



AI Advisory Curriculum Guide

A facilitator's path for taking a consequential AI question from vague concern to an owned decision and a review date.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



EDITION 53 / EMBER & AMBER

EXECUTIVE WORKING EDITION - 08 OCT 2026

53

AT A GLANCE

A facilitator's path for taking a consequential AI question from vague concern to an owned decision and a review date.

This guide explains how to run the Halden & Company AI Advisory path through four stages: Ask, Contextualize, Test and Direct. Useful advice does not remove judgment. It gives judgment enough context to make a better decision. For each stage the guide gives goals, a timed session plan, working outputs, facilitation notes, prework, sticking points and signs that the stage landed. It also covers role tracks, written exercises, assessment beyond attendance, a six-week cadence and ways to keep the decision discipline in use after the engagement.

WHO IT IS FOR

CEOs, boards, leadership teams, business owners and teams facing a consequential AI decision, and the advisers or internal facilitators who support them.

TIME TO USE

50 minutes to read; six weeks to run

What you will have at the end

- A clear view of the kind of decisions this path suits and what to prepare
- Timed plans for Ask, Contextualize, Test and Direct with checkable outputs
- Exercises written so an internal facilitator can run them
- Ways to judge decision quality beyond satisfaction with the advice
- A routine for reviewing decisions after they are made

Contents

01	Who the advisory path is for and what it assumes	03
02	Define the decision	04
03	Bring the context together	06
04	Test options and make trade-offs explicit	08
05	Decide, communicate and set the review	10
06	Executives, managers and practitioners	12
07	Four exercises a facilitator can run as written	13
08	Judging decision quality beyond satisfaction	15
09	A six-week schedule	16
10	Keeping decision discipline in place	18
11	A first quarter that produces evidence	19
12	Terms used in this publication	20

PROGRAM OVERVIEW

Who the advisory path is for and what it assumes

01



The path is for decisions that matter, with real trade-offs and an owner who must live with the result.

The AI Advisory curriculum is decision support rather than training. It uses context interviews, independent analysis, facilitated decisions and concise recommendations, in focused engagements, decision workshops and executive briefings. Typical questions include which vendor to trust with sensitive information, whether to allow a class of tool, how to govern several pilots, when to scale, or how to explain a position to a board or to staff. The outputs are a decision brief, a context view, an options paper and an action record.



Who it is for

- CEOs and business owners facing a first or a hard AI decision
- Boards and leadership teams that need a clearer view of trade-offs before they commit
- Teams that already experiment and face a vendor, policy, governance or scaling choice
- Executives where operating model, risk, investment and people considerations meet



Prerequisites

The path needs a decision owner who can commit, a deadline or a reason the decision cannot wait indefinitely, and access to the people who hold relevant context, including those who disagree. Documents help but are not required. The engagement is more effective when someone outside the immediate team challenges assumptions, whether an external adviser or an internal colleague with no stake in the answer.

STARTING POINT	WHAT TO EMPHASIZE	WATCH FOR
Starting from zero	Turn broad uncertainty into a first question that can be owned	Asking for a strategy when a decision is needed
Already experimenting	Clarify vendor, policy, governance or scaling choices	Choosing among options nobody has compared
Preparing to scale	Support executive decisions across operating model, risk, investment, people	Deferring a hard trade-off by adding another study



S.

ADVICE IS NOT A SUBSTITUTE FOR COUNSEL

Advisory work informs judgment. It is not legal, regulatory, tax or financial advice. Involve qualified professionals for matters that depend on current law or your specific obligations.

WORKING QUESTION

What decision is waiting on you right now that a good half-day of structured thinking could move forward?

K.

STAGE 1: ASK

Define the decision

02

K.

Turn a broad concern into a precise question, an owner, a timing and a boundary.

Goals

- Rewrite the concern as a decision that can be answered yes, no or choose
- Name the decision owner, the people consulted and the people who must be informed
- State why now, and what happens if the decision is delayed
- Draw the boundary: what is in scope for this decision and what is not

Session plan (90 minutes, plus two 30-minute interviews)

TIME	ACTIVITY	OUTPUT
0-15	Owner describes the concern in their own words without preparation	Raw concern
15-40	Facilitator reframes: what exactly will be decided, by whom, by when	Draft question

K.

TIME	ACTIVITY	OUTPUT
40-60	List what is known, assumed and unknown	Known and unknown
60-75	Set the boundary and decision rights	Boundary
75-90	Agree who to interview and what documents to gather	Fieldwork plan



Working outputs

- A decision brief of one page: question, owner, deadline, boundary, why now
- A list of assumptions and unknowns
- An interview list and document list



Facilitation notes

Resist a broad framing. A question such as what should we do about AI is not a decision. Ask what the owner could sign next month. Separate the decision from the topic: a decision might be whether to approve a specific category of tool for client work under certain conditions. Make the cost of delay explicit, because some decisions look urgent only because they are loud.

Pework

- Owner writes a half-page on what is prompting the question now
- Facilitator collects any proposals, vendor material, policies or incident notes
- Owner nominates three people who will disagree and agrees to hear them



Common sticking points

- The question contains three decisions. Split them and sequence
- The owner is unclear. Ask who will be blamed if it goes wrong, then check they have the authority
- Urgency is asserted without evidence. Ask for the date and the consequence
- The conversation becomes a technology tour. Return to the choice

How to tell it landed

- The question fits in one sentence and ends with a question mark
- The owner can name the date the decision is due
- Dissenters have been identified by name
- The boundary excludes at least one adjacent topic



WORKING QUESTION

If you had to sign something next month, what exactly would it say?

STAGE 2: CONTEXTUALIZE

Bring the context together

03

Surface priorities, workflow realities, people, information, risk, technology and constraints in one view.

Goals

- Hear from the functions that will carry the consequences of the decision
- Understand how the work and the information really flow
- Identify constraints from contracts, regulation, security, budget and people
- Produce one cross-functional context view that all parties recognize as fair

Session plan (interviews of 30 minutes each, then a 120-minute synthesis session)

TIME	ACTIVITY	OUTPUT
Interviews	Hear priorities, concerns and facts from each function	Interview notes
Synthesis 0-30	Present themes back, without attributing them to individuals	Themes
Synthesis 30-60	Map stakeholders by influence, impact and current position	Stakeholder map
Synthesis 60-90	List constraints and which are firm versus assumed	Constraint list
Synthesis 90-110	Identify evidence gaps and who can close them	Gap list

TIME	ACTIVITY	OUTPUT
Synthesis 110-120	Confirm the context view and corrections	Agreed context



Working outputs

- A cross-functional context view of two to three pages
- A stakeholder map showing impact and current stance
- A constraint list that separates firm from assumed
- A list of evidence gaps with owners

Facilitation notes

Interviews work best when they begin with the person's work, not the decision. Ask what a good outcome means for their team and what keeps them up. Take notes verbatim for key points and keep sources confidential unless agreed. In the synthesis, challenge constraints: many are habits, some are real, and the difference matters. Ask which constraints a contract, a regulator or a customer would actually enforce.



Pework

- Facilitator sends each interviewee the question and three prompts a day ahead
- Legal, security and finance provide any relevant limits or commitments
- Owner approves the stakeholder list

Common sticking points

- Only senior voices are heard. Add one person who does the work
- Technology views dominate. Give people, risk and customers equal time
- Constraints are assumed. Ask for the source and check it
- Interviewees hold back. Reassure about attribution and show how input is used



How to tell it landed

- Each affected function recognized its own view in the summary
- Firm constraints have sources
- The owner learned something that changed their framing
- The gap list has owners and dates



WORKING QUESTION

Whose view would most change your decision if you heard it, and have they been asked?

STAGE 3: TEST

Test options and make trade-offs explicit

04

Challenge assumptions and compare realistic options so that trade-offs are visible rather than buried.

Goals

- Generate three to four realistic options, including do nothing and a smaller version
- Test the assumptions behind each option and note how they could fail
- Compare options on value, cost, risk, people impact, dependencies and reversibility
- Prepare a recommendation the owner can accept or reject on its merits

Session plan (150 minutes)

TIME	ACTIVITY	OUTPUT
0-20	Restate the question, constraints and criteria	
20-55	Build options on a wall, with the strongest version of each	Option cards
55-85	Assumption audit: for each option what must be true, and how would we know	Assumption list
85-115	Compare options against criteria a table; record disagreement	Comparison table
115-135	Red team: one person argues against the leading option	Challenges



TIME	ACTIVITY	OUTPUT
135-150	Draft the recommendation and conditions	Draft recommendation



Working outputs

- An options and trade-offs paper
- An assumption register with tests
- A recommendation, with the conditions under which it would change

Facilitation notes

Always include do nothing and a reduced version. They reveal the real cost of the preferred option and test whether the group is solving the right problem. Treat reversibility as a criterion, since a reversible decision can be made faster with less certainty. The red-team role should rotate and be introduced as a service to the owner. Keep the options paper short: four pages is enough.



Pework

- Facilitator drafts initial options from the context view
- Finance provides a rough range of costs, labeled as estimates
- Owner nominates a red-team member who is not invested in any option

Common sticking points

- Options are variations of one idea. Force at least one that differs in kind
- Costs are false precision. Use ranges and label assumptions
- The group falls in love with an option. Run the pre-mortem
- Vendor claims are treated as facts. Mark them as claims until tested



How to tell it landed

- Do nothing was a serious option, not a formality
- Every option has a stated way it could fail
- The comparison table records disagreement, not only consensus
- The owner can explain why the rejected options were rejected



WORKING QUESTION

What is the strongest argument against the option you currently prefer, and who can make it best?

STAGE 4: DIRECT

Decide, communicate and set the review

05

Leave with a named owner, a practical action, a message and a date to review the decision again.

Goals

- Make the decision, or state exactly what is still missing and who will provide it
- Write the action record: next steps, owners, dates and resources
- Draft the communication for the board, staff or customers as relevant
- Set the review date and the evidence that will be examined

Session plan (90 minutes)

TIME	ACTIVITY	OUTPUT
0-15	Walk through the recommendation and the conditions	Shared reading
15-40	Owner questions, final challenges and dissent recorded	Dissent log
40-55	Owner decides, or names missing evidence and a date	Decision
55-75	Write actions, owners, dates and resources	Action record
75-85	Draft the internal message and anticipated questions	Message draft

TIME	ACTIVITY	OUTPUT
85-90	Set the review date and review agenda	Review agenda



Working outputs

- A decision and action record
- A follow-up review agenda
- A draft internal communication
- A short list of questions people are likely to ask, with honest answers

Facilitation notes

Do not let the meeting end without a decision or a dated path to one. A decision to wait for specific evidence is a decision. Record dissent respectfully; it often becomes the early warning. Draft the communication in plain words and test it on someone outside the leadership group. Never overstate certainty, and tell people what will be reviewed and when. A decision explained clearly is accepted more readily than one announced.



Pework

- Circulate the options paper at least two days ahead
- Owner reads and writes down their leaning before the session
- Communications lead drafts a first message

Common sticking points

- The owner wants more analysis. Ask what specific evidence would change the choice
- Actions have no owners. Do not close the session until each has one
- Communications are polished but vague. Add what will and will not change
- The review date is left open. Set it now, even if it moves



How to tell it landed

- The decision is recorded in one sentence
- Every action has an owner and a date
- A trusted outsider understood the message
- The review date is in the calendar of everyone involved



WORKING QUESTION

When you review this decision, what evidence will you ask to see?

ROLE-BASED TRACKS

Executives, managers and practitioners

06

Advisory work is mostly executive, but the quality of the context depends on managers and practitioners.

ROLE	ATTENDS	CONTRIBUTION
Decision owner	All stages	Frames the question, decides, owns the action record
Executives and board	Ask, Test (selected), Direct	Challenge assumptions, set risk appetite, receive the recommendation
Managers	Contextualize interview and synthesis	Describe workflow impact, capacity and people effects
Practitioners	Contextualize interview	Explain how the work and information really flow
Specialists	Contextualize and Test	Advise on law, security, finance and technology within their remit

Executive track

Executives and boards need concise material and honest options. They should receive a short briefing on the question, the main trade-offs and the recommended path, with an appendix for those who want depth. Ask them to state their risk appetite for this decision in a sentence, since unstated appetite causes late surprises.

Manager track

Managers hold the facts about capacity, workload and what teams can absorb. They are asked to describe the impact on the work, not to endorse an option. Make sure they see how their input shaped the outcome, and give them a communication kit for their teams.

Practitioner track

Practitioners should be heard in the interview stage, then informed on the result. Their role is evidence, not approval. Tell them how their input was used. Where possible, include a short validation step so that they can correct a misreading of their work before the decision is made.

WORKING QUESTION

Which voice in your organization holds the most relevant knowledge and the least access to the decision?

EXERCISES

Four exercises a facilitator can run as written

07

Each exercise lists the steps and the output.

Exercise 1: Sign next month (Ask, 25 minutes)

- 01 Imagine**
Ask the owner: it is a month from now and you signed something. What does the document say?
- 02 Write**
The owner writes the sentence. The facilitator pushes for specifics: what, for whom, from when, at what limit.
- 03 Check**
List who else must agree before it can be signed.
- 04 Refine**
Rewrite the decision brief title as the question this sentence answers.

Exercise 2: Constraint audit (Contextualize, 30 minutes)

- 01 List**
Write every stated constraint on a card.
- 02 Source**
Beside each, write where it comes from: contract, regulation, policy, habit or belief.
- 03 Verify**
Assign a person to confirm each non-habit source within a week.
- 04 Sort**
Mark constraints firm, soft or unverified. Only firm constraints can eliminate an option.

Exercise 3: Option cards and assumptions (Test, 45 minutes)

- 01 Draft**
Write each option on a card with a one-line description and the strongest case for it.
- 02 Assume**
Under each card list the three assumptions that must hold.
- 03 Test**
For each assumption, write how we would know within 30 days.
- 04 Compare**
Place options in a table against criteria and mark where the group disagrees.

Exercise 4: Red team (Test, 20 minutes)

- 01 Assign**
Pick a person not attached to the leading option.
- 02 Argue**
They present the best case against it for five minutes.
- 03 Respond**
The owner answers each point or marks it as an accepted risk.
- 04 Record**
The challenges and responses go into the options paper.

ILLUSTRATIVE EXAMPLE

A decision brief title might read: should we permit staff to use a general-purpose assistant with internal documents classified internal, starting next quarter, under a named approval process?



WORKING QUESTION

Which assumption in your current preferred option have you not yet tested?

ASSESSMENT OF LEARNING

Judging decision quality beyond satisfaction

08



The test of advice is whether the decision was better made and better carried out.



Satisfaction with the workshop or the report is a weak signal. Judge the work on four questions: was the decision framed well, was the context complete, were options tested, and did the decision lead to action. Outcomes of a single decision may take months and may be affected by luck, so judge the process as well as the result.

LAYER	WHAT TO MEASURE	HOW
Framing	Was the question specific, owned and dated	Compare the brief with the checklist
Context	Were affected functions heard and constraints verified	Count functions heard; trace constraints to sources
Options	Were alternatives real, assumptions tested, dissent recorded	Review the options paper
Follow-through	Were actions done on time and the review held	Check the action record at 30 and 90 days



Signals worth watching

- Later decisions start with a one-page brief without being prompted
- Leaders ask what could make a recommendation wrong
- Do nothing appears as a genuine option in later papers
- Constraints are traced to sources before they are quoted
- Reviews happen on the date set, and decisions are revised when the evidence changes

DO NOT GRADE BY OUTCOME ALONE

A good decision can have a poor result and a poor decision can succeed. Review what was known and how it was weighed, then compare the result.

WORKING QUESTION

How will you tell, a year from now, whether this decision was made well, rather than merely whether it turned out well?

SAMPLE CADENCE

A six-week schedule

09

Six weeks suits a significant decision: enough time for context and testing, short enough to keep momentum.

WEEK	SESSION OR TASK	WHO
1	Ask session (90 minutes); decision owner, facilitator brief; interview list agreed	
2	Interviews and document review	Facilitator, functions

WEEK	SESSION OR TASK	WHO
3	Contextualize synthesis (120 minutes); context view issued	Owner, functions
4	Test session (150 minutes); options paper drafted	Owner, specialists, red team
5	Specialist checks; communication drafted; paper circulated	Specialists, communications
6	Direct session (90 minutes); decision and action record; review date	Owner, executives

Running the cadence

- Share a one-page recap after every session
- Keep a running list of open questions with owners
- Hold interviews in weeks 1 and 2 so insight arrives before the synthesis
- Protect week 5 for the checks that matter, such as legal or security
- A shorter version is possible for narrower decisions: compress to three weeks with fewer interviews

If the decision is time-critical, run Ask and Direct as a one-day sprint with interviews done in advance. Say plainly what was skipped and what risk that adds.

WORKING QUESTION

What is the real deadline for your decision, and what is lost if you meet it with less analysis?

SUSTAINING THE WORK

Keeping decision discipline in place

10

The value of the engagement continues if the same habits are used for the next decision.

01 Hold the review

At the date set, examine the evidence, compare with expectations and decide whether to keep, change or reverse the decision.

02 Keep the register

Maintain a short decision register: question, owner, date, option chosen, assumptions and review date.

03 Reuse the templates

Use the brief, options paper and action record for the next AI question.

04 Watch the triggers

Reopen a decision when a key assumption fails, a regulation changes or a major incident occurs.

Sustainment checklist

- A decision register with an owner
- Review dates in calendars for every open decision
- A standard one-page decision brief
- A habit of recording dissent and its outcome
- A named person who tracks external changes that might affect decisions

Free assessments are available at halden.company/assessments, and you can contact the team at halden.company/contact if you want advisory support on a decision.

WORKING QUESTION

Which past AI decision in your business is overdue for a review, and what would you look at?



30 / 60 / 90

A first quarter that produces evidence

11



In 90 days you can frame one real decision, make it with tested options and hold the first review.

First 30 days: ground it

- Choose the decision and write the one-page brief
- Name the owner, the deadline and the boundary
- Run context interviews with at least four functions
- Start the constraint audit

**Days 31 to 60: test it**

- Issue the cross-functional context view
- Build three to four options including do nothing
- Run the assumption audit and the red-team challenge
- Consult counsel and security on firm constraints

Days 61 to 90: decide

- Make the decision and publish the action record
- Send the internal communication
- Begin the register of decisions
- Hold the first review of the decision against the evidence



GLOSSARY

Terms used in this publication

12

TERM	MEANING
Decision brief	A one-page statement of the question, owner, deadline, boundary and reason for timing.
Decision owner	The person with authority to decide and accountability for the result.
Context view	A cross-functional summary of priorities, workflow realities, constraints and concerns.
Stakeholder map	A chart of affected people by impact, influence and current stance.
Constraint audit	A check of where each stated limit comes from and whether it is firm.
Assumption register	A list of what must be true for an option to work, with ways to test each.
Red team	A person or group assigned to argue against the leading option.
Reversibility	How easily a decision can be undone if it proves wrong.
Action record	A list of next steps with owners, dates and resources.
Decision register	A running log of decisions, assumptions and review dates.

A note on use

This guide is an educational resource, not legal, technical, financial or professional advice. Adapt it to your organization and confirm legal and regulatory points with qualified advisers.

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.