AI Adoption Architecture
(AIGuide 4)

A Structured Framework for Responsible AI Navigation & Governance

AI Sourced Facts (AISF) Pte. Ltd.

Edition: Version 1.0
Publication Date: February 2026

PREFACE

Artificial intelligence systems are now embedded across professional, institutional, and educational environments. Drafting, analysis, design, research, automation, and decision support functions increasingly incorporate AI-enabled tools.

Accessibility has expanded rapidly.
Structural discipline has not always followed at the same pace.

In many environments, AI adoption begins informally. Tools are selected before use cases are fully defined. Capabilities are explored before governance boundaries are clarified. Integration deepens gradually, often without deliberate structural calibration.

This volume was developed to address that imbalance.

AISF AI Adoption Architecture presents a structured framework for responsible AI navigation and governance. It integrates task-oriented orientation with proportionate governance scaffolding.

The architecture proceeds sequentially:

Awareness → Classification → Compatibility → Governance.

It does not rank vendors.
It does not predict market outcomes.
It does not endorse platforms.
It does not substitute regulatory, compliance, or internal control systems.

Instead, it introduces structured reasoning before integration deepens.

Part I provides task-first navigation across twelve functional domains, helping users orient themselves before selecting tools.

Part II introduces governance discipline proportionate to structural integration, authority expansion, and system dependency.

Each part can be used independently. Together, they form a coherent framework.

This February 2026 Edition reflects globally observed AI usage patterns at the time of publication. The AI landscape will continue to evolve. The reasoning discipline embedded in this framework is designed to remain durable.

Artificial intelligence systems assist.

Responsibility remains human.

ARCHITECTURAL INTRODUCTION

Artificial intelligence systems are increasingly embedded across professional, institutional, and educational environments. Tools draft documents, analyse data, synthesise research, automate workflows, and influence decisions with growing operational significance.

Yet adoption frequently precedes structure.

In many environments, tools are selected before tasks are clearly defined. Governance considerations emerge after integration. Authority boundaries expand informally. Dependency develops gradually.

This architecture addresses that pattern.

The AISF AI Adoption Architecture is designed as a sequential structural framework:

Awareness → Classification → Compatibility → Governance

Each stage reflects a different discipline of responsible AI adoption:

- **Awareness** clarifies what task is being attempted and where it fits within a broader functional landscape.
- **Classification** examines the structural characteristics of that task — risk exposure, data posture, verification burden, and integration complexity.
- **Compatibility** aligns task structure with appropriate capability classes rather than vendor prominence.
- **Governance** formalises oversight proportionate to authority scope and system dependency.

This volume integrates these disciplines into a unified framework.

It is not a ranking guide.
It does not endorse vendors.
It does not prescribe mandatory structures.
It does not replace regulatory, compliance, or internal control systems.

Instead, it provides structural reasoning before technology decisions are embedded.

Each part of this volume can be used independently. However, together they form a coherent progression from exploratory use to structured governance.

Responsible AI adoption does not begin with tools.
It begins with structured thinking.

This February 2026 Edition reflects observed global AI usage patterns at the time of publication. The landscape will evolve. The reasoning discipline remains durable.

STRUCTURAL NOTE

This guide differs in structure from other AIGuides in the AISF series.

In this volume, several elements typically presented at the overall document level—such as usage guidance, governance framing, and structural interpretation—are intentionally embedded within Part I and Part II.

This reflects the architectural nature of the guide.

Part I focuses on structured navigation and task-oriented orientation.
Part II introduces governance and control architecture aligned with increasing levels of integration, authority, and system dependency.

As a result, readers may encounter certain elements—such as usage guidance, governance context, and structural definitions—within the relevant sections rather than consolidated at the beginning of the document.

This approach is deliberate.

It aligns structure with function, ensuring that guidance appears at the point of use rather than as abstract front-matter.

This guide should therefore be read both:
• as a complete architecture, and
• as two independently usable components.

VERSION & GOVERNANCE

This guide is published as part of the education framework developed by AI Sourced Facts (AISF) Pte. Ltd.

Current edition: Version 1.0
Publication date: February 2026

This is an architecture-based publication. It reflects globally observed AI usage patterns and structural considerations at the time of release. The framework is designed to remain conceptually stable, while allowing for refinement as AI capabilities, governance expectations, and integration practices evolve.

Future updates may:

- refine structural components of the architecture
- incorporate additional governance considerations
- adjust domain-level observations based on evolving usage patterns

All updates will be version-controlled. Earlier versions will be retained to preserve continuity and support longitudinal reference.

AISF maintains editorial governance over all content to ensure neutrality, structural integrity, and consistency with its non-prescriptive, capability-first approach to AI navigation and integration.

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PART I

STRUCTURED AI NAVIGATION

PREFACE

Part I — Structured AI Navigation

Artificial intelligence adoption often begins with discovery.

Users encounter tools through visibility, ecosystem alignment, or peer recommendation. Selection decisions are sometimes driven by convenience rather than structural fit.

Part I introduces disciplined orientation before commitment.

The Structured AI Navigation framework is organised into twelve flat functional domains. Each domain reflects a category of work — writing, research, coding, automation, analytics, learning, and others. No domain is elevated above another. Entry point depends entirely on task.

Within each domain:

- Scope boundaries are clarified
- Common confusion points are identified
- Decision criteria are articulated
- Representative tools are examined neutrally
- Plusses and reservations are documented
- Governance reminders are embedded

The objective is clarity, not promotion.

This section is suitable for individuals, teams, and institutions seeking structured orientation without vendor bias or ranking posture.

Navigation clarifies direction.
Governance calibrates responsibility.

INTRODUCTION

Structured AI Navigation

Artificial intelligence adoption often begins with tool discovery.

Users encounter platforms through visibility, familiarity, or marketing positioning. Capabilities are explored through experimentation. Selection decisions may be driven by convenience rather than structural fit.

Structured AI Navigation introduces a task-first orientation.

Instead of beginning with vendors, it begins with domains of work. Writing, research, coding, automation, design, analytics, learning, and strategic support are treated as functional categories. The architecture remains flat: no domain is elevated above another.

Within each domain:

- Scope boundaries are defined.
- Common confusion points are clarified.
- Decision criteria are articulated.
- Representative tools are examined neutrally.
- Plusses and reservations are documented.
- Governance reminders are included.

This is orientation without prescription.

Tool visibility does not determine structural relevance.
Use case determines entry point.

Part I provides clarity before commitment.

It is suitable for individuals, teams, and institutions seeking disciplined navigation of the AI landscape without vendor bias or ranking posture.

Human accountability remains constant across all domains.

How to Use This Architecture

This volume can be used in three ways:

1. Task-Based Navigation

Begin with the domain that most closely matches your objective.
If you are drafting professional documents, start with Writing.
If you are building automation flows, go to Workflow Integration.
If you are planning at board level, see Strategic Planning & Decision Support.

Each domain is self-contained.

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2. Governance Review

Before implementing any AI system in operational environments, review:

- Common confusion points
- Plusses and reservations
- Governance reminders

These sections are designed to prevent overextension, misinterpretation, and unmanaged risk.

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3. Comparative Capability Awareness

If multiple domains appear relevant, review decision criteria across them. Some tasks span boundaries. For example:

- Research may intersect with Writing.
- Coding may intersect with Workflow Automation.
- Learning may intersect with Strategic Planning.

The architecture supports cross-domain awareness without collapsing categories.

This book does not prescribe a specific tool.
It provides structured orientation to support informed selection.

Understanding Operational Maturity in AI Adoption

AI adoption does not occur in a single step.

Individuals and organisations typically move through increasing levels of structured use. Early experimentation may involve isolated tasks. Later stages involve integration into workflows, documentation standards, and governance frameworks.

Operational maturity includes considerations such as:

- Review protocols
- Version control
- Escalation pathways
- Data classification
- Role-based access
- Documentation discipline

A system that is appropriate for exploratory learning may not be suitable for regulated environments. A tool that accelerates drafting may require additional oversight before public release.

The architecture encourages gradual, structured adoption aligned with organisational readiness.

Capability expansion should be matched by governance expansion.

Survey Anchoring & Neutrality Posture

Tool selection in this volume reflects globally observed AI usage patterns as of February 2026.

No ranking is implied.
No endorsement is intended.

Representative tools were selected based on cross-sector visibility of usage patterns as observed in February 2026, not on claims of superiority. This neutrality posture is deliberate.

The AI landscape is fluid. New tools emerge rapidly. Capabilities evolve. Market positioning changes.

By focusing on functional categories rather than competitive positioning, this framework remains durable even as specific platforms evolve.

The architecture is capability-first.
Vendor prominence does not determine structural relevance.

Functional Domains

Domain 1: Writing & Professional Documents

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Business writing (emails, reports, proposals, briefs)
- Structured professional documents (policies, memos, position papers)
- Editing and rewriting
- Draft refinement and tone adjustment
- Structured long-form writing
- Iterative drafting workflows

It does **not** cover:

- Graphic design tools
- Slide presentation software
- Coding environments
- Research databases (though some writing tools integrate research features)

The focus is on AI systems that assist with the **production, refinement, and structuring of written material** in professional or academic contexts.

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Draft material more efficiently
- Improve clarity or tone
- Restructure an existing document
- Reduce cognitive load during early drafting
- Convert bullet notes into structured prose
- Summarise long material into decision-ready format
- Maintain consistent professional tone

Users may include:

- Students
- Early-career professionals
- Executives
- Consultants

- Policy writers
- Researchers

Common Confusion Points

1. **Assuming all writing tools perform identically**
   Systems vary in:
   - Reasoning depth
   - Context window length
   - Revision control
   - Formatting stability
   - Data handling posture
2. **Conflating drafting with editing**
   Some systems are stronger at generative drafting.
   Others perform better in refinement and rewriting tasks.
3. **Misjudging tool maturity**
   Not all systems are equally stable for:
   - Long documents
   - Complex formatting
   - Multi-step revision cycles
4. **Assuming AI replaces author responsibility**
   Professional documents remain the responsibility of the human author.

Decision Criteria for Choosing Tools

When selecting a writing AI tool, evaluate:

1. Document Complexity

- Short email vs multi-section policy draft
- Narrative vs structured analytical report

2. Required Reasoning Depth

- Surface-level drafting
- Multi-layered argumentation

3. Revision Iteration Needs

- Single-pass generation
- Multi-round refinement cycles

4. Context Handling Capacity

- Does the tool reliably manage long inputs?

5. Data Sensitivity Requirements

- Is confidential or proprietary information involved?
- Are enterprise governance controls required?

6. Formatting Environment

- Are structured headings, citations, or tables required?
- Is drafting occurring inside an existing productivity suite?

Quick-Start Decision Guidance

- **When document complexity is high and multiple revision cycles are expected:**
  Begin with conversational AI systems designed for iterative drafting and structured reasoning.
- **When drafting occurs inside an existing productivity environment:**
  Begin with embedded AI assistants integrated into that workflow.
- **When the primary need is clarity correction and tone adjustment of short content:**
  Begin with real-time editing assistants.
- **When reviewing or restructuring very long documents (15–20+ pages):**
  Begin with systems that support extended context handling.

Selection should reflect workflow structure, document scale, and governance requirements.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

OpenAI — ChatGPT

Category Fit:
General-purpose conversational AI with structured drafting and restructuring capability.

Primary Strengths

- Structured drafting across formats (emails, reports, memos)
- Iterative refinement through conversational dialogue
- Strong reasoning support for complex documents
- Long-form drafting capacity (dependent on model tier and configuration)
- Effective summarisation and restructuring

Reservations

- Formatting stability may vary depending on output complexity
- Tone calibration requires clear user instruction
- Data sensitivity posture depends on account configuration
- Not a document-native editor (external copy/paste workflow may apply)

Best Fit For

- Policy drafting
- Structured argument development
- Executive summaries
- Multi-stage document building

Less Suitable For

- Fully automated publishing workflows
- Design-dependent formatting environments
- Regulated environments without enterprise controls

Tool Profile 2

Grammarly

Category Fit:
Embedded writing assistant focused on editing, clarity, and tone correction.

Primary Strengths

- Real-time grammar and clarity correction
- Tone adjustment suggestions
- Seamless browser and document integration
- Low-friction editing workflow

Reservations

- Limited deep reasoning capability
- Less suitable for complex structured drafting from scratch
- Dependent on integration environment

Best Fit For

- Polishing emails and short documents
- Clarity improvements
- Tone alignment in professional communication

Less Suitable For

- Long-form structured argument development

- Policy drafting
- Multi-layered analytical documents

Tool Profile 3

Microsoft — Copilot (Microsoft 365)

Category Fit:
Integrated AI writing assistant embedded within productivity software.

Primary Strengths

- Native integration within Word, Outlook, and related tools
- Structured drafting within existing document environments
- Enterprise governance alignment (licence-dependent)
- Meeting summarisation-to-document workflows

Reservations

- Output quality dependent on organisational configuration
- Less flexible conversational iteration compared to standalone systems
- Full capability often tied to enterprise licence tiers

Best Fit For

- Corporate environments operating inside Microsoft 365
- Document drafting within structured enterprise systems
- Meeting-to-report conversion workflows

Less Suitable For

- Independent users outside the Microsoft ecosystem
- Highly iterative exploratory writing sessions

Tool Profile 4

Anthropic — Claude

Category Fit:
Conversational AI with extended context handling.

Primary Strengths

- Large context window for long documents
- Structured summarisation capability

- Consistent tone across extended outputs
- Stable handling of large text inputs

Reservations

- Platform features vary by plan tier
- Formatting control may require manual adjustment
- Limited native integration with productivity suites

Best Fit For

- Reviewing long contracts or policy drafts
- Summarising lengthy research material
- Restructuring multi-section documents

Less Suitable For

- Embedded real-time editing inside document platforms
- Layout-sensitive publishing workflows

Quick Decision Summary

If You Are Short on Time, Begin Here

- **High-complexity drafting with multiple revisions:**
  Begin with conversational AI systems built for structured iteration.
- **Drafting inside enterprise productivity suites:**
  Begin with embedded AI assistants integrated into that environment.
- **Short content requiring grammar and tone refinement:**
  Begin with real-time editing assistants.
- **Very long documents requiring restructuring or review:**
  Begin with systems that support extended context handling.

If uncertain, begin at basic level and scale upward as document complexity increases.

Human oversight remains essential.
Tool selection should align with workflow structure, document length, and governance context.

Governance Reminder

AI writing systems:

- May retain interaction data depending on configuration
- May produce plausible but incorrect information
- Do not replace professional responsibility

Regulated or compliance-sensitive documents require additional review protocols and professional oversight.

Users remain accountable for:

- Accuracy
- Confidentiality
- Version control
- Final publication decisions

Domain 2: Content & Digital Publishing

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Blog and article generation
- Social media content creation
- Newsletter drafting
- SEO-aligned content structuring
- Website copy development
- Multi-platform content repurposing
- Content ideation and calendar planning

It focuses on AI systems that assist with **scalable content production and digital distribution workflows**.

It does **not** cover:

- Graphic-only design platforms
- Video editing tools
- Paid advertising optimisation platforms
- Pure analytics dashboards

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Generate blog posts at scale
- Maintain consistent publishing cadence
- Repurpose long-form content into shorter formats
- Align content with SEO structures
- Develop structured website copy
- Create multi-platform social posts

Users may include:

- Entrepreneurs
- Marketing teams
- Independent creators
- Corporate communications teams

- Educational publishers

Common Confusion Points

1. **Confusing writing tools with publishing tools**
   Writing tools assist with drafting; publishing tools assist with distribution, SEO alignment, and multi-channel scaling.
2. **Assuming SEO alignment is automatic**
   Not all AI systems structure content for discoverability without explicit configuration.
3. **Overestimating automation**
   Editorial oversight remains required for brand voice, compliance, and factual integrity.
4. **Underestimating governance considerations**
   Public-facing content introduces reputational and regulatory considerations.

Decision Criteria for Choosing Tools

1. Content Volume Requirements

- Occasional blog posts vs daily multi-channel publishing

2. Channel Complexity

- Single website vs multi-platform distribution

3. SEO Requirements

- Informational blogging vs search-optimised strategy

4. Workflow Integration

- Standalone content drafting vs CMS-integrated publishing

5. Brand Consistency Needs

- Individual creator voice vs enterprise brand governance

Quick-Start Decision Guidance

- **For structured blog and long-form content drafting:**
  Typical starting point: conversational AI systems capable of structured content generation.
- **For social media scaling and multi-platform repurposing:**
  Consider starting with content automation platforms designed for distribution workflows.

- **For enterprise environments requiring CMS integration:**
  Often aligned with tools integrated into the existing content management system.
- **For ideation and content calendar development:**
  Consider starting with systems that support structured topic clustering and planning.

Selection should reflect publishing cadence, governance needs, and distribution complexity.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

OpenAI — ChatGPT

Category Fit:
Conversational AI used for blog drafting, content ideation, and repurposing.

Primary Strengths

- Long-form article drafting
- Content repurposing (blog → social → summary)
- Topic clustering and idea generation
- Flexible tone adaptation

Reservations

- SEO structuring requires user direction
- Not natively integrated into publishing platforms
- Output requires editorial verification

Best Fit For

- Blog drafting
- Educational content development
- Thought leadership articles
- Content transformation workflows

Less Suitable For

- Automated multi-platform scheduling
- CMS-native publishing without manual transfer

Tool Profile 2

Jasper AI

Category Fit:
Content-focused AI platform designed for marketing workflows.

Primary Strengths

- Marketing-oriented templates
- Brand voice configuration
- Content workflow structuring
- Campaign-level content generation

Reservations

- Marketing-centric orientation may not suit academic or policy contexts
- Template-driven outputs may require refinement
- Enterprise-level features tied to higher tiers

Best Fit For

- Marketing teams
- Brand-managed content production
- Campaign-aligned publishing

Less Suitable For

- Deep analytical long-form research writing
- Non-marketing institutional publishing

Tool Profile 3

HubSpot — AI Content Tools

Category Fit:
AI-assisted content generation integrated within marketing and CRM systems.

Primary Strengths

- Integration with CRM data
- SEO-aligned content structuring
- Workflow integration within marketing pipelines
- Campaign tracking alignment

Reservations

- Dependent on broader platform adoption
- Designed primarily for marketing-aligned content workflows rather than neutral institutional publishing contexts.
- Full capability tied to subscription tier

Best Fit For

- Marketing-driven content strategies
- Inbound content ecosystems
- CRM-integrated publishing

Less Suitable For

- Independent creators outside CRM environments
- Non-commercial institutional publishing

Tool Profile 4

Canva — Magic Write

Category Fit:
AI-assisted content drafting integrated into a visual publishing environment.

Primary Strengths

- Integrated text generation within design workflows
- Social media content drafting
- Rapid short-form content creation
- Visual-layout integration

Reservations

- Limited deep reasoning capability
- Less suited for complex analytical writing
- Formatting optimised for visual layouts rather than long-form prose

Best Fit For

- Social media captions
- Newsletter snippets
- Visual-first publishing environments

Less Suitable For

- Multi-thousand-word analytical articles
- Policy or institutional documents

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Long-form blog drafting:**
  Typical starting point: conversational AI capable of structured content generation.
- **Marketing campaigns and brand alignment:**
  Often aligned with marketing-focused AI platforms.
- **CRM-integrated publishing:**
  Consider starting with tools embedded within your marketing ecosystem.
- **Visual-first social publishing:**
  Often aligned with AI integrated into design platforms.

If uncertain, begin at basic level and scale upward as publishing complexity increases.

Human editorial oversight remains essential.
Public-facing content requires governance discipline and brand review protocols.

Governance Reminder

AI content tools:

- May generate factually plausible but unverified statements
- May require SEO validation and compliance checks
- Operate within platform-specific data policies

Public-facing content introduces reputational considerations.

Content subject to jurisdiction-specific regulations (e.g., advertising standards, financial disclosure, health claims) may require specialist review.

Organisations remain responsible for:

- Accuracy
- Brand integrity
- Regulatory compliance
- Editorial review standards

Domain 3: Research & Knowledge Synthesis

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Research assistance
- Multi-source information synthesis
- Literature summarisation
- Structured knowledge comparison
- Evidence clustering
- Briefing document preparation

It focuses on AI systems that assist with **information aggregation, structured summarisation, and synthesis across multiple inputs**.

It does **not** cover:

- Primary data collection platforms
- Statistical modelling tools
- Citation management software (though some tools integrate citation support)
- Academic database subscriptions

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Summarise long research papers
- Compare multiple sources
- Identify thematic patterns
- Convert research into structured briefs
- Reduce time spent scanning large volumes of text

Users may include:

- Students
- Policy analysts
- Researchers
- Strategy teams
- Journalists
- Institutional advisors

Common Confusion Points

1. **Confusing summarisation with verification**
   AI synthesis does not guarantee factual accuracy or source reliability.
2. **Assuming all AI research tools access live web data**
   Access models vary by configuration and subscription tier.
3. **Overlooking citation integrity**
   Not all systems reliably generate traceable citations.
4. **Mistaking speed for comprehensiveness**
   Rapid synthesis may omit minority viewpoints or edge-case data.

Decision Criteria for Choosing Tools

1. Source Volume

- Single document vs multi-document comparison

2. Citation Requirements

- Informal brief vs formally referenced report

3. Live Data Access Needs

- Static document analysis vs current-event research

4. Output Structure Requirements

- Bullet summary vs structured policy briefing

5. Governance and Audit Needs

- Internal research vs externally published material

Quick-Start Decision Guidance

- **For synthesising multiple long documents:**
  Typical starting point: conversational AI systems with strong long-context handling.
- **For citation-sensitive academic workflows:**
  Often aligned with tools designed for research referencing environments.
- **For current-event or live-web research needs:**
  Consider starting with systems that support browsing or connected data access.
- **For structured executive briefings:**
  Often aligned with AI capable of layered summarisation and argument structuring.

Selection should reflect evidence requirements, citation discipline, and review protocols.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

OpenAI — ChatGPT (model capability varies by tier)

Category Fit:
Conversational AI supporting structured synthesis and comparative analysis.

Primary Strengths

- Multi-document summarisation
- Thematic clustering
- Structured briefing generation
- Iterative clarification through dialogue

Reservations

- Citation reliability dependent on configuration
- Live browsing capability varies by tier and configuration
- Output requires independent verification

Best Fit For

- Internal research briefs
- Comparative topic analysis
- Strategy preparation documents

Less Suitable For

- Fully audited academic publication without manual citation verification
- Primary legal research requiring authoritative databases

Tool Profile 2

Perplexity AI

Category Fit:
AI-assisted research interface with citation-linked responses.

Primary Strengths

- Source-linked summaries
- Real-time web access
- Citation visibility
- Rapid topic overview generation

Reservations

- Depth of synthesis may vary by query complexity
- Source quality dependent on web indexing
- Not a substitute for academic database access

Best Fit For

- Current-event research
- Rapid exploratory research
- Source discovery workflows

Less Suitable For

- Deep academic literature review
- Proprietary database research

Tool Profile 3

Anthropic — Claude

Category Fit:
Conversational AI with strong long-context document processing.

Primary Strengths

- Large document ingestion
- Consistent summarisation across extended texts
- Structured extraction of key themes
- Stable long-form comparison

Reservations

- Citation tracking requires manual verification
- Live data access varies by configuration
- Formatting may require adjustment

Best Fit For

- Policy draft review

- Long research document consolidation
- Multi-section synthesis tasks

Less Suitable For

- Citation-critical academic submission without verification
- Database-specific research queries

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Single long document summarisation:**
  Typical starting point: conversational AI with extended context handling.
- **Current-event research with visible citations:**
  Often aligned with AI research interfaces providing source links.
- **Multi-document synthesis for strategy or policy:**
  Consider starting with AI capable of structured comparative analysis.

If uncertain, begin at basic level and scale upward as synthesis complexity increases.

Human verification remains essential.
Research outputs require source validation before external publication.

Governance Reminder

AI research tools:

- May summarise inaccurately
- May generate incomplete citation references
- Reflect limitations of accessible data sources

Institutional research workflows should include:

- Independent source verification
- Citation validation
- Documentation of review steps

Sensitive or high-stakes research outputs require formal review protocols.

Domain 4: Data Analysis & Structured Insight

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Spreadsheet analysis
- Data summarisation
- Pattern identification
- Basic statistical interpretation
- Structured reporting from datasets
- Query-based data exploration

It focuses on AI systems that assist with **interpreting structured data and generating decision-support insights**.

It does **not** cover:

- Full-scale enterprise BI platforms
- Advanced statistical modelling software
- Dedicated programming-only environments
- Data warehouse infrastructure

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Analyse spreadsheet data
- Extract trends from tabular datasets
- Generate visual summaries
- Produce executive-ready data briefs
- Identify anomalies or patterns
- Convert raw numbers into structured insights

Users may include:

- Business managers
- Finance teams
- Operations analysts
- Consultants
- Small business owners

- Educators

Common Confusion Points

1. **Confusing analysis with automation**
   AI can assist with insight generation but does not replace full analytical validation.
2. **Assuming statistical correctness is guaranteed**
   Outputs require verification, particularly for high-stakes decisions.
3. **Overlooking data privacy obligations**
   Uploading datasets may introduce confidentiality risks.
4. **Equating visualisation with insight**
   Charts do not automatically produce strategic conclusions.

Decision Criteria for Choosing Tools

1. Dataset Size and Structure

- Small spreadsheet vs multi-table dataset

2. Required Depth of Analysis

- Descriptive summary vs deeper statistical interpretation

3. Integration Environment

- Spreadsheet-native vs standalone AI interface

4. Governance and Data Sensitivity

- Internal analysis vs regulated data environments

5. Output Format Needs

- Visual dashboards vs structured executive brief

Quick-Start Decision Guidance

- **For spreadsheet-native analysis within existing office environments:**
  Typical starting point: AI tools integrated within spreadsheet software.
- **For conversational exploration of uploaded datasets:**
  Consider starting with AI systems capable of code-assisted analysis.
- **For lightweight visual dashboards and automated reporting:**
  Often aligned with business intelligence–oriented AI tools.

Selection should reflect data sensitivity, validation needs, and reporting requirements.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

Microsoft — Copilot in Excel

Category Fit:
AI-assisted analysis embedded within spreadsheet software.

Primary Strengths

- Native spreadsheet integration
- Formula generation and explanation
- Trend identification within tabular data
- Visualisation assistance

Reservations

- Dependent on Microsoft ecosystem
- Advanced statistical modelling remains limited
- Enterprise licence tiers may apply

Best Fit For

- Finance reporting
- Operational dashboards
- Internal spreadsheet analysis

Less Suitable For

- Complex predictive modelling
- Multi-source data warehousing

Tool Profile 2

OpenAI — ChatGPT (data analysis capability varies by tier)

Category Fit:
Conversational AI supporting code-assisted data exploration.

Primary Strengths

- Dataset upload and structured analysis (configuration-dependent)
- Python-based exploratory analysis
- Narrative explanation of statistical outputs
- Flexible query-driven interaction

Reservations

- Accuracy dependent on user validation
- Data privacy posture dependent on configuration
- Not a replacement for full statistical software suites

Best Fit For

- Exploratory data analysis
- Educational analytics
- Structured insight summarisation

Less Suitable For

- Regulated financial modelling without verification
- Large enterprise data pipelines

Tool Profile 3

Tableau — AI-Enhanced Analytics Features

Category Fit:
Business intelligence platform with AI-assisted insight capabilities.

Primary Strengths

- Advanced visual dashboards
- Pattern highlighting
- Enterprise integration
- Structured reporting outputs

Reservations

- Learning curve for non-technical users
- Subscription and enterprise alignment required
- AI features complement rather than replace analyst judgment

Best Fit For

- Organisational reporting

- Cross-team analytics dashboards
- Performance monitoring environments

Less Suitable For

- Quick single-spreadsheet analysis
- Individual casual data exploration

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Spreadsheet-based analysis inside Excel:**
  Typical starting point: AI tools integrated within spreadsheet software.
- **Conversational exploration of uploaded datasets:**
  Often aligned with AI systems supporting code-assisted analysis.
- **Enterprise dashboard environments:**
  Consider starting with BI platforms that include AI-assisted insight features.

If uncertain, begin at basic level and scale upward as analytical complexity increases.

Data validation remains essential.
High-stakes decisions require independent verification.

Governance Reminder

AI data analysis tools:

- May produce statistically plausible but incorrect interpretations
- Reflect limitations of input data quality
- Operate within platform-specific data handling policies

Sensitive datasets may require controlled environments and internal governance approval.

Organisations remain responsible for:

- Data accuracy
- Compliance with privacy regulations
- Analytical validation
- Documentation of assumptions

Domain 5: Visual Content & Design Assistance

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Graphic design assistance
- Image generation
- Presentation visual development
- Branding mock-ups
- Social media visual assets
- Layout experimentation

It focuses on AI systems that assist with **visual content creation and design augmentation**.

It does **not** cover:

- Full professional design agency services
- Complex 3D modelling environments
- Dedicated video editing suites
- Print production management systems

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Generate marketing visuals
- Create social media graphics
- Develop presentation slides
- Prototype branding concepts
- Produce illustrative images
- Reduce time spent on layout tasks

Users may include:

- Entrepreneurs
- Marketing teams
- Educators
- Small business owners
- Content creators
- Internal communications teams

Common Confusion Points

1. **Confusing image generation with brand strategy**
   AI can produce visuals but does not replace coherent brand governance.
2. **Assuming design quality is automatic**
   Outputs often require human refinement.
3. **Overlooking licensing and usage rights**
   Image usage terms vary by platform and subscription tier.
4. **Equating visual volume with effectiveness**
   Strategic alignment remains essential.

Decision Criteria for Choosing Tools

1. Asset Type

- Social post graphic vs presentation slide vs standalone illustration

2. Brand Control Requirements

- Template-driven consistency vs open-ended experimentation

3. Integration Environment

- Browser-based design vs integrated productivity suite

4. Output Scale

- Occasional visual vs campaign-level asset generation

5. Governance and Licensing Needs

- Commercial usage requirements
- Attribution considerations

Quick-Start Decision Guidance

- **For social media graphics and quick layout tasks:**
  Typical starting point: browser-based design platforms with integrated AI features.
- **For image generation from text prompts:**
  Consider starting with dedicated AI image generation systems.
- **For presentation development inside office suites:**
  Often aligned with AI tools embedded in productivity software.

Selection should reflect brand governance, licensing awareness, and distribution context.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

Canva — AI Design Features

Category Fit:
Browser-based design platform with AI-assisted layout and content generation.

Primary Strengths

- Template-driven design
- Integrated text and image assistance
- Social media asset production
- Presentation slide creation

Reservations

- Template constraints may limit advanced design flexibility
- Brand precision requires manual oversight
- Enterprise governance features tier-dependent

Best Fit For

- Small business marketing
- Internal communications visuals
- Social media graphics

Less Suitable For

- High-end brand design requiring custom design systems
- Complex multi-layer graphic workflows

Tool Profile 2

Adobe — Firefly (AI image generation features)

Category Fit:
AI-assisted image generation integrated within professional design software.

Primary Strengths

- Text-to-image generation
- Integration with professional creative tools
- Commercial usage alignment (licence-dependent)
- Layer-based editing compatibility

Reservations

- Requires familiarity with creative software ecosystems
- Subscription-based access
- Not a substitute for full design expertise

Best Fit For

- Professional designers
- Marketing departments
- Brand-aligned asset creation

Less Suitable For

- Casual users without design tool familiarity
- Quick one-off social graphics

Tool Profile 3

Microsoft — Designer (AI-Enhanced Features)

Category Fit:
AI-assisted visual design integrated within productivity environments.

Primary Strengths

- Integration with Microsoft ecosystem
- Social post and marketing asset generation
- Template-guided visual creation
- Rapid concept prototyping

Reservations

- Feature set dependent on ecosystem alignment
- Advanced design control limited compared to professional suites
- Branding precision requires manual oversight

Best Fit For

- Office-based visual content creation
- Presentation support
- Internal marketing materials

Less Suitable For

- Complex professional graphic production
- Advanced artistic workflows

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Template-based social and presentation visuals:**
  Typical starting point: browser-based design platforms with AI assistance.
- **Professional design workflows requiring layered control:**
  Often aligned with AI integrated into creative software suites.
- **Office-based visual generation inside productivity ecosystems:**
  Consider starting with embedded AI design tools.

If uncertain, begin at basic level and scale upward as visual complexity increases.

Brand oversight and licensing awareness remain essential.

Governance Reminder

AI design tools:

- Operate under platform-specific licensing terms
- May generate assets requiring attribution review
- Do not replace brand governance frameworks

Commercial usage may require licence validation.

Organisations remain responsible for:

- Brand consistency
- Usage rights compliance
- Final asset approval
- Distribution oversight

Domain 6: Audio & Video Content Production

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Text-to-speech narration
- AI voice cloning (configuration-dependent)
- Video generation from text
- AI-assisted video editing
- Subtitle generation and transcription
- Synthetic presenters and avatar-based video

It focuses on AI systems that assist with **audio narration, video creation, and media augmentation workflows**.

It does **not** cover:

- Full film production studios
- Complex cinematic post-production environments
- Hardware-based recording systems
- Broadcast infrastructure management

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Convert written content into narrated audio
- Produce training videos without full production teams
- Generate social media video clips
- Add subtitles automatically
- Create AI-generated spokesperson videos
- Repurpose blog or research content into multimedia formats

Users may include:

- Educators
- Marketing teams
- Corporate trainers
- Content creators
- Internal communications departments

Common Confusion Points

1. **Confusing synthetic media with authenticity**
   AI-generated audio or video may require disclosure depending on context.
2. **Assuming voice cloning is unrestricted**
   Ethical and legal boundaries apply.
3. **Overestimating automation**
   Human review remains necessary for tone, accuracy, and pacing.
4. **Underestimating licensing and likeness considerations**
   Commercial usage policies vary by platform and jurisdiction.

Decision Criteria for Choosing Tools

1. Media Format

- Audio-only narration vs full video production

2. Realism Requirements

- Synthetic voice vs professional voice recording

3. Editing Control

- Template-based automation vs timeline editing

4. Distribution Context

- Internal training vs public marketing

5. Governance Sensitivity

- Disclosure requirements
- Brand and reputational risk

Quick-Start Decision Guidance

- **For converting text into natural-sounding narration:**
  Typical starting point: AI text-to-speech platforms with configurable voice options.
- **For synthetic presenter-style video generation:**
  Consider starting with AI avatar-based video platforms.
- **For editing and enhancing recorded video content:**
  Often aligned with AI-assisted video editing software.

Selection should reflect disclosure standards, audience expectations, and usage rights.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

ElevenLabs — AI Voice Generation Platform

Category Fit:
AI-driven text-to-speech and voice synthesis platform.

Primary Strengths

- Natural-sounding narration
- Voice configuration options
- Multi-language support
- Scalable audio generation

Reservations

- Voice cloning subject to ethical and legal boundaries
- Commercial usage policies vary by tier
- Requires disclosure consideration in some jurisdictions

Best Fit For

- Audiobook narration
- E-learning modules
- Marketing voiceovers

Less Suitable For

- High-stakes official announcements without human oversight
- Regulated broadcast environments

Tool Profile 2

Synthesia — AI Avatar Video Platform

Category Fit:
Text-to-video platform using synthetic presenters.

Primary Strengths

- Presenter-style video creation
- Multi-language avatar options
- Corporate training compatibility
- Scalable video production

Reservations

- Avatar realism may not suit all audiences
- Disclosure requirements vary by jurisdiction
- Creative flexibility limited compared to full video editing suites

Best Fit For

- Corporate training
- Internal communications
- Structured informational videos

Less Suitable For

- High-production cinematic content
- Highly personalised branding environments

Tool Profile 3

Adobe — Premiere Pro (AI-Enhanced Features)

Category Fit:
Professional video editing software with AI-assisted enhancement features.

Primary Strengths

- Timeline-based editing control
- Automated subtitle generation
- Scene detection and enhancement tools
- Integration with creative ecosystems

Reservations

- Learning curve for non-technical users
- Subscription-based access
- AI features augment but do not replace editing expertise

Best Fit For

- Marketing teams
- Professional content creators
- Structured video production environments

Less Suitable For

- Rapid one-click video generation
- Casual users without editing experience

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Audio narration from written content:**
  Typical starting point: AI text-to-speech platforms.
- **Presenter-style informational videos:**
  Often aligned with avatar-based video platforms.
- **Professional editing and enhancement of recorded video:**
  Consider starting with AI-assisted editing software.

If uncertain, begin at basic level and scale upward as media complexity increases.

Disclosure awareness and usage rights validation remain essential.

Governance Reminder

AI audio and video tools:

- May generate synthetic media requiring transparency
- Operate under platform-specific licensing and usage policies
- Introduce reputational considerations

Content involving voice replication or synthetic likeness may require explicit consent and jurisdictional compliance review.

Organisations remain responsible for:

- Disclosure standards
- Usage rights validation
- Brand integrity
- Final content approval

Domain 7: Workflow Automation & Integration

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Task automation
- Cross-platform workflow integration
- Trigger-based actions
- AI-assisted process orchestration
- Data movement between systems
- Repetitive operational workflow optimisation

It focuses on AI systems that assist with **linking tools, automating structured processes, and reducing manual workflow friction**.

It does **not** cover:

- Full enterprise ERP systems
- Custom software engineering projects
- Core infrastructure hosting environments
- Standalone AI content generation tools (unless integrated into workflows)

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Automate repetitive digital tasks
- Connect apps without manual copying
- Trigger actions based on defined conditions
- Reduce operational bottlenecks
- Integrate AI outputs into structured workflows

Users may include:

- Small business operators
- Operations managers
- Marketing teams
- IT coordinators
- Consultants

Common Confusion Points

1. **Confusing automation with intelligence**
   Automation platforms execute predefined logic; they do not inherently create strategic reasoning.
2. **Underestimating configuration requirements**
   Workflow automation requires structured setup and testing.
3. **Assuming universal compatibility**
   Integration capability varies by platform and API access.
4. **Overlooking governance controls**
   Automated workflows may move sensitive data across systems.

Decision Criteria for Choosing Tools

1. Number of Systems to Integrate

- Two-platform link vs multi-system orchestration

2. Technical Depth

- No-code configuration vs developer-level scripting

3. Data Sensitivity

- Internal workflow vs customer-facing automation

4. Frequency of Execution

- Occasional trigger vs continuous operational automation

5. Scalability Needs

- Individual productivity vs team-level process integration

Quick-Start Decision Guidance

- **For simple no-code app integrations:**
  Typical starting point: no-code automation platforms.
- **For structured business workflow orchestration:**
  Often aligned with automation systems offering conditional logic and multi-step flows.
- **For developer-oriented integrations requiring API control:**
  Consider starting with platforms supporting advanced scripting and custom connectors.

Selection should reflect governance discipline, testing protocols, and operational risk tolerance.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

Zapier — Automation Platform

Category Fit:
No-code workflow automation platform connecting multiple applications.

Primary Strengths

- Wide app integration library
- Trigger-based automation
- Conditional logic workflows
- Low technical barrier to entry

Reservations

- Complex workflows may require advanced configuration
- Task volume limitations based on subscription tier
- Data flows dependent on connected app permissions

Best Fit For

- Small business automation
- Marketing workflow triggers
- Internal productivity optimisation

Less Suitable For

- Highly customised enterprise integrations
- Large-scale infrastructure orchestration

Tool Profile 2

Make — Workflow Automation Platform

Category Fit:
Visual automation platform supporting multi-step and conditional workflows.

Primary Strengths

- Visual scenario builder
- Advanced conditional logic
- Multi-app orchestration
- API integration flexibility

Reservations

- Learning curve higher than simple no-code tools
- Workflow debugging requires careful testing
- Subscription-tier dependent execution limits

Best Fit For

- Growing operational teams
- Structured marketing automation
- Cross-platform data routing

Less Suitable For

- Minimal single-task automation
- Fully custom enterprise software development

Tool Profile 3

Microsoft — Power Automate

Category Fit:
Workflow automation tool integrated within enterprise productivity ecosystems.

Primary Strengths

- Deep Microsoft ecosystem integration
- Enterprise governance compatibility
- Approval workflow support
- Structured business process automation

Reservations

- Ecosystem dependency
- Advanced workflows may require technical configuration
- Licensing tiers influence capability

Best Fit For

- Enterprise environments
- Structured approval chains
- Internal operational automation

Less Suitable For

- Cross-ecosystem automation outside Microsoft environments
- Casual single-app triggers

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Simple no-code automation between common apps:**
  Typical starting point: no-code automation platforms.
- **Multi-step workflows with conditional logic:**
  Often aligned with visual scenario-based automation tools.
- **Enterprise workflow integration within Microsoft environments:**
  Consider starting with ecosystem-integrated automation systems.

If uncertain, begin at basic level and scale upward as workflow complexity increases.

Automation requires testing and governance oversight.

Governance Reminder

Workflow automation tools:

- May transfer sensitive data between systems
- Operate within connected app permission scopes
- Require structured testing before deployment

Automated processes should include:

- Access control validation
- Audit trail review
- Fallback procedures

Organisations remain responsible for:

- Data protection compliance
- Process validation
- Operational risk management
- Ongoing monitoring

Domain 8: Coding & Technical Development Assistance

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Code generation
- Debugging assistance
- Code explanation
- Refactoring suggestions
- Test case generation
- Technical documentation drafting

It focuses on AI systems that assist with **software development workflows and technical problem-solving**.

It does **not** cover:

- Full DevOps infrastructure management
- Production deployment pipelines
- Cybersecurity monitoring platforms
- Enterprise source control governance systems

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Generate code snippets
- Diagnose and resolve errors
- Translate code between programming languages
- Understand legacy systems
- Accelerate development cycles
- Draft developer documentation

Users may include:

- Software developers
- Technical leads
- Engineering teams
- Students learning programming
- Startup founders

Common Confusion Points

1. **Confusing suggestion with correctness**
   AI-generated code may compile while still containing logical or security flaws.
2. **Assuming production readiness**
   Generated output requires testing, validation, and review.
3. **Overlooking licensing and compliance implications**
   Code usage policies vary by environment and subscription tier.
4. **Equating speed with architectural soundness**
   AI may optimise locally without considering system-wide implications.

Decision Criteria for Choosing Tools

1. Development Environment

- IDE-integrated assistant vs standalone conversational interface

2. Codebase Scope

- Single-file scripts vs multi-module repositories

3. Security Sensitivity

- Experimental prototype vs production-grade system

4. Collaboration Model

- Individual developer vs team-based workflow

5. Governance and Compliance Requirements

- Open-source environment vs enterprise-controlled repository

Quick-Start Decision Guidance

- **For inline code completion and rapid iteration inside development environments:**
  Typical starting point: AI coding assistants embedded in IDE workflows.
- **For structured debugging discussions and architectural reasoning:**
  Often aligned with conversational AI systems capable of extended technical dialogue.
- **For repository-level integration within structured development ecosystems:**
  Consider starting with coding assistants integrated into source control platforms.

Selection should reflect codebase scale, security posture, and review discipline.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

GitHub — Copilot

Category Fit:
AI coding assistant integrated within development environments.

Primary Strengths

- Inline code suggestions
- Context-aware completions
- Multi-language support
- IDE integration

Reservations

- Suggestions require human validation
- Feature set varies by subscription tier
- Enterprise governance configuration required for sensitive repositories

Best Fit For

- Daily development workflows
- Rapid prototyping
- Code completion acceleration

Less Suitable For

- Full system architecture design
- Security-critical production code without review

Tool Profile 2

OpenAI — ChatGPT (code capability varies by tier)

Category Fit:
Conversational AI supporting debugging, refactoring, and technical explanation.

Primary Strengths

- Code explanation and walkthrough
- Multi-language translation
- Debugging support through structured dialogue
- Architectural reasoning assistance

Reservations

- Not natively embedded in IDE workflows
- Code correctness dependent on user testing
- Context limits dependent on configuration

Best Fit For

- Learning environments
- Refactoring discussions
- Cross-language comparison

Less Suitable For

- High-speed inline coding workflows
- Automated production deployment

Tool Profile 3

Amazon — CodeWhisperer (AI coding assistant)

Category Fit:
AI-assisted coding support integrated within development environments.

Primary Strengths

- Context-aware code suggestions
- Security scanning support (tier-dependent)
- Multi-language coverage
- Cloud ecosystem alignment

Reservations

- Ecosystem alignment influences capability
- Subscription tier impacts available features
- Requires validation before production deployment

Best Fit For

- Cloud-oriented development teams
- Integrated development workflows
- Rapid iteration within managed environments

Less Suitable For

- Local-only experimentation outside ecosystem
- Standalone architectural design discussion

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Inline IDE code assistance:**
  Typical starting point: AI coding assistants embedded in development tools.
- **Conversational debugging and architectural reasoning:**
  Often aligned with standalone AI systems supporting structured technical dialogue.
- **Cloud-integrated development workflows:**
  Consider starting with ecosystem-aligned coding assistants.

If uncertain, begin at basic level and scale upward as codebase complexity increases.

Testing, review, and security validation remain essential.

Governance Reminder

AI coding tools:

- May generate insecure or inefficient code
- Operate within platform-specific licensing frameworks
- Require structured review before deployment

Production workflows should include:

- Code review
- Security testing
- Performance validation
- Version control discipline

Organisations remain responsible for:

- Compliance with software licensing
- Secure development practices
- Architectural integrity
- Ongoing maintenance

Domain 9: Communication & Collaboration Support

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Meeting transcription
- Real-time summarisation
- Email drafting assistance within collaboration platforms
- Internal knowledge retrieval
- Conversation analysis
- Team communication augmentation

It focuses on AI systems that assist with **enhancing communication clarity and improving collaborative workflows**.

It does **not** cover:

- Full project management platforms
- Enterprise document storage infrastructure
- Standalone writing tools (unless integrated within collaboration systems)
- Dedicated customer support ticketing systems

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Capture meeting notes automatically
- Generate action summaries
- Retrieve prior discussion points
- Draft internal communications more efficiently
- Reduce manual note-taking
- Improve team clarity and follow-through

Users may include:

- Corporate teams
- Remote organisations
- Executives
- Project managers
- HR departments

Common Confusion Points

1. **Confusing summarisation with accountability**
   AI-generated summaries do not replace formal minutes or decision logs.
2. **Assuming full conversation retention**
   Data retention policies vary across platforms.
3. **Overlooking privacy implications**
   Meeting recording and transcription may require consent.
4. **Equating transcription accuracy with strategic clarity**
   Summaries require human review.

Decision Criteria for Choosing Tools

1. Collaboration Platform Integration

- Standalone transcription tool vs ecosystem-integrated assistant

2. Real-Time vs Post-Meeting Processing

- Live captions vs summary after recording

3. Data Governance Requirements

- Internal team usage vs regulated environment

4. Knowledge Retrieval Scope

- Single meeting vs organisation-wide search

5. Security and Compliance Needs

- Industry-specific regulations
- Cross-border data storage considerations

Quick-Start Decision Guidance

- **For real-time meeting transcription and summaries:**
  Typical starting point: AI tools integrated within collaboration platforms.
- **For organisation-wide knowledge retrieval and internal search:**
  Often aligned with AI assistants embedded within enterprise communication ecosystems.
- **For standalone recording and summarisation workflows:**
  Consider starting with dedicated transcription platforms.

Selection should reflect consent requirements, retention policies, and compliance posture.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

Microsoft — Copilot for Teams

Category Fit:
AI assistant integrated within collaboration and meeting environments.

Primary Strengths

- Real-time meeting summaries
- Action item extraction
- Integration within productivity ecosystem
- Knowledge retrieval across internal documents

Reservations

- Ecosystem dependency
- Enterprise licensing tiers influence capability
- Data governance configuration required

Best Fit For

- Enterprise teams
- Structured meeting workflows
- Cross-department collaboration

Less Suitable For

- Independent users outside ecosystem
- Informal small-team collaboration without licensing

Tool Profile 2

Zoom — AI Companion

Category Fit:
AI-enhanced meeting assistant within video conferencing environment.

Primary Strengths

- Meeting transcription
- Summary generation
- Post-meeting recap features
- Live meeting augmentation

Reservations

- Accuracy dependent on audio quality
- Data retention subject to platform policy
- Advanced features tier-dependent

Best Fit For

- Remote teams
- Virtual meetings
- Training sessions

Less Suitable For

- Enterprise-wide document knowledge management
- Non-video-based collaboration

Tool Profile 3

Slack — AI Features

Category Fit:
AI-enhanced communication assistance within messaging platforms.

Primary Strengths

- Channel summarisation
- Thread recap generation
- Internal knowledge search
- Message drafting support

Reservations

- Dependent on platform configuration
- Search scope limited to workspace
- Governance policies vary by organisation

Best Fit For

- Fast-moving communication teams

- Internal messaging environments
- Distributed organisations

Less Suitable For

- Formal meeting documentation
- External-facing communication without review

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Live meeting transcription and recap:**
  Typical starting point: AI tools integrated within collaboration platforms.
- **Virtual meeting environments requiring recap and follow-up:**
  Often aligned with AI-enabled video conferencing tools.
- **Persistent team messaging knowledge retrieval:**
  Consider starting with AI features embedded in messaging ecosystems.

If uncertain, begin at basic level and scale upward as collaboration complexity increases.

Human oversight and consent protocols remain essential.

Governance Reminder

Communication AI tools:

- May record and store conversations
- Operate under platform-specific data retention policies
- Require participant awareness and, in some jurisdictions, consent

Organisations should implement:

- Clear recording policies
- Retention and deletion protocols
- Access control configuration

Teams remain responsible for:

- Accuracy of official records
- Compliance with privacy regulations
- Decision validation
- Appropriate disclosure

Domain 10: Customer Interaction & Service Automation

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Chatbots for customer service
- Automated response systems
- FAQ handling
- AI-assisted support ticket triage
- Conversational commerce
- Customer interaction analytics

It focuses on AI systems that assist with **structured customer communication and service workflow automation**.

It does **not** cover:

- Full CRM database platforms
- Marketing campaign automation tools
- Human-only call centre operations
- Backend logistics systems

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Reduce support response times
- Automate common customer inquiries
- Route tickets efficiently
- Provide 24/7 interaction coverage
- Improve customer experience consistency

Users may include:

- E-commerce businesses
- Service providers
- SaaS platforms
- Customer support teams
- Enterprise service departments

Common Confusion Points

1. **Confusing automation with empathy**
   AI systems can assist with responses but may not replicate human nuance.
2. **Assuming complete issue resolution**
   Complex cases often require human escalation.
3. **Overlooking escalation workflows**
   Automation must integrate with human review processes.
4. **Underestimating regulatory obligations**
   Customer communication may be subject to jurisdiction-specific rules.

Decision Criteria for Choosing Tools

1. Interaction Volume

- Low-volume support vs high-traffic platform

2. Integration Requirements

- Standalone chatbot vs CRM-integrated system

3. Escalation Design

- AI-first triage vs human-first support

4. Regulatory Sensitivity

- General customer inquiries vs financial/health-related interactions

5. Data Protection Requirements

- Internal data storage vs cross-border interactions

Quick-Start Decision Guidance

- **For website-based customer chat automation:**
  Typical starting point: AI chatbot platforms configured with structured response flows.
- **For CRM-integrated support workflows:**
  Often aligned with AI systems embedded within customer service platforms.
- **For high-volume ticket routing and triage:**
  Consider starting with AI-assisted support management systems.

Selection should reflect escalation discipline, compliance needs, and customer experience goals.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

Intercom — AI Customer Support Platform

Category Fit:
Customer messaging platform with AI-assisted support automation.

Primary Strengths

- Automated FAQ handling
- Ticket routing
- CRM integration
- Customer interaction analytics

Reservations

- Configuration required for accurate response flows
- Subscription tier impacts feature depth
- Requires escalation design to prevent misrouting

Best Fit For

- SaaS companies
- Digital service platforms
- Structured customer interaction environments

Less Suitable For

- Highly regulated financial or medical advice without oversight
- Low-volume businesses with minimal automation needs

Tool Profile 2

Zendesk — AI Features

Category Fit:
AI-enhanced customer service management platform.

Primary Strengths

- Ticket categorisation
- Workflow routing
- Agent assistance
- Analytics integration

Reservations

- Enterprise configuration required for optimal performance
- Licensing tiers affect automation scope
- Requires structured governance for escalation

Best Fit For

- Medium to large support teams
- Structured customer service departments
- Multi-channel support environments

Less Suitable For

- Informal or low-volume customer interactions
- Non-digital service contexts

Tool Profile 3

Shopify — AI Chat & Support Features

Category Fit:
AI-assisted customer interaction within e-commerce ecosystem.

Primary Strengths

- Product query handling
- Order tracking assistance
- Integration within commerce platform
- Scalable storefront support

Reservations

- Ecosystem-dependent
- Customisation limits outside platform
- Escalation design required for complex cases

Best Fit For

- E-commerce businesses

- Online storefronts
- Direct-to-consumer platforms

Less Suitable For

- Non-commerce service environments
- Complex advisory services

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Website-based customer chat automation:**
  Typical starting point: AI chatbot platforms configured with structured response flows.
- **CRM-integrated support systems:**
  Often aligned with AI-enabled customer service platforms.
- **E-commerce storefront support:**
  Consider starting with AI tools embedded within commerce ecosystems.

If uncertain, begin at basic level and scale upward as interaction complexity increases.

Human escalation pathways remain essential.

Governance Reminder

Customer interaction AI tools:

- May store and process personal data
- Operate under jurisdiction-specific consumer protection regulations
- Require transparent escalation mechanisms

Organisations should implement:

- Clear disclosure of automated interactions
- Data protection safeguards
- Escalation to human support when necessary

Businesses remain responsible for:

- Compliance with consumer law
- Data privacy obligations
- Accuracy of automated responses
- Customer experience standards

Domain 11: Strategic Planning & Decision Support

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Scenario modelling (qualitative)
- Strategic option comparison
- SWOT-style structuring
- Risk identification
- Board-level briefing preparation
- Policy impact exploration

It focuses on AI systems that assist with **structured reasoning, comparative analysis, and decision framing**.

It does **not** cover:

- Quantitative forecasting engines
- Financial modelling software
- Enterprise risk management platforms
- Legal advisory systems

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Compare strategic options
- Map risks and trade-offs
- Prepare board or executive briefs
- Explore second-order consequences
- Structure complex decisions
- Test assumptions before implementation

Users may include:

- Executives
- Founders
- Policy advisors
- Strategy consultants
- Governance boards

Common Confusion Points

1. **Confusing structured reasoning with prediction**
   AI-assisted scenario analysis does not guarantee real-world outcomes.
2. **Assuming neutrality of input framing**
   Output quality depends on question structure.
3. **Overestimating quantitative precision**
   Most tools in this category provide qualitative analysis unless paired with data systems.
4. **Replacing governance judgment with automation**
   Strategic accountability remains human-led.

Decision Criteria for Choosing Tools

1. Depth of Reasoning Required

- High-level framing vs multi-layered scenario mapping

2. Context Scope

- Single-decision analysis vs cross-portfolio strategy

3. Confidentiality Requirements

- Sensitive board material vs exploratory internal planning

4. Integration Needs

- Standalone analysis vs workflow-linked documentation

5. Review Protocols

- Informal discussion vs formal governance documentation

Quick-Start Decision Guidance

- **For structured scenario comparison and option mapping:**
  Typical starting point: conversational AI systems capable of multi-step reasoning.
- **For collaborative executive briefing preparation:**
  Often aligned with AI systems embedded in document workflows.
- **For iterative assumption testing and counterfactual exploration:**
  Consider starting with AI capable of extended contextual dialogue.

Selection should reflect governance protocols, confidentiality safeguards, and review structure.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

OpenAI — ChatGPT (reasoning capability varies by tier)

Category Fit:
Conversational AI supporting structured reasoning and scenario exploration.

Primary Strengths

- Option comparison
- Risk identification
- Multi-perspective analysis
- Iterative assumption testing

Reservations

- Output dependent on prompt framing
- Qualitative reasoning unless paired with data
- Confidentiality posture dependent on configuration

Best Fit For

- Executive brainstorming
- Strategy drafting
- Policy framing discussions

Less Suitable For

- Quantitative forecasting without data integration
- Legally binding advisory conclusions

Tool Profile 2

Anthropic — Claude

Category Fit:
Conversational AI with strong long-context reasoning.

Primary Strengths

- Extended document ingestion
- Consistent tone across complex analyses
- Comparative reasoning across scenarios
- Structured briefing generation

Reservations

- Model capability varies by tier
- Quantitative modelling limited without external tools
- Requires human governance validation

Best Fit For

- Policy review
- Board-level document drafting
- Cross-scenario strategic comparison

Less Suitable For

- Data-heavy predictive modelling
- Financial projection software replacement

Tool Profile 3

Microsoft — Copilot (enterprise-integrated reasoning features)

Category Fit:
AI-assisted reasoning embedded within productivity ecosystems.

Primary Strengths

- Integration with internal documents
- Structured summarisation for executives
- Cross-document comparison
- Enterprise governance compatibility

Reservations

- Ecosystem-dependent
- Depth of reasoning dependent on model tier
- Requires configuration for sensitive material

Best Fit For

- Board brief preparation

- Internal policy comparison
- Structured executive reporting

Less Suitable For

- Independent exploratory analysis outside ecosystem
- Standalone predictive modelling

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Structured scenario comparison:**
  Typical starting point: conversational AI capable of multi-step reasoning.
- **Board-level briefing within enterprise systems:**
  Often aligned with ecosystem-integrated AI assistants.
- **Iterative assumption testing and counterfactual dialogue:**
  Consider starting with extended-context conversational AI systems.

If uncertain, begin at basic level and scale upward as strategic complexity increases.

Strategic accountability remains human-led.

Governance Reminder

Strategic decision-support AI tools:

- Provide structured reasoning, not binding conclusions
- Reflect framing biases present in prompts
- Require confidentiality safeguards

Organisations should implement:

- Structured review protocols
- Multi-stakeholder validation
- Documentation of assumptions

Leadership remains responsible for:

- Final decision authority
- Risk acceptance
- Governance oversight
- Ethical alignment

Domain 12: Learning, Training & Capability Development

Domain Introduction

What This Domain Covers

This domain addresses AI tools used to support:

- Personalised learning assistance
- Training content generation
- Skill development planning
- Interactive tutoring
- Microlearning creation
- Competency reinforcement

It focuses on AI systems that assist with **knowledge acquisition, structured learning pathways, and professional capability development**.

It does **not** cover:

- Accredited certification bodies
- Full learning management systems (LMS) infrastructure
- Formal examination administration
- Institutional curriculum governance

This domain focuses on capability matching rather than product endorsement.

Typical User Intent

Users entering this domain commonly want to:

- Learn new technical or professional skills
- Reinforce understanding of complex topics
- Generate training materials
- Create structured learning pathways
- Practice problem-solving interactively

Users may include:

- Students
- Professionals reskilling
- Corporate training teams
- Educators
- Independent learners

Common Confusion Points

1. **Confusing assistance with accreditation**
   AI tools can support learning but do not confer recognised qualifications.
2. **Assuming pedagogical accuracy**
   Explanations may require verification.
3. **Overestimating personalisation depth**
   Adaptive learning varies by platform capability.
4. **Replacing structured curriculum design with automation**
   Training governance remains institution-led.

Decision Criteria for Choosing Tools

1. Learning Objective

- Concept explanation vs structured course development

2. Interactivity Level

- Passive reading vs question-driven engagement

3. Organisational Scale

- Individual learning vs enterprise training

4. Assessment Needs

- Informal practice vs formal evaluation

5. Governance and Compliance Context

- General skill development vs regulated training environments

Quick-Start Decision Guidance

- **For interactive concept explanation and tutoring:**
  Typical starting point: conversational AI systems capable of adaptive dialogue.
- **For structured corporate training material generation:**
  Often aligned with AI tools supporting instructional content creation.
- **For skills practice and reinforcement exercises:**
  Consider starting with AI systems capable of generating quizzes and applied scenarios.

Selection should reflect learning objectives, review standards, and instructional oversight.

Representative Tools

(Selection reflects globally observed AI usage patterns — February 2026.
No ranking implied.)

Tool Profile 1

OpenAI — ChatGPT (learning support capability varies by tier)

Category Fit:
Conversational AI supporting tutoring, explanation, and adaptive questioning.

Primary Strengths

- Step-by-step explanation
- Interactive Q&A
- Scenario-based learning dialogue
- Multi-domain subject coverage

Reservations

- Explanations require fact-checking
- Not a substitute for accredited curriculum
- Capability varies by model tier

Best Fit For

- Self-directed learners
- Skill reinforcement
- Concept clarification

Less Suitable For

- Formal certification programs
- Regulated training compliance documentation

Tool Profile 2

Khan Academy — AI-Enhanced Learning Support

Category Fit:
AI-supported educational assistance within structured learning platform.

Primary Strengths

- Curriculum-aligned explanations
- Student progress support
- Structured practice environments
- Educational context integration

Reservations

- Subject scope limited to platform offerings
- Institutional integration varies
- Advanced professional topics may be limited

Best Fit For

- School-level learners
- Foundational skill development
- Structured academic reinforcement

Less Suitable For

- Enterprise executive training
- Advanced industry-specific certification

Tool Profile 3

Coursera — AI-Assisted Course Support

Category Fit:
Online learning platform incorporating AI-supported tutoring and course assistance.

Primary Strengths

- Course-aligned learning
- Structured assessment support
- Integration with accredited programs
- Professional skill pathways

Reservations

- Subscription and course-based access
- AI support secondary to course structure
- Formal accreditation subject to course provider

Best Fit For

- Professional upskilling
- Structured certification pathways
- Enterprise workforce development

Less Suitable For

- Informal exploratory learning outside course catalog
- Immediate one-off concept clarification

Quick Decision Summary

If You Are Short on Time, Begin Here

- **Interactive tutoring and concept clarification:**
  Typical starting point: conversational AI systems supporting adaptive dialogue.
- **Structured academic reinforcement:**
  Often aligned with AI-enhanced educational platforms.
- **Professional certification and workforce upskilling:**
  Consider starting with AI-assisted course platforms integrated into structured programs.

If uncertain, begin at basic level and scale upward as learning complexity increases.

Human instructional oversight remains essential.

Governance Reminder

Learning-support AI tools:

- Do not replace accredited instruction
- May generate inaccurate explanations
- Operate within platform-specific content policies

Organisations and learners remain responsible for:

- Verification of critical knowledge
- Compliance with accreditation standards
- Alignment with professional requirements
- Ethical and responsible application of learned skills

Architectural Integrity Statement

The twelve domains presented in this volume reflect structured capability categories observed across global AI usage environments as of February 2026.

The framework is intentionally flat.

No domain is ranked above another.

Use case determines entry point.

Tool capabilities will evolve.

Governance responsibility remains constant.

Cross-Domain Governance Guidance

Across all twelve domains, certain governance guidance apply consistently:

1. Human Accountability
   AI output does not replace professional judgment.
2. Verification
   Critical information must be reviewed and validated.
3. Documentation
   Decision pathways and revisions should be recorded where appropriate.
4. Escalation
   Automated systems must allow structured human override.
5. Transparency
   Where required by law or policy, AI-assisted outputs should be disclosed.
6. Proportionality
   Governance rigor should reflect risk level.

Whether drafting a memo or preparing a board briefing, the responsibility for accuracy and ethical alignment remains with the organisation or individual deploying the tool.

Confidentiality & Data Sensitivity Considerations

AI systems differ in how they process, store, and transmit data.

Before using any AI tool in sensitive environments, consider:

- Data residency
- Encryption standards
- Access controls
- Logging and audit capabilities
- Cross-border data transfer implications
- Regulatory obligations

Confidential material — including personal data, strategic plans, financial projections, or regulated content — requires particular caution.

Configuration matters.

Organisations remain responsible for compliance with applicable data protection, consumer protection, and sector-specific regulations.

No AI tool removes legal accountability.

Implementation Considerations Across Organisational Contexts

AI adoption varies by scale and structure.

Individual Professionals

May prioritise efficiency and personal learning while maintaining client confidentiality and professional standards.

Small & Medium Enterprises

May focus on automation efficiency while gradually formalising governance.

Large Enterprises

Typically require documented review protocols, IT integration standards, data classification policies, and cross-functional oversight.

Public Institutions

May require additional transparency, procurement review, and regulatory compliance validation.

The architecture does not assume a single organisational model.
It supports adaptation across contexts.

Implementation should align with operational complexity and regulatory exposure.

PART II

Governance & Control Architecture

PREFACE

Part II — Governance & Control Architecture

AI usage does not remain static.

As adoption expands, integration deepens. Authority boundaries may shift from advisory assistance to conditional automation. System dependency may emerge gradually. Oversight obligations evolve alongside structural complexity.

Part II introduces governance discipline proportionate to this evolution.

It integrates three complementary instruments:

• The AI Decision Matrix — structured task classification before alignment
• The Context Maturity Index — governance-first maturity mapping
• The AI Tool Selection & Review Charter — lifecycle governance scaffold

These instruments are not certification programs.
They do not assign vendor scores.
They do not impose regulatory guarantees.

They provide structured reasoning before delegation expands and before operational dependency becomes embedded.

Organisations may adopt these instruments in full, adapt them proportionately, or use them as reference benchmarks within existing governance ecosystems, including SOX-aligned or equivalent internal control frameworks.

Higher structural maturity does not imply superiority.
It reflects expanded integration and broader impact radius.

Governance is not a constraint on innovation.
It is the structure that sustains it.

INTRODUCTION

Governance & Control Architecture

AI adoption does not remain static.

As usage becomes embedded within workflows, risk exposure expands. Authority boundaries shift. System dependency becomes observable. Informal experimentation transitions into operational integration.

Part II introduces governance discipline proportionate to structural complexity.

It integrates three complementary instruments:

- The AI Decision Matrix (task classification and compatibility alignment)
- The Context Maturity Index (governance-first maturity mapping)
- The AI Tool Selection & Review Charter (lifecycle governance scaffold)

These instruments are not certification programs.
They do not assign vendor scores.
They do not impose regulatory guarantees.

They provide structural clarity before delegation, automation, or integration deepens.

Organisations may adapt these instruments to align with existing governance frameworks, including SOX-aligned internal controls or equivalent regulatory regimes.

Higher structural maturity does not imply superiority.
It reflects expanded integration, authority scope, and oversight requirements.

Part II functions as a complementary governance layer to Part I.

Navigation clarifies direction.
Governance calibrates responsibility.

SECTION A — AI DECISION MATRIX

This workbook is a structural decision hygiene instrument.

It supports structured reasoning before AI system selection.

It clarifies task characteristics, risk exposure, data posture, verification burden, and integration complexity before aligning to structural capability classes.

It does not recommend tools.
It does not rank systems.
It does not replace formal enterprise risk assessment processes.

CONTEXT FRAMING & SCOPE BOUNDARY

Worksheet 1.1 — Use Context Declaration

Complete all fields before proceeding.

A. User Context

☐ Individual
☐ Team
☐ Department
☐ Institution

B. Output Exposure Level

☐ Internal-only use
☐ External-facing (limited circulation)
☐ Public communication

C. Functional Use Type

☐ Advisory support
☐ Operational execution
☐ Public-facing communication
☐ Embedded into workflow

D. Usage Frequency

☐ One-off task
☐ Recurring task
☐ Embedded/continuous

Scope Boundary Reminder

If use context, exposure level, or functional use type changes materially during implementation, reclassification is required before proceeding.

Context Profile Code (CPC)

User Context: _____
Exposure Level: _____
Functional Use Type: _____
Usage Frequency: _____

CPC Reference Code: _____
Classification Date: _____
Responsible Party: _____

The CPC anchors internal reasoning throughout this workbook.
It does not represent organisational maturity, risk tiering, or formal classification status.

TASK STRUCTURE CLASSIFICATION

Worksheet 2.1 — Task Type Grid

Select one classification per row.

1. Output Type

☐ Informational
☐ Analytical
☐ Generative
☐ Transformational

2. Structure Level

☐ Structured
☐ Semi-structured
☐ Unstructured

3. Decision Impact

☐ Low
☐ Moderate
☐ High

4. Repeatability

☐ Ad hoc
☐ Recurring
☐ Automated candidate (structurally capable of rule-defined automation)

5. Domain Stability

☐ Stable
☐ Moderately dynamic
☐ Rapidly changing

Task Structural Profile (TSP)

Output Type: _____
Structure Level: _____

Decision Impact: _____
Repeatability: _____
Domain Stability: _____

Internal Coherence Check

If ALL apply:

• Decision Impact = High
• Repeatability = Ad hoc
• Structure Level = Unstructured

☐ Heightened Verification Review Flag

This flag is informational only.
It highlights structural fragility risk.

RISK LAYERING ASSESSMENT

Worksheet 3.1 — Risk Exposure Matrix

For each category, select the current dominant exposure level based on intended use.
Do not aggregate numerically.

1. Reputational Risk

☐ None
☐ Low
☐ Moderate
☐ High

2. Legal / Regulatory Risk

☐ None
☐ Low
☐ Moderate
☐ High

3. Financial Risk

☐ None
☐ Low
☐ Moderate
☐ High

4. Safety or Welfare Risk

☐ None
☐ Low
☐ Moderate
☐ High

Risk Profile (RP)

Reputational: _____
Legal/Regulatory: _____
Financial: _____
Safety/Welfare: _____

Risk categories are not numerically aggregated.
Classification must reflect dominant exposure type.

Decision Checkpoint 1

If two or more categories are marked High:

☐ Escalation Flag — Multi-Domain High Exposure

Escalation decisions remain organisational.
This workbook does not prescribe approval pathways.

DATA SENSITIVITY MAPPING

Worksheet 4.1 — Data Classification Grid

Identify all data categories that will be input, processed, or generated during intended task execution.

☐ Public Information
☐ Internal Operational Data
☐ Commercially Sensitive Data
☐ Personal Data
☐ Regulated Data

Worksheet 4.2 — Data Flow Direction

Select all that apply.

☐ Inbound only
☐ Outbound only
☐ Bi-directional
☐ Persistent storage required

Storage Location Class

(Required if Persistent Storage selected)

☐ Local environment
☐ Controlled enterprise environment
☐ Third-party environment

Data Sensitivity Profile (DSP)

Data Types Present: _____
Flow Direction: _____
Storage Location Class: _____

Decision Checkpoint 2

If ALL apply:

• Personal Data present
• Regulated Data present
• Bi-directional flow selected

☐ Elevated Handling Flag

Classification reflects intended use; future scope expansion requires reclassification.

Escalation decisions remain organisational.
This workbook does not prescribe technical controls.

VERIFICATION LOAD ASSESSMENT

Worksheet 5.1 — Verification Requirement Grid

Select required level for each dimension.

Factual Accuracy
☐ Low ☐ Moderate ☐ High

Citation Requirement
☐ Low ☐ Moderate ☐ High

Numerical Precision
☐ Low ☐ Moderate ☐ High

Policy or Standard Alignment
☐ Low ☐ Moderate ☐ High

Public Distribution Sensitivity
☐ Low ☐ Moderate ☐ High

Verification Load Index (VLI)

Overall Classification
☐ Low ☐ Moderate ☐ High

Select classification reflecting highest required verification burden dimension.

Decision Checkpoint 3

If:

• VLI = High
AND
• Risk Profile includes High exposure

☐ Independent Validation Flag

Escalation decisions remain organisational.
High verification burden increases operational dependency risk if unmanaged.

INTEGRATION COMPLEXITY EVALUATION

Worksheet 6.1 — Integration Surface Mapping

Select the level that best reflects intended deployment characteristics at initial implementation.

System Integration Requirement
☐ Low ☐ Moderate ☐ High

Workflow Disruption Potential
☐ Low ☐ Moderate ☐ High

Training Requirement
☐ Low ☐ Moderate ☐ High

Change Management Sensitivity
☐ Low ☐ Moderate ☐ High

Integration Complexity Profile (ICP)

System Integration: _____
Workflow Disruption: _____
Training Requirement: _____
Change Sensitivity: _____

Authority–Integration Interaction

If BOTH apply:

• Integration Complexity includes High
AND
• Task classified as Automated candidate or intended for delegated execution

☐ Governance Alignment Flag

This workbook does not prescribe governance structures or deployment pathways.

TOOL CATEGORY ALIGNMENT MATRIX

Tool Category Archetypes represent structural capability classes, not vendor categories.

1. Conversational Assistance Systems
2. Structured Analytical Systems
3. Retrieval-Augmented Systems
4. Workflow Automation Systems
5. Content Transformation Systems
6. Embedded Enterprise Systems
7. Closed-System Deployment Tools

Eliminate categories structurally incompatible with prior classifications.

Maximum 1–3 categories may remain.

Structural Elimination Grid

Mark exclusions where structural incompatibility exists.

Conversational Assistance Systems ☐ Excluded
Structured Analytical Systems ☐ Excluded
Retrieval-Augmented Systems ☐ Excluded
Workflow Automation Systems ☐ Excluded
Content Transformation Systems ☐ Excluded
Embedded Enterprise Systems ☐ Excluded
Closed-System Deployment Tools ☐ Excluded

Suitable Tool Category Band

1. ____
2. ____
3. ____

Selection within this band requires independent evaluation outside this workbook.
Inclusion indicates structural compatibility only, not operational suitability.

DECISION SUMMARY SHEET

Context Profile Code (CPC)

User Context: _____
Exposure Level: _____
Functional Use Type: _____
Usage Frequency: _____

CPC Reference Code: _____
Classification Date: _____
Responsible Party: _____

Scope reconfirmed unchanged since initial classification?
☐ Yes ☐ No

If No → Reclassification required beginning at Section 1.

Task Structural Profile (TSP)

Output Type: _____
Structure Level: _____
Decision Impact: _____
Repeatability: _____
Domain Stability: _____

Internal Coherence Flag ☐ Yes ☐ No

Risk Profile (RP)

Reputational: _____
Legal/Regulatory: _____
Financial: _____
Safety/Welfare: _____

Multi-Domain High Exposure Flag ☐ Yes ☐ No

Data Sensitivity Profile (DSP)

Data Types: _____
Flow Direction: _____
Storage Location Class: _____

Elevated Handling Flag ☐ Yes ☐ No

Verification Load Index (VLI)

Overall Classification ☐ Low ☐ Moderate ☐ High

Independent Validation Flag ☐ Yes ☐ No

Integration Complexity Profile (ICP)

System Integration: _____
Workflow Disruption: _____
Training Requirement: _____
Change Sensitivity: _____

Governance Alignment Flag ☐ Yes ☐ No

Suitable Tool Category Band

1. ____
2. ____
3. ____

Key Assumptions Identified During Classification

1. ____
2. ____
3. ____
4. ____

Assumptions reviewed by: _____
Date reviewed: _____

If assumptions materially change, reclassification is required beginning at Section 1.

This workbook clarifies structural compatibility.
It does not mandate tool selection.
It does not replace formal enterprise risk assessment processes.

WORKED EXAMPLE 1 — INDIVIDUAL USE

Independent consultant drafting a public-facing article.

Context: Individual; Public communication; Advisory support; One-off.

Task: Generative; Semi-structured; Moderate impact; Ad hoc; Moderately dynamic.

Risk: Moderate reputational; others Low or None.

Data: Public Information; Internal Operational Data (research notes).
No Personal Data. No Regulated Data.

Verification: High factual accuracy requirement → VLI = High.

Integration: Low complexity.

Elimination removes structurally incompatible categories.

Remaining band (example):
Retrieval-Augmented Systems
Structured Analytical Systems

No ranking. No selection mandated.

WORKED EXAMPLE 2 — INSTITUTIONAL USE

Department automating recurring financial report summarisation.

Context: Department; Internal-only; Operational execution; Recurring.

Task: Transformational; Structured; High impact; Automated candidate; Stable.

Risk: Financial High; others Moderate or None.
Multi-Domain High Exposure Flag not triggered.

Data: Internal Operational Data; Commercially Sensitive Data.
No Personal Data. No Regulated Data.
Bi-directional; Persistent storage in Controlled enterprise environment.

Verification: High accuracy and precision → VLI = High.
Independent Validation Flag triggered.

Integration: High integration complexity.
Automated candidate classification combined with High Integration Complexity → Governance Alignment Flag triggered.

Elimination leaves enterprise-aligned structural categories.

Remaining band (example):
Embedded Enterprise Systems
Closed-System Deployment Tools

No ranking. No endorsement.

SECTION B — Context Maturity Index (CMI)

1. Purpose of the CMI

The AISF Context Maturity Index (CMI) is a structured classification framework designed to help organisations:

- Identify their current stage of AI integration
- Understand how authority scope, context integration, governance evolution, and system dependency interact
- Recognise escalation risks associated with structural transitions
- Calibrate governance posture during organisational scaling
- Plan progression responsibly without assuming inevitability

The CMI is governance-first and classification-based.
It does not score, rank, certify, or evaluate vendors.

---

2. Boundary Statement

2.1 What the CMI Is

The CMI is:

- A structural maturity classification scaffold
- A governance evolution planning instrument
- A contextual integration diagnostic model
- A risk-escalation mapping framework
- A system-dependency awareness tool

2.2 What the CMI Is Not

The CMI is not:

- A certification program
- A regulatory compliance guarantee
- A performance benchmarking ranking
- A vendor comparison mechanism
- A technical capability scoring index
- A maturity badge or marketing credential

Higher tiers reflect greater structural complexity and broader impact radius — not superiority.

3. Terminology Lock

To ensure consistent interpretation, the following terms apply throughout the CMI:

Context
Structured organisational information that shapes interpretation and action, including policies, roles, processes, constraints, records, standards, decision logs, and governance rules.

Integration
AI usage embedded into defined organisational workflows or systems, rather than ad hoc or individual usage.

Authority
Permission for AI-enabled processes to initiate or complete actions that affect organisational state (records, transactions, communications, decisions).

Override Authority
Explicitly retained human power to halt, reverse, or supersede AI-enabled actions or recommendations.

Verification Discipline
Documented methods for checking AI outputs against internal truth sources, constraints, or validation rules.

Governance
Assigned roles, approval pathways, accountability structures, audit mechanisms, and incident-handling processes overseeing AI usage.

System Dependency
The degree to which operational continuity relies on AI-enabled processes for timely or accurate execution.

4. Structural Dimensions of Maturity

Maturity classification is determined across six structural dimensions:

1. Context Integration Level
2. Data Access Scope
3. Automation Authority Level
4. Verification & Validation Discipline
5. Governance Formalisation
6. Human Oversight Density

Progression across dimensions may not occur uniformly.
An organisation may exhibit higher maturity in one dimension and lower maturity in another.

Higher maturity does not equate to lower risk.
It equates to greater structural complexity and broader impact exposure.

---

5. Tier 1 — Exploratory Usage

5.1 Structural Definition

AI usage is present but non-institutional:

- Used by individuals or small teams
- Not embedded into enterprise workflows
- No shared context repository
- No formal governance framework
- Outputs do not trigger organisational action without human decision

---

5.2 Core Structural Characteristics

- Tool-level usage
- No automation chains
- No system dependency
- Governance informal or undefined

5.3 Observable Organisational Indicators

- Inconsistent usage patterns across teams
- Prompts and outputs not centrally stored
- Personal judgement determines validation
- AI usage largely invisible to leadership

5.4 Dimension Profile

Dimension	Tier 1 Profile
Context Integration	No shared context; ad hoc prompts
Data Access Scope	Public/synthetic or unmanaged internal copying
Automation Authority	None; draft outputs only
Verification Discipline	Personal judgement; unstructured
Governance Formalisation	No formal governance; ownership informal or undefined
Human Oversight Density	Human performs decisions and actions

5.5 Escalation Risks

- Shadow usage proliferation
- Inconsistent output quality
- Unmanaged data exposure
- Informal dependency formation
- Reputational inconsistency from divergent outputs

5.6 Governance Requirements

- Documented organisational position on permitted and non-permitted use
- Documented prohibited data categories
- Named point-of-contact
- Minimal incident reporting pathway

5.7 Cross-Dimensional Imbalance Example

High usage volume without governance documentation results in elevated exposure risk while remaining structurally Tier 1.

5.8 Diagnostic Guidance

An organisation is Tier 1 when AI use is not embedded in workflows and lacks formal ownership.

An organisation is not Tier 1 if AI usage is documented, workflow-embedded, and governed.

Classification must reflect structural reality, not intention.

5.9 Implementation Cautions

- Do not equate high usage with maturity.
- Do not expand usage without basic documentation.

6. Tier 2 — Structured Assistance

6.1 Structural Definition

AI embedded in defined workflows under human control:

- Documented use cases
- Human validation required before action
- Workflow-limited context

6.2 Core Structural Characteristics

- Templates and playbooks
- Reproducible processes
- Assistance, not authority

6.3 Observable Indicators

- Standard prompts documented
- Structured review steps
- Identifiable governance owner

6.4 Dimension Profile

Dimension	Tier 2 Profile
Context Integration	Workflow-limited context
Data Access Scope	Controlled internal non-sensitive data
Automation Authority	Draft generation only; no updates, transmissions, or transactions without approval
Verification Discipline	Structured manual review
Governance Formalisation	Basic guidelines and identifiable ownership
Human Oversight Density	Human reviews outputs; retains override authority

---

6.5 Escalation Risks

- Operational dependency formation
- Process fragility
- Policy mismatch risk
- Overconfidence in templates

6.6 Governance Requirements

- Documented permitted and prohibited use cases
- Defined review requirements
- Template versioning controls
- Basic issue log

6.7 Cross-Dimensional Imbalance Example

Strong templates without disciplined review create fragile reliability.

6.8 Diagnostic Guidance

Tier 2 exists when AI is workflow-embedded but authority remains fully human.

An organisation is not Tier 2 if use remains ad hoc.

6.9 Implementation Cautions

- Templates do not replace validation.
- Workflow embedding does not equal delegation.

---

7. Tier 3 — Operational Integration

7.1 Structural Definition

AI becomes operationally embedded and system-relevant while remaining authority-bounded.

System dependency becomes observable and documentable within reporting or continuity planning.

7.2 Core Structural Characteristics

- Controlled data integration with traceable flows
- Conditional automation under explicitly documented rule-defined boundaries
- Formal governance assignment
- Documented validation protocols periodically reviewed

7.3 Observable Indicators

- AI integrated into system architecture
- Metrics reflect AI influence
- Fallback procedures documented

7.4 Dimension Profile

Dimension	Tier 3 Profile
Context Integration	Departmental/functional context embedded
Data Access Scope	Controlled operational data with traceability
Automation Authority	Conditional automation under documented rules
Verification Discipline	Documented and periodically reviewed validation protocols
Governance Formalisation	Assigned oversight roles; risk register inclusion
Human Oversight Density	Supervises exceptions; retains override authority

---

7.5 Escalation Risks

- Escalation failure
- Rule fragility
- Monitoring fatigue
- Fallback inadequacy

7.6 Governance Requirements

- Formal AI operational owner
- Authority boundary documentation
- Review cadence for automation rules
- Incident logging and escalation path
- Inclusion in continuity planning

7.7 Diagnostic Guidance

Tier 3 exists when operational continuity depends on AI integration.

Not Tier 3 if AI remains optional.

7.8 Implementation Cautions

- Do not equate integration with delegation.
- Do not expand automation without review capacity.

---

8. Tier 4 — Delegated Execution

8.1 Structural Definition

AI granted bounded execution authority within explicitly defined domains.

Execution occurs without per-instance validation but within predefined documented limits.

Authority is reallocated — not dissolved.

8.2 Core Structural Characteristics

- Delegated authority scope enumerated
- Monitoring thresholds calibrated
- Escalation architecture engineered
- Automatic suspension conditions defined

8.3 Observable Indicators

- Autonomous actions within scope
- Delegation registry with version history
- Real-time monitoring dashboards
- Boundary stress testing

8.4 Dimension Profile

Dimension	Tier 4 Profile
Context Integration	Enterprise context within delegated domains
Data Access Scope	Transactional data within bounded domains; cross-domain requires approval
Automation Authority	Bounded execution authority within explicitly documented limits
Verification Discipline	Automated cross-checking; post-execution audits
Governance Formalisation	Risk committee oversight; delegation registry
Human Oversight Density	Threshold-based supervision; override retained

---

8.5 Escalation Risks

- Authority boundary drift
- Authority creep
- Monitoring blind spots
- Escalation miscalibration

8.6 Governance Requirements

- Explicit authority boundary documentation
- Delegation scope registry with version history
- Calibrated monitoring
- Escalation triggers and suspension conditions
- Delegation review cadence

8.7 Diagnostic Guidance

Tier 4 exists when documented execution authority is transferred under governance controls.

Not Tier 4 if delegation is informal or undocumented.

8.8 Implementation Cautions

- Do not weaken override authority.
- Do not treat dashboards as governance sufficiency.

---

9. Tier 5 — Systemic Orchestration

9.1 Structural Definition

AI-enabled systems coordinate multiple delegated domains through governed orchestration pathways under explicit authority limits.

Orchestration coordinates bounded authorities; it does not remove boundaries.

9.2 Core Structural Characteristics

- Cross-domain orchestration logic
- Enterprise context fabric with assigned stewardship roles
- Documented interaction mapping between domains
- Enterprise-level governance integration appropriate to organisational scale

---

9.3 Observable Indicators

- Orchestration pathway registry
- Enterprise context governance framework
- Cross-domain monitoring dashboards
- Enterprise-level escalation procedures

9.4 Dimension Profile

Dimension	Tier 5 Profile
Context Integration	Cross-domain enterprise context fabric
Data Access Scope	Strategic cross-functional data under explicit governance
Automation Authority	Coordinated multi-domain execution within bounded authority
Verification Discipline	Continuous audit and feedback integration
Governance Formalisation	Board-level or equivalent enterprise oversight structure appropriate to organisational scale.
Human Oversight Density	Policy-level supervision; override retained

---

9.5 Escalation Risks

- Cross-domain propagation risk

- Context fabric corruption
- Orchestration brittleness
- Coordination latency risk
- Governance diffusion

9.6 Governance Requirements

- Orchestration pathway registry with version history
- Interaction mapping between domains
- Enterprise context governance with stewardship roles
- System-level monitoring calibration
- Cross-domain boundary alignment
- Periodic orchestration stress testing

9.7 Diagnostic Guidance

Tier 5 exists when coordinated delegation occurs through governed orchestration pathways.

Not Tier 5 solely due to scale or multiple AI systems.

9.8 Implementation Cautions

- Do not over-orchestrate loosely coupled processes.
- Do not weaken authority boundaries due to coordination breadth.
- Do not treat Tier 5 as aspirational superiority.

---

10. Global Diagnostic Principles

- Classification must reflect structural reality, not aspiration.
- Higher tiers increase complexity and impact radius.
- Authority boundaries and override rights must remain explicit at all tiers.
- Governance evolution defines maturity progression — not tool sophistication.
- Maturity progression is not mandatory; organisations may stabilise responsibly at any tier.

SECTION C — AI Tool Selection & Review Charter

DOCUMENT CONTROL

0.1 Instrument Identification (Required)

- **Document Title:** AI Tool Selection & Review Charter
- **Document ID / Reference Code:** _____
- **Version Number:** _____
- **Status:** ☐ Draft ☐ Active ☐ Superseded ☐ Retired
- **Business Unit / Entity Name:** _____
- **Effective Date:** _____
- **Next Scheduled Review Date:** _____
- **Confidentiality Classification:** ☐ Public ☐ Internal ☐ Confidential ☐ Restricted
- **Authoritative Storage Location (Repository/System):** _____
- **Related Governance Documents (if any):** _____

0.2 Ownership & Approvals (Required)

- **Document Owner (Role Title):** _____
- **Approving Authority (Role or Governing Body):** _____
- **Approval Date:** _____

Approval Record

Name	Role	Signature	Date

0.3 Change Log (Required)

Version	Date	Summary of Change	Changed By (Role)	Approved By (Role)

0.4 Distribution & Access (Optional)

- **Permitted Audiences (Roles/Functions):** _____
- **Access Method (System/Location):** _____
- **Delegated Access Exceptions (if any):** _____

PURPOSE, SCOPE, & APPLICABILITY

1.1 Purpose Statement (Required)

This charter establishes the governance framework for evaluating, approving, monitoring, and reviewing AI tools prior to and during organisational use. It documents selection rationale, risk tier assignment, data handling boundaries, accountability structures, and review cadence.

1.2 Scope of Coverage (Required)

This instrument applies to AI-enabled tools used for the following categories (select all applicable):

☐ Text generation / conversational systems
☐ Document analysis or summarisation
☐ Coding or software assistance
☐ Image or media generation
☐ Speech or audio processing
☐ Automated agents or workflow automation
☐ Predictive analytics or forecasting
☐ Customer-facing AI systems
☐ Internal decision-support systems
☐ Other (specify): _____

Deployment Context

☐ Internal-only use
☐ Customer-facing use
☐ Both

1.3 Out of Scope (Required)

The following are excluded from this instrument unless explicitly approved for inclusion:

- Purely deterministic automation systems without AI components
- Custom-developed machine learning models governed under separate internal model governance frameworks
- Hardware-embedded AI devices governed under operational technology controls
- Non-AI software tools

1.4 Applicability Criteria (Required)

Completion of this charter is mandatory when any of the following conditions apply:

☐ The tool processes organisational data
☐ The tool processes personal data
☐ The tool influences internal decision-making
☐ The tool produces outputs used in customer interactions
☐ The tool automates any operational workflow
☐ The tool integrates with internal systems
☐ The tool operates under organisational credentials
☐ The tool influences decisions with financial, legal, reputational, or operational impact

If none apply, documented exemption approval is required.

1.5 Definitions (Required)

AI Tool:
A software system employing probabilistic or machine learning-based techniques to generate, classify, analyse, or recommend outputs that may influence tasks, decisions, or user actions.

Risk Tier:
A categorisation of impact and control requirements as defined in Section 6.

Data Classification:
The categorisation of information sensitivity levels as defined in Section 5.

Tool Owner:
The accountable role responsible for approved use, monitoring, and compliance.

Approving Authority:
The role or body authorised to approve risk tier assignment and adoption.

Operator:
Authorised user of the tool under defined conditions.

Reviewer:
Role responsible for evaluating outputs where human oversight is required.

GOVERNANCE ROLES, ACCOUNTABILITY, & DECISION RIGHTS

2.1 Responsibility Matrix (Required)

Role/Function	Responsible	Accountable	Consulted	Informed
Requestor	☐	☐	☐	☐
Tool Owner	☐	☐	☐	☐
Data Steward	☐	☐	☐	☐
Security/Privacy	☐	☐	☐	☐
Legal/Compliance	☐	☐	☐	☐
Procurement	☐	☐	☐	☐
IT/Technical Custodian	☐	☐	☐	☐
Risk Reviewer	☐	☐	☐	☐
Approving Authority	☐	☐	☐	☐
Audit/Assurance	☐	☐	☐	☐

2.2 Role Statements (Required)

Tool Owner (Accountable Role)
Responsible for ensuring use remains within approved scope, conditions, and review cadence.

Business Sponsor
Accountable for benefit realisation and alignment with business objectives.

Data Steward
Confirms classification of data categories and permitted handling boundaries.

Risk Reviewer
Confirms risk tier assignment and adequacy of required controls.

Technical Custodian
Implements access controls, logging, and configuration in alignment with approved conditions.

Approving Authority
Grants final approval for adoption and assigns residual risk acceptance authority.

Oversight Body (if applicable)
Receives summary reporting for Tier 3 and Tier 4 tools.

2.3 Delegations & Overrides (Required)

- Delegation authority must be documented in writing and retained in the Change Log.
- Emergency use or override requires documented justification, temporary risk tier confirmation, and defined review date.
- All overrides must specify duration and revert-to-approved-state condition.
- Overrides must be recorded in Section 9 (Exception Register).

USE CASE STATEMENT & BOUNDARIES OF USE

3.1 Primary Use Case(s) (Required)

For each approved use case:

- **Use Case Title:** _____
- **Description of Intended Activity:** _____
- **Intended Users (Roles):** _____
- **Intended Output Types:** _____
- **Decision Influence Level:**
  ☐ Informational only
  ☐ Advisory (human decision retained)
  ☐ Operational support
  ☐ Customer-facing interaction
  ☐ Influences rights, safety, financial position, or legally consequential outcomes

_____

3.2 Prohibited Uses (Required)

The following uses are not permitted unless separately approved and documented:

- Processing restricted or highly sensitive data not explicitly authorised
- Autonomous execution of financial transactions
- Autonomous approval or denial of employment decisions
- Autonomous legal determinations
- Use beyond defined deployment context
- Any use outside the defined data classification boundaries
- Deployment in jurisdictions not assessed under this instrument (if applicable)

Additional prohibited uses (organisation-specific):

_____
_____

3.3 Human-in-the-Loop Requirements (Required)

- **Mandatory Human Review Points:** _____
- **Reviewer Role/Competency Requirement:** _____
- **Escalation Path for Uncertain or High-Risk Outputs:**
  _____
- **Verification Standard (e.g., plausibility check / cross-reference / independent validation / domain expert review):** _____

- **Maximum Automation Boundary (what the tool must never autonomously decide): _____**

3.4 Operating Constraints (Optional)

- Approved operating environment(s): _____
- Volume or usage limitations (if applicable): _____
- Geographic or jurisdictional restrictions (if applicable): _____
- Additional safeguards required: _____

TOOL IDENTIFICATION AND DEPLOYMENT CONTEXT

4.1 Tool Identification (Required)

- **Internal Tool Reference Name:** _____
- **Commercial / Product Name (if applicable):** _____
- **Provider / Developer Entity:** _____
- **Delivery Model:**
  ☐ Software-as-a-Service (SaaS)
  ☐ On-Premises Deployment
  ☐ Hybrid Deployment
  ☐ API Integration
  ☐ Embedded Feature within Existing System
  ☐ Other (specify): _____
- **Account / Tenant Identifier (if applicable):** _____
- **Deployment Environment (e.g., corporate tenant, sandbox, production):**
  _____
- **Data Residency Setting (if configurable):** _____
- **Current Version / Release Identifier (if available):**
  _____

4.2 Functional Description (Required)

- **Primary Functional Capabilities:** _____
- **Secondary or Ancillary Capabilities:** _____
- **Known System Limitations (if documented):**
  _____
- **Intended Decision Support Boundary (what the tool is not relied upon to determine):** _____

4.3 Integration Touchpoints (Required)

- **Systems Receiving Inputs From This Tool:** _____
- **Systems Sending Data To This Tool:** _____
- **Output Storage Location(s):** _____
- **API Connections (if applicable):** _____
- **Automated Workflow Connections (if applicable):**
  _____

4.4 Access and Identity Model (Required)

- **Authentication Method:**
  ☐ Single Sign-On
  ☐ Local Account Provisioning
  ☐ API Key
  ☐ Service Account
  ☐ Other (specify): _____
- **Eligible User Groups / Roles:** _____
- **Provisioning Authority (Role):** _____
- **Deprovisioning Authority (Role):** _____
- **Access Review Frequency:** _____
- **Logging Enabled:** ☐ Yes ☐ No
- **Log Retention Period:** _____
- **Log Storage Location:** _____

4.5 Change Sensitivity Declaration (Required)

The following changes require reassessment under this instrument:

☐ Material configuration changes
☐ Expansion of user base
☐ New system integrations
☐ Expanded data classification usage
☐ Version or model changes materially affecting behaviour
☐ Change in delivery model
☐ Change in provider data handling terms or privacy policy

Additional change triggers (if any): _____

DATA CLASSIFICATION & HANDLING RULES

5.1 Organisational Data Classification Taxonomy (Required)

The organisation adopts the following classification levels for purposes of this instrument:

☐ Public
☐ Internal
☐ Confidential
☐ Restricted / Highly Restricted

(If alternative terminology is used internally, map categories here.)

5.2 Permitted Data by Classification (Required)

Data Classification	Permitted	Permitted with Controls	Prohibited	Control Reference
Public	☐	☐	☐	
Internal	☐	☐	☐	
Confidential	☐	☐	☐	
Restricted / Highly Restricted	☐	☐	☐	

5.3 Personal Data Handling (Required if applicable)

- **Personal Data Processed:** ☐ Yes ☐ No
- **Category of Personal Data (if applicable):** _____
- **Permitted Personal Data Classes:** _____
- **Anonymisation or Pseudonymisation Required:** ☐ Yes ☐ No
- **Explicit Prohibited Personal Data Types:** _____
- **Cross-Border Transfer Considered:** ☐ Yes ☐ No ☐ Not Applicable

---

5.4 Data Handling Requirements (Required)

- **Input Data Handling Rules:** _____
- **Output Data Handling Rules:** _____
- **Storage Location for Outputs:** _____
- **Retention Period for Outputs:** _____

- **Deletion Mechanism Owner (Role):** _____
- **Evidence of Deletion Required:** ☐ Yes ☐ No
- **Data Minimisation Principle Applied:** ☐ Yes ☐ No (Explain if No): _____

5.5 Data Usage Boundaries (Required)

- **Use of Inputs/Outputs for External Model Training Permitted:**
  ☐ Yes
  ☐ No
  ☐ Not Applicable
  ☐ Unknown (Approval may not proceed until clarified)
- **Sub-Processor Disclosure Required:** ☐ Yes ☐ No ☐ Not Applicable

---

5.6 Prohibited Data Types (Required)

The following data types must not be entered into the tool:

☐ Authentication credentials
☐ Encryption keys or security secrets
☐ Restricted regulatory identifiers
☐ Financial account numbers
☐ Health-related data (if not explicitly authorised)
☐ Biometric identifiers
☐ Confidential strategic plans not explicitly authorised
☐ Other (specify): _____

RISK TIERING & CONTROL REQUIREMENTS

6.1 Risk Tier Definitions (Required)

- **Tier 1 — Low Impact:**
  Internal productivity use; no sensitive data; outputs reversible; limited decision influence.
- **Tier 2 — Moderate Impact:**
  Supports internal processes; may involve limited sensitive data under defined controls; human oversight required.
- **Tier 3 — High Impact:**
  Influences operational decisions or customer experience; sensitive data likely; enhanced controls required.
- **Tier 4 — Critical Impact:**
  Materially affecting rights, safety, financial position, or legally consequential decisions; requires executive-level oversight and enhanced controls.

6.2 Risk Tier Assessment (Required)

- **Assigned Risk Tier:** ☐ Tier 1 ☐ Tier 2 ☐ Tier 3 ☐ Tier 4
- **Drivers Supporting Tier Assignment (select all applicable):**
  ☐ Data sensitivity
  ☐ Decision influence level
  ☐ Customer-facing impact
  ☐ Automation level
  ☐ Integration complexity
  ☐ Scale of deployment
  ☐ Reversibility of potential harm
  ☐ Operational dependency
  ☐ Financial exposure
  ☐ Safety implications
- **Evidence Supporting Tier Assignment (reference ID or attachment location):**
  _____

6.3 Minimum Control Requirements by Tier (Required)

Control Category	Tier 1	Tier 2	Tier 3	Tier 4
Approval Level	Functional Lead	Business Unit Head	Senior Executive	Executive Committee / Board

Control Category	Tier 1	Tier 2	Tier 3	Tier 4
Human Review Requirement	As defined in Section 3	Required	Enhanced	Enhanced + Independent Review
Logging & Monitoring	Basic	Standard	Enhanced	Enhanced + Periodic Audit
Access Restrictions	Role-based	Role-based	Restricted	Restricted + Periodic Review
Testing Prior to Adoption	Basic Validation	Structured Testing	Scenario Testing	Independent Validation or External Assurance (as appropriate)
Incident Escalation	Functional	Business Unit	Senior Executive	Executive Oversight
Review Cadence	Periodic	Defined	Increased	Increased + Oversight Reporting

---

6.4 Residual Risk Acceptance (Required)

- **Residual Risk Identified:** _____
- **Residual Risk Acceptance Authority (Role):** _____
- **Conditions of Acceptance (if any):** _____
- **Risk Acceptance Expiry / Review Date:** _____

6.5 Over-Tiering Safeguard (Recommended)

Risk tier assignment must be evidence-based and proportionate. Assigning higher tiers without defined drivers may inhibit responsible innovation and should be avoided.

EVALUATION FRAMEWORK & EVIDENCE RECORD

7.1 Evaluation Dimensions (Required)

Each dimension requires Rating + Evidence Reference ID + Notes.

Dimension	Rating	Evidence Reference ID	Notes
Fit to Defined Use Case			
Output Reliability (including susceptibility to confident but incorrect outputs)			
Reversibility of Potential Harm (if outputs are incorrect)			
Data Handling Alignment			
Access Control Compatibility			
Auditability and Logging Sufficiency			
Operational Resilience			
User Impact and Training Requirements			
Cost Model Alignment with Organisational Budget Governance Category			
Exit Feasibility			

7.2 Evidence Register (Required)

Evidence ID	Evidence Type (e.g., pilot, internal review, documentation)	Date	Owner (Role)	Storage Location

- **Tool Version / Model Version at Time of Evaluation:** _____

7.3 Testing Summary (Required)

- Testing Scope Conducted
- Data Classification Used
- Limitations Identified
- Unresolved Issues
- Mitigation Action Reference ID

7.4 Alternatives Considered (Required)

Option	Description Rationale	Evidence Reference
Option A (Selected)		
Option B		
Option C (Maintain Current State / No Adoption)		

DECISION RECORD & CONDITIONS OF USE

8.1 Decision Outcome (Required)

- **Decision:**
  ☐ Approved
  ☐ Approved with Conditions
  ☐ Deferred
  ☐ Rejected
- **Decision Authority (Role or Body):** _____
- **Decision Record Reference ID:** _____
- **Implementation Scope:**
  ☐ Full Deployment
  ☐ Limited Deployment
  ☐ Pilot Only

8.2 Conditions of Use (Required if Approved)

- **Permitted User Groups:** _____
- **Permitted Data Classifications:** _____
- **Mandatory Human Review Requirements (reference Section 3):** _____
- Maximum Automation Boundary (cross-reference Section 3): _____
- **Additional Control Conditions (if any):** _____
- **Explicit Prohibited Extensions of Use:** _____

8.3 Success and Performance Indicators (Optional)

- **Operational Performance Indicator(s):** _____
- **Quality Monitoring Indicator(s):** _____
- **Usage Thresholds (if applicable):** _____
- **Measurement Owner (Role):** _____

EXCEPTIONS, ISSUES, & COMPENSATING CONTROLS

9.1 Exception Register (Required if applicable)

Exception ID	Description	Risk Created	Compensating Controls	Approval Role	Duration	Review Date

---

9.2 Known Issues Log (Required)

Issue ID	Description	Severity	Owner (Role)	Mitigation Action	Status	Target Resolution Reference

---

9.3 Incident Escalation Path (Required)

- **Initial Notification Role: _____**
- **Escalation Threshold Criteria: _____**
- **Escalation Authority (Role): _____**
- **Incident Record Reference Location: _____**
- External Reporting Required: ☐ Yes ☐ No ☐ Not Applicable

MONITORING, REVIEW, & SUNSET DISCIPLINE

10.1 Review Cadence (Required)

- **Standard Review Frequency:** _____
- **Tier-Adjusted Review Frequency (if applicable):** _____
- **Review Owner (Role):** _____
- **Inputs Required for Review:**
  ☐ Usage Metrics
  ☐ Incident Records
  ☐ Error Frequency Analysis
  ☐ Data Classification Changes
  ☐ Configuration Changes
  ☐ Provider Policy Changes
  ☐ Integration Changes

10.2 Continuous Monitoring Expectations (Required)

- **Monitored Indicators:** _____
- **Monitoring Owner (Role):** _____
- **Threshold for Escalation:** _____
- **Monitoring Record Storage Location:** _____
- Verification Sampling Frequency: _____

10.3 Interim Review Triggers (Required)

☐ Material vendor data handling policy change
☐ New integration or system connection
☐ Expansion to higher data classification
☐ Material configuration change
☐ Significant incident or near miss
☐ Model/version behaviour change
☐ Change in decision influence level
☐ Regulatory or policy shift affecting use context

10.4 Sunset / Decommission Triggers (Required)

☐ Loss of compliance alignment
☐ Inability to maintain required controls
☐ Persistent quality failures
☐ Material degradation in output reliability or increase in verified error frequency
☐ Contract termination or service discontinuation
☐ Better controlled alternative adopted
☐ Strategic discontinuation decision

10.5 Exit Plan Summary (Required)

- **Data Export Requirements:** _____
- **Data Deletion Confirmation Mechanism:** _____
- **Replacement Workflow Identified:** _____
- **Exit Owner (Role):** _____

APPENDICES (INSTRUMENT-EMBEDDED)

Appendix A — Executive Summary Sheet (Required)

- Tool Reference Name
- Assigned Risk Tier
- Decision Outcome
- Permitted Data Classifications
- Key Conditions of Use
- Next Review Trigger Reference
- Residual Risk Acceptance Authority

Appendix B — Evaluation Scoring Sheet (Optional)

Dimension	Score Band	Evidence Reference	Notes

Appendix C — Role Attestations (Required)

Tool Owner Attestation
I confirm that use will remain within the approved scope and conditions.
Name: _____
Role: _____
Signature: _____
Date: _____

Data Steward Attestation
I confirm data classification and permitted handling boundaries are accurate.
Name: _____
Role: _____
Signature: _____
Date: _____

Risk Reviewer Attestation
I confirm the assigned risk tier and control requirements are proportionate and evidenced.
Name: _____
Role: _____
Signature: _____
Date: _____

Technical Custodian Attestation
I confirm controls, logging, and access configuration align with approved conditions.
Name: _____
Role: _____
Signature: _____
Date: _____

All attestations confirm review of evidence referenced in Section 7.

Future Edition Updates & User Submissions

Artificial intelligence capabilities evolve rapidly. New tool categories emerge. Integration models expand. Regulatory environments shift.

This volume reflects globally observed AI usage patterns and governance considerations as of February 2026.

Future editions may incorporate:

- New functional domains
- Emerging capability categories
- Refined governance instruments
- Structural adjustments reflecting industry developments
- Clarifications informed by user feedback

AISF may invite structured feedback from readers regarding:

- Domain clarity
- Governance applicability
- Structural alignment suggestions
- Observed use case developments

Feedback mechanisms, if activated, will be made available through official AISF channels.

Future revisions will preserve the core architectural logic:

Awareness → Classification → Compatibility → Governance.

Acknowledgements

This publication reflects structured analysis of AI usage patterns observed across professional, institutional, and educational environments as of February 2026.

AISF acknowledges the evolving contributions of researchers, technologists, governance specialists, educators, and practitioners whose work continues to shape responsible AI discourse.

While this framework does not endorse specific vendors or platforms, it recognises that ongoing innovation across the AI ecosystem informs the need for disciplined navigation and governance.

Responsibility for interpretation and implementation remains with the adopting user or organisation.

About

AI Sourced Facts (AISF) Pte. Ltd.

AISF is a Singapore-headquartered institution dedicated to structured reasoning, responsible AI navigation, and governance-informed adoption of artificial intelligence systems.

AISF operates with a capability-first, vendor-neutral posture. Its publications do not rank platforms, endorse providers, or promote specific technologies. Instead, AISF develops structured frameworks that help individuals, professionals, and institutions reason clearly before integrating AI into operational, strategic, or educational environments.

AISF's work spans whitepapers, applied insight books, education instruments, governance architectures, and structured research initiatives. These outputs are informed by cross-system AI research methodologies and reflect globally observed usage patterns at the time of publication. Human accountability remains central across all AISF frameworks.

AISF does not provide regulatory, legal, financial, investment, or compliance advice. Its publications are designed to support structured thinking, proportionate governance, and disciplined evaluation of AI capabilities prior to deployment or reliance.

As artificial intelligence systems continue to evolve, AISF's focus remains constant: clarity before integration, governance proportionate to capability, and long-term institutional resilience in the age of AI.

Further publications and structured frameworks are available at:

www.aisourcedfacts.com

Back Cover

Artificial intelligence tools are accessible.
Responsible adoption is not automatic.

AISF AI Adoption Architecture provides a structured framework for navigating AI capability while preserving governance clarity.

Part I — Structured AI Navigation
A task-first orientation across twelve functional domains, with representative tools examined neutrally and governance reminders embedded throughout.

Part II — Governance & Control Architecture
A complementary framework integrating task classification, maturity mapping, and lifecycle governance instruments for structured organisational adoption.

This volume does not rank vendors.
It does not prescribe platforms.
It does not substitute regulatory frameworks.

It provides structural discipline before integration deepens.

Suitable for individuals, teams, and institutions, this February 2026 Edition reflects globally observed AI usage patterns while maintaining neutrality and scalability.

Responsible AI adoption begins with clarity.
Clarity begins with structure.

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