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Beyond the Scribe: Workflows

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From Scribe to System: Scaling Institutional Expertise

BIG Question:
What if every repetitive, knowledge-intensive task you do could work the same way?

Challenge ≠ technology

Challenge = Where to start + building useful workflows

3D Framework for AI in Higher Ed

DEFINE

- Specific Problem
- Outputs Desired
- Data Risk Levels

DEVELOP

- Capture Context
- Clean & Structure
- Build Tools

DEPLOY

- Generate Content

- Expert Review
- Distribute

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DEFINE: Where your expertise shines

1. Specific Problem

- What repetitive task drains your time but requires YOUR knowledge?
- Not “communication is hard” → “New policy announcement needs 5 different versions for different audiences”
- The more specific, the better the solution

2. Outputs Desired

- What does “done” look like?
- Who needs what format? (Email vs talking points vs FAQ)
- What quality standards must be met?

3. Data Risk Levels

- What information is involved? (Public, Internal, Proprietary)
- Determines what tools to use (MS CoPilot, RamGPT or external)
- Veterans know this instinctively- document it explicitly

Institutional Knowledge is the Foundation.

AI savvy colleagues can’t build systems without clarity on these three elements

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DEVELOP: Building Knowledge Infrastructure

4. Capture Context

- Document the knowledge that lives in your & your colleagues' heads
- Examples, edge cases, exceptions, preferences
- Multiple methods for capturing

5. Clean & Structure

- Make information AI ready (+ data security considerations)
- Templates, decision trees, approval workflows
- Think: If I were training someone new, what would they need?

6. Build Tools

- Create custom GPTs, prompt templates, automated workflows
- Partner here if you're not AI savvy (Building literacy)
- Test with real scenarios- your judgement validates the outputs

This is legacy building.

You're not just solving today's problem - you're creating systems that outlast you

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DEPLOY: You Stay in Control

7. Generate Content

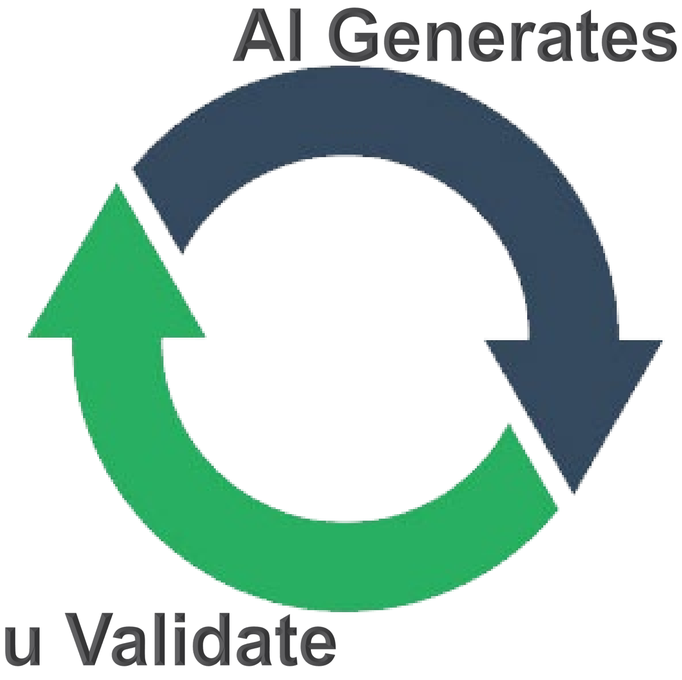
- Let AI capture the first draft based on your context
- Consistency at scale – same quality, every time
- Handles the repetitive heavy lifting

8. Expert Review

- This is non-negotiable. You are the quality gatekeeper
- Check for accuracy, tone, completeness, institutional fit
- Refine the system based on what needs correction

9. Distribute

- Deploy the approved output to the right audiences
- Track what works, what doesn't
- Iterate and improve the workflow



The 'human-in-the-loop isn't a weakness-
it's the entire point.

AI scales your judgement, not replaces it

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WebFocus to Power BI Migration

The Chaos

- Migration in 3 mos.
- 150+ report users panicking
- Starting over in learning
- Data views not identical
- Non-CSU specific tutorials online
- Fielding constant questions
- Users building anxiety, data team drowning

Define

Problem: Scale support for 150 users learning new system

Outputs: CSU specific guides, data location mapper, FAQs, common task tutorials

Data Risk: Internal process documentation, but not proprietary other than data locations

Develop

Capture: Webfocus → Power BI translation matrix, Old → New views, common reports

Structure: searchable data dictionary, tech methods to convert to average user

Build: Custom GPT on CSU data structure + Power BI best practices

Deploy

Generate: an interactive chatbot that produces how-to's based on user queries

Review: Data warehouse team validates technical accuracy

Distribute: Self-service hub, guides, learning paths

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DVM Program Accreditation Self-Study

The Chaos

- Due in 18 months
- 11 standards, 200+ substandards
- Distributed analysis
- 12+ contributors
- Inconsistent documentation
- Last min. scramble to map info to standards
- 1000+ pg report to compile & edit for consistency
- Site visit prep

Define

Problem: continuous evidence gathering, standard mapping

Outputs: Evidence inventory, standard mapped questions, gap analysis, Q&A Prep

Data Risk: Institutional Data = MS CoPilot + RamGPT

Develop

Capture: Interview transcripts with key people, historical information, relevant data

Structure: evidence matrix, templates, review checklists

Build: Custom GPT with AVMA standards + your context in source documents

Deploy

Generate: Evidence summaries mapped to standards, associated tables

Review: Faculty experts validate accuracy, completeness for their areas

Distribute: Living document, Methods, Briefs, Web-updates, Prep materials

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Take this framework with you:

Scan for the resource folder:

✓ **Detailed 3D Framework breakdown**
- Checklists for DEFINE, DEVELOP, DEPLOY

✓ **Deep-dive use case examples**

✓ **Starter templates**
- Problem definition worksheet
- Context capture template
- Expert review checklist
- Sample prompts

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Questions?

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