and governing AI assistants and copilots — scoping appropriate assistant capability boundaries, building escalation and handoff design, and establishing ongoing governance — avoiding the common failure mode of assistants deployed with unclear scope that either overreach into consequential decisions or underdeliver on their genuine potential value.

How should organizations decide what an AI assistant should and

shouldn't handle? Based on the consequence of errors and the genuine value of AI assistance for the specific task — routine, low-consequence tasks are strong candidates for

full assistant handling, while consequential or ambiguous decisions warrant clear escalation to human judgment, covered specifically in the framework below.

What's the most common design gap in deployed AI assistants?

Unclear scope boundaries — assistants deployed without explicit definition of what they should and shouldn't handle, leading to either overreach into consequential decisions the assistant shouldn't be making autonomously, or underuse where users don't trust the assistant with tasks it could actually handle well.

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