

Integrating Flexible, Scalable AI into Your Tech Stack

Spreadsheet Version:
bit.ly/scale-ai-xls

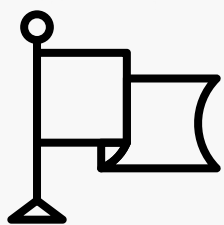


Treat AI as a layer—not a lock-in. Own the interface; orchestrate across every system.

Start by identifying a use case

Look for work that involves many people, departments and platforms... *and lots of manual copy/paste.*

Use Case:



Trigger & Desired Outcome

What starts this use-case and how do we know it's complete?

Trigger event (what starts the flow)

Example: Applicant “approved for hire” in Workday.

Desired outcome (what “done” means)

Example: New employee is ready to work on first day



People & Ideal Experience

What should this person see/do in one place?

Persona	Top 3 tasks in this flow	Ideal single experience (what they should see/do)
	1. 2. 3.	
	1. 2. 3.	
	1. 2. 3.	

Add others:

Examples:

Persona: New employee
Tasks: 1) Complete forms 2) Get equipment 3) Access systems
Experience: One checklist with status + due dates; no tool-hopping

Persona: Hiring manager
Tasks: 1) Approve access 2) Track start readiness 3) Resolve blockers
Experience: One dashboard: approvals + status; nudges for delays

Step / Task	Existing Data Referenced	New Data created	Platforms touched	Who owns it?

Examples:

New hire enters their W2 information	Yearly salary, start date	Tax filing, direct deposit information, SSN	Docusign, Rippling	HR
Laptop and software provisioning	Shipping address, start date, software needed, account access	Computer system/model selection, other equipment needed	Email, Servicenow, Purchasing platform, Active Directory	IT
Required Training has been completed	Account information, Manager, Training needed	Module completion status	LMS, Active Directory	Operations



Circle steps to decouple

Circle any Step/Task where both are true:

- Platforms Touched lists 2+ platforms
- New Data Created will be used by another platform later

Circled steps are your **decouple targets** (orchestration + shared layer = no re-typing).

Define your Core Systems (integrations to wire)

From the circled steps, list the platforms that appear 2+ times. These are the systems you'll connect via integrations.

Core Systems

to Connect:



Establish an AI Play

Star ★ one circled step and check one AI Play below. Essentially: “How can AI help this along?”

Pick an AI Play (how AI helps this step):

- Choose for me (Recommend)
- Spot issues (Detect)
- Give me the ETA (Forecast)
- Send it to the right place (Classify & Route)

★ **Step:** Laptop & software provisioning
Ex: Core Systems: HR, Identity, Finance, ITSM
AI Play: Choose for me (Recommend)

Log the steps on the next page

Final Step

How can decoupling your tech stack enable your AI Strategy?

Let’s see your top three steps that are prime for flexible, scalable AI assistance:

STEP

CORE SYSTEMS

AI PLAY

STEP

CORE SYSTEMS

AI PLAY

STEP

CORE SYSTEMS

AI PLAY

If you need a way to truly scale AI across your org, You're Not Alone
Technology changes quickly. To truly scale AI, you need the freedom to swap platforms while keeping data consistent.

KINETICDATA

Want Help Mapping a Smarter Stack?

We've helped federal agencies, financial institutions, and global enterprises rethink their architecture strategy... without ripping everything out. If you'd like a fresh set of eyes, we're here.

Book a 60-minute AI Stack Review

