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# The AI Delegation Map

How to hand real work to Microsoft Copilot, AI agents, and workflow assistants safely.

**A prompt is a request. A coworker is a relationship.**

Use this worksheet after the AI Agent Readiness Checklist. The checklist answers: **Should we build this?** The Delegation Map answers: **How do we delegate it safely?**

<b>Best for</b>	Inbox triage, meeting prep, quote follow-up, customer research, dispatch triage, weekly reporting, invoice follow-up, service request routing.
<b>Not for</b>	"Help with everything." AI systems work best when the job is narrow, repeatable, and bounded.

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# Workflow Snapshot

Map one workflow at a time. If the work only exists in one person's head, it is not ready to delegate yet.

**Workflow name**

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**Current owner**

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**Business outcome**

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**Success metric**

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## Example

**Workflow:** Service dispatch triage

**Current owner:** Office manager

**Business outcome:** Route service requests faster

**Success metric:** Reduce manual triage from 20 minutes per request to 5 minutes

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# 1. Task

## What exact job should AI help with?

Your rule

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### Examples

**Weak:** Help with operations.

**Better:** Read new service request emails, identify customer name, appliance type, urgency, location, and missing information.

**Weak:** Help with meetings.

**Better:** Prepare a meeting brief using the calendar invite, prior Teams thread, related documents, and open action items.

# 2. Context

## What information is AI allowed to use?

Your rule

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### Examples

**Allowed:** Outlook inbox, Teams meeting chat, SharePoint service documents, CRM notes, approved pricing sheet, Power BI report.

**Not allowed:** payroll data, private HR notes, unapproved vendor pricing, customer payment details.

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## 3. Authority

### What can AI do without approval?

Your rule

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#### Examples

**AI can complete:** categorize a message, summarize a meeting, extract missing fields, draft a follow-up, recommend next action.

**Human approval required:** issue a refund, change a price, send a sensitive customer message, approve a discount, commit to a delivery date.

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## 4. Stop Rules

### When must AI stop and ask a human?

Your rule

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#### Examples

Stop when required information is missing, records conflict, customer is angry or escalated, price exception is requested, legal/HR/medical/financial/compliance risk appears, the request does not match approved policy, or confidence is low.

## 5. Output Standard

### What does “done” look like?

Your rule

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#### Examples

**Dispatch triage output:** customer name, appliance type, service location, urgency level, missing information, recommended next step, escalation reason.

**Meeting brief output:** objective, attendees, prior decisions, open questions, risks, recommended next actions.

## 6. Handoff

### Who receives the escalation?

Your rule

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#### Examples

**Escalate to:** owner for pricing exceptions, admin for missing scheduling information, sales rep for quote follow-up, technician for technical diagnosis, bookkeeper for invoice/payment questions.

**Include:** summary, source records, reason for escalation, recommended next step, deadline or urgency.

## Worked Example: Dispatch Triage

<b>Task</b>	Read new service request emails and extract customer, appliance, issue, urgency, location, and missing information.
<b>Context</b>	Allowed: shared inbox, customer history, service area list, approved appliance categories, technician availability calendar. Not allowed: payment details, payroll data, private employee notes.
<b>Authority</b>	AI can classify request type, identify urgency, draft customer follow-up, and recommend technician category. AI cannot promise an appointment time, change pricing, issue refunds, or close a complaint.
<b>Stop Rules</b>	Stop when address is missing, appliance type is unclear, customer is angry, warranty/payment issue appears, or request is outside the service area.
<b>Output Standard</b>	Customer name, phone/email, location, appliance, issue summary, urgency level, missing information, recommended next step.
<b>Handoff</b>	Route to office manager in the dispatch queue with source email, extracted fields, missing information, and recommended next action.

## Final Check

- Is the task narrow enough to delegate?
- Are the allowed data sources clear?
- Are approval limits documented?
- Are stop rules defined?
- Is the output standard clear?
- Is the handoff owner known?

**If any answer is no, clean up the delegation rules before building the agent.**