



PRITT INVESTMENT PARTNERS

Bring the business into focus before turning on the agents.

A structured workbook for selecting the first department, mapping the organization, tracing one operating workflow, and defining the technical and commercial boundaries.

PARTICIPANTS

Scott, department owner, operating user, technical owner, Bennett, delivery lead, and Roberto.

TARGET OUTPUT

A signed-off pilot definition with owners, inputs, boundaries, and acceptance criteria.



CHOOSE THE FIRST CIRCLE

Operations or Marketing should win because it is ready to prove value, not because it sounds more exciting.

SELECTION FACTOR	OPERATIONS	MARKETING
Named owner Who makes decisions?		
Visible pain What is breaking or slow?		
Repeatable workflow What happens often?		
Accessible evidence Can we inspect real work?		
Measurable result What can improve?		
User commitment Who will test it?		
Selected department		
Department owner		
Pilot users		
Acceptance authority		

PEOPLE, AUTHORITY, AND BOUNDARIES

Attach the org chart, then resolve the questions it does not answer.

- ☐ List each legal entity and the companies or operating units under it.
- ☐ Identify the executive owner for each of the nine proposed circles.
- ☐ List department teams, roles, named users, contractors, and external partners.
- ☐ Identify which roles can approve, edit, publish, spend, sign, or delete.
- ☐ Identify information that can cross departments and information that cannot.
- ☐ Record people who operate in multiple departments and which role is active when.
- ☐ Identify the technical administrator, security owner, and incident decision-maker.
- ☐ Identify the business owner who accepts the first department pilot.

OPEN QUESTIONS AND EXCEPTIONS

ONE REAL OPERATING LOOP

Trace an actual item from input to accepted outcome, including every human decision and system handoff.

PHASE 1 / ONE DEPARTMENT

The paid pilot proves one complete operating loop before expansion



COMMENTARY: DATA

USD 10,000 funds one department implementation. A second department begins only after separate approval.

INPUT

What starts the work?

- Source and format
- Trigger and frequency
- Required context
- Current owner

PRITT DISCOVERY WORKBOOK

DECISION

What requires judgment?

- Rules and exceptions
- Authority and escalation
- Evidence required
- Agent assistance allowed

OUTCOME

What becomes official?

- Destination and record
- Notification and handoff
- Success measure
- Audit requirement

Inventory what exists before deciding what to connect, rebuild, or retire.

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LOCK THE PILOT DEFINITION

Do not begin the build until both teams can state what success means and who can accept it.

Pilot goal

Primary workflow

Named users

Required modules

Approved integrations

Local model plan

Cloud responsibility

Security boundary

Success measures

Acceptance authority

Explicit exclusions

PILOT APPROVAL

Name / date

DELIVERY APPROVAL

Name / date
