
WHERE VALUE LIVES

EXECUTIVE IMPLEMENTATION TOOL

Human–AI SAM Attention Planner

A practical discipline for combining human judgement with AI scale while keeping customer-recognised value, trust and accountability at the centre.

SUPPORTING CHAPTER 21

Author	Fred Mills
Website	millsconsultancy.com
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How to Use This Planner

Use this planner with the account team to decide where AI can widen the radar, reduce cognitive load and improve follow-through — and where human attention must lead. Work through the ten stages for one strategic account, one recurring workflow or one important customer interaction. Treat AI output as an input to judgement, never as final truth.

CORE DOCTRINE

Human attention creates meaning. AI scales attention. Customer value remains the test.

The working discipline

HUMAN FIRST — Begin with customer context, judgement, ethics and purpose.

AI SECOND — Use AI for memory, pattern recognition, synthesis, preparation and consistency.

CUSTOMER ALWAYS — Judge success by whether the customer feels more understood and experiences recognised value.

VERIFY — Check facts, evidence, assumptions, tone and claims before action.

PROTECT — Respect permission, confidentiality, security and customer trust.

OWN — A human remains accountable for every customer-facing decision and promise.

Evidence labels

VERIFIED	Confirmed against a reliable source or responsible person.
INFERENCE	A plausible interpretation that still requires testing.
ASSUMPTION	An untested belief that could change the decision.
UNKNOWN	Information the team does not yet possess.

The Human-AI SAM Attention Model

Use this overview to allocate attention deliberately. AI can support every stage, but human judgement leads wherever meaning, prioritisation, trust, ethics or accountability is involved.

1. Sense	6. Personalise
2. Summarise	7. Evidence
3. Interpret	8. Act
4. Prioritise	9. Learn
5. Prepare	10. Govern

Current attention challenge

Account / workflow / interaction in scope
Customer outcome this should improve
Where human attention is currently overloaded
Where AI may add useful scale
Greatest trust, data or judgement risk
How the customer should experience the improvement
CUSTOMER TEST The customer should feel more understood, not more automated.

1. Sense

Use AI to widen the radar across approved sources. Human judgement decides which signals deserve attention.

STAGE 1 QUESTION

What signals are emerging from the customer's world?

Signal / source	Possible meaning	Human validation	Attention?

Approved sources to monitor

Signals detected

Why each may matter

Affected stakeholders

Weak or contradictory signals

Signals requiring human validation

DECISION TEST
Does this signal materially affect customer priorities, risk, value or account strategy?

2. Summarise

Turn fragmented information into usable account memory, then test the summary for omissions, bias and error.

STAGE 2 QUESTION

What do we already know?

Summary claim	Source	Verified?	Correction / nuance

Information included and excluded

Open commitments

Repeated risks or themes

Value delivered and recognised

Unresolved issues

Customer language to preserve

DECISION TEST

Would responsible account-team members recognise this summary as accurate and balanced?

3. Interpret

AI may generate hypotheses; people must understand the world behind the words, including politics, timing, trust and ambiguity.

STAGE 3 QUESTION

What does this mean in the customer’s context?

Observation	AI hypothesis	Human interpretation	Confidence

Possible meanings

Customer context that changes the interpretation

Stakeholder perspectives

Tone, silence or sequence that matters

Alternative explanations

What must be tested in conversation

DECISION TEST

Have we separated what was observed from what we think it means?

4. Prioritise

Make strategic choices. Not every signal, stakeholder, risk or opportunity deserves equal investment.

STAGE 4 QUESTION

Where should scarce attention go?

Candidate	Customer value	Risk	Effort	Decision

Customer importance
Relationship importance
Future value at stake
Risk and urgency
Mutuality and likely return
What we will stop or defer
DECISION TEST Does this choice direct attention to what matters most, rather than what is easiest to produce?

5. Prepare

Use AI to assemble context and options. Human attention shapes purpose, questions, judgement and the experience in the room.

STAGE 5 QUESTION
How do we make the next interaction more useful?

Preparation item	AI contribution	Human addition	Final owner

Interaction purpose

Customer context briefing

Open commitments

Intelligent questions

Likely objections or sensitivities

What should not be said or promised

DECISION TEST
Will this preparation make the conversation more useful to the customer?

6. Personalise

Connect communication to actual customer context and stakeholder priorities. Avoid false intimacy and synthetic empathy.

STAGE 6 QUESTION

How do we make relevance specific and true?

Audience	Specific relevance	Human check	Channel

Stakeholder and purpose
Relevant customer context
Value language they use
Appropriate tone and channel
Claims requiring evidence
Where a human conversation is better
DECISION TEST Would this make the customer feel genuinely understood?

7. Evidence

AI can assemble and structure evidence. Humans protect integrity, distinguish evidence from inference and avoid overclaiming.

STAGE 7 QUESTION

What proof of value can we gather and share?

Value claim	Evidence	Status	Customer recognises?

Customer outcome
Baseline and comparison
Evidence sources
Customer recognition
Other contributing factors
Claims to qualify or remove
DECISION TEST Would the customer agree that the evidence is credible and the claim is fair?

8. Act

Turn insight into owned action. AI can organise reminders and drafts; people make commitments and close the loop.

STAGE 8 QUESTION

What should happen next?

Action	Owner	By when	Customer outcome	Evidence done

Decision required

Next action

Customer-side contribution

Supplier-side contribution

Promise and communication

Escalation or support needed

DECISION TEST

Is there a named human owner and a visible definition of completion?

9. Learn

Convert account memory into wiser strategy. Record what changed, challenge old assumptions and update the living account plan.

STAGE 9 QUESTION

What are we learning about the customer and relationship?

Learning	Implication	Plan update	Owner

New learning

Assumption confirmed or challenged

Pattern across interactions

What should change

Who needs to know

Where learning will be recorded

DECISION TEST
Has the relationship become smarter, not merely older?

10. Govern

Protect trust through clear permission, data handling, validation, transparency and human accountability.

STAGE 10 QUESTION

How do we keep AI-supported SAM ethical, safe and useful?

Control / boundary	Why it matters	Owner	Evidence

Permitted tools and data
Prohibited or sensitive information
Output validation method
Customer-facing approval
Transparency or consent required
Named human accountability
Incident or escalation route
DECISION TEST Could we explain this use of AI clearly and confidently to the customer?

Human-AI Workflow Design

Map one recurring SAM workflow end to end. Be explicit about the AI contribution, the human decision and the customer-value test at every point.

Workflow or interaction				
Customer outcome				
Current friction or cognitive load				
Approved inputs and sources				
Required output				
Named accountable human				
Step	AI supports	Human leads	Control / check	Customer-value test
DESIGN STANDARD Automate handling where useful. Never automate responsibility.				

Trust, Data and Permission Record

Strategic-account information is sensitive. Agree boundaries before using AI and revisit them whenever tools, data, purpose or customer expectations change.

Data / information	Permitted use	Tool / location	Access	Retention	Owner

Pre-use trust check

- ☐ Customer confidentiality and contractual terms checked
- ☐ Approved tool and data location confirmed
- ☐ Consent or transparency requirement understood
- ☐ Facts and sources will be validated
- ☐ Customer-facing material has a human approver
- ☐ Named escalation route exists

MORAL SMOKE ALARM

Never use AI in a way that you would be embarrassed to explain clearly to the customer.

Success Measures and 90-Day Plan

Measure whether AI improves Strategic Account Management, not whether it increases output.

Outcome measure	Current baseline	90-day target	Evidence source	Owner

90-day action plan

Action	Customer outcome	AI role	Human owner	By when	Review evidence

FINAL STANDARD
Human first. AI second. Customer always.