Beyond the Plant Floor

Turning Your Company's Expertise into an AI Advantage

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At Shiftsmart, most of the work happened while I wasn't in the room

2,500+

people screened a day for temporary work

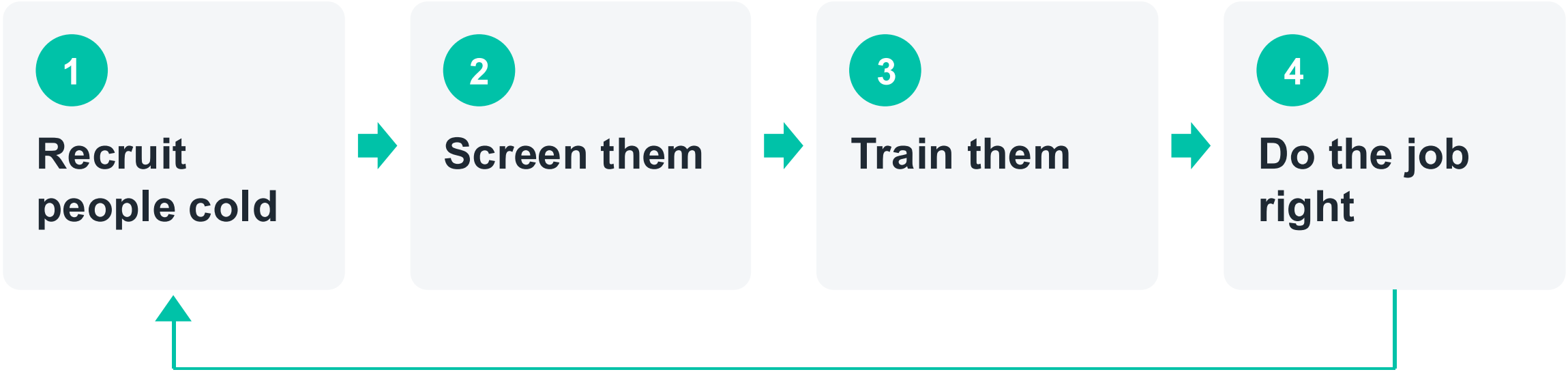
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continents: Asia, North America and Europe

24/7

screening ran day and night

Each step was written down well enough for someone I'd never met to get it right



When something didn't work: fix the process and roll it out again

When a process is written down well enough for someone new to run it, it's written down well enough for AI to help with it.

Steel has used AI on the plant floor for years

This hour is about the business around it: safety, compliance, HR, sales, finance and supply chain.

Members already use AI off the plant floor

	WHAT IT DOES	COMPANY
1	A chatbot that asks incident-report writers for missing details, now in testing	Large producer
2	First drafts of functional specs, checked by a different group	Engineering firm
3	Sales emails drafted overnight, with a person approving every send	Small supplier
4	A VP's report that stalled whenever its owner was away, now being automated by IT	Large producer
5	Finding the closest past project file without asking colleagues	Engineering firm

AI can now write tools that run with no AI in them

62,000

lines of app code, written with AI

2,400+

automated tests that run on every change

0

AI models called when it runs

uConnect is grant software I built with AI, starting in April.

AI use grows through four stages

1

Prompts

A person types one question into a chat.

2

Skills

A written process the AI saves and runs the same way every time.

3

Connected skills

Skills that hand work to each other or run on a schedule, often called agents.

4

Automation and custom builds

A process runs end to end on its own, or AI builds a tool for it.

The written process stays the same. Each stage runs more of it on its own.

The parts AI can't do yet are just a matter of time

> *“Every two months you see something that is an amazing thing that you never saw.”*
>
> A leader at an automation engineering firm that supplies steel mills

Nobody can predict which part of your process AI can do next year

But you can write the process down now, so your team can move quickly when the tool catches up.

Commit your 12-month plan to foundations

PLANNING FOR OUTCOMES

The tech outpaces it by launch

If the plan is a series of AI agents and an internal tool, a newer model may do its job by launch, and the old setup takes time to undo.

PLANNING FOR FOUNDATIONS

Better models make it more useful

Organized data, written processes and data sorted by risk were useful in 2024 and will be in 2028.

A scoped project, like one finance process, can still plan for an outcome.

A large producer moved with a push from the top

WHO DROVE IT	The CEO, with a weekly huddle where everyone shares what they're building, and an AI team for safety
WHAT THEY WROTE DOWN FIRST	The safety team's rules for a good incident report, which is now applied by a chatbot (in testing phase)
THE LIMIT THEY SET	A written HR commitment that the tools won't be used to discipline people
WHAT YOU CAN COPY	**Any leader can start a weekly huddle and a team for their own function.**

A small supplier wrote its procedures down before it built anything

WHO DROVE IT	Its leaders, who built the tools themselves, from simple scripts to agents that run on a schedule
WHAT THEY WROTE DOWN FIRST	Procedures, rules for when to check in with each customer, and brand guidelines
THE LIMIT THEY SET	The tools enforce it: each role reaches only what it's allowed, and a person approves every email and drawing
WHAT YOU CAN COPY	**Set what your team's tools can touch by role. You don't have to wait for a company-wide rule.**

An engineering firm lets AI draft and has a different group check

WHO DROVE IT	A dedicated AI group inside the firm
WHAT THEY WROTE DOWN FIRST	Standard project documents and a catalog of past projects, so AI can draft and find the closest match
THE LIMIT THEY SET	Customer data stays in the customer's own systems. Anything sent to an outside AI company's tool uses made-up data.
WHAT YOU CAN COPY	**Have a different group check every AI draft, and keep customer data in the customer's systems.**

Every one of them wrote something down first

The producer wrote incident-report rules, the supplier wrote procedures and brand guidelines, and the engineering firm wrote standard project documents.

Every team feeds the same engine

Teams write the skills. IT and engineering build the harness every skill and agent runs inside.

BACK-OFFICE TEAMS

Write prompts, and turn the good ones into skills.

- **Safety**
- **Finance**
- **Sales**
- **HR**
- **Supply chain**

THE HARNESS

BUILT BY IT AND ENGINEERING

SAMPLE TASK **Draft this week's customer check-in emails**

DATA COLOR

Product specs	GREEN
Visit history	YELLOW
Usage, pricing	RED · STRIPPED

ACCESS, BY ROLE

CRM — Read only

None · Read · Write

Email — Draft only

None · Draft · Send

APPROVED TOOL

The company's paid AI tool handles **green and yellow**. Red details never reach it.

STAYS WITH A PERSON

The sales lead reads each draft, edits it and **presses send**.

WHAT IT RUNS

Skills — EVERY TEAM

A team's written process, run the same way every time.

Connected skills — TEAM + IT

Skills that hand work to each other or run on a schedule.

Automation — TEAM + IT

A process runs end to end, and a person checks the result.

Custom builds — IT + ENG

Tools built with AI, often with no AI inside them.

LEADERS RUN THE CADENCE A weekly huddle to share what's working, and a quarterly check on what's possible now.

The framework turns your process into a plan in four parts

Write it down, color the data, set the limits, and keep asking what's possible.

First, put the whole process on one page

1 Write it down | 2 Color the data | 3 Set the limits | 4 Keep asking

The steps

In order, as the work really runs

The sources

The systems, files and data each step uses

The people

Who does each step, and who signs off

The unwritten rules

What people know that isn't written down yet

Write it so someone new could follow it.

Next, color the data each source carries

1 Write it down | **2 Color the data** | 3 Set the limits | 4 Keep asking

GREEN

Public, or harmless if it got out

Published standards, public product specs

YELLOW

Internal, with nothing personal or confidential

Procedures, internal reports, working drafts

RED

Personal or confidential

Names in incident reports, customer pricing, trade secrets

Each step takes the color of the most sensitive source it touches.

Then, set the limits

1 Write it down | 2 Color the data | **3 Set the limits** | 4 Keep asking

Which tool for which color

- Green: any AI tool your company allows
- Yellow: the AI tool your company pays for and controls
- Red: remove the details, or keep AI out

What AI can touch, by role

Built into the tools where you can, so the limit holds on its own

What stays with a person

Approvals and final decisions, like the corrective action

The harness decides what each agent can touch

Two routes through the same harness: what an agent is allowed to do, and what it's allowed to show.

ROUTE 1

Pathway to build

The less a person checks, the less the agent can do.

A sales rep's access

CRM	Read and write
Email	Send
ERP	Read
HR files	Read

THE HARNESS

Sets what each agent gets from that access.

Agent with a person approving — PERSON APPROVES

CRM read and write
ERP read
Email send, once approved
HR files none

Fully autonomous agent — RUNS ALONE

CRM read only
ERP read
Email draft only
HR files none

ROUTE 2

Data processing

The chatbot never shows who the report is about.

01 IN

An incident report

Names, injuries and what happened, typed into the chatbot.

02 SPOT

A skill flags red data

It finds the names and medical details in the report.

03 STRIP

It strips them out

The identifiers come out before the report is filed.

04 OUT

Manager's summary

What happened and what's missing, with no names.

Explore what's possible every quarter

1 Write it down | 2 Color the data | 3 Set the limits | **4 Keep asking**

When something doesn't work, fix the written process and roll it out again.

Put a check on the calendar every quarter and ask your team what AI can do now that it couldn't before.

Pick one process at a mid-size mill

1

FINANCE

The month-end close

2

SUPPLY CHAIN

A supplier quote to a purchase order

3

SAFETY AND HR

An incident report to the corrective action

4

SALES

A customer's quote request to the order

The mill is made up, so no one has to describe their own company's process.

Fill in one row for each step of the mill process you picked

STEP	WHO'S INVOLVED	DATA COLOR	AI COULD HELP	STAYS WITH A PERSON
Example: supervisor writes up the incident	*Supervisor, injured worker, witnesses*	R *Red*	*Ask for missing details, names removed*	*Deciding the corrective action*
1				
2				

Then list the data sources and your questions for IT in box 4 of the worksheet.

Which step would you give AI first, and which would you keep with a person?

Back at work, bring IT the page as your plan

ASKING YOUR IT TEAM FOR A PLAN

IT starts from a blank page

IT has to learn your process before it can say yes or no.

BRINGING YOUR IT TEAM THE PAGE

IT reviews a plan you wrote

The page shows the steps, the data colors and what stays with a person.

Do the worksheet on a real process from your own area first.

You have five things to do this month

1. Write down one process in your area: the steps, the sources, the people and the rules.
2. Color the data it touches green, yellow or red.
3. Set the limits: which tool for which color, what AI can touch by role, what stays with a person.
4. Bring the page to IT, or whoever owns the risk, as the plan.
5. Book a quarterly check to ask what's possible now.

Circle the step on your worksheet that you'll start this month.

Take the session guide home

Beyond the Plant Floor: the AIST session guide

The four stages, the three companies, the four parts and a blank worksheet.

trevorstechtalk.com/aist-guide

Your expertise is already your advantage.

Write it down and keep asking what's possible.

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