WELLESLEY COVE GROUP

The Operator's Guide *to Practical AI.*

Shipping your first AI workflow in five weeks, without sending sensitive data into unmanaged tools.

PRIVATE BY DESIGN · HYBRID WHEN IT HELPS
BUILT AROUND OPERATING IMPACT

§ 01 · WHY MOST AI PILOTS STALL

Smart demos that never reach *the P&L.*

Most AI pilots don't fail because the model is weak. They fail because the workflow was never redesigned, the data path was never clarified, and no one agreed what operational number the pilot was supposed to move. The result is a smart demo that never reaches the P&L. Most organizations expect real impact from AI; only a small fraction have it delivering measurable results today.

This is the operator's version of how to get a first AI workflow live: what to pick, how to de-risk it, how to measure it, and how to keep your data under control while you do. No hype, no "AI strategy" deck, just the handful of decisions that separate a working workflow from another stalled pilot.

THE ONE IDEA TO TAKE AWAY

Don't try to "transform the company." Pick one high-value workflow, map it to a measurable operating lever, prototype it on the architecture your data requires, and leave with a rollout plan. Win once, then expand.

THE FIRST 5 WEEKS

This thinking is the basis for WCG's lead engagement, the First 5 Weeks: in five weeks, select one workflow, prototype it safely on the right architecture, and leave with a rollout plan and a fixed-scope build proposal. How it runs is at the end of this guide.

§ 02 · THE ONE-WORKFLOW RULE

Four rules for a first workflow *that ships.*

1 **Start with the operating model, not the model.**
AI fails wherever people are quietly bridging gaps the system should bridge. Before automating anything, make the implicit explicit: map the workflow, the decision rights, and the handoffs. The redesign is the leverage; the AI is the layer on top. Teams that skip this automate their own confusion.

2 **Pick ONE workflow mapped to a measurable lever.**
"Where should we use AI?" is the wrong first question. The right one is: "Which single workflow, if it ran better, would move a number the CFO already cares about?" Tie it to one lever, cost, cycle-time, throughput, quality, or revenue leakage, and agree the metric up front. One workflow done well beats five pilots done halfway.

3 **De-risk with a week-1 checkpoint and a fixed scope.**
The fastest way to kill momentum is an open-ended engagement. Bound it: a fixed fee, agreed before work begins, and a week-1 checkpoint where, once the workflow, data access, feasibility, and success metric are confirmed, you decide to confirm, rescope, or stop before any build begins. You should never be committed to a build that is not right.

4 **Aim for a working prototype, not finished production.**
In a first, short engagement, the honest goal is a production-shaped prototype plus a clear path to rollout, not at-scale production software. Anyone promising full production in a few weeks for a complex, regulated workflow is overselling. Production rollout is its own, separately scoped phase.

§ 03 · HOW TO CHOOSE YOUR FIRST WORKFLOW

Score candidates on *four dimensions.*

IMPACT	**Does it move a lever the CFO already tracks?** Tied to cost, cycle-time, throughput, quality, or revenue leakage.
FEASIBILITY	**Is the data reachable and the task well-defined?** Documents and records exist; the work is repetitive and rules-based.
SENSITIVITY	**Does the data need to stay controlled?** Regulated or confidential, exactly where you differentiate.
SPONSORSHIP	**Will an owner champion it and provide access?** A named COO, CFO, or operating-partner sponsor.

Where operators usually start: financial close (reconciliations, flux, audit prep) · order-to-cash and collections (disputes, cash application) · document and contract review (read, extract, flag) · procurement and spend (savings, intake-to-approval). The best first workflow is usually not flashy. It is an expensive, repetitive operating bottleneck leadership already knows is broken, which is exactly why it is a safe, high-credibility place to start.

A REAL EXAMPLE · HEALTHCARE EXPENSE RECONCILIATION

A large hospital group reconciled thousands of paystubs against labor records, a multi-team effort that ran for months. The workflow was redesigned, the data structured, and AI document understanding applied only where it removed the bottleneck (97%+ extraction accuracy). The result: $500M in expenses now moves through a working cadence in weeks, with a leaner review team and far less rework. **One workflow, one measurable result, not a transformation program.**

§ 04 · THEN CHOOSE THE ARCHITECTURE

Privacy is a spectrum *you own.*

Privacy is not a single setting; it is a spectrum you own end to end. Once the workflow is chosen, match the architecture to how sensitive its data is:

POSTURE-01 · FULLY PRIVATE

Air-gapped.

For PHI, financial data, classified IP, or any workflow where nothing should leave your perimeter. Models and data stay on infrastructure you control.

POSTURE-02 · HYBRID

Private + governed cloud.

Private models hold the confidential context; governed external calls are used only when they add clear value, minimized and logged.

POSTURE-03 · EXTERNAL

Cloud-assisted, governed.

For lower-sensitivity workflows where cloud models are acceptable under your policy, logging, and guardrails.

The point is not "always private." You decide where the line is, per workflow, and you are never locked into one vendor, model, or cloud.

§ 05 · WHAT A GOOD FIRST 5 WEEKS PRODUCES

A concrete, usable package, *not a slide deck.*

— **A working prototype** of the chosen workflow, running on your own data: proof, not slideware.
— **A clear map** of how the workflow runs today, where it breaks, and what must change before scale.
— **An agreed operating metric,** baselined, so you know exactly what "better" means.
— **A recommended architecture** matched to the workflow's sensitivity: private, hybrid, or external, with no vendor, model, or cloud lock-in.
— **A controlled rollout plan** and a fixed-scope build proposal: scope, timeline, and decision points.

Some teams continue into a larger buildout from here; others take the prototype, roadmap, and decision package and run with it. Either way, the first engagement should stand on its own.

§ 06 · A 60-SECOND READINESS CHECK

Are you ready to run *a first workflow?*

You are ready to run a first AI workflow if you can say yes to most of these:

- ✓ We can name one workflow that, if it ran better, would move a number leadership tracks.
- ✓ The data that workflow needs exists, and we can grant access.
- ✓ We have (or our sponsor will name) an owner to champion it.
- ✓ We know our data-control constraints: what can and cannot leave our perimeter.
- ✓ We would rather prove one workflow in weeks than commission a long strategy study.

§ 07 · HOW WCG RUNS THIS

The First 5 Weeks, *start to working prototype.*

This guide is how we think; the First 5 Weeks is how we deliver. In five weeks, WCG helps your team select, design, and prototype one high-value AI workflow mapped to a measurable operating lever, on the right private, hybrid, or external architecture, and leave with a rollout plan and a fixed-scope build proposal. **Fixed fee, agreed before work begins, with the week-1 checkpoint built in.** You own everything we build, and you stay model-agnostic: no lock-in.

01	Select & map: workflow, data, sensitivity, success metric. Confirm, rescope, or stop.
02	Architecture & build plan: private, hybrid, or external; access and governance.
03	Build the first workflow: a working prototype on your data.
04	Controls & feedback: logging, access, guardrails, evaluation.
05	Demo, enable, expand: walkthrough, rollout plan, build proposal.

Founded by ex-Big 4 consultants. Senior, practitioner-led delivery, built around the operating model, private by design.

READY TO PICK YOUR FIRST WORKFLOW?

Discuss your *first workflow.*

A 30-minute working session: we will identify one measurable workflow your team can prototype in five weeks.

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For what AI looks like in your environment, private, hybrid, or external: wellesleycove.com/ai-for-business.