04 / ADOPTION OWNERSHIP FROM THE START

The handover starts when you choose the workflow

Javier Masides · Agentic Worklabs · 9 September 2026

An AI workflow becomes part of the business when the team can use it, fix routine problems and decide when it needs to change. The consultant should help establish that capability throughout the engagement.

Waiting until the final week to nominate an owner leaves too much unresolved. Someone has to decide which work moves into the new process, what counts as a good result and what happens when the system cannot produce one. Those decisions shape the build from the start.

I would name an operating owner as soon as we choose the first workflow. For a sales process, that may be someone in RevOps working with the frontline manager. They need protected time and enough authority to change the routine. A name in a project document does little on its own.

01
Name the operating owner

02
Define ready with evidence

03
Practise change and recovery

04 / ADOPTION THE HANDOVER RECORD

Make ownership concrete

The sponsor owns the business outcome and the trade-offs. The process owner decides how the work should happen. The technical owner manages access and operational reliability. The manager makes room for practice and reviews whether the team is using the workflow. In a small business, one person may cover several roles, but the responsibilities still need to be understood.

The following handover record can fit on one page:

Item	Evidence that it is ready
Purpose and scope	The owner can explain which work belongs in the workflow
Quality	Representative examples show acceptable outputs and known failures
Normal operation	A second user completes a real task without the builder's help
Exceptions	The operator can find a failed run and route it correctly
Change	The operator makes a small approved change and checks the result
Recovery	The operator can stop the workflow and restore the previous version
Cost and access	Subscription costs, usage limits and permissions have named owners
Next review	A date and owner exist for the next operating review

04 / ADOPTION PRACTICE & EXPANSION

Practise the handover during delivery

Once the first working path exists, ask someone other than the builder to run it. Watch where they hesitate. A missing explanation, confusing approval or output in the wrong place is useful feedback. Correcting those details is part of making the workflow usable.

Then test a failure the team will actually encounter: missing source information, two similarly named accounts, an expired permission or an event arriving twice. The operator needs to recognise the problem and know what to do next. Nobody benefits from a runbook that describes only the successful path.

As normal use begins, record eligible tasks, completed tasks, rejections and reasons for non-use. That makes it easier to distinguish a technical defect from an unnecessary step or a routine the manager has not yet changed. Each calls for a different response.

Expand after the first workflow holds up

At the end of the pilot, ask the client operator to demonstrate the runbook, including a small change and recovery. Review the result against the starting baseline and the effort needed to keep it running. The next decision can be to expand, maintain the current scope or stop.

A second team should inherit the method and the lessons, with its own access, owner and working examples. Copying an assistant into another department does not settle those questions.

Use the handover record at the beginning of an engagement. It tells the buyer what they will own, gives the builder a clear finish line and makes the next investment decision easier to defend.

04 / WORKFLOW MAP PUT THE ARTICLE TO WORK

Build ownership into delivery

Make the handover record a starting agreement and test it throughout the engagement.

01

Choose the workflow and its owner

Protect the owner's time and authority. Clarify sponsor, process, technical and manager responsibilities.

02

Define the evidence of readiness

Agree scope, quality, normal operation, exceptions, change, recovery, cost, access and the next review.

03

Have a second user run real work

Watch for hesitation. Correct missing explanations, confusing approvals and outputs in the wrong place.

04

Practise failure, change and recovery

Test a realistic failure, a small approved change and restoring the previous version.

Track eligible tasks, completions, rejections and reasons for non-use.

05

Review and decide the next scope

The client operator demonstrates the runbook. Compare results and operating effort with the baseline.

DECISION	IF EXPANDING
Expand, maintain the current scope or stop. Use the pilot evidence to make the next investment decision.	The next team needs its own access, owner and working examples, alongside the method and lessons.

Workflow synthesis based on this article. Read alongside the full examples and qualifications.