



The Workflow Is the Asset: Building the Foundation for AI That Works

AHFA Global Logistics & Supply Chain Conference · June 17, 2026

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Two Things Are True About AI Right Now

THE CAPABILITY

**AI can do more than at any point
in the history of work.**

THE USAGE

Most have started using it.

Few have scaled it.

The space between those two facts is my focus today.

The Gap Between Reality and Aspiration

THE REALITY

What I Have

40 hrs/wk

Same hours. Same headcount.
Increasing expectations.

AI

THE ASPIRATION

What I Want to Do

Follow up with every lead or email promptly

Prep thoroughly for every meeting

Stay on top of competitor moves

Personalize every customer touchpoint

Document what actually works

Fix what's broken

What This Is

1 NOT a logistics expert.

A translator.

2 NOT predictions.

Patterns.

3 NOT abstract.

Practical.

I Think of AI as My Intern

Capable. Eager. Needs direction. Makes mistakes. Gets better with feedback.

1 Eager and fast

Will attempt anything you ask, immediately.

2 Solid first drafts

Gets you from zero to something you can work with.

3 Sometimes confidently wrong

Won't tell you when it's making things up.

4 Needs supervision and review

Your expertise is the quality control layer.

5 Gets better with clear direction

Specific asks beat vague direction every time.

6 Won't push back when it should

Agreeable to a fault — you bring the skepticism.

AI works great in parallel with you, not instead of you.



What the Intern Can Do

Three operational examples — generic data, real workflow

EXAMPLE 1

Draft a Carrier Email

THE PROMPT

"Draft a follow-up to ABC Freight about the late delivery on PO-4471. Reference the SLA, ask for root cause, and request a credit."

EXAMPLE 2

Turn a PDF into a Spreadsheet

THE PROMPT

"Extract the line items from this PDF into a clean table with columns for date, description, quantity, and price. Flag anything that looks inconsistent."

EXAMPLE 3

Summarize a Claim File

THE PROMPT

"Summarize this claim correspondence chain into a one-page brief for our claims team. Include dates, parties, damages, and current status."

None of these require intimate knowledge of your business. They require you to know what you need.

What the Intern Can't Do

Act unsupervised

Every output needs your eyes before it goes anywhere.

Know your business

It doesn't know your customers, your margins, your accounts.

Be trusted blindly

Confidence and accuracy are not the same thing.

You wouldn't send an intern to a client meeting alone. Same rule applies here.

\$20/month

The Tools

GPT 5.5 Quick ▾



Favorite Interns)

Claude

Anthropic

Strong reasoning, nuanced writing, and "Projects" for storing context. Great for creative work, maintaining brand voice. Cowork automates workflows.

MY GO-TO

Auto

Decides how long to think

Quick Response

Answers right away

Think Deeper

Think longer for better answers

Opus

Claude

GPT

Open AI

- ✓ GPT 5.5 Quick Response
- GPT 5.5 Think Deeper
- GPT 5.3 Quick Response
- GPT 5.4 Think Deeper
- GPT 5.2 Quick Response
- GPT 5.2 Think Deeper

ilot

Outlook,
are you
by GPT-

Google Gemini

Google

Built into Gmail, Docs, Sheets,
and Search. Seamless for
Google Workspace users.

GOOGLE INTEGRATION

Learn to prompt one well, and you can use any of them.

WHERE MOST ORGANIZATIONS ARE TODAY

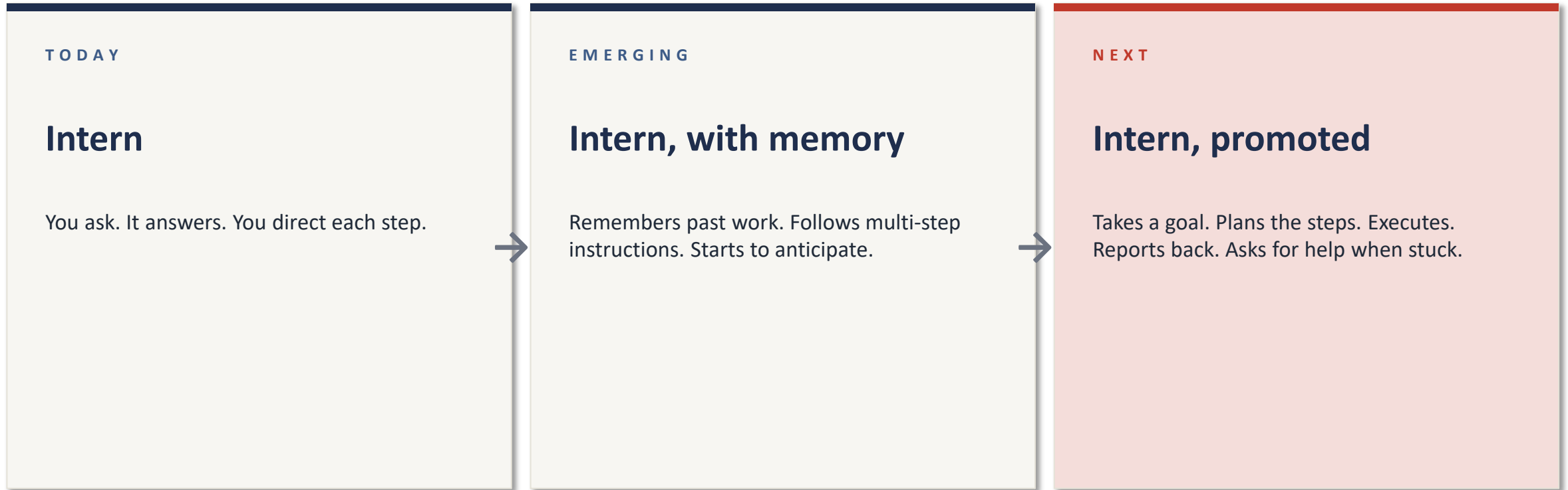
Most organizations are using AI as an intern.

Useful. Limited by the fact that someone has to direct it.



Here's what's changing.

The Intern Gets Promoted



What Changes

From producing text to taking action

THE INTERN

Drafts the email

Summarizes the response

Tells you the shipment is late



THE INTERN, PROMOTED

Drafts the email and tracks which ones still need a response

Summarizes the response and updates your open-items list

Pulls carrier history, drafts the follow-up, and queues it for your review

What's Real Today

Honest calibration — what's production-ready vs. what's emerging

PRODUCTION READY

- Coding assistants
- Research assistants
- Personal-productivity agents

Real, used daily, reliable enough to trust.

STILL EMERGING · 12–24 MONTHS

- Multi-step operational workflows
- Regulated / compliance-heavy domains
- High-stakes autonomous action

Coming, but unevenly.

Where Many of Us Actually Are Right Now



Recently, a senior leader admitted that their tasks, ideas, and reminders all lived on sticky notes.

Stuck to the monitor. Stuck to the desk. Stuck to the wall.

"I think I have a system."

But things were slipping. Important things.



Once everything is a priority,
nothing is.

Meet Erin

Same problem. Different response.

WHO

Erin

ROLE

Chief Financial Officer

She did something different about it.

THE PROBLEM

Too many competing demands.

- Dropping things
- No real-time consolidation across email and Teams
- No clear answer to: "What do I focus on first?"

If this sounds familiar — it should.

Start Here

This is where Erin started — four sentences, written one Tuesday afternoon

THE STARTING PROMPT

Act as my Chief of Staff.

Each morning, give me a prioritized daily briefing based on my Outlook calendar, my emails, and my Teams messages.

Be direct, concise, and ruthlessly prioritized. No fluff.

I want clarity on what I must do today.

You could write that today. Erin did, and it worked — with tweaks.

Everything that follows came from noticing what was breaking and articulating the fix.

Then She Iterated

Each addition came from noticing a specific failure during the day

WEEK 1	Add: Ignore auto-generated system emails. I'm getting noise from platforms my team no longer uses.
WEEK 2	Add: Cross-reference email AND Teams before flagging anything as unresolved. Sometimes I respond on Teams to an email request and the briefing thinks it's still open.
WEEK 3	Add: Scan my sent items from the past 7 days for commitments I made that haven't been completed. "I'll send that over." "Let me check and get back to you." Those are dropping through.
WEEK 4	Add: For each meeting today with other people, suggest 2-3 sharp questions I should ask — based on the agenda, recent threads, and what's been pending with these people.

Every one of these started as a sentence she could have written into a notebook. Instead, she wrote it into the prompt.

What It Produces

Open items with direct reports — a section of Tuesday morning's briefing

OPEN ITEMS WITH MY DIRECT REPORTS		
Sarah Chen	David Park	Maria Rodriguez
Waiting on: Q3 forecast model update (asked Monday, 4 days open)	Waiting on: Growth plan for Q4 (asked 9 days ago)	Due today: Month-end close confirmation
Waiting on: Vendor contract review (12 days open)	Waiting on: Director-level hire scorecard	Owe her: Decision on the consultant engagement
Owe her: Walk through budget revision at next 1:1	Good work: Caught the reporting error in the board materials yesterday	Upcoming: Performance review (scheduled Friday)
Watch: Quieter than usual on the new initiative — check in		
<i>Note: details generalized for this presentation; actual briefing names real colleagues and live workstreams.</i>		

It doesn't just track tasks. It tracks people — in both directions.

What It Becomes

Eight weeks later — the same prompt, fully grown

PROMPT
STEP 1 — CARRYOVER CHECK
STEP 2 — NEW INPUTS SCAN
STEP 3 — CALENDAR REVIEW
STEP 4 — SENT ITEMS & COMMITMENTS
BRIEFING FORMAT
STANDING RULES
AT END OF DAY

THE NUMBERS

4

sentences in the starting prompt

8

weeks of iteration

32+

specific instructions in the current version

1

person built it — no IT, no consultants

She didn't sit down and write this. She discovered it — one missed email at a time.



**Most people can't describe their workflow
from a cold start —
because they don't fully know it
until they watch it break.**

Erin didn't write a workflow spec. She delegated badly, watched what fell through, and articulated what fell through.

You don't need to know your workflow
before you start.

You need to delegate it badly,
watch what breaks, and pay attention.

That's the documentation. That's the asset.

She Shared the Prompt

And here's what happened next

**Her colleagues use it — with the same tweaks
necessary along the way.**

The artifact transferred.

The thinking didn't.

The Same Problem, at Scale

What Erin did personally, large organizations are paying significant money to figure out

WALL STREET JOURNAL · MARCH 2026

"AI Needs Management Consultants After All."

~2 in 3

of organizations haven't started scaling AI across the enterprise (McKinsey)

OpenAI, Anthropic

now partnering with McKinsey, BCG, Deloitte, Accenture

\$ Billions

the gap between what AI can do and what businesses do with it

This isn't about consultants being good or bad. The expertise gap is real and expensive.

Your Workflow Is the Asset

No consultant can produce your tribal knowledge

A CONSULTANT CAN PRODUCE

- Strategy decks
- Vendor evaluation frameworks
- Org-design recommendations
- Implementation timelines

A CONSULTANT CANNOT PRODUCE

- **Your tribal knowledge**
- **Your exception-handling instincts**
- **Your decision criteria at 2 a.m. on the last shipping day of the quarter**
- **The documented workflow only you can build**

Two Takeaways

One for you. One for your organization.

FOR YOU, THIS WEEK

Pick one recurring task.

- Not your whole job — one recurring task
- Build a rough AI assistant for it
- Watch where it fails
- Articulate the failures back to the AI
- Iterate

Six weeks: something useful. · Six months: the expert in your org.

FOR YOUR ORGANIZATION

Fund the conditions.

- The most valuable AI investment isn't a tool
- It's the time, culture, and recognition
- Permission to spend Tuesday afternoons
- Permission to experiment
- Figuring out how to delegate your own work
- That's how Erin built hers

First movers won't have the biggest budgets — they'll have the best-documented workflows.

“

AI is simultaneously substituting and complementing different parts of the same workflow. It complements the expert while substituting for the intermediary.

The economist can now build her own simulation, the doctor can prototype a clinical decision tool, and the logistics manager can write his own optimizer.

Each has the expertise to know which questions are worth asking, and AI can turn that knowledge into working tools.

Scott Wallsten

Technology Policy Institute · Wall Street Journal, May 31, 2026



The expertise is yours.

The intermediary is what's getting substituted.

The question isn't whether your role survives.

It's whether you wait for someone to build the tool for you —

or start documenting what you already know.



Questions?

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