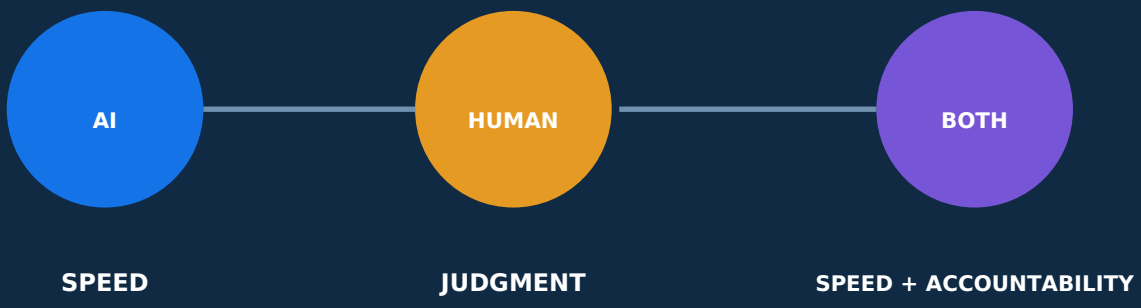
THE AI vs HUMAN DELEGATION MATRIX

What Should AI Handle, What Needs a Human, and When Should You Use Both?



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THE REAL QUESTION

Stop Asking: "Can AI Do This?"

Many business owners approach AI by asking: "Can AI do this task?" But capability is only part of the decision.

THE BETTER QUESTION

"Should AI be responsible for this task?"

RISK

What happens if the task goes wrong?

CONTEXT

How much understanding of the situation is required?

ACCOUNTABILITY

Who is responsible for the final outcome?

Delegate by risk, context, and accountability - not simply by what AI can technically do.

DECISION FRAMEWORK

The Delegation Matrix

As risk and context increase, human involvement should increase.



AI FIRST

Give AI the Repetitive Work

AI is generally most useful when the task is predictable, repeatable, and easy to review.

- ✓ **Repetitive**
- ✓ **Predictable**
- ✓ **High-volume**
- ✓ **Based on clear instructions**
- ✓ **Easy to review**
- ✓ **Low-cost if an error occurs**

WRITING

- First drafts
- Routine emails
- Summaries
- Content repurposing

INFORMATION

- Extracting details
- Categorizing enquiries
- Structuring notes
- Summarizing documents

ADMINISTRATION

- Preparing reports
- Structured updates
- Creating task lists
- Routine processing

AI DELEGATION TEST

"If AI makes a mistake here, can a person easily spot and correct it before meaningful damage occurs?"

HUMAN FIRST

Give People the Work That Requires Judgment

- **Judgment**
- **Empathy**
- **Relationship awareness**
- **Negotiation**
- **Business context**
- **Exception handling**
- **Accountability**
- **Meaningful consequences**

CUSTOMER RELATIONSHIPS

- Complaints
- Important clients
- Sensitive requests

EXCEPTIONS

- Unusual scheduling
- Refund decisions
- Non-standard situations

DECISIONS

- Negotiations
- Hiring
- Important commitments
- Strategic choices

Generating an answer and owning a decision are not the same thing.

AI + HUMAN

The Biggest Opportunity Is Often AI + Human

AI does not always need to replace a task completely. Redesign the workflow.



LEAD MANAGEMENT

AI: Extract lead details → Categorize → Draft response

Human: Review valuable/unusual leads → Personalize → Approve

CUSTOMER SUPPORT

AI: Summarize request → Suggest response

Human: Handle complaints, exceptions, or sensitive cases

SCHEDULING

AI: Offer available times → Confirm → Remind

Human: Handle conflicts and unusual requests

WORKSHEET

Before Delegating a Task to AI, Ask These 3 Questions

1. RISK

What happens if this goes wrong?

☐ 1 - Very little consequence

☐ 2 - Minor inconvenience

☐ 3 - Moderate business impact

☐ 4 - Customer or financial impact

☐ 5 - Serious business consequence

2. CONTEXT

How much situational understanding does the task require?

☐ 1 - Clear rules

☐ 2 - Mostly predictable

☐ 3 - Some interpretation

☐ 4 - Significant judgment

☐ 5 - Deep business/relationship context

3. ACCOUNTABILITY

Does a person need to own or approve the outcome?

☐ 1 - Minimal oversight required

☐ 2 - Occasional review

☐ 3 - Regular review

☐ 4 - Human approval required

☐ 5 - Human should own the decision

SCORING GUIDE

Your Delegation Score

3–5 — **AI FIRST**

The task is likely suitable for AI assistance or automation. Still monitor performance.

6–9 — **AI + HUMAN**

Use AI for repetitive or preparatory work. Keep a person responsible for review, exceptions, or final actions.

10–15 — **HUMAN FIRST**

Use AI only as an assistant where appropriate. A person should own the decision and outcome.

IMPORTANT NOTE

This score is a practical starting point, not an automatic decision rule. Legal, financial, privacy, safety, contractual, or regulatory requirements may require human review regardless of the score.

QUICK REFERENCE

Task-by-Task Reality Check

BUSINESS TASK	AI	HUMAN	BOTH
Meeting summary	✓		
Routine email first draft	✓		
Customer complaint		✓	
Lead categorization	✓		
High-value lead follow-up			✓
Appointment reminders	✓		
Scheduling exception		✓	
CRM data extraction	✓		
Important CRM changes			✓
Weekly report preparation	✓		
Strategic decision		✓	
Social media first draft	✓		
Final brand-sensitive content			✓
Routine customer FAQ	✓		
Unusual customer request		✓	
Proposal first draft			✓
Negotiation		✓	

PRINTABLE WORKSHEET

Map One Workflow

Workflow: _____

Task 1: _____

Risk: ___ Context: ___ Accountability: ___ Decision: ☐ AI ☐ Human ☐ Both

Task 2: _____

Risk: ___ Context: ___ Accountability: ___ Decision: ☐ AI ☐ Human ☐ Both

Task 3: _____

Risk: ___ Context: ___ Accountability: ___ Decision: ☐ AI ☐ Human ☐ Both

Task 4: _____

Risk: ___ Context: ___ Accountability: ___ Decision: ☐ AI ☐ Human ☐ Both

Task 5: _____

Risk: ___ Context: ___ Accountability: ___ Decision: ☐ AI ☐ Human ☐ Both

What should AI handle?

What should a person handle?

Where is human approval required?

What exceptions should always be escalated?

THE DELEGATION RULE

AI FOR SPEED.

PEOPLE FOR JUDGMENT.

BOTH FOR ACCOUNTABILITY.

Repetitive + Predictable + Low Risk

↓

AI

Context + Relationships + Exceptions

↓

HUMAN

Repetitive Work + Meaningful Consequences

↓

AI + HUMAN

Don't pay people to behave like software.

Don't expect software to take human responsibility.

The goal is the right division of work.

ACTION PLAN

Build Your AI-Human Workflow

Choose one repetitive business process. Break it into tasks. Then decide where AI, a person, or both belong.

Process I want to improve:

Tasks AI could handle:

Tasks a person should own:

Tasks where AI can prepare and a person approves:

Exceptions that should immediately go to a person:

How I will measure whether this works:

START WITH ONE WORKFLOW

Don't try to automate your entire business. Pick one repetitive process. Break it into individual tasks. Evaluate each task by Risk → Context → Accountability. Then decide: AI → Human → Both.

Need Help Finding the Right Tasks to Automate?

Start by mapping one workflow and identifying where repetitive work is consuming human time without requiring human judgment. That's usually where the best first automation opportunities appear.

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