The AI Briefing for Non-Technical Leaders

A risk-adjusted framework for professionals who need clarity, not a course.

WHO THIS IS FOR

Professionals who make decisions about AI tools but did not study computer science. Team leads evaluating vendor pitches. Managers fielding questions from direct reports about which tools are safe to use. Anyone who needs a framework, not a tutorial.

THE THREE-BUCKET TEST

Every AI use case falls into one of three categories. Naming the bucket clarifies the risk, the review process, and the expected output before anyone opens a tool.

SYNTHESIZE	DRAFT	AUTOMATE
Summarize information that already exists.	Generate a first version of something new.	Execute a repeatable task without manual input.
Example: Condense a 40-page report into a one-page brief.	*Example: Write a stakeholder update from bullet-point notes.*	*Example: Route incoming support tickets by category.*

THE AI MINUTE RISK LADDER

Not every AI task carries the same exposure. This three-tier model maps risk level to the review process required before output leaves the tool.

TIER	WHEN IT APPLIES	WHAT TO DO
LOW	Summarizing public information. Brainstorming. Rephrasing your own notes.	Use freely with any company-approved tool.
MEDIUM	Drafting client-facing content. Building presentations. Writing proposals.	Use with review. A human checks every output before it ships.
HIGH	Anything touching financials, legal, HR, or regulated data.	Use only with explicit policy approval. Confirm with compliance first.

DECISION MATRIX

TASK	BUCKET	RISK	PROTOCOL
Researching a vendor or topic	Synthesize	LOW	Company-approved tool. Verify claims before presenting.
Summarizing meeting notes	Synthesize	LOW	Company-approved tool. No client names in free-tier tools.
Drafting a status update	Draft	LOW	Company-approved tool. Review before sending.
Building a leadership presentation	Draft	MEDIUM	Company-approved tool. Verify all data points independently.
Writing a client proposal	Draft	MEDIUM	Review every line. Do not send AI output directly to clients.
Analyzing financial data	Synthesize	HIGH	Policy approval required. No sensitive data in external tools.
Automating HR screening	Automate	HIGH	Legal review mandatory. Bias and compliance risks are real.

THE MEETING CHEAT SHEET

Five questions that cut through any AI vendor pitch or internal proposal. Print this page. Bring it to the meeting.

TO UNDERSTAND WHAT THE TOOL DOES

"Which of these best describes it: does it summarize information, generate drafts, or automate repetitive tasks?"

TO SURFACE THE REAL RISK

"What data does it touch, who has access to it, and where does it go after the session?"

TO ESTABLISH ACCOUNTABILITY

"What specific outcome are we measuring, and what does success look like at 90 days?"

TO PROTECT THE ORGANIZATION

"If this does not perform, what is the exit process?"

TO CUT THROUGH THE DEMO

"Can we run it against a real task from our workflow before we commit to anything?"

THE 30-DAY PLAN

A structured ramp that moves from individual experimentation to team-level policy. No certifications required. No courses to complete.

THIS WEEK

Pick one task from your actual workload. Run it through the Three-Bucket Test. Classify it. Try it with a company-approved tool. Evaluate the output honestly.

THIS MONTH

Identify three recurring tasks your team does weekly. Map each one: bucket, risk tier, current tool. Present findings to your manager with a recommendation.

THIS QUARTER

Build a one-page AI policy for your team using the Risk Ladder. Define which tiers need review, which need approval, and which are free to use. Get sign-off.

THE BOTTOM LINE

AI is not a strategy. It is a tool. The professionals who thrive will not be the ones who adopt fastest. They will be the ones who adopt with the clearest boundaries. This framework gives you the boundaries. The rest is execution.

YOUR PERSONAL AI POLICY (FILL IN)

The tools I am approved to use: _____

The data I will never put into an AI tool: _____

My review process before sending AI output externally: _____

The colleague I will consult when unsure: _____