Organisational Intelligence Practice Review

Examine one recurring decision or workflow. Identify an evidence-backed problem and agree an improvement to investigate.

Case / workflow	Canvas / revision	Linked records	Decision owner	Facilitator / participants	Date

01 Work and intended outcome

Name the work, who it affects, its start and end, exclusions and constraints. State the outcome that matters.

02 Evidence and uncertainty

What happened? Record source IDs, dates, cases and limitations. Separate observations, interpretations and unknowns; retain contradictory cases.

03 Context and knowledge

What must people understand? Where is knowledge or expertise held? Identify missing or disputed context and link the Knowledge Map.

04 Decisions and coordination

Who decides and acts? Where do authority, ownership or handoffs become unclear? Cite cases and link the Decision and Coordination Canvas.

05 Feedback and continuing learning

How are outcomes reviewed? What knowledge or working practice changes? Check whether the learning remains usable in later cases.

06 Competing explanations

List plausible causes and evidence for and against each. What remains unknown, and what evidence could change the conclusion?

07 Priority for improvement

Choose one change or investigation. Record expected benefit, tradeoffs, prerequisites, accountable owner, due date and evidence of completion.

08 Decision and next records

Proceed, investigate further or pause? Record rationale, owner and date. Agree baseline, comparison, quality limits and review date. Link the AI canvas if relevant and the Outcome and Learning Record.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

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Context and Knowledge Map

Map the knowledge and expertise needed for a specific workflow, including what people know and the records they rely on.

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01 Work signals and shared context

What work or decision is supported? State its purpose, boundaries and affected people. What draws attention to the issue? Record circumstances, constraints and differing interpretations.

02 Knowledge register

List critical knowledge or expertise. Refer to a record or person, identify its current version or date, and record the owner and gap.

Knowledge or expertise needed	Source or person and version or date	Accountable owner	Gap, uncertainty and consequence

03 Access and trust

Can the right people access the source? How are provenance, freshness and conflicting versions checked? Identify unknowns and who will resolve them.

04 Consequences and priorities

Where does missing, outdated or misunderstood knowledge affect decisions or action? Cite cases, consider alternative explanations and choose the most important gap.

05 Knowledge actions and follow-up

What must be verified, retained or updated? Record owner, due date, location or version, communication and review date. Link the Practice Review.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

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Decision and Coordination Canvas

Walk through a real case. Clarify decision authority, preserve context through handoffs and identify a useful change.

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01 Outcome and scope

State the decision or workflow, intended outcome, affected people, start and end points, exclusions and constraints.

02 Decision authority

Who may decide what? Record the authority source, limits and consultation required. Distinguish the decision maker from the person responsible for acting.

03 Context and rationale

What knowledge informs the decision? Which evidence, assumptions and reasoning must be retained? Link the current source and any Knowledge Map.

04 Handoffs and dependencies

Record the actual sequence and where work waits, changes owner or depends on another team. Add source references for important gaps.

Decision or handoff	Decision maker, actor and next recipient	Required context and output	Completion condition or exception

05 Exceptions and recovery

What triggers escalation, who resolves it and what is the fallback? How does work resume? Explain how people can challenge or correct a decision.

06 Observed gaps and explanations

Where is context, ownership or momentum lost? Cite cases, distinguish observation from interpretation, and consider other possible causes.

07 Actions and review

Choose an improvement or investigation. Record owner, due date, prerequisite, completion evidence, review measure and date. Link the Practice Review and evaluation record.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

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AI Opportunity and Work Design Canvas

Compare credible options and define AI's role in a bounded improvement. Agree the evaluation and operating conditions before a pilot.

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01 Problem and outcome

What specific work needs improvement, for whom and why? State scope, eligible cases, exclusions and the intended outcome. Link the Practice Review.

02 Evidence and causes

Record current performance, baseline period, sources and sample limits. Consider competing explanations and what remains unknown.

03 Options and total effort

Compare current practice, improvement without AI and an AI-assisted option. Record benefit to test, dependencies, setup, integration, training, review, correction and ongoing effort or cost.

04 AI task and boundaries

Define approved inputs, expected output and permitted actions. Specify what AI may propose or do, prohibited actions and where human authority is required.

05 Knowledge and access

Specify authoritative context, source owners, version or freshness checks, permissions, allowed and restricted data, record location and retention requirements.

06 People and handoffs

Who checks what, who authorises action and who owns the result? Define handoff context, review capability and review time.

07 Exceptions and fallback

Define abstention, escalation, correction and fallback for missing or conflicting information, poor output, unavailable systems and cases outside scope. Name owners and what is recorded.

08 Pilot and evaluation plan

Set eligible cases, allocation, intake and follow-up, comparison and sample limits. Agree measure definitions, baselines, targets, quality, total review effort, sources and evidence owner. Link the evaluation record.

09 Decision and conditions

Choose AI pilot, change without AI, investigate or no change. Record rationale, tests and approvals needed, pause and restart rules, owners, due dates and next review. Separate expected benefits from results.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

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Outcome and Learning Record

Complete the first row before the change, the second after observation, and the third for the decision and continuing learning.

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BEFORE THE CHANGE

01 Intervention and expected effect

Describe the complete change, the problem, intended outcome and why it should help. Separate AI's expected contribution from other changes. Link the review and any AI canvas.

02 Cases and comparison

Define eligibility, exclusions, allocation, intake and follow-up, unit and expected count. Record comparison, other changes and handling of missing or incomplete cases.

03 Measures and decision rules

Agree baselines, targets, quality limits, units, definitions, denominators, sources and collection owner. Include checking and correction effort. Set review date, pause and restart conditions before results.

AFTER THE OBSERVATION PERIOD

04 Observed results

Record actual values, counts, periods and source IDs against the original criteria. Compare outcome, quality and effort. Retain missing data and limits.

05 Exceptions and deviations

Record unintended effects, incidents, changes to the plan and corrective work. Distinguish defects caught during review from errors reaching customers or other affected people.

06 Explanations and uncertainty

What supports or contradicts the expected effect? Consider case mix, staffing, workload, learning, other changes and measurement differences. Identify further evidence needed. Separate package effects from AI-only effects.

DECISION AND LEARNING

07 Decision and accountability

Continue, adapt, stop or gather more evidence? Record the basis, scope, conditions, decision owner, date and next review.

08 Changes to retain

Which knowledge, policy, decision record, handoff, training or configuration changes? Record location or version, owner, due date, communication and completion evidence.

09 Persistence and record history

Set a later review of cases, including use by another person. Keep revision history, unresolved questions and evidence links. Record who checks continued use and what triggers another review.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

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