

TEMPLATE PACK

INTELLIGENCE PIPELINES

Eight worksheets to build your AI-powered communications function.

Print these and fill them by hand, or use the spreadsheet version for on-screen editing. Both at the link below.

01	Time and Task Discovery	Ch 1
02	Judgment vs Systematic Sorting	Ch 1
03	Five-Dimension Filter	Ch 5
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06	Measuring the Build	Ch 11
07	AI Inventory & Corpus Register	Ch 11
08	Coalition Map	Ch 14

TIME & TASK DISCOVERY

What gets done, by whom, how often, at what cost.

TASK	WHO	FREQUENCY	HOURS	TRIGGER
Cross-check claims	Comms	Quarterly + ad hoc	8-12	Pre-publication

Bring four to six weeks of logged work.

JUDGMENT VS SYSTEMATIC

Sort the work. Score cost of failure. Rank the candidates.

TASK	JUDGMENT / SYST.	DATA NOW	COST OF FAIL.	RANK
Cross-check claims	Systematic	Partial	High	1

Start with the lowest cost of failure.

FIVE-DIMENSION FILTER

Five gates. Fail any of the first three and it is dead.

Candidate agent

- 1**

Within the CCO's core remit

Narrative, relationships, risk, reputation.

Reason _____

HARD GATE

☐ Pass ☐ Fail
- 2**

No existing tool does this systematically

A mature vendor category means buy, not build.

Reason _____

HARD GATE

☐ Pass ☐ Fail
- 3**

Architecturally distinct

Covers a failure mode no other agent covers.

Reason _____

HARD GATE

☐ Pass ☐ Fail
- 4**

Systematic intelligence work

Repeatable work a briefed junior could do.

Reason _____

☐ Pass ☐ Fail
- 5**

ROI across all three lenses

Efficiency, quality and business impact.

Reason _____

☐ Pass ☐ Fail

Fail four or five: recoverable with redesign.

BUILD DECISION WORKSHEET

Score readiness Green, Amber, Red. Then sequence.

Candidate agent

	GREEN	AMBER	RED
Task clarity Input, process, output all clear?	☐	☐	☐
Data availability Sources exist in usable form?	☐	☐	☐
Data security Public or pre-approved data?	☐	☐	☐
Precision requirement Low-precision with CCO review?	☐	☐	☐
Output destination Clear recipient and workflow moment?	☐	☐	☐

Priority (from Template 02) _____ Sequence _____

Green — ready, dimension met.
Amber — workable with named groundwork.
Red — blocks the build until resolved.

Build the most-Green, highest-priority first.

LEGAL QUESTIONS CHECKLIST

A structured agenda for your legal team.

DATA CLASSIFICATION

- ☐ Does our data classification framework cover AI processing, or need extending?
- ☐ Who authorises classified documents in AI tools, and is it documented?

DATA PROCESSING & PRIVACY

- ☐ Do our DPAs with AI providers cover the planned use cases?
- ☐ What retention and deletion provisions apply?

COPYRIGHT & IP

- ☐ Do we retain full IP of AI-generated and AI-assisted output?
- ☐ Does that extend to internal frameworks applied through AI tools?

REGULATORY CONTEXT

- ☐ Does our use of AI trigger transparency or documentation obligations?
- ☐ If a tool processes personal data, what does that create?

DISCLOSURE OBLIGATIONS

- ☐ Which AI regulations apply, given where we operate and our stakeholders?
- ☐ Do any uses trigger specific compliance obligations?

NOTES & DECISIONS

Bring a current inventory of AI tools.

MEASURING THE BUILD

Baseline, target, method — before you build.

Agent

EFFICIENCY • TIME RETURNED

Work the agent takes on (input, process, output)

How it is done today: hours, frequency, coverage

Hours returned; what depth becomes possible

How the gain will be measured

QUALITY • ERRORS CAUGHT

Manually-reviewed corpus used as baseline

What manual review caught vs what the agent caught

The delta between the two

BUSINESS IMPACT • RISK & ALIGNMENT

Risk category reduced: regulatory, reputational, narrative, strategic

One finding that, surfaced externally, would cause exposure

Strategic priority the agent connects to

How findings route into communications planning

Three lenses: efficiency, quality, impact.

AI INVENTORY & CORPUS REGISTER

One record of every AI tool and every data corpus.

PER AI TOOL	PER DATA CORPUS
Tool name & version	Document / dataset name
Purpose in the function	Source
Operator role (AI Act)	Classification
Risk class + basis	Authorisation (who, date)
Vendor & contract ref	Tools that use it
Human oversight point	Retention rule
Owner	
Review cycle	
Incident log	

No tool in use without a complete entry.

COALITION MAP

Who to engage, in what order, and what each one needs.

INTERNAL COALITION	EXTERNAL COALITION
Role & function	Role & organisation
What they care about	Relationship type
What you need from them	What they enable
What they need from you	What you need from them
Engagement order	Cadence of engagement
Risk / how to handle	

The coalition decides: supported or stalled.