The Human-Centered AI 30-Day Quick-Start Guide

A companion worksheet for "Your First 30 Days: A Confident Start"

Free Resource from Dr. Steve Vargo

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Start Here

The goal of your first month with AI is not transformation. It is traction.

You do not need a grand strategy, a formal implementation plan, or a dramatic practice-wide launch. In fact, starting too big often slows everything down. The better approach is to start with curiosity, test a few narrow use cases, and ask a simple question: Did this make the work easier?

This guide is designed to help you and your team take that first step. It follows the roadmap from the chapter "Your First 30 Days: A Confident Start" and gives you a simple structure for awareness, experimentation, shared learning, and deciding what moves forward.

Start where you are. Use what you have. Do what you can.

—Arthur Ashe

The First-Month Mindset

AI adoption does not have to begin with a big launch. It can begin with a draft, a checklist, a meeting summary, a training outline, or a patient communication script. The key is to choose small experiments that are narrow enough to be low risk and focused enough to teach you something.

Think of these early use cases as proving grounds. They help your practice learn how to prompt AI effectively, understand its strengths and limitations, and identify where it genuinely improves productivity.

The Wrong Goal	The Better Goal
Transform the practice in 30 days	Create traction through small experiments
Find every possible AI use case	Identify two or three useful starting points
Launch AI across the entire team at once	Test low-risk tasks in a structured way
Prove AI is perfect	Learn where AI helps and where it does not
Replace human judgment	Support better human work

The Simple First-Month Roadmap

Use this roadmap to guide your first 30 days. Each week has a specific focus, a leadership role, and a team role.

Week	Focus	Leadership Role	Team Role
Week 1	Guardrails and Awareness	Define safe boundaries	Learn the basics and identify friction
Week 2	Small Experiments	Approve pilots	Test narrow tasks
Week 3	Shared Learning	Evaluate results	Share insights and refine prompts
Week 4	Decide What Scales	Approve workflows	Adopt successful pilots

Before You Begin: Set the Boundary

AI can help with the work around the work. It can draft, organize, summarize, brainstorm, rewrite, structure, and clarify. It should not replace clinical judgment, leadership judgment, or direct human connection.

Before your team begins experimenting, agree on what is safe, what requires approval, and what is off limits.

Category	What It Means	Examples
Safe to Try	Low-risk tasks that do not include sensitive patient information and are reviewed before use.	Meeting agendas, staff training outlines, generic patient education drafts, internal checklists.
Ask First	Tasks that may affect patient communication, practice policy, brand voice, or team expectations.	Patient-facing emails, policy language, coaching scripts, workflow changes.
Off Limits	Anything involving protected patient information, clinical decision-making, or unreviewed AI output.	Entering PHI into public AI tools, using AI to diagnose, sending AI-generated content without review.

Our practice guardrails:

Question	Our Answer
What AI tools are approved for use?	
What types of tasks are safe to try?	
What requires leadership approval?	
What is off limits?	
Who should team members ask if they are unsure?	

Week 1: Guardrails and Awareness

The first week is about introducing the concept and setting the tone. This is the time to have a clear, honest conversation about why you are exploring AI, what you hope it accomplishes, and where the boundaries are.

The message to your team should be simple: We are looking for ways to reduce friction, not replace people.

Week 1 Leadership Script

Use this as a starting point for your team conversation.

"Over the next 30 days, we are going to explore a few simple ways AI might help us reduce repetitive work, improve communication, and make certain tasks easier. This is not about replacing anyone or making our practice less personal. It is about learning where AI can support the work we already do. We will start small, stay within clear guardrails, and review anything before it is used."

Step 1: Identify What Is Draining the Team

Invite your team into the process. Ask where repetitive work, unclear communication, or unnecessary friction is draining time and energy.

Team Reflection Question	Notes
What tasks do we create from scratch over and over?	
What do we explain repeatedly to patients or team members?	
What activities consume time without meaningfully improving the patient experience?	
Where do we lose time because information is unclear, scattered, or inconsistent?	
What part of the day creates the most avoidable frustration?	

Step 2: Build a Short List of Possible Use Cases

Look for tasks that occur frequently, take more time than they should, and are low risk enough to test. Good early use cases often include SOP drafting, meeting summaries, internal documentation, marketing drafts, staff training outlines, and patient communication drafts that are reviewed before use.

Possible Use Case	Frequent?	Low Risk?	Easy to Test?	Worth Trying?
	Yes / No	Yes / No	Yes / No	Yes / No
	Yes / No	Yes / No	Yes / No	Yes / No
	Yes / No	Yes / No	Yes / No	Yes / No
	Yes / No	Yes / No	Yes / No	Yes / No
	Yes / No	Yes / No	Yes / No	Yes / No

Week 1 Finish Line

By the end of Week 1, your team should have a basic understanding of what AI is and is not, clarity about what is safe to try, and a short list of low-risk experiments. Leadership remains responsible for approving which experiments move forward.

Week 1 Checkpoint	Complete?
We explained why we are exploring AI.	
We clarified safe use, ask-first use, and off-limits use.	
We invited the team to identify repetitive or draining tasks.	
We created a short list of possible low-risk experiments.	
Leadership approved which pilots can move into Week 2.	

Week 2: Small Experiments

In the second week, begin testing a few narrowly defined pilots. The responsibility of each pilot owner is not to implement permanent changes yet. The goal is simply to test how AI performs in a real task.

Keep the experiments focused on low-risk administrative and communication work. Examples include drafting an onboarding checklist, building a meeting agenda, creating a script for explaining a new product, summarizing a long policy document, or turning a recurring problem into a simple workflow checklist.

Step 1: Choose Two or Three Pilots

Do not test everything. Choose two or three narrow experiments that are likely to produce useful learning.

Pilot	Task to Test	Owner	Deadline	Approved by Leadership?
Pilot 1				
Pilot 2				
Pilot 3				

Step 2: Define Each Experiment Clearly

A good AI experiment should be specific enough that you can evaluate whether it helped.

Experiment Question	Pilot 1	Pilot 2	Pilot 3
What task are we testing?			
What output do we want AI to create?			
What problem is this supposed to make easier?			
What information will we give AI?			
Who will review the output before use?			

Step 3: Use the Four-Part Prompt Framework

Use this structure to keep your experiments focused.

Framework Part	What to Include
Context	The situation, task, audience, current problem, and desired outcome.
Identity	The role you want AI to play, such as trainer, communication coach, operations consultant, or patient experience writer.
Questions	Ask AI to ask you 3 questions, one question at a time, before completing the task.
Task	The specific final output you want: script, checklist, agenda, summary, training outline, or email.

Prompt template:

I run an independent optometry practice. I want help with [specific task or problem]. The current challenge is [describe friction]. You are a [role/expertise]. Before completing the task, ask me 3

questions, one question at a time, to gain deeper context. After I answer, create [specific output] in a tone that is clear, practical, and human.

Step 4: Check In Every Few Days

Short check-ins keep experimentation visible and prevent people from drifting outside the guardrails. Use the same three questions each time.

Pilot	Did it save time?	Did it improve clarity or structure?	Did it introduce confusion or extra work?	Notes
Pilot 1				
Pilot 2				
Pilot 3				

Week 2 Finish Line

By the end of Week 2, each pilot should have produced a first draft, early learning, or a clear reason to stop.

Week 2 Checkpoint	Complete?
We selected two or three narrow pilots.	
Each pilot has an owner.	
Each pilot stayed within approved guardrails.	
We reviewed outputs before use.	
We used the three evaluation questions.	

Week 3: Shared Learning

By the third week, patterns usually begin to emerge. Some experiments will clearly show value, while others will prove less useful. Both outcomes are valuable because both teach the practice something.

The goal of Week 3 is to compare notes, improve prompts, and build organizational AI literacy. If someone discovers that AI can reduce a 45-minute task to 10 minutes, talk about it. These small examples help build confidence across the team.

Step 1: Compare What Happened

Bring the team together and review the pilots honestly.

Learning Question	Notes
Which tasks benefited most from AI?	
Where did AI struggle?	
What prompts worked better than others?	
What concerns came up?	
What did we learn about how to use AI responsibly?	

Step 2: Capture Better Prompts

When a prompt works well, save it. When a prompt produces generic output, improve it. The team is not just learning AI tools; they are learning how to think more clearly about the work.

Pilot	Original Prompt	What We Changed	Improved Prompt or Notes
Pilot 1			
Pilot 2			
Pilot 3			

Step 3: Improve the Workflow

A successful pilot may need a small process adjustment before others can use it. Decide whether the output should become a checklist, template, script, SOP, training resource, or meeting tool.

Useful Output	What It Should Become	Where It Should Live	Who Needs Access?

Week 3 Finish Line

Leadership's role during this phase is to identify which experiments are worth continuing and which should stop.

Week 3 Checkpoint	Complete?
We compared results from each pilot.	
We identified where AI helped and where it did not.	
We captured prompts worth reusing.	
We refined at least one promising use case.	
Leadership identified which experiments should continue.	

Week 4: Decide What Moves Forward

The final week is for reflection and decision-making. Do not expand a use case just because it was interesting. Expand it because it saved meaningful time, improved consistency, reduced cognitive load, or gave the team a genuinely useful starting point.

If the answer is yes, document the workflow, share the prompt, and expand the use case to others on the team who could benefit. If the answer is no, that is still a win. You learned where AI is not the right tool, and that knowledge is worth something too.

Step 1: Evaluate Each Pilot

Use this scorecard to decide what should move forward.

Pilot	Saved Meaningful Time?	Improved Consistency or Clarity?	Reduced Cognitive Load?	Required Heavy Revision?	Decision

Pilot 1					Continue / Stop / Revise
Pilot 2					Continue / Stop / Revise
Pilot 3					Continue / Stop / Revise

Step 2: Document What Works

For any pilot that moves forward, capture the workflow so it can be repeated safely.

Documentation Question	Answer
What task will AI help with?	
Who is allowed to use this workflow?	
What prompt should they use?	
What information should they provide?	
What must be reviewed before use?	
Where will the final approved output live?	

Step 3: Reinforce the Guardrails

As confidence grows, it is important to reinforce boundaries. AI remains a tool that supports professional judgment, not a substitute for it. The human is still in the loop.

Guardrail Reminder	Team Agreement
We do not enter sensitive patient information into public AI tools.	
We review AI output before using it.	
We edit for accuracy, tone, and practice voice.	
We use AI to support judgment, not replace it.	
We ask when we are unsure.	

Week 4 Finish Line

By the end of the month, your practice should have three things: a team that understands the basics of AI, real experience using it in everyday tasks, and a handful of practical use cases that demonstrate genuine value.

End-of-Month Outcome	Notes
Our team understands the basic guardrails.	
We tested AI in everyday tasks.	
We identified what helped.	
We identified what did not help.	
We documented at least one workflow worth continuing.	

Final 30-Day Summary

Use this page to summarize what your practice learned.

Reflection Question	Answer
What did AI help us do better?	
Where did it save time?	
Where did it improve clarity or structure?	
Where did it create confusion or extra work?	
What use case should we continue?	
What use case should we stop or revisit later?	
What is the next small experiment we should try?	

AI Literacy Is Becoming a Leadership Responsibility

If your practice does not provide structured guidance, your team may still experiment with AI on their own. Avoiding the conversation does not prevent the behavior. It only removes your ability to shape it.

That is why the first 30 days matter. You are not trying to become an AI expert. You are creating a safe, practical starting point for your team to learn deliberately, test responsibly, and expand what works.

The Decision in Front of You

The real decision is not whether AI will show up in your practice. It almost certainly will. The real decision is whether you want to shape how it shows up or let it show up on its own.

You do not need to understand how AI works under the hood. You need to be curious enough to try something small, honest enough to evaluate it fairly, and willing enough to let what works change how you lead.

Start somewhere. Start this week. The rest will follow.

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