



Suhas Bhairav

AI Board Update Preparation Kit

Turn operating data into crisp, action-ready board updates.

A practical, repeatable process to craft AI-informed board updates that drive decisions.

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suhasbhairav.com

Board Update Structure

Define the data, narrative, and workflow that makes AI-powered board updates practical. Focus on weekly cadence and concise storytelling.

Key move Create a weekly data pull script and AI draft, with human review before submission

PRACTICAL CHECKLIST

- 01** Align metrics to board questions; pick 3-5 core KPIs with trend context.
- 02** Automate data collection from ERP, CRM, and product analytics with scheduled refresh.
- 03** Use AI to draft concise narratives; humans validate tone, accuracy, and decisions.
- 04** Add a top risks section with owners and mitigations.
- 05** Maintain a decisions log with status and due dates.
- 06** Present 90-day outlook and key milestones.
- 07** Use color-coded visuals for quick executive scan.

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Data to Board Pipeline

This page describes the end-to-end flow from data sources to a board-ready narrative. It distinguishes what to automate, what to review, and who owns each step.

Key move Establish a single owner per data source to ensure accountability

PRACTICAL CHECKLIST

- 01** Data sources: ERP, CRM, project portfolio, product analytics; define owner and refresh cadence.
- 02** Automate extraction and transformation with lightweight scripts or notebooks.
- 03** AI-assisted narrative: AI drafts sections; humans validate tone, accuracy, and decisions.
- 04** Data quality: ensure data quality checks and lineage logging.
- 05** Access controls: role-based access and sensitive data masking.
- 06** Tools: dashboards in BI tool, GPT/Claude-style agent for draft comments.
- 07** Week-by-week pilot: Week 1 connect sources; Week 2 automate draft; Week 3 implement review; Week 4 publish with feedback loop.

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Governance, Risk & Ownership

This page codifies guardrails, approvals, and success metrics for AI-driven board updates. It defines ownership and how progress is measured.

Key move Prioritize human review of strategic claims; AI should inform, not decide.

PRACTICAL CHECKLIST

- 01** Guardrails: Limit AI-generated content to concise narrative; require human-in-the-loop for risk and strategy sections.
- 02** Approvals: Define approval flow: data accuracy, draft narrative, and final publish.
- 03** Roles & ownership: Assign owners for data sources, AI drafts, narrative, and board liaison.
- 04** Metrics: Measure cycle time, update accuracy, stakeholder satisfaction, and error rate.
- 05** Compliance: Ensure data privacy, security, and regulatory considerations are satisfied.
- 06** Risk tracking: Maintain a risks backlog with owners and mitigations; review weekly.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

WEBSITE

suhasbhairav.com

EMAIL

suhasbhairav@gmail.com