Ai Applied

FREE PRACTICAL TOOL | 5 MINUTES

AI Escalation Decision Card

Choose one repeated task. Decide when routine AI help is enough, when deeper analysis is useful, and when a person should approve.

01 **Name the repeated task**

Example: reply to service enquiries or prepare a first proposal draft.

02 **Define a routine request**

What information is normally present, and what can AI prepare from approved sources?

03 **Define the escalation trigger**

What missing, conflicting, unfamiliar, or high-consequence details need deeper analysis?

04 **Name the human approval point**

Who approves prices, promises, customer-record changes, or unusual terms?

NEXT STEP: TEST THE RULE ON 10 REAL EXAMPLES

Count accepted results, staff corrections, response time, and total cost. Anonymize customer details before testing.

Read the guide: aiapplied.ca/blog/when-should-ai-use-a-stronger-model

Want help designing a small pilot? Bring this card and a few anonymized examples to Ai Applied.

aiapplied.ca/contact