ShiftMate

Execution guide · Activate + Measure

Design a proof of value that can earn the next decision

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Move from a defined use case to evidence and a clear expand, refine, or stop decision.

The executive decision

What must a proof of value demonstrate before the institution expands its scope?

A proof of value should produce more than a demonstration. It should show how the institution operates AI, measures results, handles exceptions, and decides whether the capability is ready for a broader role.

Use this guide to leave with

- A phased operating plan with accountable decision gates
- A measurement contract that combines outcomes, quality, and risk
- A final decision supported by an evidence pack rather than momentum

Framework at a glance

Evidence opens the next gate

A governed proof of value moves through five decision gates, increasing exposure only when evidence supports the next step.

01.	Stage 1	**Align**
02.	Stage 2	**Establish foundations**
03.	Stage 3	**Limited production**
04.	Stage 4	**Controlled expansion**
05.	Stage 5	**Scale, extend, or stop**

Operating principle: Increase exposure only as evidence improves.

01 / Define the contract

Write the decision before you run the pilot.

The proof of value begins with a compact agreement on scope, ownership, measures, controls, and the final decision the work must support.

Scope

Name the channels, workflows, users, data, and actions that are in scope. Explicitly list what is not.

Measures

Freeze baseline definitions and identify the source, owner, review cadence, and acceptable evidence for each measure.

Decision rights

Identify who may open each gate, who can pause activity, and who makes the final scale, extend, or stop decision.

02 / Phase activation

Increase exposure only as evidence improves.

This illustrative sequence moves from foundations to limited production, controlled expansion, and a formal decision. Timing depends on source readiness, integration access, staffing, and the evidence needed; it is not a delivery commitment.

Stage 1: Align

Confirm the charter, scope, owners, baselines, evidence plan, and executive reporting cadence.

Stage 2: Establish foundations

Validate access, integrations, data maps, identity, logging, safety testing, rollback, and training readiness.

Stage 3: Limited production

Introduce controlled traffic, review interactions, tune approved content, and verify escalation behavior.

Stage 4: Controlled expansion

Add only the flows that pass prior gates, then assemble results, incidents, exceptions, and financial evidence.

Stage 5: Scale, extend, or stop

Compare results with the original contract and document the rationale, conditions, and next controls.

03 / Run decision gates

Treat each expansion point as a governed decision.

Gates are most useful when they have named evidence, accountable approvers, and a documented outcome.

Before staff or member traffic

Verify controls, approved sources, access, measurement, escalation, testing, training, and rollback readiness.

Before authenticated or higher-risk flows

Validate identity, authorization, auditability, consent, exception handling, and human review for the specific workflow.

At the end of the proof of value

Review outcomes, quality, incidents, adoption, operating effort, costs, and residual risk together in one meeting.

04 / Build the evidence pack

Make the result explainable to the next room.

The final output should help an executive team, board committee, risk leader, or operator understand what happened and why the recommendation follows.

Outcome evidence

Define a baseline or comparable cohort and observation window. In lending, distinguish staff engagement, pending native application, LOS receipt, approval, and funded status. Record each source, denominator, and refresh delay; separate funded principal from revenue and incremental contribution.

Operating evidence

Adoption, exceptions, human interventions, training, support load, configuration changes, and rollback exercises.

Risk evidence

Control results, incidents, complaints, access tests, unresolved gaps, and accepted residual risk.

Decision memo

A concise scale, extend, or stop recommendation with rationale, conditions, owners, budget implications, and the next review date.

Questions worth putting on the agenda

1. What is the smallest scope that can produce decision-quality evidence?
2. Which measures combine business value, member experience, quality, and risk?
3. What must be proven before traffic or workflow authority expands?
4. How will the team document changes so results remain explainable?

Meeting notes

This is educational guidance, not evidence that ShiftMate implements every control described. Tailor it to your institution's policies, risk appetite, and legal or regulatory guidance before using it to support a decision.

Plan a workflow evaluation: Request an executive briefing.