



HALDEN & COMPANY

LIBRARY INDEX

AI Playbook Library

A guide to all 46 Halden & Company playbooks, and how to choose where to start.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



EDITION 00 / EMBER & SKY

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AT A GLANCE

A guide to all 46 Halden & Company playbooks, and how to choose where to start.



The Halden & Company AI Playbook Library covers 46 practical guides, from the core technologies to functions, industries, hands-on implementation and the decisions that surround them. Each playbook follows the same arc: an executive brief, where the approach fits, how it works, the operating model, risks and controls, measurement, implementation, pitfalls and buying questions. This index groups the playbooks, tells you when to read each one, gives decision rules for choosing a first use case, explains the decision canvas and the 30/60/90 roadmap that close every playbook, and describes how Halden keeps the library current.

WHO IT IS FOR

Executives, functional leaders, transformation and technology teams, and anyone who needs to decide which AI guidance to read first and how to turn it into a plan.



TIME TO USE

30 minutes to read; use as a reference whenever you plan a new use case

What you will have at the end

- The right two or three playbooks for your situation, not all 46
- A decision rule for choosing a first use case
- A shared way to use the decision canvas and the 30/60/90 roadmap across teams
- Clarity on how the library is kept current and where to ask for help

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HOW TO USE THE LIBRARY

How the library is organized and how to read it

01



Read the playbooks you need, in an order that matches your decision, rather than the whole library front to back.

The library has 46 playbooks in six groups. Foundations explain the technologies and patterns that most solutions share. People, governance and risk cover the controls and habits that make AI safe to depend on. Function playbooks apply the foundations to the work of a department. Industry playbooks do the same for a sector and its constraints. Hands-on guides walk through specific kinds of daily work in detail. Strategy playbooks cover the business case, adoption, vendors and commercialization.



Every playbook has the same structure so you can move between them quickly. It opens with an executive brief and a plain test for whether the approach fits, explains how it works without jargon, sets out roles, covers risks and human review, shows how to measure quality and value, gives an implementation guide, names common pitfalls with a clearly labeled hypothetical scenario, and ends with questions to ask vendors. Each section ends with a working question you can take into a meeting. Each playbook closes with a decision canvas prompt, a 30/60/90 roadmap and a short glossary.



- Most readers need one foundation playbook, one governance or risk playbook and one function, industry or hands-on playbook
- Leaders deciding whether to invest should read the strategy group first
- Teams already running pilots should start with evaluation, governance and security
- Numbers in the playbooks are labeled as illustrative; measure your own baseline
- Nothing in the library is legal advice; check current requirements with qualified advisers

A SHORT READING ORDER

If you have time for three: the playbook closest to your use case, AI evaluation and quality assurance (15), and AI governance and responsible AI (13). Together they answer what to build, how to know it works and how to keep it safe.



WORKING QUESTION

Which decision are you facing in the next 90 days, and which group of playbooks speaks to it most directly?

FOUNDATIONS

Foundations and capabilities

02

These playbooks explain the building blocks that most business AI is made from. Read them to understand what is possible and what each pattern needs.

NO.	PLAYBOOK	READ THIS WHEN
01	Enterprise generative AI	You are rolling out general-purpose assistants and need secure, useful everyday use
02	AI agents and workflow orchestration	You want AI to take bounded actions across steps, with supervision
03	Retrieval-augmented generation	Answers must come from your own documents, with citations
04	Multimodal AI	Your work involves images, audio, video or mixed documents
05	AI automation	You want to automate repeatable work and keep humans on exceptions
06	Intelligent document processing	Staff key data from invoices, forms, claims or contracts
40	Prompting and context design for business teams	Outputs are inconsistent and teams need reusable instructions

The foundations differ in how much freedom the AI has. Generative assistants respond when asked. Retrieval and document processing ground the AI in specific content. Automation and agents act, which raises the importance of limits, approvals and logging. As you move toward systems that act, move up the list of controls: narrower permissions, clearer stop conditions and more review. Most mature solutions mix several of these patterns, so expect to read more than one.

WORKING QUESTION

Where does your intended use case sit between answering a question and taking an action, and are your controls sized to match?

PEOPLE, GOVERNANCE AND RISK

People, governance and risk

03

These playbooks make AI dependable. They are useful before the first pilot and essential before the first scale-up.

NO.	PLAYBOOK	READ THIS WHEN
13	AI governance and responsible AI	You need ownership, policy, risk tiers and evidence that stand up to scrutiny
14	AI security and data protection	AI will touch sensitive data, connected tools or customer information
15	AI evaluation and quality assurance	You must show an AI output or workflow is good enough for its purpose
16	AI platform and data foundations	You are choosing data, identity, integration and vendor architecture for scale

NO.	PLAYBOOK	READ THIS WHEN
17	AI copilots for knowledge workers	You are introducing role-based assistance and want to avoid unmanaged shadow use
28	Implementing AI in day-to-day work	You want everyday AI use to be clear, supported and measurable

Frameworks such as the NIST AI Risk Management Framework and ISO/IEC 42001 provide structure for governing AI, and data protection law, sector rules and the EU AI Act may apply depending on your use. The governance and security playbooks translate these ideas into practical controls, but they are not legal advice. Check current requirements with qualified advisers for each jurisdiction and sector in which you operate.

COMMON MISTAKE

Treating governance as something to add after the pilot. It is cheaper to agree a risk tier, a data rule and a named owner before the first user logs in than to retrofit them later.

WORKING QUESTION

Who in your organization can say today which AI tools are approved, for which data, and who is accountable for each?

FUNCTIONS

Function playbooks

04



These apply the foundations to the daily work, controls and metrics of a department.

NO.	PLAYBOOK	READ THIS WHEN
07	AI for sales and business development	Account research, qualification, proposals and follow-up take too much seller time
08	AI for marketing and go-to-market	You need better planning, content operations and campaign learning
09	AI customer service and contact centers	You are weighing self-service, agent assist and quality management
10	AI for finance and accounting	Controlled financial workflows need speed without weaker review
11	AI for HR and workforce capability	You are using AI in learning, people operations and workforce support
12	AI for legal, risk, and compliance	Counsel and risk teams want faster review with accountable judgment
26	AI growth operations	You want connected, accountable commercial operations across the funnel



NO.	PLAYBOOK	READ THIS WHEN
41	AI for procurement and supply chain	Sourcing, supplier management and exception handling are heavy on documents and email
46	AI for IT operations and service desk	You want faster ticket resolution and less toil with change control intact
24	AI products, services, and commercialization	You are building AI into what you sell, not only how you work



Function playbooks assume you have read enough of the foundations to know the pattern you will use. If you have not, the first page of each function playbook points you to the relevant foundation. Work that is sensitive by nature, such as finance, HR, legal and customer data, benefits from reading the governance and evaluation playbooks alongside.


WORKING QUESTION

Which function in your business has the most repeated, document-heavy work with clear checks, and who leads it?

INDUSTRIES

Industry playbooks

05



Sector context changes the answer: different data, regulation, risk tolerance and operating rhythms.



NO.	PLAYBOOK	READ THIS WHEN
18	AI for manufacturing and field operations	Documentation, quality, maintenance and frontline decisions are your priorities
19	AI for construction and project delivery	Project information flow, coordination and risk visibility need work
20	AI for food and beverage operations	You run multi-site operations needing forecasting and standard work
21	AI for professional and PRO services	Specialist knowledge must become faster, more consistent client delivery
22	AI for healthcare administration	Administrative workflows touch sensitive data near clinical boundaries



NO.	PLAYBOOK	READ THIS WHEN
23	AI for banking and financial services	You operate in a high-control environment with strong evidence needs
NO.	PLAYBOOK	READ THIS WHEN
42	AI for retail and e-commerce	Merchandising, content, service and search must improve without losing trust
43	AI for insurance operations	Underwriting, claims, service and compliance need controlled, explainable support
44	AI for logistics and transportation	Planning, documents, exceptions and customer updates drive your costs
45	AI for real estate and property management	Leasing, maintenance, documents and tenant service need human accountability

If your sector is not listed, start with the closest relative and the function playbook for the work you want to improve. Industry differences are mostly about data sensitivity, regulation, safety and what an error costs, and those can be reasoned through with the governance playbook and a clear view of your risk tolerance.

WORKING QUESTION

What is the costliest error in your sector, and does your intended use case sit near it or far from it?

HANDS-ON GUIDES

Hands-on implementation guides

06

These guides go inside a specific kind of work and show how AI assistance can be introduced with review in place.

NO.	PLAYBOOK	READ THIS WHEN
25	Personal AI assistant	You want a supervised assistant for your own repeated knowledge work
27	Implementing AI in Excel	Spreadsheet analysis, formulas and reporting consume skilled hours
29	Implementing AI in accounting work	Accounting tasks need auditability, evidence and professional review
30	Implementing AI in sales cycles	Discovery, qualification, proposals and follow-up need to be more deliberate
31	Implementing AI in marketing work	Research, planning and content operations need a responsible AI practice
32	Implementing AI in engineering work	Engineering knowledge, documentation and review need technical accountability
33	Implementing AI in machine design	Design teams want knowledge retrieval and concept support with controlled review

NO.	PLAYBOOK	READ THIS WHEN
34	Implementing AI in quotation workflows	Quotes need clearer scope and evidence without handing over commercial accountability
35	Implementing AI in business analysis	Analysts must keep evidence, stakeholder context and ownership visible

NO.	PLAYBOOK	READ THIS WHEN
36	Implementing AI in financial analysis	Models and commentary need explicit data controls and transparent assumptions



The hands-on guides are shorter on concepts and longer on workflow. They are meant to be used in a working session with the people who do the work: map today's steps, mark where AI could help, decide what a reviewer checks and agree how to measure the change.

WORKING QUESTION

Who does this work every week, and would they be willing to map their steps with you in a one-hour session?



STRATEGY, BUYING AND ADOPTION

Strategy, buying and adoption

07

These playbooks help you decide whether, how fast and with whom to invest, and how to bring people along.



NO.	PLAYBOOK	READ THIS WHEN
37	AI business case and ROI	You must justify investment with baselines, costs, benefits and a way to stop
38	AI change management and adoption	Tools exist but people are not using them dependably
39	AI vendor selection and contracting	You are choosing or renegotiating AI tools and partners



Start here when the question is about money, people or suppliers rather than technique. The business case playbook insists on an honest baseline and on stop criteria. The adoption playbook treats roles, habits and incentives as part of the system, not as communication tasks

after launch. The vendor playbook focuses on tests, data terms, exit routes and accountability, because vendor claims do not move your obligations to the vendor.


WORKING QUESTION

If the pilot succeeded, what would have to be true about budget, people and contracts for it to continue?


CHOOSING WHERE TO START

Decision rules for choosing where to start

08

Pick a first use case with repeated work, a named owner, available data, checkable outputs and tolerable risk. Then read only what that choice requires.



01 Start with the work, not the technology

List five tasks that are frequent, slow and mostly reading, writing, comparing or entering data. Ignore tools for now.

02 Score each task

Rate value, ease of checking, data readiness, risk if wrong and availability of an owner. Choose the task with strong checkability and a willing owner.

03 Match the pattern

Use the foundations table: answers from documents point to 03, data capture to 06, repeated steps to 05, drafting to 01 and 40.

04 Add the controls

Read 13 and 14 for risk tier and data rules, and 15 for the test set and pass mark.

05 Read the context playbook

Choose the function, industry or hands-on playbook that matches the work, and build the plan from its roadmap.



IF THIS IS TRUE	START WITH	THEN
You have no AI policy and staff are already using tools	13, 14 and 17	Publish a short policy, approve tools, then pick a use case
Your biggest cost is people keying or reading documents	06	Add 03 if staff then need answers from the same documents
Your teams ask the same questions of internal documents	03	Add 15 for the test set and 14 for access rules
You need executive backing and a budget	37	Use 38 and 39 to plan adoption and procurement
You have pilots but no results anyone trusts	15	Re-baseline and set pass marks with the owners
You regulate or serve regulated customers	13, 14 and your industry playbook	Involve compliance and counsel before the pilot
You want quick personal wins for a team	28, 40 and 25	Move to workflow-level change once habits form

AVOID THESE STARTS

Choosing the most impressive demonstration, the use case with no owner, or a task where nobody can tell whether the output is right. A modest, measurable start builds the evidence and the trust that later projects need.

WORKING QUESTION

Which one task, with which owner, would you choose in the next two weeks, and how would you know it worked?

CANVAS AND ROADMAP

Using the decision canvas and the 30/60/90 roadmap

09

The canvas turns a playbook into a decision. The roadmap turns the decision into dated work.

Each playbook ends with a working question per section and a 30/60/90 roadmap. Use the questions in a workshop to complete a one-page decision canvas for your use case. The canvas is a simple record, not a template to be admired. It captures who owns the outcome, what the task is today, what the baseline numbers are, what AI will do, what a person will check, what data and tools are involved, what could go wrong, how success will be measured and what would make you stop.

Decision canvas fields

- Use case and business owner by name
- Current process, volume and baseline time and quality
- What AI will and will not do, and what a human always checks
- Data used, its sensitivity and who may access it
- Risks and the controls chosen, with the risk tier
- Test set, pass mark and review sample
- Cost, effort and expected benefit, labeled as estimates until measured
- Decision date and the criteria to scale, change or stop

01 Days 1 to 30: define and baseline

Choose the use case, name the owner, collect real examples, record the baseline and agree the controls.

02 Days 31 to 60: build and test

Configure the solution, run the test set, fix the main failure causes and test with the people who will use it.

03 Days 61 to 90: pilot and decide

Run a small pilot with a feedback route and weekly review, compare with the baseline and decide to scale, change or stop.

The roadmaps are deliberately short. Three to five actions per period keep the work achievable alongside normal duties. If a period slips, adjust the date, not the evidence standard. A decision to stop on good evidence is a successful outcome, because it saves money and attention for better candidates.


WORKING QUESTION

If you filled in the canvas today for your top use case, which box would you be unable to complete?

STAYING CURRENT AND WORKING WITH HALDEN

How Halden keeps the library current, and how to work with us

10



AI changes quickly. The library is reviewed on a fixed cycle so that guidance stays accurate and honest about what is known.

Halden & Company reviews the library every quarter. The review covers four areas. Model changes: what capabilities and limits have shifted, and which advice about patterns needs to change. Vendor terms: how data use, retention, security commitments and pricing structures are evolving, and which buying questions need updating. Regulation and standards: developments in data protection law, the EU AI Act, the NIST AI Risk Management Framework, ISO/IEC 42001 and sector rules, described generally and with a reminder to check current requirements. Evidence: what we have learned from implementation work and from published, credible research.



- Playbooks that depend on fast-moving details are marked for earlier review
- We prefer to remove a claim we cannot support rather than keep it
- Illustrative examples are labeled as hypothetical and are never presented as client results
- Each playbook states that it is general guidance and not legal advice
- Readers can ask questions or suggest corrections through the contact page


Working with Halden

SERVICE	HOW IT HELPS
AI strategy	Choose use cases, sequence investment and build the business case
AI readiness	Assess data, systems, skills and governance before you commit
Workforce training	Teach teams to use AI well, with review habits built in
AI implementation	Design, build, test and launch supervised solutions
AI advisory	Independent guidance on vendors, risk, evaluation and scale-up

A good first step is a free assessment, available at halden.company/assessments. It helps you see where you stand and which playbooks to use first. If you already know the question, contact us at halden.company/contact. Halden helps businesses make AI work for them, and we start from your work, your risks and your evidence.

WORKING QUESTION

What is the one question you would want an experienced adviser to answer before you commit budget to AI?

30 / 60 / 90

A first quarter that produces evidence

11

Choose one use case, read the few playbooks it needs, and decide on evidence.

First 30 days: ground it

- Choose two or three candidate tasks and score them with the decision rules
- Read the playbook that matches the leading candidate, plus 13 and 15
- Name the business owner and complete the decision canvas
- Record the baseline for time and quality

Days 31 to 60: test it

- Draft a short use policy and approve tools and data rules
- Build a test set and set a pass mark before configuring anything
- Run the test and fix the main failure causes
- Train the pilot group on the review standard



Days 61 to 90: decide

- Run the pilot with a feedback route and weekly review
- Compare results with the baseline and the pass mark
- Decide to scale, change or stop and record the reasons
- Select the next playbook and use case from the library

GLOSSARY

Terms used in this publication

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TERM	MEANING
Playbook	A practical guide to one capability, function, industry or decision, with roles, controls and a roadmap.
Decision canvas	A one-page record of the owner, baseline, controls, measures and decision criteria for a use case.
30/60/90 roadmap	A three-stage plan: define and baseline, build and test, pilot and decide.
Baseline	Measured current performance, recorded before any change so results can be compared.
Use case	A specific task or workflow where AI will be applied, with an owner and a measure.
Human in the loop	A design in which a person reviews or approves outputs at defined points.
Risk tier	A classification of a use case by the consequences of error, which sets the level of control.



TERM	MEANING
Test set	A fixed collection of real examples with agreed correct answers, used to score a solution.
Pass mark	The agreed score a solution must reach before it is relied on.
Shadow use	Staff using AI tools outside approved channels and controls.
NIST AI Risk Management Framework	A voluntary framework for identifying and managing risks of AI systems.
ISO/IEC 42001	An international standard for an AI management system within an organization.

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.