PRMG | LEADERSHIP CONFERENCE 2026

PEOPLE / PROGRESS / A BRIGHTER TOMORROW

START WORKBOOK

Automate the Routine. Personalize the Rest.

The START Framework for Responsible AI Execution

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PRMG 25

PROTECT JUDGMENT.
CREATE CONSISTENCY.
INCREASE CONNECTION.

Automate the Routine. Personalize the Rest.

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Session Notes + Core Takeaways

S → SPOT
Find the repetitive bottleneck.

T → TEACH
Give AI context, constraints and purpose.

A → AUTOMATE
Turn repeatable work into repeatable workflows.

R → REHUMANIZE
Use time back for conversations and trust.

T → TRACK
Measure what changed before you scale.

1 Biggest idea from the session.

2 What routine wastes the most time in my branch or workflow?

3 What should always stay human?

My one big takeaway.

S + T: Spot the Friction / Teach It the Business

Do not start with the tool. Start with what slows the team down.

S SPOT THE FRICTION

Where are we losing time every day?

What keeps getting repeated?

What needs consistency before it needs creativity?

AUTOMATE IT
What can be fully automated?

ASSIST ME WITH IT
What can AI help with (draft, analyze, summarize)?

KEEP IT HUMAN
What should stay human (relationship, judgment, empathy)?

T TEACH IT THE BUSINESS

Give AI the same context a great team member would have. The more specific you are, the better the results.

1. ROLE
What role should AI play?

2. CONTEXT
What background does it need to know?

3. OBJECTIVE
What do you want it to accomplish?

4. GUARDRAILS
What should it avoid or have in mind?

5. OUTPUT
What format or style do you want?

START WITH THE BOTTLENECK, NOT THE TOOL.

A + R: Automate the Routine / Rehumanize the Experience

BUILD EFFICIENCY. CREATE CONNECTION. DRIVE A BRIGHTER TOMORROW.

1. WORKFLOW BUILDER

Turn a task into a workflow. Fill in each step below to design a repeatable process.

Trigger
What starts the workflow?

Inputs
What information is needed?

AI Draft
What does AI create or suggest?

Human Review
Who reviews, edits or personalizes?

Final Delivery
How is it delivered and to whom?

2. MY TEST WORKFLOW

Choose one real task and map it out. Start small, test it, and refine it.

Task / Use Case: _____

Short Description:

_____

_____

_____

_____

Next Steps:

1. _____
2. _____
3. _____
4. _____
5. _____

3. REHUMANIZE THE EXPERIENCE

Use these prompts to plan how you will add more humanity, not more distance, as you use AI.

Make the call
Where can you be more proactive in reaching out to people?

Explain the why
How will you clearly communicate the purpose and value?

Coach the person
How will you support, develop or empower the individual?

> **AI scales information. Humans scale trust.**

T: TRACK THE IMPACT / 30-DAY ACTION PLAN

Do not measure how many AI tools you use. Measure what changed.

Workflow I am testing

e.g., AI-assisted borrower follow-up

Owner

Name

Success measure

e.g., response time, conversations, closed loans

Start date

MM / DD / YYYY

30-DAY CHECK-IN

Document progress, be honest about what's working, and adjust as needed.

WEEK 1	WEEK 2	WEEK 3	WEEK 4
Wins	**Wins**	**Wins**	**Wins**
Friction	**Friction**	**Friction**	**Friction**
Next Move	**Next Move**	**Next Move**	**Next Move**

MEASURE WHAT CHANGED

Compare before and after your 30-day test. Use numbers where possible.

Time saved	Response speed	More conversations	Better follow-up	Stronger experience
e.g., hours per week	*e.g., average time to reply*	*e.g., number per week*	*e.g., % follow-ups completed*	*e.g., CSAT or feedback*

REFLECTION

Turn insights into action.

What should we improve?

What got in the way?
What could work better?

What should we scale?

What worked well?
Where else can we apply this?

My commitment before I leave this room

What is one specific action you will take in the next 30 days?

ONE PROBLEM. ONE WORKFLOW. ONE MEASURABLE RESULT.