

FORWARDABLE BUYER BRIEF

Controlled AI for proposal and report reuse.

For Australian engineering, environmental and project advisory teams using Microsoft 365 and SharePoint. Review one workflow before broader AI rollout.

Decide whether standard Microsoft AI is already enough, or whether one workflow needs a clearer source, access and review boundary.

First workflow

Proposal, tender and technical-report reuse from approved project knowledge.

First step

A short, non-confidential review-call request.

Best internal owner

Operations, proposals, reports, AI governance or a principal/partner.

WHEN A REVIEW IS WORTH IT

Not every AI workflow needs ArxLayer.

The useful decision is narrow: if standard Microsoft controls already fit the workflow, use them. If proposal or report reuse touches restricted project knowledge, review the boundary before rollout.

STANDARD MICROSOFT AI MAY BE ENOUGH WHEN	A CONTROLLED WORKFLOW IS WORTH REVIEWING WHEN
Current Microsoft 365 permissions already match the workflow.	Proposals, tenders or reports reuse prior client/project material.
Source material is low-risk or easy to separate.	Teams are unsure which SharePoint folders AI should use.
Staff already review outputs before client use.	Restricted client files, draft advice or commercial material must be excluded.
There is a clear owner for AI use, review and exceptions.	Source references, reviewer confidence and audit trail matter.
The work is everyday drafting, meeting notes or admin support.	Someone needs to operate the workflow after go-live.

What this avoids

Broad AI transformation before one workflow is proven, private infrastructure decisions before the business boundary is known, and pilots that create a demo but no operating owner.

THE AI CONTROL REVIEW

A boundary check, not a forced build.

The review checks whether a controlled workflow is justified and what the lightest useful next step should be.

REVIEW CHECKS

- Which proposal/report process causes friction.
- Which source groups should be approved or excluded.
- Which users and roles belong inside the first boundary.
- Where human review sits before client-facing use.

PILOT MUST PROVE

- Approved source reuse is useful.
- The agreed access boundary is respected.
- Source references are exposed where supported.
- A named review path can operate after go-live.

Sources

Approved project knowledge, excluded material and owner rules.

Access

Users, roles and the first workflow boundary.

Review

Human approval before client-facing use.

Operate

Updates, exceptions, evals and managed oversight.

Confidentiality note

Do not send confidential files before a scoped review path is agreed. The first request only needs category-level workflow context.

PRACTICAL OUTCOMES

The review should end in one of four answers.

A useful first conversation should narrow the decision, not open a broad AI program.

Stop	Standard enterprise AI is enough for this workflow.
Tighten	Fix current Microsoft 365 / SharePoint controls first.
Blueprint	Map sources, roles, risks, evals and pilot scope.
Pilot	Prove one controlled workflow with approved sources and managed oversight.

WHAT TO SEND

- The workflow to review.
- The team or role that owns it.
- The systems involved.
- The broad material categories.
- Why the current AI path feels unclear.

WHAT NOT TO SEND

- Confidential client files.
- Secrets or source code.
- Sensitive personal information.
- Detailed project documents.
- Anything that needs a signed scope first.

Request a review call

If the review is not useful, the reply should say so. If it is useful, the next step is a short call.

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