

The Jonesi Consultancy | Houston, TX

EXECUTIVE AI ADOPTION · FRAMEWORK HANDOUT

THE AI OPERATING HANDBOOK



9 Sections Every Organization Needs in Writing

Most AI problems are not technology problems. They are unwritten expectations.

An operating handbook puts the rules, the standards, and the escalation paths in one place so people can move quickly without guessing.

1 GOVERNANCE

Who decides, and on what authority.

- › Governance structure and named roles
- › Policy and standards oversight
- › Decision rights and escalation
- › Risk based approach to approvals

GOAL Clear leadership, accountability, and alignment.

2 ACCEPTABLE USE

What is permitted, and what is not.

- › Approved and restricted tools
- › Personal versus business use
- › Prohibited activities and data types
- › Consequences for misuse

GOAL AI used ethically, responsibly, and appropriately.

3 PROMPTING STANDARDS

How people are expected to ask.

- › A shared prompting framework such as CRAFT
- › Reusable prompt templates by function
- › Worked examples of good and poor prompts
- › House rules on tone and formatting

GOAL Consistent prompts that produce usable results.

4 VERIFICATION

How output gets checked before it is used.

- › A standard verification routine such as CHECK
- › Fact checking requirements by risk level
- › Source validation expectations
- › Escalation when something looks wrong

GOAL Accuracy verified, errors caught early, trust preserved.

5 SECURITY

What data may go where.

- › Data classification and handling rules
- › Explicit list of what never gets pasted
- › Access controls and authentication
- › Incident reporting process

GOAL Protect data, systems, and reputation.

6 WORKFLOWS AND OVERSIGHT

Where humans stay in the loop.

- › When AI may act without review
- › When human approval is mandatory
- › Review and sign off process
- › Exception handling

GOAL Human judgment applied where it matters most.

7 TRAINING

How capability actually gets built.

- › Role based training paths
- › Onboarding for every new tool
- › Ongoing practice and office hours
- › Fluency checks and refreshers

GOAL Confidence and capability across the whole team.

8 IMPROVEMENT

How the handbook stays alive.

- › Collect feedback from actual users
- › Monitor performance and outcomes
- › Update policies on a set cadence
- › Share what works across teams

GOAL Learn, adapt, and improve continuously.

9 DOCUMENTATION

What gets written down and kept.

- › Records of AI use and material decisions
- › Data lineage and usage logs
- › Tool and model documentation
- › Retention schedules and audit readiness

GOAL Transparency, traceability, and accountability.

WRITE IT DOWN BEFORE YOU SCALE IT UP

A handbook is not bureaucracy. It is the fastest way to give hundreds of people the same good judgment you would give one person in a hallway conversation. Start with sections 1, 2, and 5. The rest follow.

CRAFT and CHECK are widely used community mnemonics. The Jonesi Consultancy teaches and applies them as part of its AI integration practice.

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Nine Sections Every Organization Needs in Writing

We help organizations set the lines, train to them, and put governance behind them.

