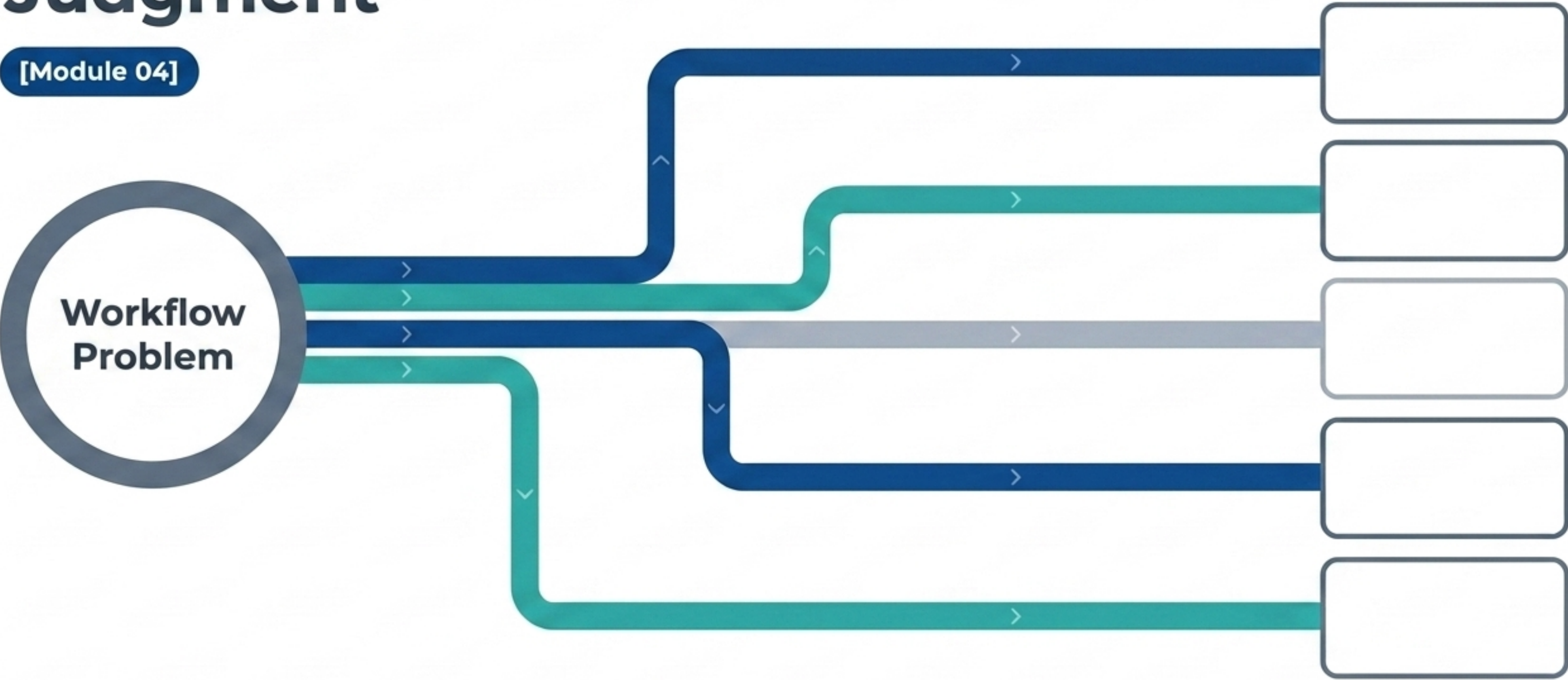


Tool-Fit And Solution Judgment

[Module 04]



Not Every AI Idea Deserves A Build

Interesting Demo

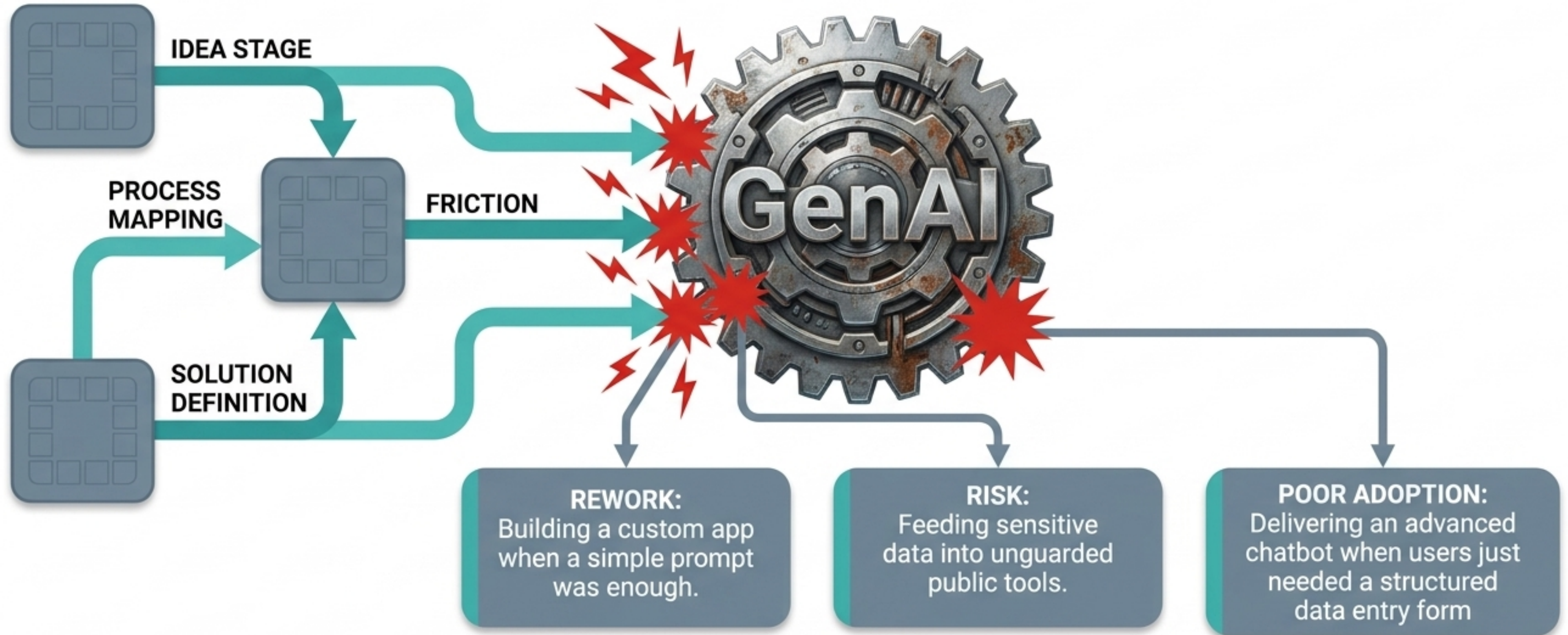


The goal is not to use AI everywhere. The goal is to solve the right problems well.

Useful, Owned, Tested Solution



Mismatched Tools Create Workflow Friction



Treating every problem as an AI problem creates confusion.
Good tool-fit routes ideas to the right implementation path.

Start With The Use Case

 AI Use Case Assessment Card

Problem & Current Process

Manual extraction of patient referral forms

Audience

Intake Coordinators

Expected Value

[Time Savings]

[Error Reduction]

Data Classification & Risk Level

[Data: PHI]

[Risk: High]

Human Review Needs

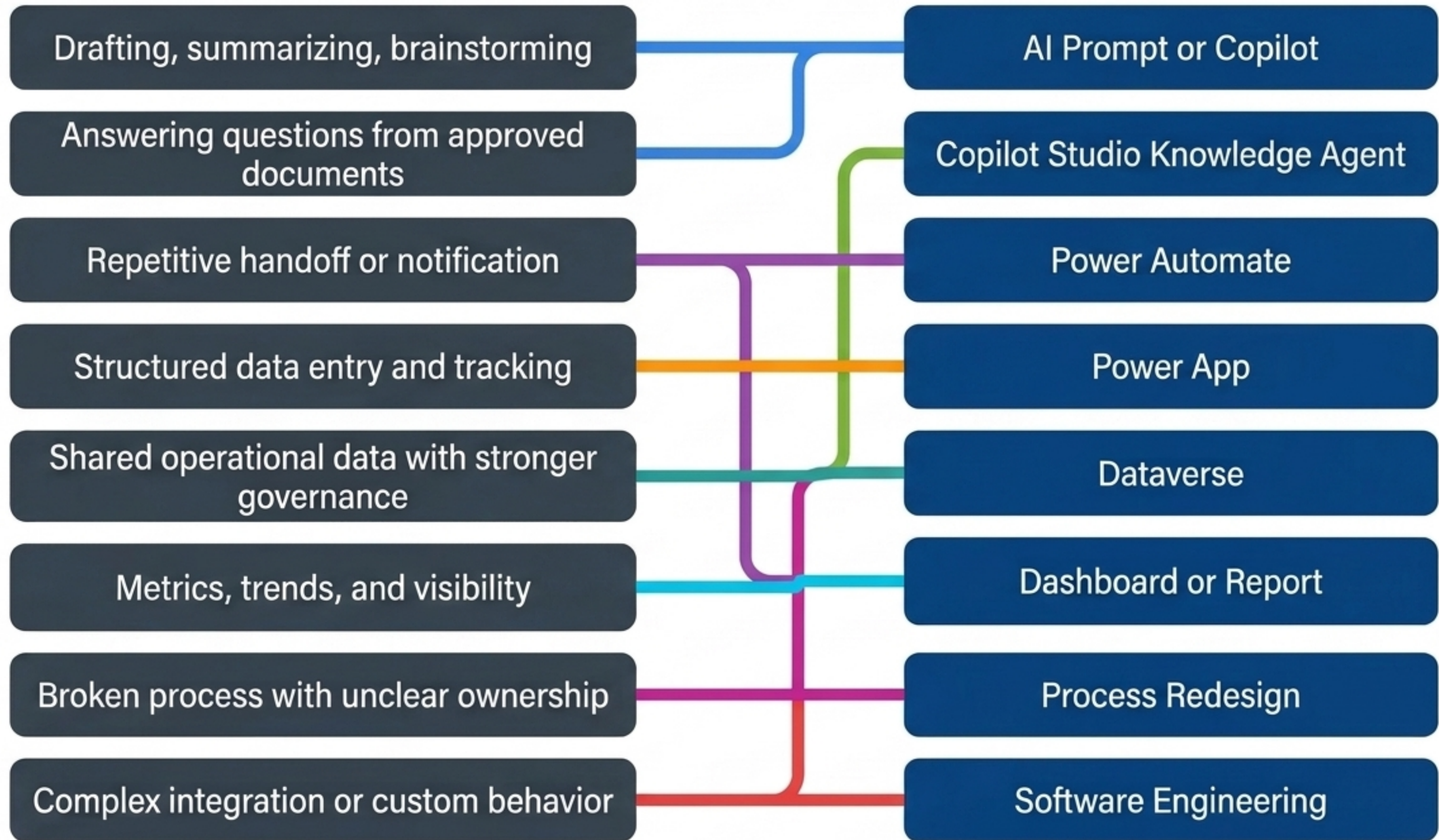
☒

[Required]

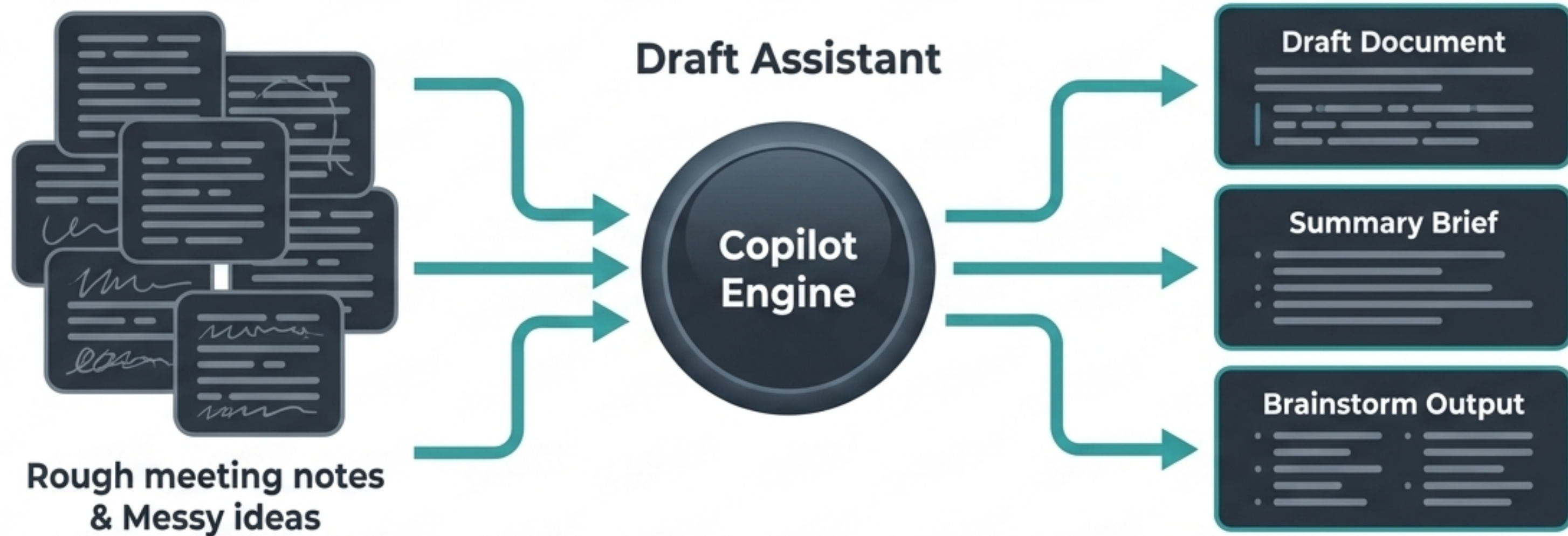
Dependencies

Epic integration required

The Core Routing Matrix



AI Prompt Or Copilot



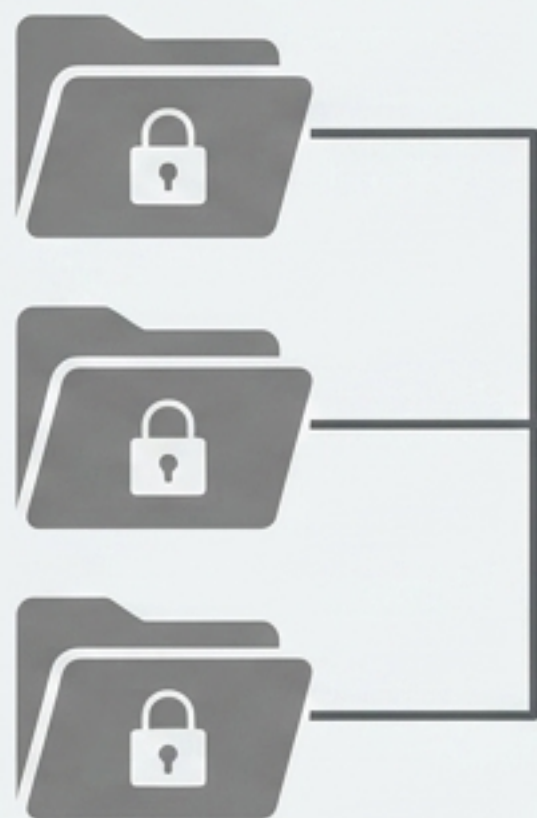
Best For: Drafting, summarizing, brainstorming, and reformatting.

Condition: Low-risk content.

Diagnostic Question: Is the primary need language help?

Copilot Studio Knowledge Agent

Approved
Internal Sources



Bounded Q&A

Agent

According to the governance policy, the approval process involves three stages...

End-tag: [Citation] 

 **BLOCKED**

Best For: Answering questions strictly from approved internal documents.

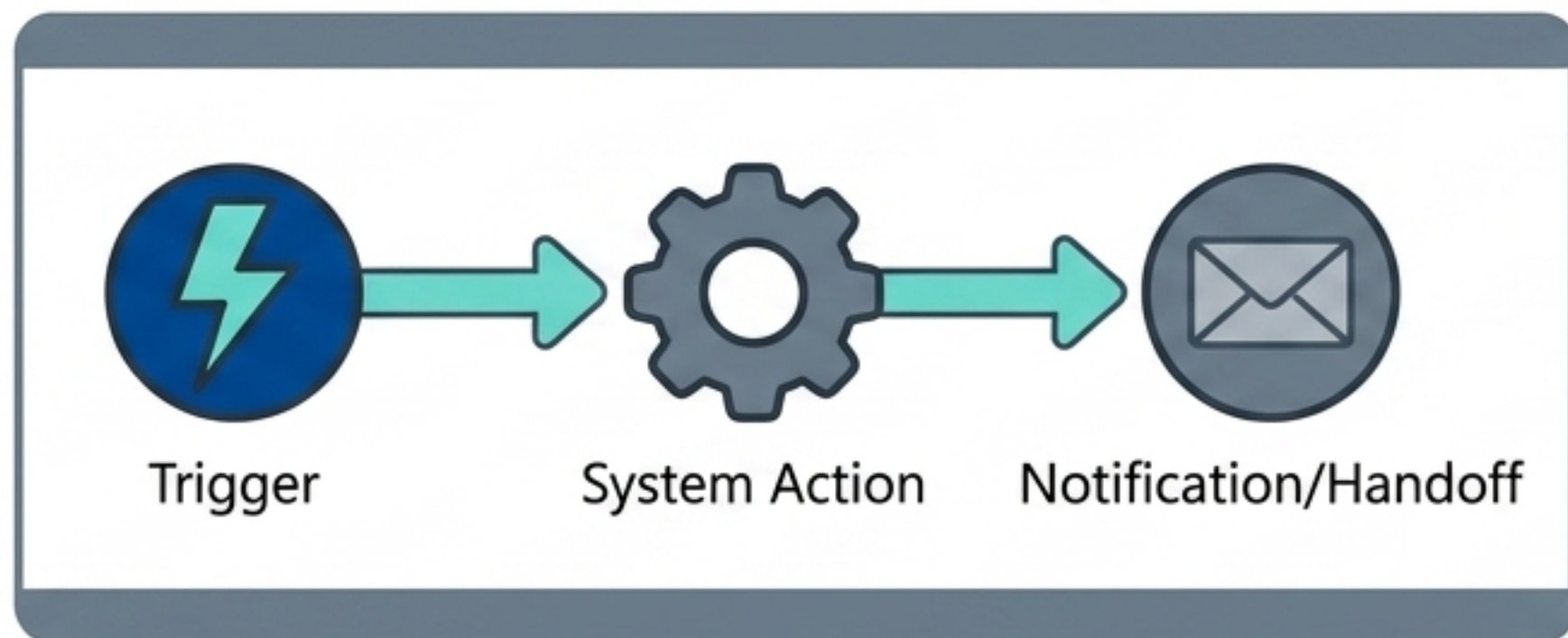
Safety Check: Removes the risk of hallucination by grounding answers in governed organizational truth.

Condition: High-value or sensitive content.

Diagnostic Question: Is the primary need strict adherence to approved content?

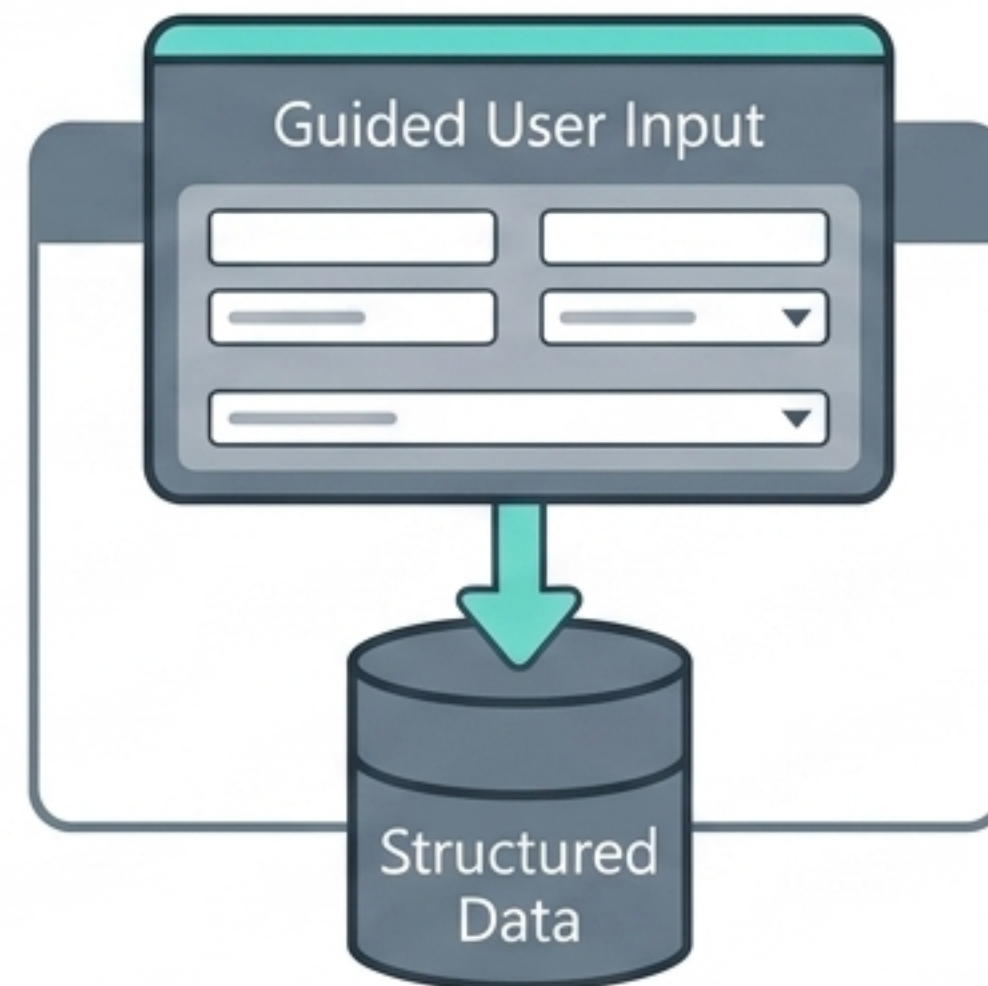
Automation Versus Application

Power Automate



Repeatable handoffs and system-triggered actions.

Power App



Structured data entry and lightweight operational tools.

Scaling Operations: Dataverse, Dashboards, Or Engineering



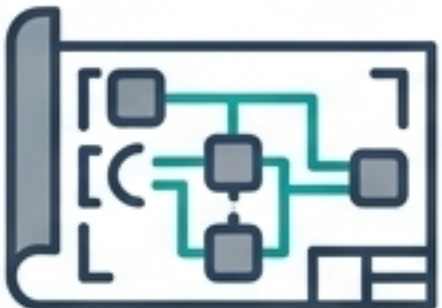
Dataverse

Best when shared operational data needs stronger structure, permissions, and governance.



Dashboard or Report

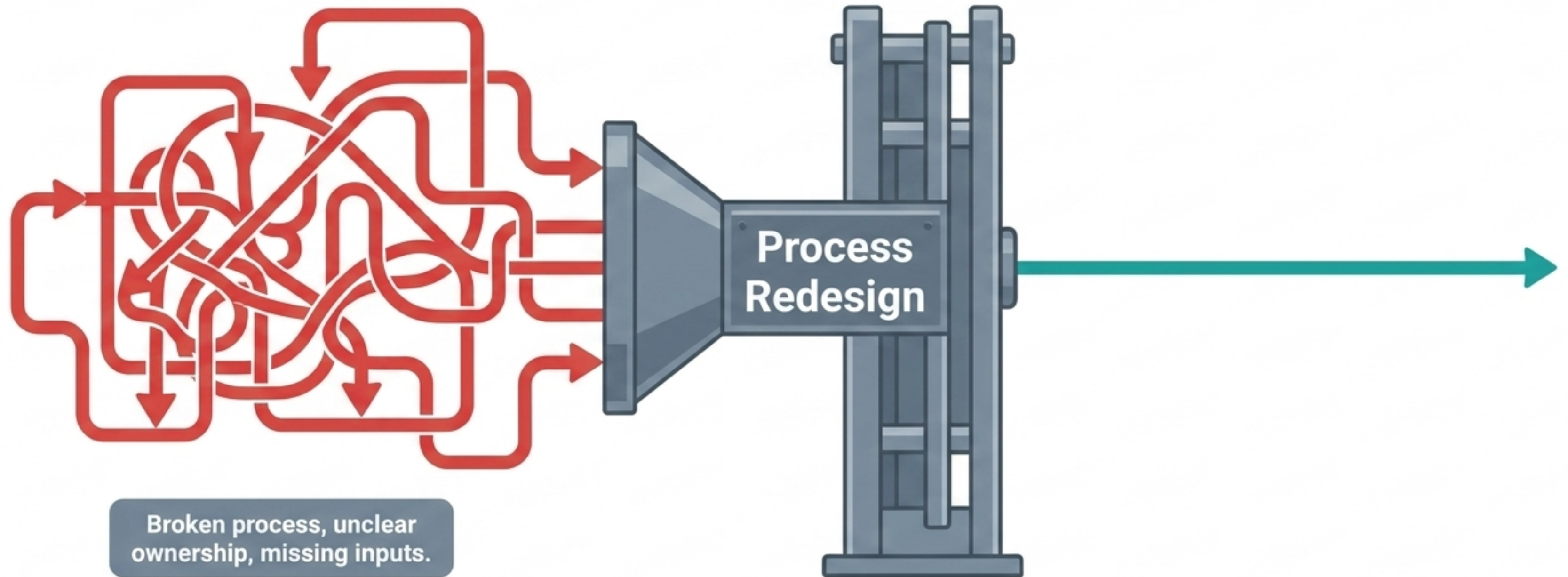
Best when the primary need is visibility, monitoring, metrics, or trends.



Software Engineering Path

Best for complex integration, custom behavior, scale, or advanced reliability needs.

Process Redesign Before AI



Automation can make a bad process fail faster. When ownership or rules are unclear, simplify the process before adding technology.

Weighing The Tradeoffs

Example: Custom Engineering

High on Governance and UX, but Low on Speed and Maintainability.

"Balanced Scorecard" Equalizer UI

Speed to Deployment



Governance & Risk Control



Maintainability & Support Burden



Ownership Clarity



User Experience (UX)



Feasibility & Dependencies



What would make this solution hard to maintain?

Diagnostic Practice Activity

Tool Path	Expected Impact	Implementation Effort	Risk Profile	Identified Owner
Prompt	[Med]	[Low]	[Low]	[Data Team]
Agent	[Low]	[High]	[High]	[TBD] [Reject]
Flow	[Med]	[Med]	[Med]	[IT]
Power App	[High]	[Med]	[Low]	[Ops Dept]
Dashboard	[Low]	[Med]	[Low]	[Analysts]
Process Change	[High]	[High]	[TBD]	[Ops Leads]

The Plain-Language Recommendation

We recommend pursuing a [Solution Path] because the primary problem is [Core Need: e.g., structured tracking].

While a [Alternative Path] was considered, it is not the best first step due to [Tradeoff: e.g., high maintenance burden / missing data governance].

The immediate next step is to [Action].

A good recommendation explains the chosen path and why other paths were ruled out.

Correcting Common Misdiagnoses

Myth: The most advanced tool is the best fit.

Reality: The simplest tool that solves the real problem is the best fit.

Myth: Automation fixes slow processes.

Reality: Automation can make a bad process fail faster.

Myth: Dashboards fix accountability.

Reality: A dashboard provides visibility; it does not fix unclear ownership.

Myth: Chatbots are always the answer.

Reality: A chatbot is often less effective than a well-organized document or guided workflow.

The Ultimate Algorithm Is Human Judgment

Good AI enablement depends on judgment, tool fit, ownership, risk review, and maintainability. The model is only one part of the system.

Next-Step Decisions

- ☐ **Reject** (Wrong fit / High risk)
- ☐ **Delay** (Dependencies missing)
- ☐ **Discover More** (Problem unclear)
- ☐ **Prototype** (Test feasibility)
- ☐ **Pilot** (Test with small group)
- ☐ **Escalate** (Complex engineering required)