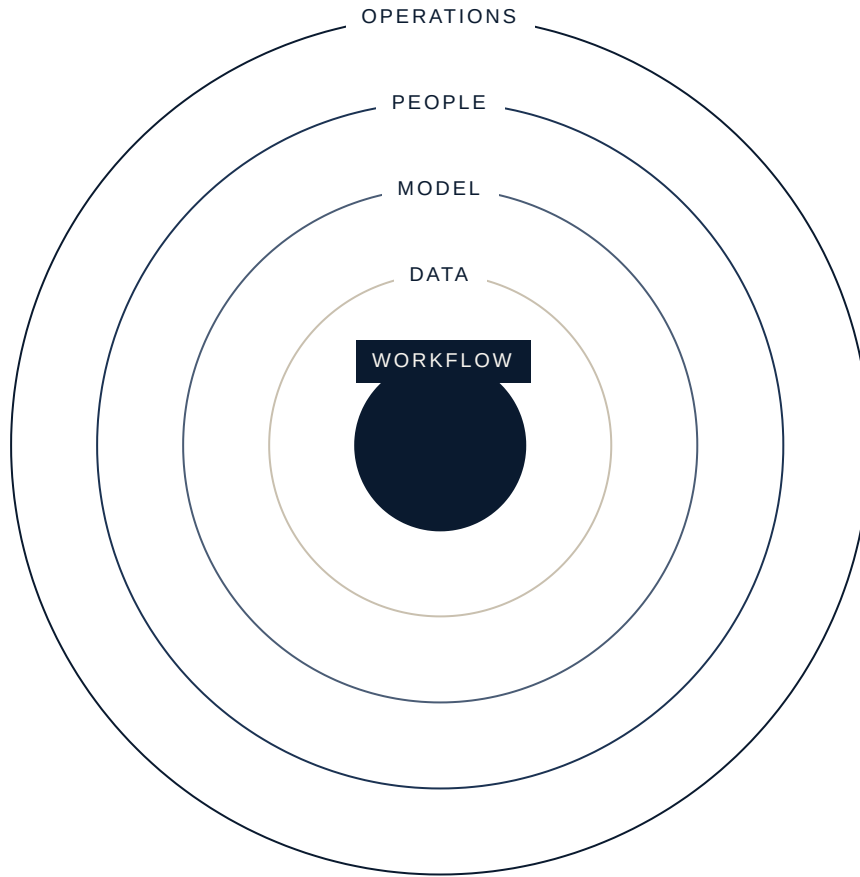


DES 2026 EDITION

The Five Layers

Five layers to design before AI touches real work.



Use the layers before the pilot gets loose.

- | | | |
|----|-------------------|---|
| 01 | Workflow | What task is being improved? Where does it start and end? Which handoffs, exceptions, approvals, and escalation points already exist? |
| 02 | Data | Which documents, systems, logs, and records may the pilot use? Which fields are sensitive? What must be masked, excluded, retained, or deleted? |
| 03 | Model | Which model setup is accurate enough for the task? What latency, cost, hosting, prompt control, and evaluation constraints matter? |
| 04 | People | Who owns the workflow? Who reviews the output? Who can override it? Who explains the decision when a customer, auditor, or manager asks? |
| 05 | Operations | How will the pilot be monitored, evaluated, documented, secured, handed over, and rolled back when something breaks? |
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CRM assistant, mapped quickly.

Workflow: account managers ask for a customer summary before a renewal call, then review the answer before using it.

Data: contracts, support tickets, CRM notes, meeting transcripts, and invoice status are allowed. Legal disputes and HR notes are excluded.

Model: retrieval plus a small instruction-following model is enough if the answer cites source records and refuses unsupported claims.

People: sales owns the workflow, legal defines exclusions, IT controls access, and the account manager approves the final summary.

Operations: logs capture citations and refusals, access follows CRM permissions, and a weekly review checks bad answers before wider rollout.