



AI Advisory Thesis

Useful advice does not remove judgment; it gives judgment enough context to make a better decision.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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48

AT A GLANCE

Useful advice does not remove judgment; it gives judgment enough context to make a better decision.

Leaders face AI decisions that no longer fit neatly into one function: which vendor to trust, how much risk to accept, who may approve what, how fast to let change run. Good advice does not hand over an answer. It sharpens the question, brings the relevant context together, tests assumptions and leaves a named person with a practical action and a date to revisit. This thesis sets out four stages (Ask, Contextualize, Test, Direct), a diagnostic across five dimensions, roles, measures, the risks of advice itself and a first-quarter plan.

WHO IT IS FOR Executives, boards, risk and technology leaders, and advisers who need a clearer view of an AI question, a trade-off or the next responsible action.

TIME TO USE 50 minutes to read; one decision session to apply

What you will have at the end

- A precise decision question and a reason it matters now
- A clear set of options and the trade-offs between them
- Cross-functional context captured on one page
- A named owner, a practical next action and a date to review the decision

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THE POINT OF VIEW

Advice should improve a decision, not replace it

01



The measure of advice is whether the person who must decide is better equipped afterward, and whether anything changes as a result.

We believe the person accountable for a decision should make it. Advice exists to improve the inputs: a sharper question, fuller context, tested assumptions and visible trade-offs. An adviser who hands down a verdict, however confident, takes away the ownership that makes a decision stick. An adviser who delivers an abstract report and leaves, takes away the momentum.

AI questions are unusually prone to bad advice. The field moves quickly, the claims are loud, and many people giving opinions have a product to sell or a position to protect. Leaders often receive a mix of enthusiasm from vendors, caution from risk teams and anxiety from staff, with nobody integrating them. The most useful thing an adviser can do is bring these views together and ask what the decision actually requires.

We also believe in advice that is honest about its limits. Nobody can promise outcomes from AI in a specific business before trying. Good advice says what is known, what is assumed and what would change the recommendation. It prefers a reversible step with a review date to a confident forecast.

- The decision belongs to the accountable person, and advice is judged by what it adds
- A precise question beats a broad concern
- Trade-offs are made explicit, never hidden in a recommendation
- Assumptions are named, so they can be tested
- Every piece of advice ends in an owner, an action and a review date





A USEFUL TEST

After an advisory conversation, ask the decision-maker to state the decision, the reason and the next action without notes. If they cannot, the advice did not land.

WORKING QUESTION

What decision are you carrying right now that you would make differently with better context, not with a better answer?



COMMON FAILURES

What most organizations get wrong about AI advice

02



Advice fails when the question is vague, the context partial or the output a document nobody owns.

The first failure is the vague question. Leaders ask what should we do about AI, and receive a survey of possibilities. A precise question, for example whether to allow a particular category of customer information in an approved assistant for a defined team, can be answered and acted on. Most of the value of advisory work lies in converting the first kind of question into the second.

The second failure is partial context. A technology team reviews a vendor on features. A legal team reviews it on contract terms. Finance reviews price. Nobody sees the interaction: a feature that needs data the legal team will not permit, at a price that assumes a rollout the business cannot staff. Advice that connects these views is more valuable than any single expert opinion.



The third failure is the recommendation that nobody owns. A report is delivered, praised and filed. No one is named to act, no date is set to revisit, and the world moves on. The decision is made by default, usually by whoever acts first, which is often a vendor or an enthusiastic team.

FAILURE PATTERN	WHAT IT LOOKS LIKE	BETTER APPROACH
Vague question	What should we do about AI	A specific decision with a deadline
Partial context	Each function reviews its own slice	One view of priorities, people, risk, operations and technology
Hidden trade-offs	A single recommendation with no alternatives	Options with costs and conditions side by side
Interested advice	Opinion from someone who profits from one answer	Declare interests, seek a second view
Orphaned report	Advice with no owner or date	Named owner, action and review point
False certainty	Forecasts presented as facts	State assumptions and what would change the view

ILLUSTRATIVE EXAMPLE

A leadership team (illustrative) is asked to approve an AI vendor. Procurement likes the price, security has open questions and operations has not been consulted on workflow. Approval is delayed twice, with no one assigned to resolve the three issues together.

WORKING QUESTION

Which of your open AI questions is still phrased as a topic rather than a decision?

THE METHOD

Four stages: Ask, Contextualize, Test, Direct

03

The method is short and can be applied in a single focused session or across several weeks, depending on the stakes.

Ask turns a broad concern into a precise decision question and defines why it matters now. Contextualize brings together business priorities, people, risk, operations, technology and constraints. Test challenges assumptions, compares options and makes trade-offs explicit. Direct leaves the decision-maker with a named owner, a practical action and a point to review the decision again.

Our free advisory assessment at halden.company/assessments scores five dimensions that commonly decide whether advice turns into action: decisions, governance, vendors, risk and change. Use them to see where decisions in your organization tend to stall.

STAGE	CORE QUESTION	MAIN OUTPUT
1. Ask	What exactly must be decided, and why now?	A decision question with a deadline and decision-maker
2. Contextualize	What do we need to know to decide well?	A one-page context summary across functions
3. Test	Which option holds up when challenged?	Options, assumptions and explicit trade-offs
4. Direct	Who does what, by when, and when do we look again?	A named owner, action and review date

DIMENSION	QUESTION	IF WEAK
Decisions	Are decisions recorded, evidence-based and owned?	Introduce a simple decision record
Governance	Are roles, approvals and reviews clear?	Name who can approve what
Vendors	Is there a consistent way to assess and buy?	Agree a short vendor checklist

DIMENSION	QUESTION	IF WEAK
Risk	Are top risks known and planned for?	List top risks and a plan for harmful errors
Change	Are people prepared and involved?	Involve affected teams and add light structure

WORKING QUESTION

Which stage do advisers, internal or external, usually skip when they work with you?

STAGE 1: ASK

Ask a precise question and say why it matters now

04

A well-formed question is half the answer. It also reveals whether a decision is ready to be made.

Start by writing the question as a decision: should we do X, choose between A and B, or set a limit on Y. Name who decides, by when and what happens if nothing is decided. Then ask why now. If there is no cost to waiting, perhaps the question is not yet urgent, and other questions deserve the time. If there is a deadline, such as a renewal, a regulatory date or a competitive move, record it.

- 01 Gather the concern**
Let the person describe the worry or opportunity in their own words, without editing.
- 02 Convert to a decision**
Rewrite it as a choice with options, or as a limit to set, or as a yes or no.
- 03 Name the decider**
Identify who is accountable and who must be consulted.

04 Set the clock

State the deadline and what happens without a decision.

05 Define good enough

Agree how much certainty is needed. Some decisions are reversible and need less.

BROAD CONCERN	PRECISE DECISION QUESTION (ILLUSTRATIVE)
We are worried about AI risk	Should we allow customer account data in an approved assistant for the support team, and under what conditions
We need an AI vendor	Which of two shortlisted tools do we trial for the finance team, for eight weeks, with what exit terms
Staff are using AI without rules	What is the minimum guidance we publish this month, and who owns it
Competitors are moving	Which one workflow do we test this quarter, and what would make us stop

COMMON MISTAKE

Asking a question the person in the room cannot decide. If the real decision sits with the board or a regulator, say so, and prepare the advice for them instead.

WORKING QUESTION

Write your most pressing AI question as a decision with a decider and a date. What did you have to change?

STAGE 2: CONTEXTUALIZE

Contextualize across priorities, people, risk, operations and technology

05



Bring the relevant views together, briefly, so the decision is made with the whole picture.

Contextualizing is an act of integration. For the decision at hand, collect what each relevant function knows, and what it assumes. The goal is not exhaustive research but a one-page summary that a decision-maker can read in ten minutes. Include what is established, what is uncertain and what has not been checked.

LENS	QUESTIONS TO ASK	TYPICAL SOURCE
Business priorities	Which goals does this serve, and which does it compete with	Leadership team, strategy documents
People	Who is affected, and how will they respond	Managers, practitioners, HR
Risk	What can go wrong, how badly, and who is accountable	Risk, legal, security, compliance
Operations	What would this change in daily work	Operations leads and users
Technology	What does it need, connect to and depend on	IT, data, vendor documentation
Constraints	Budget, time, contracts, capacity	Finance, procurement, legal regulation



Treat vendor claims as claims. Ask for what can be verified: a trial on your own tasks, references you can contact, documented terms on data use and retention, and a clear description of what happens to your information. Where a statement cannot be verified, label it as unverified in the summary and decide how much weight it deserves.



Include dissent. If the risk lead is uneasy or a manager doubts adoption, put it on the page in their words, with their permission. A decision made with the objections visible is both better and easier to defend later than one made after quietly smoothing them over.

ILLUSTRATIVE EXAMPLE

For a vendor decision (illustrative), the one-page context shows: business sponsor wants speed, security wants data to stay in a defined region, operations lacks capacity to train staff this quarter. The decision shifts from which vendor to whether to wait one quarter.

WORKING QUESTION

Whose view on your current decision is missing from the room, and what would they say?

STAGE 3: TEST

Test assumptions and make trade-offs explicit

06

Challenge the leading option before committing, and compare it fairly with the alternatives, including doing less.

Testing means asking what must be true for each option to work, and checking whether it is. List the assumptions behind the leading option: users will adopt it, the data is usable, the vendor will meet its terms, costs will stay within budget. Then rank them by how much they matter and how uncertain they are. The assumptions that are both important and uncertain deserve a quick check before the decision, or a staged commitment that tests them.

01 List the options

Include at least three: the proposed action, a lighter alternative and doing nothing for now.

02 State the assumptions

For each option, write what must be true for it to succeed.

03 Rank by importance and uncertainty

Focus attention on the assumptions that are high on both.

04 Run a pre-mortem

Imagine it is a year later and the option failed. Ask the group why, then add the reasons to the list.

05 Compare the trade-offs

Set out cost, speed, risk, reversibility and learning value side by side.

OPTION	GAINS	COSTS AND RISKS	REVERSIBILITY
Act now at scale	Speed, signal to the market	Higher exposure if assumptions fail	Low
Contained trial	Evidence, lower exposure	Slower, requires owner time	High
Wait one quarter	Time to fix information and rules	Missed learning, shadow use continues	High
Decline	Avoids a specific risk	Opportunity cost, may push use underground	Medium

COMMON MISTAKE

Treating do nothing as free. Staff may already be using tools without guidance, so waiting has its own risk. Describe it as an option with consequences, like the others.

WORKING QUESTION

Which assumption behind your preferred option is both most important and least checked?

STAGE 4: DIRECT



Direct: leave with an owner, an action and a review date

07

Advice has not finished until the next action has a name and a date, and the decision has a time to be reconsidered.



Close every advisory conversation with a short decision record. It states the decision, the options considered, the reasons, the assumptions to check, the owner, the first action, the date and the trigger for a review. One page is enough. The record serves three purposes: it clarifies what was decided, it allows others to understand it later and it enables learning when the outcome is known.

Decision record

- 
- The decision, stated in one sentence
 - Options considered and why they were not chosen
 - Reasons, including the main trade-off accepted
 - Assumptions to check, each with an owner
 - Named owner for the first action, and the action itself
 - Date or trigger for review
 - Who must be informed, and by whom

Set the review date as part of the decision, not afterward. Choose a trigger that would reopen the question sooner, such as an incident, a change in contract terms or a regulatory update. The review is not an admission of doubt. It is part of making decisions in an area that changes quickly.

- 
- Prefer reversible steps with a review date to irreversible commitments
 - Keep actions small enough that someone can start this week
 - Communicate the decision and the reasons to those affected
 - Store records where the next leader can find them
 - At review, ask what was learned, not only whether the decision was right

WORKING QUESTION

For your last significant AI decision, can you find a written record of what was decided and why?



DIAGNOSTICS AND ROLES

Diagnostics and ownership

08



A short check shows where decisions stall. Clear roles stop advice from drifting between functions.

Answer the checklist as a leadership group and compare responses. Disagreement is informative. The free advisory assessment at halden.company/assessments scores decisions, governance, vendors, risk and change, and highlights patterns such as buying ahead of governing, or risks known but decisions informal.

Advisory self-check

- AI decisions are recorded with reasons and an owner
- Evidence is used in decisions, not only enthusiasm
- Roles, approvals and review points are clear
- Someone can approve a tool, and everyone knows who
- There is a short vendor checklist used consistently
- Our top AI risks are listed and someone owns each
- There is a plan for what happens if an AI tool causes harm
- Affected teams are involved before changes, not after
- We revisit decisions on a schedule



ROLE	RESPONSIBILITY	TYPICAL HOLDER
Decision-maker	Accountable for the decision and its outcome	Executive or owner



ROLE	RESPONSIBILITY	TYPICAL HOLDER
Adviser	Sharpens the question, brings context, tests options	Internal lead or external partner
Context contributors	Provide their function's view, including dissent	Risk, operations, technology, finance, people
Action owner	Carries out the first action and reports	Manager named in the record
Record keeper	Maintains the decision log	Chief of staff, PMO or operations lead

The adviser role can be held by an internal person with credibility and a neutral stance, or by an external party. What matters is that they have access to the decision-maker, can ask uncomfortable questions and have no stake in one particular answer.

WORKING QUESTION

Who in your organization can say no to a good idea without being seen as obstructive?

MEASURING PROGRESS

Measuring whether advice is working

09

Measure whether decisions get better and faster, and whether they are followed, rather than how many reports were produced.

Advice is hard to measure by outcomes alone, since outcomes depend on many things. Measure instead the behaviors that good advice should produce. Are decisions framed precisely? Are they made by the deadline? Are options and assumptions recorded? Do actions have owners, and do they happen? Are decisions reviewed on schedule? These can be counted from a simple log.

INDICATOR	WHAT IT SHOWS	HOW TO COLLECT
Decisions with a written question and decider	Quality of framing	Decision log
Time from question to decision	Decision speed	Log dates
Decisions with recorded options and assumptions	Rigor	Spot check of records
Actions completed by their date	Follow-through	Action tracker
Decisions reviewed on schedule	Learning discipline	Compare review dates with the log
Reversals with stated reasons	Healthy learning rather than drift	Review at quarter end

Look at outcomes in retrospect, carefully. Pick a decision from six months ago and ask what you now know that you did not then. Was the main risk the one you expected? Was an assumption wrong? This keeps the focus on judgment and process, and avoids rewarding lucky outcomes or punishing good decisions that turned out badly.

Do not use the count of decisions as a target. A log full of trivial decisions is no better than an empty one. Aim for the significant ones: those that commit money, expose information, change how people work or set a precedent.

WORKING QUESTION

Looking back six months, which AI decision would you now make differently, and what did you not know then?

RISKS AND TRADE-OFFS

Risks, trade-offs and when not to seek advice

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Advice has costs and failure modes of its own. Use it where it adds something.

The main trade-off is speed against thought. A structured advisory process adds days to a decision. For reversible, low-stakes choices that is rarely worth it: decide, note it and move on. For choices that are hard to undo, involve sensitive information or set a precedent, the extra time is cheap compared with the cost of an avoidable mistake.

- Dependence: leaders who outsource judgment to advisers lose the ability to evaluate them
- Conflicts of interest: advisers tied to products or partners may lean toward them, so ask and declare
- Analysis paralysis: perpetual testing of assumptions with no decision
- Borrowed confidence: citing an adviser's name to justify a decision the decider has not understood
- Legal, regulatory and contractual obligations differ by sector and region, so check current requirements and obtain qualified professional advice, since our advice is not legal, financial or technical certification

WHEN NOT TO SEEK ADVISORY HELP

Skip it if the decision is small and reversible. Skip it if the decider has not yet been identified. Skip it if you want validation for a decision already made: that is a different service, and a poor use of time.

Be wary of advice that arrives with a solution in search of a problem. If the adviser's first move is to recommend a product, a program or a framework before asking about your decision, treat that as a signal to slow down and ask what else they considered.

WORKING QUESTION

What is the smallest decision you could make this week without any advisory process, and why have you not made it?



WORKING WITH HALDEN

How Halden works with teams

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We help leaders frame decisions, bring context together and test options, and we leave the decision with you.

Halden & Company is an AI advisory and implementation partner. In advisory work, we act as a structured, independent voice. We help you turn a concern into a decision question, assemble the relevant context across functions, challenge assumptions and options, and write the decision record with you. We do not need you to buy a product, and we will tell you if we see a conflict.

- Start with the free assessment at halden.company/assessments, which scores decisions, governance, vendors, risk and change
- Bring us one specific decision, and we can work through the four stages in a focused session
- We prepare one-page context summaries and option comparisons
- We can serve as a recurring sounding board for leaders during early adoption
- Our advice is not legal, financial or technical certification, and we will say where you need a specialist



If you would like to talk through a decision you are facing, contact us at halden.company/contact. A first conversation is a chance to test whether outside advice would help at all, and we are comfortable if the answer is that your own team can handle it.



 WORKING QUESTION

What is the decision you would bring to an outside adviser first, and what would you expect to be different afterward?

30 / 60 / 90

 A first quarter that produces evidence

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A first quarter that ends with a decision log in use, two or three well-framed decisions made and a regular review.

 First 30 days: ground it

- List open AI questions and rewrite each as a decision with a decider and a date
- Run the advisory self-check with the leadership group and note disagreements
- Choose the single most important decision to work through first
- Set up a simple decision record template and a place to store it

Days 31 to 60: test it

- Apply Contextualize and Test to the first decision, with a one-page summary and option table
- Make the decision, record it and name the action owner
- Agree a short vendor checklist and a named approver for AI tools
- Write a short list of top AI risks with owners

 Days 61 to 90: decide

- Hold the first scheduled review of the decision and record what was learned
- Apply the four stages to a second decision
- Review the log for follow-through and speed
- Decide how often leaders will meet on AI decisions, and who keeps the record

GLOSSARY

Terms used in this publication

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TERM	MEANING
Decision question	A specific choice, limit or yes-or-no, with a named decider and a deadline.
Context summary	A one-page view of priorities, people, risk, operations, technology and constraints for a decision.
Assumption	Something that must be true for an option to work, and which can be checked.
Trade-off	A cost or risk knowingly accepted in return for a gain.
Pre-mortem	A group exercise that imagines a decision has failed and asks why, before the decision is made.
Reversibility	How easily a decision can be undone or changed if it proves wrong.
Decision record	A short written account of what was decided, why, by whom, with owner, action and review date.
Review trigger	An event or date that reopens a decision.
Vendor checklist	A short, consistent list of questions asked of any AI supplier before purchase.
Governance	The roles, approvals and reviews that decide who may do what with AI.
Conflict of interest	A situation in which an adviser or supplier benefits from one particular answer.



A note on use

This publication is a public orientation resource, not legal, technical, financial or professional advice. Adapt it to your people, information, workflows and obligations, and check current tool terms, regulations and risks before acting.



TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

