

# Sample AI Manager Readiness Report

Representative scenario, not a client case study.

## Prepared for:

A 200-person professional services organisation

## Scenario:

Microsoft Copilot has been rolled out. Staff are also using public AI tools informally. P&C has an AI policy, but managers do not yet have practical guidance for client-facing work, disclosure, confidentiality, performance concerns or escalation.

# Executive snapshot

Summary view for P&C / HR leadership.

Overall readiness

**Developing**

Baseline score

**1.7 / 4**

Primary issue

**Policy exists, but manager practice is inconsistent.**

Main exposure

**Managers are making AI-related people decisions team by team.**

What changed

**AI moved into daily work before manager guidance caught up.**

What needs attention

**Client-facing work, confidentiality, disclosure and review.**

What is inconsistent

**Managers apply different standards to similar AI-assisted work.**

What needs a decision

**When AI use is acceptable, disclosed, reviewed and escalated.**

What P&C should do next

**Brief managers and publish practical employee guidance.**

# Baseline scorecard

Summary-level scores only. Detailed assessment items are intentionally not included.

Domain	Score
Manager readiness	1.5 / 4
Employee AI use guidance	2.0 / 4
Confidentiality and privacy	2.0 / 4
Performance and conduct ambiguity	1.0 / 4
Human review	1.5 / 4
Escalation pathways	1.0 / 4
Employee trust and concern pathways	1.0 / 4
Responsible adoption evidence	1.5 / 4

## Scoring key

- 0 = Not in place
- 1 = Informal / inconsistent
- 2 = Partially defined
- 3 = Defined and communicated
- 4 = Embedded and evidenced

# Key people-risk themes

Representative themes from the scenario.

- **Manager inconsistency:** managers are applying different standards to similar AI-assisted work.
- **Confidentiality uncertainty:** staff and managers are unclear what information must not be entered into AI tools.
- **Performance and conduct ambiguity:** poor AI-assisted output is not consistently classified as quality, capability, conduct or review failure.
- **Trust and fairness concerns:** employees may be unclear whether AI is being used to monitor, judge or replace work without transparency.

Risk	Consequence	Current state	Recommended response	Owner	Priority
Manager inconsistency	Different outcomes across teams	Informal	Decision rules and briefing	P&C	High
Confidentiality uncertainty	Sensitive data exposure	Partly defined	Tool-use boundaries	P&C / Privacy	High
Conduct ambiguity	Poor case handling	Unclear	Classification guide	P&C	Medium

# Manager guidance excerpt

Short excerpt only. This is not the full Manager AI Playbook.

## Scenario:

An employee uses AI to draft client-facing material.

## Manager question:

Is this acceptable, should it be disclosed, and what needs to be checked before the work is used?

## Manager should:

- confirm whether AI use is allowed for this type of work
- check whether confidential, client, employee or sensitive information was entered
- review the output for accuracy, tone, completeness and client-specific obligations
- decide whether disclosure is required
- escalate if confidentiality, conduct, regulatory or client commitments are involved

# Escalation map preview

Simple preview of how manager handling and escalation can be made clearer.

Issue type	Manager handles	Escalate to P&C	Escalate to Legal/Privacy/Cyber/Risk
AI used for low-risk internal drafting	Yes	No	No
AI used for client-facing material	Review and document	If standards are unclear	If client, legal or regulatory risk
Confidential information entered into AI tool	Stop and record facts	Yes	Yes
Poor AI-assisted output affects performance discussion	Initial review	Yes	If wider risk
Employee raises fairness or monitoring concern	Listen and record	Yes	If privacy, WHS or risk issue

# 90-day action plan preview

A practical sequence after the readiness check.

## First 30 days

**Clarify manager decision rules and escalation triggers.**

## Days 31-60

**Brief managers and publish employee AI use guidance.**

## Days 61-90

**Review early cases, update risk register, and collect evidence of responsible adoption.**

## What the full sprint delivers

The full sprint produces practical outputs for P&C, managers and employees.

- Manager AI Playbook
- Employee AI Use Guide
- Human Review and Escalation Map
- AI People Risk Register
- 90-Day P&C / HR Action Plan
- Baseline and Measurement View

[Book a 30-minute AI manager readiness check](#)

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