Pick your team's first AI task

Most teams start with AI by picking a tool. I'd start by picking a task. This guide helps you choose the one recurring task worth changing first, and it gives you the questions to ask anyone you bring in to help, me included.

You don't need to install anything.

What you need

- A team that does some of the same work every week.
- Ten minutes, and a list of what that work is. A rough list is fine.
- Any Claude or ChatGPT account, if you want it to interview you. The free ones work.

Step 1: list what comes back every week

Write down five to ten tasks your team repeats. Use the words your team uses.

Good examples are specific: “turn call notes into a proposal”, “answer the same three billing questions”, “chase missing documents before month end”. “Improve communication” is not a task.

For each one, note:

- what starts it
- who does it today
- roughly how long it takes each time

Step 2: score each task on five things

Give each task 1 to 3 on each line. Higher is better.

1. **It happens often.** Weekly beats monthly. You learn faster from a task you see 50 times a year.

2. **One person can decide to change it.** If changing it needs three departments to agree, it is not a first task.
3. **Its inputs live somewhere a computer can read.** A shared inbox, a CRM, a folder, a form. Not someone's memory or a hallway conversation.
4. **A person can check the result in under a minute.** If nobody can tell quickly whether the output is right, nobody will trust it.
5. **A mistake is cheap to fix.** A draft someone reviews is cheap. A payment or a message sent to a customer without review is not.

Start with the task that scores highest. If two tie, take the one your team complains about most.

Step 3: check that the task is the problem

Before any AI, ask what is really slowing this task down. Often it is one of these:

- **The process.** Two people do the same check, or work waits in a queue for an approval

nobody needs.

- **The data.** The information exists but sits in three places.
- **The ownership.** Nobody is sure whose job it is.

Fix that first, even if the fix is a shared checklist. AI on top of a broken process gives you a faster broken process.

Step 4: decide how to change it

There are four ways, and they are worth weighing in this order:

1. **Keep the tool you have and connect it.** Cheapest, and your team already knows it.
2. **Change the process.** Sometimes that alone is the win.
3. **Buy something that fits better.**
4. **Build the missing part.** Only when the first three don’t do it.

Whichever you pick, decide where a person reviews the result before it goes anywhere.

Step 5: agree what better looks like

Write one line before you start, so you can tell afterwards whether it worked. Pick one measure:

- time per task
- errors caught late
- how long a customer or colleague waits

Then run it on real work for two weeks and look at that one number.

The last test matters most: can someone on your team keep it running without the person who set it up? If not, it isn't finished.

What to ask anyone you bring in to help

These apply to me as much as anyone.

1. **"Which task would you start with, and why that one?"** If the answer is a tool, not a task, be careful.

2. **“Who on my team will you sit with?”** The people doing the work know where it breaks.
3. **“What happens if the first fix isn’t AI?”** A good answer is “then we fix the process first”.
4. **“Where does a person check the result?”** There should be a clear answer for every step that reaches a customer or moves money.
5. **“What will my team have at the end that they can run without you?”**
6. **“How will we know it worked?”** One measure, agreed before the work starts.
7. **“What won’t you do?”** Everyone has limits. You want to hear them before you sign.

If you want to talk it through

Write a one-page brief of the task you picked and send it to me. There’s a prompt that interviews you and writes it: pierresabbagh.com/work-with-me.

How a first engagement runs is here: the first four weeks.