PICREW

UNIFIED PLATFORM OF WORK

Five steps to AI your firm can trust

A vendor-agnostic discipline for building AI in regulated environments. Follow it with any tools you already use.

Why most AI stalls after the demo

The model is rarely the bottleneck. Most AI fails in production because nobody encoded the firm's rules, nobody tested it against real scenarios, and nobody can show an examiner why the output is correct. The fix is not a better model. It is a discipline for how AI gets defined, grounded, tested, verified, and run.

The five steps

01. Define

Agree on what the agent should do, in plain language, signed off by whoever owns the process.

Skip this: the agent builds the wrong thing.

02. Ground

Connect the agent to your firm's actual data, documents, and policies, so it references them instead of guessing.

Skip this: the agent hallucinates.

03. Test

Run it against real scenarios from your firm and compare it to what your team would have done.

Skip this: failures surface in production.

04. Verify

Every output is checked against your rules before anyone sees it. Pass or fail, not the AI grading its own work.

Skip this: you cannot prove the output is correct.

05. Run

Your team approves what executes. Every step is logged as it happens, and the evidence trail exports on demand.

Skip this: there is nothing to show when the examiner asks.

Three actions you can take this week

01	Pick one workflow and write down what "correct" looks like: trigger, rules, exceptions, sign-off.
02	Find where the data actually lives, and agree which system is the source of truth when they disagree.
03	Pull your five hardest real scenarios from the past year. If AI cannot handle these five, it is not ready for the rest.

Published by PitCrew Agents. Vendor-agnostic and free to use. gopitcrew.com/unified-platform-of-work