

ILLUSTRATIVE EXAMPLE | NOT A CUSTOMER RESULT

THE BUSINESS DECISION

Improve the AI already in use

A fictional operations team uses an AI assistant to answer policy questions. Staff still check answers manually because the source library contains current and superseded guidance.

Illustrative recommendation: narrow the next step

Improve one policy-answering workflow before expanding access. Identify authoritative sources and access boundaries, then measure whether the existing assistant can meet the agreed need.

What the assessment would examine

The sponsor's intended outcome; a bounded sample of policy questions; current and older source documents; staff review effort; permissions; and the selected assistant's actual retrieval path.

Coverage and evidence limits

This sample contains no real customer evidence or measured result. A live assessment would state the named systems, evidence window, permissions, methods and unobserved areas. A policy conflict is not proof that restricted information was disclosed.

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WITHIN AGREED REPORTING COVERAGE

Services in use and review questions

Ovatio Protect reporting informs the observed evidence. Client context and analyst judgment remain visibly separate.

01 OBSERVED | Collaboration service

Evidence: connected-service record and supported activity signal in the approved window. Review: confirm business purpose, owner and access.

02 CLIENT-STATED | AI assistant service

Evidence: workflow interview; no corresponding Protect observation in this illustrative scope. Review: validate approved use, owner and access.

03 INFERRED | File-transfer service

Evidence: analyst inference from overlapping workflow descriptions; client validation is required. Review: confirm potential duplication or dependency.

04 NOT OBSERVABLE | Endpoint-only assistant

Evidence: outside the approved reporting coverage. Review: collect client-owned evidence only if it is needed for the decision.

Illustrative only. This report does not claim exhaustive discovery, prove what a named assistant accessed or create ongoing monitoring.

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FROM OBSERVATION TO ACTION

Three questions worth resolving

01 Source authority

A current policy and an older version could both be retrieved.

Next step: Check which source is authoritative and how superseded content is handled.

Owner: Knowledge owner

Decision: Could improving source management resolve the problem without new software?

02 Access boundaries

The content library may be shared more broadly than intended.

Next step: Review groups and sharing links; verify allowed and denied access through the actual assistant route.

Owner: Security and IT counterpart

Decision: Which access changes or controls are needed before expansion?

03 Business value

Manual checking may absorb time the assistant was expected to save.

Next step: Measure review effort and answer quality on a repeatable sample of the workflow.

Owner: Business process owner

Decision: Is the next investment justified by a measurable improvement?

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A PATH WITH DECISION POINTS

Measure first then choose

The roadmap is a sequence of client actions. It does not imply that implementation or three months of support are included in the assessment.

First 30 days: establish the baseline

Business and IT owners confirm source authority, authorized access and a representative question set. Record review time, answer acceptability, source accuracy and access-test results.

Days 31 to 60: test the chosen improvement

If separately approved, compare the existing tool and proposed change using the same questions and controls. Include exceptions and denied requests. Record costs as well as benefits.

Days 61 to 90: decide whether to expand

Proceed only if the agreed value, quality and control criteria are met. Otherwise revise, defer or stop. Implementation, proof work and ongoing support require their own scope.

The included outcome check

About 30 days after the readout, review decisions taken, obstacles and whether priorities need adjustment. No savings or return on investment is claimed in this example.