



Suhas Bhairav

AI Project Documentation System

**A structured system for briefs, decisions, plans,
and status across PM teams.**

One coherent system to capture briefs, decisions,
plans, statuses, and history.

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suhasbhairav.com

Automate What Matters

Automate routine capture and status updates while keeping critical judgments human reviewed. Identify data sources and AI-ready templates to anchor the workflow.

Key move Start with a single project, iterate weekly, and document decisions in the same system.

PRACTICAL CHECKLIST

- 01** Automate: project briefs capture from intake forms and kickoff notes using a standard template.
- 02** Automate: status updates by pulling progress from task boards (Jira, Asana) and calendar milestones.
- 03** Automate: risk monitoring by flagging overdue tasks or blockers from issue trackers.
- 04** Automate: deliverable checklists and acceptance criteria with versioned templates.
- 05** Automate: meeting notes capture via AI summarization of recordings or notes.
- 06** Keep human review: final decisions, risk escalations, and scope changes, before sign-off.
- 07** Define data sources and toolchain for each artifact; ensure access controls and audit trails.

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Data, Tools, and Governance

Identify data sources, templates, and access controls needed to support automation. Establish governance for data quality and usage.

Key move **Guardrails: enforce data accuracy, secure access, and audit trails.**

PRACTICAL CHECKLIST

- 01** Inventory artifacts: briefs, decisions, risks, statuses, and deliverables; standardize field names and data types.
- 02** Templates: create versioned templates for briefs, risks, and status reports.
- 03** Data sources: connect PM tools (Jira, Asana), calendars, email, and chat logs.
- 04** Data quality: validate inputs, deduplicate, and enforce field formats.
- 05** Access controls: role-based access, audits, and change history.
- 06** AI agents and tools: Claude and ChatGPT used for drafting, summarization, and auto-fill.
- 07** Governance: define data steward, system owner, and approval flows.

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Adoption and Governance

Adoption is staged with pilots and clear ownership. Align approvals, metrics, and accountability.

Key move Document decisions in the same system; avoid parallel notes.

PRACTICAL CHECKLIST

- 01** Week 1: set up templates, connect data sources, assign owners.
- 02** Week 2: run a pilot for one project; collect feedback and adjust templates.
- 03** Week 3: expand to two additional projects; enforce version history.
- 04** Week 4: require AI-generated briefs to be reviewed by PM lead before distribution.
- 05** Approvals: require sign-off from PM and sponsor for major changes.
- 06** Metrics and guardrails: monitor adoption, data quality, review latency, and escalation for unresolved risks.
- 07** Ownership: assign a system owner per artifact type and a data steward.

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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

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