

Leadership workflows checklist

Use this checklist before using AI support for leadership drafting or synthesis.

Checklist

- Confirm the decision or message before generating.
- Remove personal or sensitive details unless approved.
- Ask for structure, tone and audience explicitly.
- Check policy, statutory and local context.
- Name the final human owner and approval route.
- Save useful briefing or agenda formats for reuse.

Review questions

- 1 Is this drafting support rather than decision-making?
- 2 Does the output add claims that were not agreed?
- 3 Is the tone suitable for staff, families or leaders?
- 4 Does anyone need to approve this before it is shared?
- 5 Have confidential details been removed or protected?

Use this PDF alongside the full RockettAI guide at rockettai.com/resources.