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Action Plan

Harbour & Pine — the support assistant, and what it may decide

Harbour & Pine · extracted 2026-09-28 · revised 2026-09-24

What to build, in what order, and which decisions AI can help with after each step lands. Derived from the build sequence and each decision's own route up the ladder. Read alongside the readiness view, which sorts every decision; this page follows only the ones that move.

Settle these first

Ranked by what settling each one releases. *Frees* counts every decision that cannot be settled until this one is, following the chain all the way out rather than one step — a decision that directly blocks two, each of which blocks two more, frees six. *Gates* names the build items waiting on it. Both come from the envelope; neither is a judgement.

HP-013 — What counts as a correct reply — frees 1 other decision and gates 1 build item. Settle it first.

Ref	Decision	Frees	Gates item	Resolver	Settle by
HP-013	What counts as a correct reply	1	3	Maya Reed — Support lead	2026-10-21
HP-020	How long the records are kept	0	2	Jon Bell — Operations owner	2026-10-21

The rest are in the readiness view and the envelope. A decision that frees nothing and gates nothing is not unimportant — it is simply not what is holding anything else up.

Already delegable — no build needed

Delegated today, or specified well enough that only the evidence is missing.

- **HP-002** What counts as the two records disagreeing — **AI now**, today *proposing*. Then: Fifty verdicts in a row where Maya changed nothing.
- **HP-006** What authenticates a customer and establishes order ownership — **AI now**, today *automated*. Running on authority granted ahead of evidence (review 2026-11-11).

Earned when: evidence not yet named — decide in the room what would earn the next rung

Movable on evidence alone

No build item stands in the way. Each needs only the evidence named — usually a shadow run against what a person would have done.

- **HP-001** Which record is authoritative for which fact — AI could, today *shadow*. Then: Two hundred past enquiries replayed with the record each answer was drawn from logged, and no case in which the wrong record was consulted.
- **HP-016** What is recorded for each exchange, and how the four records link — AI could, today *instrumented*. Then: The four records emitted and linked for every exchange over a full week.

The sequence

Phase 1 — Enabler · The reply standard — what may be said, on what evidence

about 2 weeks · Maya Reed — Support lead

HP-013 is the same missing document as HP-004's route: what counts as a correct reply. Written down, it becomes a check a rule can apply, and it is what the shadow run in BS-003 drafts against.

Done when: One document, owned by Maya and agreed with Jon, stating what makes a reply correct as distinct from fluent, with a hundred past replies labelled against it.

Must be settled first:

- HP-005 Where reporting status ends and promising an outcome begins

After this lands, AI can help with:

- **HP-013** What counts as a correct reply — AI assists, a person decides, today *held*. Then: A written standard separating factual claims from judgement, and a hundred past replies labelled against it by two people.

Phase 2 — Measurement · The conversation record — snapshot, reply, correction, handover

about 3 weeks · Alex Chen — Engineering lead

Three decisions name a missing record as the reason nobody can tell whether something worked. This is the instrumentation that closes them, and none of it is AI work: a schema, four writers and three joins. It cannot start until retention is approved.

Done when: Every exchange produces the four linked records, held under the approved retention period, with the handover record carrying arrival time and the time a person took it.

Must be settled first:

- HP-016 What is recorded for each exchange, and how the four records link
- HP-020 How long the records are kept — settle by 2026-10-21

After this lands, AI can help with:

- **HP-003** What staff do when the records disagree — AI assists, a person decides, today *held*. Then: Fifty investigations logged with the explanation a person reached, and a proposed explanation beside it that matched in forty.
- **HP-009** Whether the assistant may prepare a refund or address change for a person to execute — AI assists, a person decides, today *held*. Then: Fifty prepared actions logged beside what Maya actually did, with the cases she changed categorised rather than counted.

Phase 3 — AI use case · The assistant in shadow on status enquiries

about 4 weeks · Alex Chen — Engineering lead

The only evidence that settles whether a status-only reply may go unattended is a run in which it drafts one and nobody sends it. Third, because it needs the standard to draft against and the record to be compared in.

Done when: The assistant drafts a status-only reply for every eligible enquiry, sends nothing, and each draft is stored beside the reply the person sent, with the differences categorised against the reply standard.

Must be settled first:

- HP-013 What counts as a correct reply — settle by 2026-10-21
- HP-016 What is recorded for each exchange, and how the four records link

After this lands, AI can help with:

- **HP-004** Whether the assistant may send a status-only reply without a person seeing it — AI could, today *shadow*. Then: A shadow run in which the assistant drafts and sends nothing, each draft stored beside the reply the person sent, agreeing on status and on what was not claimed across four hundred enquiries with fewer than four factual differences.

Phase 4 — AI use case · The handover clock, emitted

about 1 week · Alex Chen — Engineering lead

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HP-011 is settled; what is missing is the timestamp itself. A one-week change to the mail handler, and the first decision in this envelope to reach automated on evidence rather than on a grant.

Done when: Every handover carries the arrival timestamp from the mail server and the time a person took it.

Must be settled first:

- HP-011 When the handover clock starts

After this lands, AI can help with:

- **HP-011** When the handover clock starts — AI could, today *instrumented*. Then: The arrival event emitted as a timestamp on every handover for a month, with no handover missing one.

Prioritising — three axes, kept apart

Value and effort are the room's to judge; the instrument does not guess them. The steps columns are derived from the envelope: how many prerequisites are still open, which items must land first, and how far up the ladder the furthest decision has to climb. *Unblocks* is a proxy for value, not effort — a standard that unblocks five decisions is a document; a build that unblocks one may be a month.

Every item carries a value rating and a duration estimate, and the last column is computed from those. Who supplied them — the room, or the author of the envelope — is in each item's `value_note`; a document-only run's numbers are the author's, and the room should overwrite them.

P h a s e	Item	U n b l o c k s	Hou rs/ wk bac k	Value	W e k s	Op en pre req s	It e ms fir st	R u n g cli m b	Quick win?
1	Enabler · The reply standard — what may be said, on what evidence	1	—	4 — Room, session 2 — "the thing we should have written in March".	2	0	no ne	3	yes
2	Measurement · The conversation record — snapshot, reply, correction, handover	2	—	5 — Room, session 2 — "without this nothing else is checkable".	3	1	no ne	3	no — 3 weeks

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P h a s e	Item	U n b l o c k s	Hou rs/ wk bac k	Value	W e e k s	Op en pre req s	It e ms fir st	R u n g cli m b	Quick win?
3	AI use case · The assistant in shadow on status enquiries	1	4.0 h	4 — Room, session 2.	4	1	1	2	no — 2 things first
4	AI use case · The handover clock, emitted	0	—	3 — Room, session 2 — "small, but it makes HP-010 measurable".	1	0	no ne	0	no — value 3

Quick win is claimed only where value is 4 or more, effort is two weeks or less, and at most one thing stands in the way. Everything else is a judgement, and the columns are there so the room can make it with the structure in front of them.

Rough timeline

Durations are the envelope's own estimates.

Phase	Item	Weeks	Cumulative	Deadlines on decisions it requires
1	Enabler · The reply standard — what may be said, on what evidence	2	weeks 0–2	—
2	Measurement · The conversation record — snapshot, reply, correction, handover	3	weeks 2–5	HP-020 by 2026-10-21
3	AI use case · The assistant in shadow on status enquiries	4	weeks 5–9	HP-013 by 2026-10-21
4	AI use case · The handover clock, emitted	1	weeks 9–10	—

Deadlines are `settle_by` values on decisions each item requires; 4 are dates and 2 are events. The validator's schedule check confirmed the dated ones are jointly satisfiable with the sequence order; it says nothing about the durations, which are estimates.