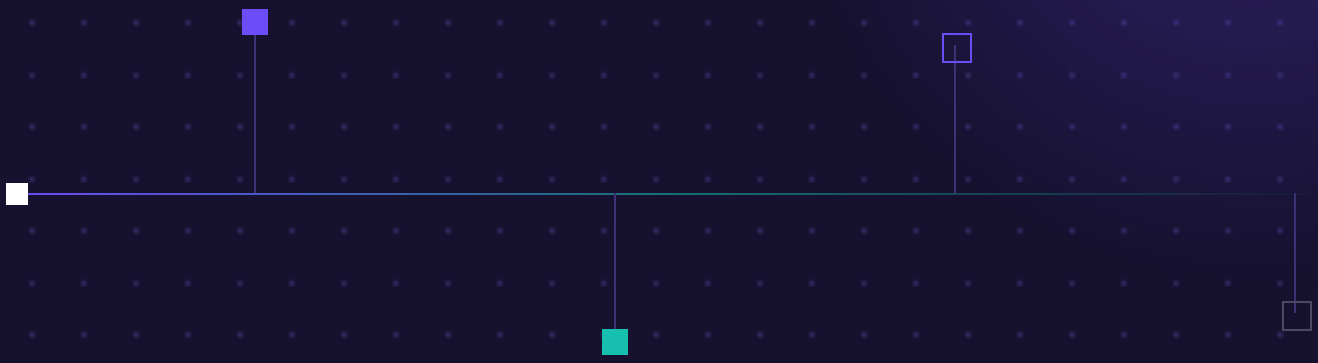


A BOULEVARDLABS PRACTICAL RESOURCE

The Practical AI Guide for Organizations

What to use, what to pay for, what to allow, and where to start.

A practical starting point for organizations moving from AI experimentation to useful, governed adoption.

START HERE

A smaller set of decisions, made well

Most organizations do not need to begin with a custom AI model or a large transformation program. This guide covers the decisions that come first — and gives you the checklists, criteria and questions to work through them.

WHO THIS IS FOR

Executives, operations leaders and technology leaders deciding how their organization should adopt AI — and the administrators and managers who will make it work day to day.

HOW TO USE IT

Read it once end to end, then work the tools. Use it as the starting point for an AI strategy session, a tool-selection review, a workforce training plan, or a practical adoption roadmap tailored to your organization.

WHAT YOU'LL LEAVE WITH

Three workflows worth improving, criteria for choosing tools, clear information boundaries, a training curriculum, a first-use-case scorecard, and a way to measure whether any of it helped.

CONTENTS

Executive summary 03

PART ONE · DECIDE

1 · Start with the work 05

2 · Choosing tools 06

3 · Free, business, enterprise 07

PART TWO · ENABLE

4 · Information boundaries 09

5 · Train the team 10

6 · Prompting 11

PART THREE · PROVE

7 · First use cases 13

8 · Measurement 14

WORKING TOOLS

Quick-start checklist 15

Strategy-session questions 16

Next step 17

EXECUTIVE SUMMARY

Six decisions come before the technology

Most organizations do not need to begin with a custom AI model or a large transformation program. They need to make a smaller set of decisions well.

01
Which tools fit their work

02
Who should have access

03
What information can be used

04
How employees should be trained

05
Which workflows are worth testing

06
How success will be measured

> The goal is not to adopt AI everywhere. The goal is to identify where AI can improve work while preserving security, accountability, and human judgment.

01

Decide

What work you are trying to improve, which tools fit it, and what level of plan the use actually requires.

01 Start with the work, not the model

02 Choosing AI tools and subscriptions

03 Free vs. business vs. enterprise

SECTION 01

Start with the work, not the model

Before comparing models or subscriptions, identify the work you want to improve. Six common starting points:

1 Drafting and communication

First drafts, summaries, outlines, structured responses, and content adaptation.

2 Research and synthesis

Organizing information, comparing sources, and identifying themes or questions.

3 Knowledge retrieval

Helping teams find approved internal information faster.

4 Decision support

Comparing alternatives, surfacing relationships, and testing assumptions.

5 Workflow support

Reducing repetitive administrative steps while keeping people in control.

6 Risk and forecasting

Identifying patterns, anomalies, or emerging conditions that deserve investigation.

A USEFUL RULE

If you cannot describe the workflow, the user, the information involved, and the desired outcome, you are not ready to choose the tool.

SECTION 02

Choosing AI tools and subscriptions

General-purpose AI assistants can overlap significantly. Selection should be based less on brand familiarity and more on fit with the organization's work, security requirements, administration needs, existing technology environment, and cost.

	CRITERION	THE QUESTION TO ANSWER
01	**Work fit**	What are employees actually trying to accomplish with the tool?
02	**Data handling**	What happens to prompts, uploaded files, and organizational information?
03	**Administration**	Can accounts, access, retention, and settings be centrally managed?
04	**Integration**	Does the tool fit the productivity, collaboration, document, and data environment already in use?
05	**Capability**	Is the output quality sufficient for the specific tasks being tested?
06	**Traceability**	Can users identify sources, assumptions, or the basis for important outputs?
07	**Cost**	Does the value created justify the license and operating cost?

> Run every candidate tool through the same seven criteria, in the same order, with the same workflow in mind. Comparison only means something when the question is identical for each option.

SECTION 03

Free vs. business vs. enterprise

Free consumer tools can be useful for learning and low-risk experimentation, but organizational use introduces additional questions.

ADMINISTRATION | DATA PROTECTION | ACCESS CONTROL | AUDITABILITY | SUPPORT | CONTRACTUAL TERMS

MATCH THE PLAN TO THE USE — FOUR ESCALATING LEVELS

A

Low-risk learning

Use non-sensitive information and clearly defined boundaries.

B

Routine organizational use

Evaluate business-grade plans with centralized administration and appropriate data protections.

C

Sensitive, regulated, or high-impact use

Involve security, privacy, legal, compliance, and technical stakeholders before deployment.

D

Custom organizational knowledge or workflows

Determine whether a managed platform, retrieval architecture, integration, or custom capability is warranted.

LOWER RISK · LIGHTER CONTROLS — HIGHER IMPACT · MORE STAKEHOLDERS

02

Enable

What information may be used, what people need to know, and how to ask for work in a way that produces reliable output.

04 Define what employees can put into AI

05 Train the team to use AI

06 Prompt engineering without the hype

SECTION 04

Define what employees can put into AI

Do not leave information-handling decisions to individual interpretation. At minimum, distinguish public information from everything that carries an obligation.

OPEN

Public information

Already published or cleared for external release.

RESTRICTED — REQUIRES A DECISION BEFORE USE

- Internal
- Confidential
- Regulated
- Proprietary
- Client
- Personnel
- Security-sensitive
- Otherwise restricted

MINIMUM VIABLE POLICY — CHECKLIST

- [ ] Approved AI tools are identified.
- [ ] Employees know which information categories are prohibited or restricted.
- [ ] Employees know when organizational or client data requires an approved environment.
- [ ] There is a process for exceptions and questions.
- [ ] Rules can be updated as tools, risks, and business needs change.

SECTION 05

Train the team to use AI

Effective training should be practical and role-specific. A useful curriculum has five layers, each building on the one below it.

05 Workflow application
How each role can use AI in repeatable, measurable ways.

04 Verification
How to check facts, sources, calculations, assumptions, and completeness.

03 Prompting
How to provide context, task, constraints, source material, and desired output.

02 Safe use
Approved tools, data boundaries, privacy, security, and escalation.

01 AI literacy
What generative AI can and cannot reliably do.

FOUNDATION — APPLIED CAPABILITY

SECTION 06

Prompt engineering without the hype

Good prompting is structured communication, not a collection of magic phrases. Strong prompts usually contain six parts.

PART 01

Context

The situation, audience, organization, or background that matters.

PART 02

Task

What the model should actually do.

PART 03

Source material

What information the model should rely on.

PART 04

Constraints

What it must avoid, preserve, or stay within.

PART 05

Output

The required format, level of detail, tone, or structure.

PART 06

Validation

What should be checked, cited, flagged, or left unresolved.

WHAT MAKES A PROMPT WORTH REUSING

Designed around a real workflow

Not a generic template borrowed from elsewhere.

Tested by the people doing the work

The practitioners judge whether the output is usable.

Improved based on output quality

Revised deliberately, then documented and shared.

03

Prove

Which use cases to try first, and how to tell whether the new way of working is actually better than the old one.

07 Pick the first use cases

08 Measure whether AI is actually helping

SECTION 07 · WORKING TOOL

Pick the first use cases

Good early use cases are valuable enough to matter but bounded enough to evaluate. Score three candidate workflows against the same six questions.

CRITERION	WORKFLOW A	WORKFLOW B	WORKFLOW C
Frequency Does the work happen often?			
Effort Does it consume meaningful staff time?			
Information availability Is the necessary information accessible and reliable?			
Risk What happens if the output is wrong?			
Human review Can a qualified person validate the result?			
Measurability Can the new workflow be compared with the old one?			
TOTAL			

Score each criterion 1–5 for every candidate. Discuss the spread, not only the total: a high-value workflow with no way to review the output is not a first use case.

SECTION 08

Measure whether AI is actually helping

DON'T MEASURE

~~Logins · prompts sent · number of tools purchased~~

MEASURE

The work itself

SEVEN SIGNALS WORTH TRACKING

01 Time saved or cycle-time reduction

02 Quality, completeness, or consistency improvements

03 Reduction in rework or search effort

04 Faster access to trusted information

05 Improved decision visibility or response time

06 User adoption and confidence

07 Cost per useful outcome

BASELINE — PILOT — COMPARISON

Capture the baseline before the pilot begins. Without it, the comparison is an opinion.

WORKING TOOL 01

Quick-start checklist

OWNER _____
DATE _____

☐	01	Identify three workflows worth improving.	
☐	02	Select approved tools for controlled testing.	
☐	03	Define information and usage boundaries.	
☐	04	Train a small pilot group.	
☐	05	Document reusable prompts and workflows.	
☐	06	Measure baseline performance before the pilot.	
☐	07	Review results, risks, and user feedback.	
☐	08	Scale only the use cases that demonstrate value.	

TARGET DATE

Working through these eight steps once, on three real workflows, produces more organizational learning than a year of unstructured experimentation.

WORKING TOOL 02

Questions to bring to an AI strategy session

Print this page. Answer what you can before the session; the gaps are the agenda.

- [ ] Which AI tools should our organization standardize on?
- [ ] Who actually needs a paid AI account?
- [ ] What information should never enter public AI tools?
- [ ] Where are employees already using AI unofficially?
- [ ] Which three workflows offer the strongest near-term opportunity?
- [ ] What training does each role need?
- [ ] What should we measure before and after implementation?
- [ ] When does an off-the-shelf tool stop being enough?

Turn the guide into a plan

Use this guide as a starting point for an AI strategy session, tool-selection review, workforce training plan, or practical adoption roadmap tailored to your organization.

- AI strategy session
- Tool-selection review
- Workforce training plan
- Practical adoption roadmap