

Co-Building Workshop

Preparation Guide & Stack Checklist

What happens in each phase, who we need from your team, and what to have ready so the first session builds something real.

The three-phase workshop lifecycle

PHASE 1

Alignment & Opportunity Mapping

We map the workflows worth automating, set security guardrails, and align leaders on the revenue and retention metrics that matter.

You leave with: a map of your highest-value workflows and a leadership team pointed the same way.

PHASE 2

Live Co-Building & Prototyping

We co-build working AI agents with your team in live sessions, inside the software you already use. Each session ends with a prototype your people have run themselves.

You leave with: working custom AI agents running in your own stack.

PHASE 3

Production Deployment & Full Handoff

We move all custom code and tools into your environment, train your internal champions, and measure results against your own metrics.

You leave with: full ownership of every system, a trained internal team, and no vendor lock-in.

Who we need from your team

ROLE	WHAT THEY DO	WHEN
Executive sponsor	Names the business metrics, clears blockers, and signs off on priorities.	Phase 1, then checkpoints
Workflow owner	Knows the process end to end and decides what "working" means.	All three phases
IT / security lead	Approves guardrails, grants tenant and tool access, and reviews the deployment.	Phases 1 and 3
Technical owner	A developer or systems admin who co-builds with us and owns the repository after handoff.	Phases 2 and 3
Internal champions	Two or three people who do the work today. They test each prototype and train their peers.	Phases 2 and 3

Before the first session

- ☐ Name the five roles above and confirm their calendars.
- ☐ Pick two or three candidate workflows, with one example of each done by hand.
- ☐ Agree the metric each workflow should move.
- ☐ List the AI licenses you already own.
- ☐ Confirm sandbox or test access to the systems involved.
- ☐ Share your data handling and security policies.
- ☐ Create or nominate a Git repository in your organization for the build.
- ☐ Complete the stack checklist below.

Stack checklist

Tick what you run today. We work inside your existing stack, so nothing here is a requirement.

CRM	☐ Salesforce ☐ HubSpot ☐ Microsoft Dynamics 365 ☐ Zoho CRM ☐ Pipedrive
LLM models	☐ OpenAI (GPT, ChatGPT Enterprise) ☐ Anthropic (Claude) ☐ Google Gemini ☐ Microsoft Copilot / Azure OpenAI ☐ Perplexity ☐ Meta Llama ☐ Mistral
Orchestration	☐ LangChain ☐ LlamaIndex ☐ LangGraph ☐ Microsoft Copilot Studio ☐ n8n ☐ Zapier ☐ Make
Vector databases	☐ Pinecone ☐ Weaviate ☐ Qdrant ☐ Milvus ☐ Chroma ☐ pgvector (PostgreSQL)
Cloud and workspace	☐ Microsoft Azure ☐ AWS ☐ Google Cloud ☐ Microsoft 365 ☐ Google Workspace
Data platforms	☐ Snowflake ☐ Databricks ☐ BigQuery ☐ PostgreSQL ☐ SQL Server
Identity	☐ Okta ☐ Microsoft Entra ID ☐ Google Cloud Identity
Git hosting	☐ GitHub ☐ GitLab ☐ Bitbucket ☐ Azure DevOps
Something else	Write it in. We work with every tech stack: _____

How handoff works

1. The build lives in a Git repository inside your organization. Your technical owner holds admin rights.
2. At handoff we transfer all custom code, workflows, prompts and documentation into that repository.
3. We walk your technical owner and champions through running, changing and extending each agent.
4. Our access is removed. You keep everything.

No retainer dependency. Nothing we build needs an ongoing contract with The Alliance to keep running. Ready to start? Get your blueprint at aiworkforcealliance.com/find-your-ai-tool-match.