WHAT YOU KNOW THAT OUTSIDERS DON'T

Industry first

Write down what you know about your industry that no software expert does, before anyone builds AI for it.

The knowledge that makes AI useful is already in your head.

What you'll end up with

Your own written account of who pays you and why, what years in your line of work have taught you, where a person has to stay in the work, and a set of questions for anyone who offers to build AI for you.

How to do it

Print it and work through the five steps in order, with a pen. Answer from real work and real customers, the way things go in a normal week. Step 5 ends with one thing to do once the rest is filled in.

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1 Why the industry comes first

Why it matters, and four things to write down.

An AI system built for your business by someone who doesn't know your line of work can perform no better than having no AI at all. That is what Sheldon Wolf told me he keeps seeing when he joined me on Episode 92 of The ATP Shift, the podcast I host for All The Power (ATP). I'm Roy Castleman. Sheldon started out in real estate in 1989 and now builds and invests in businesses. What he described was products designed by very good software people who don't know the industry they are designing for.

> *"It's like a plague to have a great piece of software, but no brains behind it. It's like having a Ferrari, the engine's perfect, but there's no body, and there's no steering wheel." Sheldon Wolf, Episode 92*

He sees the opposite as well: people who know their industry thoroughly and don't know how to apply AI to it. If you run a service business, whether that is a trade, a practice or an agency, you are probably one of those people. It is the better position to be in, because the tools can be learned or brought in and the years in your field can't.

In the same conversation I called AI a sixty per cent tool. It does about sixty per cent of the work and you do the rest, because you are still the one who designs how the work is done, knows what the AI is doing and asks the right questions. This worksheet gets what you know out of your head and onto paper, so that whoever builds for you starts from your industry and has less to guess.

The industry we work in _____

How long I have been in it _____

My business, in one plain sentence _____

_____

_____

What a newcomer to this line of work always gets wrong

_____

_____

_____

> Write these answers the way you would explain the work to a new team member on their first day. Plain and true is all they need to be.

2 Who pays, and why

Start at the back end, with the customer and what they are really buying.

Sheldon told me he builds everything backwards. Most people begin with the idea. He starts with who is going to open their wallet and how, and whether they will open it wide enough for the business to make a profit. He also said the customer today is different from the customer of five years ago, and will be different again five years from now, and that he builds around that.

Anyone building for your business needs these answers before they touch a tool, and you are the one who has them. Where you can remember your customers' or clients' own words, use them.

Who pays us (the kind of customer or client, in plain words)

What they are really buying (the result they want)

What makes them say yes

What makes them walk away, or go quiet

What they expect now that they didn't five years ago

What I think they will expect five years from now

The work that makes us a profit, and the work that doesn't

3 What only your work teaches

The things you know without thinking, because you have done the work for years.

This is the page a software expert can't fill in, and it can be an uncomfortable one. As I said in Episode 92, a business with ten or twenty people often doesn't quite know what it does any more, because everyone has changed the way things are done a little and nobody kept control of it.

Answer each one from a real job or client project. At the end of each answer write W if it is already written down somewhere in the business, or H if it lives only in someone's head.

The work that looks simple and isn't

The early sign that a job or project is about to go wrong

What a customer says, and what it usually means

The mistake that costs most, and how we avoid it

The rule, standard or law an outsider wouldn't know about

What good work looks like that the customer never sees

How many of my answers are marked H

> Every H is something a new team member, a supplier or an AI system would have to guess. Later on, those are the answers to write up first, each as a short note kept where your team keeps how things are done.

4 Where a person stays

Decide it yourself, before a tool decides it for you.

The question I ask owners is this: which parts of the work can be automated, and where does a person need to come in? I think of it as bookends, with a person at the start of the work and a person at the end of it.

Pick one piece of work your business does every week, such as preparing a quote or proposal, taking on a new client, or sending the monthly report. Choose the one where what you wrote in step 3 matters most, because that is where an outsider would go wrong. Then split it up.

The piece of work

The parts that follow a clear rule every time (software could do these)

The parts that need judgement, and who decides

The check before it reaches a customer (who checks, and what they look at)

What we never hand over, whatever the tool

Try to break it on paper

Sheldon said he goes looking for the ways his own systems break, because he would sooner break one himself than have a customer do it. You can do the same before any system exists. Suppose software did the rule-following parts you listed above. Write down where that would go wrong: the unusual customer, the missing information, the exception to the rule.

> AI can do a lot of the work. You still decide what good work is, and you check each piece of work against it.

5 Questions for whoever builds for you

Keep this page for the day someone offers to build something for your business.

Nobody may be offering yet. If so, finish steps 1 to 4 and keep this page until someone does, whether that is a supplier, a consultant or one of your own team.

Sheldon's advice to owners was to learn the technology, without feeling they have to master it. He also said to make sure whoever you work with can demonstrate what they have, can show how it will help your business directly, and understands your business.

Answer the first question after your first conversation, before you show them anything. Then give them steps 2 to 4 to read, and answer the rest. Step 1 is your own notes, so it stays with you. Circle Y or N.

Did they ask how my business works before they talked about tools?	**Y / N**
Having read my pages, can they say back who pays us and why?	**Y / N**
Can they show me something working?	**Y / N**
Can they say plainly how it will help this business?	**Y / N**
Do I know who is responsible for it once it is running?	**Y / N**
Do I know where our data will be kept, and who looks after it?	**Y / N**
Could I take these pages to someone else?	**Y / N**

Every N is something to settle before you agree to anything. The questions about responsibility and data are ones Sheldon said he weighs before he builds or buys anything. The last is mine. Keep these pages and your written procedures in your own shared folder, as ordinary documents you can open and copy. Then you can give them to a different supplier, and no supplier holds the only copy.

What they asked that I couldn't answer (write it here)

This week: the questions the outsider asked when I read step 3 aloud

THIS WEEK

Read your step 3 answers aloud to someone who has never worked in your field.

Every question they ask is something an outsider would have had to guess.

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