PRESH ai

FIELD GUIDE · 2026 EDITION

THE AI IMPLEMENTATION FIELD GUIDE FOR IT SOLUTION PROVIDERS

A practical system for choosing a workflow worth changing, governing it, shipping it, and measuring the operating result.

BUILT FOR MSPS, VARS, INTEGRATORS, DISTRIBUTORS, AND CHANNEL TEAMS

presh.ai

START WITH THE OPERATING OUTCOME.

Begin with a recurring business result, the work that produces it, and the person accountable when the system is wrong.

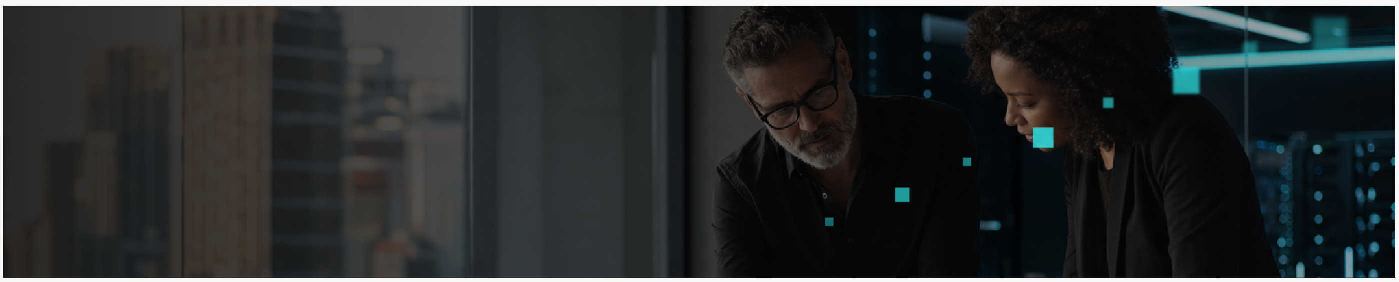
OUTCOME
Name the business result and the baseline.

WORKFLOW
Map triggers, decisions, tools, and exceptions.

AUTHORITY
Decide what AI may do, propose, or never touch.

EVIDENCE
Capture approvals, source context, and outputs.

VALUE
Measure cycle time, quality, risk, and business yield.



STRONG CANDIDATE

Repeatable work with visible evidence and reversible actions.

- A person already follows a recognizable process.
- Inputs and acceptable outputs can be shown.
- Errors are visible before they become expensive.
- An owner can review operating evidence.

RESOLVE BEFORE BUILD

Vague strategy, missing systems, or irreversible authority.

- The use case is only a generic chatbot brief.
- Inputs live in inboxes and undocumented memory.
- No one owns exceptions or final approval.
- Value depends on a broader transformation first.

Owned

Someone accepts the operating result and the exceptions.

Bounded

The system has clear authority and rollback paths.

Measurable

The team can compare the new path to a baseline.

ASSESS THE WORKFLOW BEFORE BUILDING.

Mark the strongest statement you can prove today. “Production-ready” means the evidence exists, not that the team feels confident.

Dimension	Need to resolve	Workable signal	Production-ready signal	Current
Outcome What changes?	Interest without a business result	Benefit and affected users named	Baseline, expected change, and owner agreed	☐ ☐ ☐
Workflow Can we map it?	Ad hoc or undocumented work	Main path can be described	Triggers, decisions, and exceptions are known	☐ ☐ ☐
Data access Can the system work?	Inputs and permissions unknown	Sources can be accessed manually	Approved access and test data are available	☐ ☐ ☐
Ownership Who decides?	Sponsor without an operator	Operator and reviewers identified	Acceptance and exception ownership are explicit	☐ ☐ ☐
Guardrails What can go wrong?	Risks and authority are unknown	Risks and approval points are listed	Authority, evidence, rollback, and review are defined	☐ ☐ ☐
Measurement How will we know?	No usable baseline	Useful indicators are available	Evidence source, owner, and review cadence are set	☐ ☐ ☐

Ready to scope

Ownership, access, guardrails, and evidence can be proven. Define the smallest controlled production slice.

Resolve first

Close the ownership, access, or authority gap before committing a team to implementation.

CANDIDATE WORKFLOW

Accountable owner

Current baseline

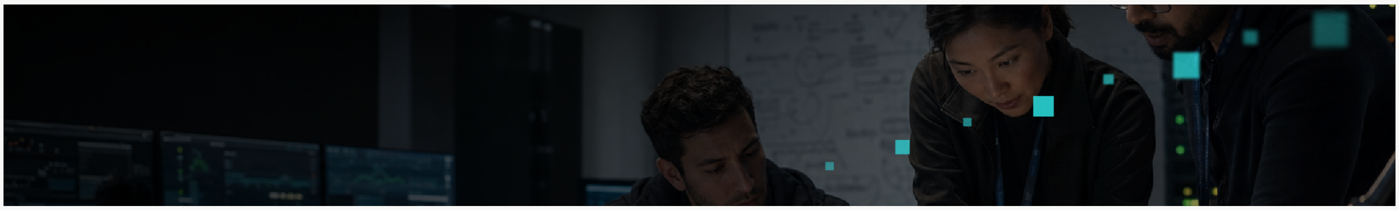
Primary approval point

Evidence for the next decision

PRESHai

MOVE FROM WORKFLOW EVIDENCE TO GOVERNED OPERATION.

The goal is a production loop with clear ownership, controlled authority, retained evidence, and a defensible decision about what comes next.



Frame

Confirm the operating result

Agree on the workflow owner, baseline, expected change, in-scope users, systems, failure modes, and review cadence.

Exit evidence: accepted workflow brief and source inventory.

Map

Observe the operating reality

Capture triggers, decisions, exceptions, permissions, and the artifacts a reviewer uses to trust the work.

Exit evidence: current-state map, access test, and risk register.

Build

Connect a controlled production slice

Integrate the minimum systems, encode authority boundaries, add human review, and retain event-level evidence.

Exit evidence: a working path through representative data in a controlled environment.

Operate

Run live work with the operating team

Label exceptions. Compare cycle time, rework, and quality to the baseline. Fix the highest-cost failure modes.

Exit evidence: operating scorecard and exception log.

Decide

Harden, transfer, and choose the next move

Confirm ownership, runbook, alerting, permissions, rollback, training, and expansion economics.

Exit evidence: production acceptance and an expand, revise, or stop decision.

Operating review

Volume, time, quality, errors, overrides.

Risk review

Exceptions, approvals, access, rollback.

Business review

Capacity, margin, speed, pipeline, retention.

DEFINE AUTHORITY BEFORE AUTONOMY.

Every production system should know which actions it may take, which it may propose, and which always require a person.

ACT

Low-risk and reversible

Classify, summarize, draft, route, enrich, and create internal records.

PROPOSE

Material but reviewable

Client communications, remediation plans, campaign assets, and change requests.

REQUIRE APPROVAL

Irreversible or regulated

Production access changes, financial commitments, legal assertions, and destructive actions.

Retain enough evidence to reconstruct every meaningful action

- Trigger, requester, and timestamp
- Source records and policy version
- Model or deterministic rule used
- Proposed action and confidence
- Reviewer, approval, or override
- Final system change and result
- Exception classification
- Rollback or correction path

THE SYSTEM IS NOT THE OWNER. IT MAKES THE BUSINESS OWNER'S ACCOUNTABILITY VISIBLE.

Approval should reduce risk.

If every item requires review indefinitely, the workflow is not ready or the authority boundary is wrong.

Evidence should reduce debate.

A reviewer should see the source, rule, proposed action, and exception without reconstructing the workflow.

CHOOSE A WORKFLOW WITH VISIBLE EVIDENCE.

These are patterns, not plug-ins. Scope each to your systems, authority model, customers, and brand standards.

EXECUTIVE

Project health brief

Assemble status, risks, decisions, and commercial impact from project systems for an accountable review.

Measure: prep time, stale risks, escalation latency.

MARKETING

Campaign production queue

Turn approved briefs into routed, on-brand assets with named reviewers and proof history.

Measure: cycle time, rework, assets shipped.

SERVICE

Incident evidence pack

Summarize incident context, actions, client impact, and follow-up while retaining links to source events.

Measure: response time, correction rate, client-update time.

MARKETING

Vendor content adaptation

Transform vendor source material into partner-ready campaign variants governed by program and brand context.

Measure: utilization, time-to-launch, approval passes.

REVENUE

QBR preparation

Assemble service, project, adoption, and opportunity evidence into a consistent account narrative.

Measure: prep hours, missing data, expansion actions.

DELIVERY

Change-request intake

Normalize requests, identify missing scope, draft impact, and route approval without silently changing commitments.

Measure: turnaround, leakage, rejected incomplete requests.

For executive teams

Pick the workflow where recurring senior attention and operating margin meet.

For marketing teams

Pick the queue with the most avoidable rework and the clearest approval evidence.

Use the readiness assessment before selecting.

TRACK CAPACITY, QUALITY, RISK, AND GROWTH.

Time saved can hide rework and adoption failure. Use a balanced scorecard tied to the workflow owner.

Dimension	Baseline	Expected operating change	Evidence source	Owner
Cycle time Trigger to accepted output				
Touch time Human minutes per item				
First-pass acceptance No material rework				
Exception rate Outside the normal path				
Business yield Revenue, margin, or capacity				

CAPACITY MODEL

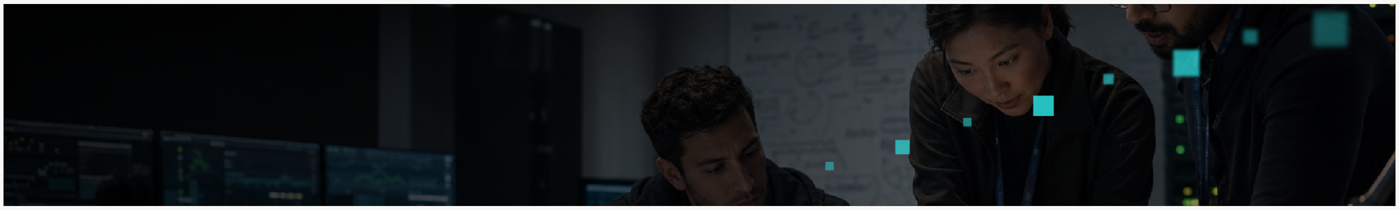
VOLUME × MINUTES SAVED ÷ 60

Multiply the resulting hours by fully loaded hourly cost or by the contribution value of the work the team can absorb.

RISK-ADJUSTED VALUE

EXPECTED VALUE × CONFIDENCE

Keep forecast, observed value, and realized value separate. Confidence should rise only when the workflow produces evidence.



Economics check before expansion

Adopted?

Users choose the workflow without being chased.

Controlled?

Exceptions and approvals are visible and shrinking.

Worth it?

Observed value exceeds operating and review cost.

TURN A CANDIDATE INTO AN IMPLEMENTATION BRIEF.

OUTCOME

What recurring business result changes, for whom, and by how much?

TRIGGER

What starts the workflow?

ACCEPTED OUTPUT

What proves the work is done?

SYSTEMS

Where do inputs and actions live?

EXCEPTIONS

What breaks the normal path?

AUTHORITY

Act, propose, or require approval?

EVIDENCE

What must be retained?

OWNER

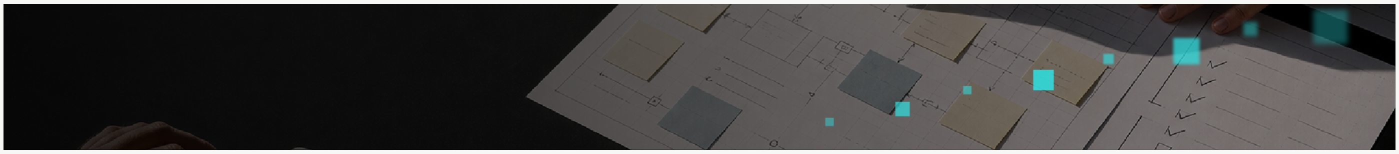
Who accepts the operating result?

OPERATING DECISION

What evidence supports expansion, revision, or stopping?

IMPLEMENTATION BRIEF STATEMENT

We will improve **[outcome]** for **[users]** by operating **[workflow]** across **[systems]**, with **[approval boundary]**, measured through **[evidence and business indicators]**.



BRING A WORKFLOW. LEAVE WITH A CLEARER PATH TO PRODUCTION.

A PRESHai architect or engineer will pressure-test the outcome, system access, authority model, evidence plan, and implementation scope. No generic maturity pitch.

Bring

- A recurring workflow
- The accountable owner
- The systems it touches
- The baseline or current pain

Leave with

- A readiness assessment
- A recommended authority boundary
- A practical implementation path
- A clear next decision

START THE CONVERSATION

PRESHai

AI implementation for the IT channel, designed, deployed, and operated with your team.

PRESHai implements and operates the system. PRESHos is the governed platform it runs on. This guide is educational and does not replace security, legal, compliance, or financial review for your organization.