

Task Audit Matrix

Chapter 3: Hands vs. Head | What NOT to Automate



For each task, assess Risk (if this goes wrong, is it annoying or fatal?) and Context (does it require emotional intelligence or history?). Place it in the appropriate quadrant.

HIGH RISK

THE DANGER ZONE

Low Context, High Risk
Strategy: Constraint. AI drafts, human hits send.

THE BOARDROOM

High Context, High Risk
Strategy: Delegate execution, never judgment.

LOW RISK

THE FACTORY FLOOR

Low Context, Low Risk
Strategy: Automate aggressively.

THE ASSISTANT

High Context, Low Risk
Strategy: Augment. AI gets you 80%, you add 20%.

LOW CONTEXT

HIGH CONTEXT

List your tasks below, then sort them into the quadrants above:

Signature Audit

Chapter 6: Standards Are Your Edge | What NOT to Automate



Identify the specific moments in your work that justify your price. These are the moments AI must never lead. If AI erodes these, it erodes your value.

1. WHAT DO YOUR BEST CUSTOMERS SAY WHEN THEY REFER YOU?

(The words they use reveal what they actually value.)

2. WHAT WOULD CHANGE IF YOU HANDED THIS WORK ENTIRELY TO AI?

(Name the specific quality, tone, or judgment that would disappear.)

3. LIST YOUR SIGNATURE MOMENTS (the interactions that justify your premium):

4. FOR EACH SIGNATURE MOMENT, WHAT IS AI'S ROLE?

Signature Moment	AI Role (Draft / Research / None)	Human Role

The Blank Page Test

Chapter 7: The Diamond | What NOT to Automate

This diagnostic identifies Editor candidates. Hand them unmarked AI output and see if they can identify what's wrong without being told what to look for.

HOW TO RUN THE TEST

- 1 Select AI output**
Choose a recent piece of AI-generated work: an email, a report draft, a proposal, or marketing copy. Do not mark it or flag any issues.
- 2 Hand it to the candidate**
Say: "This was generated by AI. Review it and tell me what you'd change before it goes out." Give no other context.
- 3 Observe what they catch**
A strong Editor will identify tone issues, factual gaps, missing context, or language that doesn't match your brand. A weak candidate will say "looks fine" or only catch typos.
- 4 Score the response**
Use the scorecard below to evaluate their editorial judgment.

SCORECARD

Criteria	Yes	No
Identified tone or voice issues		
Caught factual errors or hallucinations		
Flagged missing context the AI couldn't know		
Suggested specific improvements (not just "make it better")		
Rewrote at least one section in their own voice		

3+ Yes = Strong Editor candidate. 1-2 Yes = Needs training. 0 = Not the right role.

The Sticky Note Test

Chapter 7: The Diamond | What NOT to Automate

This diagnostic identifies Architect candidates. Give them a messy process and see if they can design a system around it.

HOW TO RUN THE TEST

1

Choose a messy workflow

Pick a real process in your business that is manual, repetitive, and involves multiple steps. The messier the better.

2

Give them a whiteboard and sticky notes

Say: "Map this process from start to finish. Then identify which steps could be handled by AI and which need a human. You have 30 minutes."

3

Watch how they think

A strong Architect will ask clarifying questions, identify decision points, and design a workflow with clear handoffs between AI and human. A weak candidate will draw a linear list.

4

Score the response

Use the scorecard below to evaluate their systems-design thinking.

SCORECARD

Criteria	Yes	No
Asked questions before mapping		
Identified decision points (not just task steps)		
Separated AI-appropriate tasks from human-required tasks		
Designed handoff points between AI and human		
Considered failure modes (what happens if AI gets it wrong?)		

3+ Yes = Strong Architect candidate. 1-2 Yes = Needs development. 0 = Not the right role.

Escalation Filter

Define which decisions the AI handles alone, which require a quick human check, and which must go to a senior decision-maker. Fill in your specific output types for each tier.

GREEN | AI Executes Autonomously

Low risk, reversible, observable output. If the AI gets it wrong, the fix takes minutes.

Our Green-tier outputs:

YELLOW | AI Drafts, Human Reviews

Moderate risk or touches external stakeholders. AI does the work, a human checks before it ships.

Our Yellow-tier outputs:

RED | Human Leads, AI Supports

High risk, irreversible, or reputation-critical. The human makes the call. AI provides research or drafts only.

Our Red-tier outputs:

The 3D Scorecard

Chapter 12: Measuring What Matters | What NOT to Automate



Measure AI value across three dimensions. Fill in your current metrics for each. Review monthly. If any dimension is declining, the system needs adjustment.

DIMENSION 1: OPERATIONAL GAINS

Unit economics, time savings, throughput, cost per deliverable.

Metric	Before AI	Current	Target
Hours per deliverable			
Cost per unit			
Throughput (units/week)			

DIMENSION 2: STRATEGIC LEVERAGE

New markets entered, revenue from AI-enabled services, competitive advantage.

Metric	Before AI	Current	Target
New revenue from AI-enabled segments			
Markets now serviceable			
Proposal win rate			

DIMENSION 3: ORGANIZATIONAL HEALTH

Team capability, override rates, burnout indicators, skill development.

Metric	Before AI	Current	Target
Human override rate			
Team satisfaction / burnout score			
Skills developed this quarter			