



Technology · Engineering · Delivery

## Room sheet

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

Harbour & Pine · one sheet, twenty minutes · collected at the end

Proposed from your material; agreed only once you write in the boxes.

### The build items — worth it, how long, whose

Value 1–5 (5 = would fund alone) · weeks elapsed · who stops doing something when it lands.

| # | Item                                                                                 | Releases       | Value 1–5                              | Weeks                                  | Owner                                                             | Start no earlier than    | Who is relieved          |
|---|--------------------------------------------------------------------------------------|----------------|----------------------------------------|----------------------------------------|-------------------------------------------------------------------|--------------------------|--------------------------|
| 1 | Enabler · <b>The reply standard — what may be said, on what evidence</b>             | HP-013         | <input type="checkbox"/> (proposed: 4) | <input type="checkbox"/> (proposed: 2) | <input type="checkbox"/> (proposed: Maya Reed — Support lead)     | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Measurement · <b>The conversation record — snapshot, reply, correction, handover</b> | HP-003, HP-009 | <input type="checkbox"/> (proposed: 5) | <input type="checkbox"/> (proposed: 3) | <input type="checkbox"/> (proposed: Alex Chen — Engineering lead) | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | AI use case · <b>The assistant in shadow on status enquiries</b>                     | HP-004         | <input type="checkbox"/> (proposed: 4) | <input type="checkbox"/> (proposed: 4) | <input type="checkbox"/> (proposed: Alex Chen — Engineering lead) | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | AI use case · <b>The handover clock, emitted</b>                                     | HP-011         | <input type="checkbox"/> (proposed: 3) | <input type="checkbox"/> (proposed: 1) | <input type="checkbox"/> (proposed: Alex Chen — Engineering lead) | <input type="checkbox"/> | <input type="checkbox"/> |

### Decisions that move — is this the right evidence?

Tick the evidence, or write what would convince you. Per week × minutes each is the hours figure — the one number here that needs nobody's judgement. Relieved: yes / no / depends.

| R<br>e<br>f                | Decision                                                       | T<br>o                                    | Evidence that moves<br>it                                                                    | Righ<br>t<br>evid<br>ence<br>? | Res<br>olve<br>r<br>kno<br>ws? | Per week ×<br>minutes                                     | Relieved<br>to stop?                                |
|----------------------------|----------------------------------------------------------------|-------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------------|--------------------------------|-----------------------------------------------------------|-----------------------------------------------------|
| H<br>P<br>-<br>0<br>0<br>1 | Which record is authoritative for which fact                   | c<br>o<br>u<br>l<br>d                     | Two hundred past enquiries replayed with the record each answer was drawn from logged, an... | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>40 × 3 min)     | <input type="checkbox"/><br>(propose<br>d: yes)     |
| H<br>P<br>-<br>0<br>0<br>2 | What counts as the two records disagreeing                     | a<br>u<br>t<br>o<br>m<br>a<br>t<br>e<br>d | Fifty verdicts in a row where Maya changed nothing.                                          | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>12 × 5 min)     | <input type="checkbox"/><br>(propose<br>d: depends) |
| H<br>P<br>-<br>0<br>0<br>3 | What staff do when the records disagree                        | p<br>r<br>o<br>p<br>o<br>s<br>i<br>n<br>g | Fifty investigations logged with the explanation a person reached, and a proposed explana... | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>12 × 15<br>min) | <input type="checkbox"/><br>(propose<br>d: no)      |
| H<br>P<br>-<br>0<br>0<br>4 | Whether the assistant may send a status-only reply without ... | c<br>o<br>u<br>l<br>d                     | A shadow run in which the assistant drafts and sends nothing, each draft stored beside th... | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>60 × 4 min)     | <input type="checkbox"/><br>(propose<br>d: yes)     |
| H<br>P<br>-<br>0<br>0<br>5 | Where reporting status ends and promising an outcome begins    | p<br>r<br>o<br>p<br>o<br>s<br>i<br>n<br>g | Twenty past replies classified against the list by two people independently, disagreeing ... | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>20 × 2 min)     | <input type="checkbox"/><br>(propose<br>d: yes)     |
| H<br>P<br>-<br>0           | What authenticates a customer and establishes order ownersh... | a<br>u<br>t<br>o<br>m                     | evidence not yet named — decide in the room what would earn the next rung                    | <input type="checkbox"/>       | <input type="checkbox"/>       | <input type="checkbox"/><br>(proposed:<br>60 × 1 min)     | <input type="checkbox"/><br>(propose<br>d: yes)     |

| R<br>e<br>f                | Decision                                                             | T<br>o                                    | Evidence that moves<br>it                                                                                   | Righ<br>t<br>evid<br>ence<br>? | Res<br>olve<br>r<br>kno<br>ws? | Per week ×<br>minutes                                 | Relieved<br>to stop?                               |
|----------------------------|----------------------------------------------------------------------|-------------------------------------------|-------------------------------------------------------------------------------------------------------------|--------------------------------|--------------------------------|-------------------------------------------------------|----------------------------------------------------|
| 0<br>6                     |                                                                      | at<br>e<br>d                              |                                                                                                             |                                |                                |                                                       |                                                    |
| H<br>P<br>-<br>0<br>0<br>9 | Whether the assistant<br>may prepare a refund<br>or address chang... | p<br>r<br>o<br>p<br>o<br>s<br>i<br>n<br>g | Fifty prepared actions<br>logged beside what<br>Maya actually did, with<br>the cases she<br>changed c...    | <input type="checkbox"/>       | <b>no</b>                      | <input type="checkbox"/><br>(proposed:<br>6 × 8 min)  | <input type="checkbox"/><br>(proposed:<br>depends) |
| H<br>P<br>-<br>0<br>1<br>1 | When the handover<br>clock starts                                    | c<br>o<br>u<br>l<br>d                     | The arrival event<br>emitted as a<br>timestamp on every<br>handover for a month,<br>with no handover ...    | <input type="checkbox"/>       | <input type="checkbox"/>       | <input type="checkbox"/> × <input type="checkbox"/>   | <input type="checkbox"/>                           |
| H<br>P<br>-<br>0<br>1<br>3 | What counts as a<br>correct reply                                    | p<br>r<br>o<br>p<br>o<br>s<br>i<br>n<br>g | A written standard<br>separating factual<br>claims from<br>judgement, and a<br>hundred past replies<br>l... | <input type="checkbox"/>       | yes                            | <input type="checkbox"/><br>(proposed:<br>60 × 2 min) | <input type="checkbox"/><br>(proposed:<br>depends) |
| H<br>P<br>-<br>0<br>1<br>4 | The evaluation set,<br>and what it must be<br>representative of      | p<br>r<br>o<br>p<br>o<br>s<br>i<br>n<br>g | A drawn sample<br>approved by Maya<br>without amendment,<br>two seasons running.                            | <input type="checkbox"/>       | yes                            | <input type="checkbox"/> × <input type="checkbox"/>   | <input type="checkbox"/>                           |
| H<br>P<br>-<br>0<br>1<br>6 | What is recorded for<br>each exchange, and<br>how the four record... | c<br>o<br>u<br>l<br>d                     | The four records<br>emitted and linked for<br>every exchange over a<br>full week.                           | <input type="checkbox"/>       | yes                            | <input type="checkbox"/> × <input type="checkbox"/>   | <input type="checkbox"/>                           |

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| Ref    | Decision                                                 | To        | Evidence that moves it                                                                       | Right evidence?          | Resolver knows? | Per week × minutes                                 | Relieved to stop?                           |
|--------|----------------------------------------------------------|-----------|----------------------------------------------------------------------------------------------|--------------------------|-----------------|----------------------------------------------------|---------------------------------------------|
| HP-017 | Whether the assistant may draft replies for Maya to send | proposing | HP-005's list in force, and a hundred drafts in shadow with no claim outside it and fewer... | <input type="checkbox"/> | yes             | <input type="checkbox"/><br>(proposed: 60 × 3 min) | <input type="checkbox"/><br>(proposed: yes) |

## Stays with a person — do you agree?

*Tick to confirm, strike through to reopen.*

| Ref    | Decision                                                       | Why                                                                                          | Agreed                   |
|--------|----------------------------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------|
| HP-008 | Whether the assistant may execute a refund or an address ch... | by choice: Irreversible from the customer's side; a person, always.                          | <input type="checkbox"/> |
| HP-015 | The acceptance thresholds                                      | unbounded: A risk appetite; no golden set could ever be frozen for it.                       | <input type="checkbox"/> |
| HP-019 | No real customer data before access and retention are appro... | by choice: A prohibition with an end condition: it holds absolutely until retention is ap... | <input type="checkbox"/> |

## Where may this run

**in-house** · **contracted** · **open** — default: ☐ exceptions: ☐ (7 of 15 already stated)

*What comes back is the roadmap with your numbers in it.*