

Job Re-design Worksheet

For: Function leads and managers · Type: Worksheet

ROLE _____

TEAM / FUNCTION _____

AGENT(S) INVOLVED (attach the Agent JD) _____

COMPLETED BY / DATE _____

Separate what the AI agent handles from what the human owns, define the hand-offs between them, and measure whether the redesign is working.

How to use it

- 1

Pick one role, ideally one an agent is already touching or is about to.
- 2

Complete it with the role’s manager and at least one person who does the job today. They know where the time actually goes.
- 3

Work through the steps in order. Steps 1 and 2 take the most time and matter the most.
- 4

Use the result to brief the team with the Manager’s Team Conversation Script, and to update the formal job description.

The examples follow a patient-support specialist in a rare-disease team.

1

Map the role today

List the main activities the role performs now. Be specific: “pulling records before a patient call” not just “admin”.

Activity	Frequency	Hours per week	Judgment required High / Medium / Low	Direct impact on patient or HCP High / Medium / Low
Pulling records, forms, and benefit details before each patient call	Daily	10	L	L
Patient conversations: onboarding, adherence, concerns	Daily	14	H	H
Logging interaction notes in the CRM	Daily	5	L	L
Drafting follow-up letters and reminders	Weekly	4	M	M
Identifying and reporting possible adverse events	As needed	2	H	H

2 Decide who owns each activity

Use the two ratings from Step 1 as a guide:

Low on both ratings

The agent handles it.

Medium on either rating, and neither High

Shared. The agent prepares or drafts; the human reviews and decides.

High on either rating

The human owns it. The agent may support with information.

Activity	Agent handles	Shared	Human owns	Why
Pulling records and forms	☒	☐	☐	Repetitive retrieval from approved systems
Drafting follow-up letters	☐	☒	☐	Agent drafts; specialist personalizes and approves
Patient conversations	☐	☐	☒	Trust, empathy, and judgment on each case
Adverse-event reporting	☐	☐	☒	Regulatory obligation; agent flags signals, human reports
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	

3 Redraw the role

Bring Step 2 together into the new shape of the job.

What the agent now handles	What the human now owns
Pulling records and pre-reading before each patient interaction; first drafts of follow-ups; logging notes	Every patient conversation; deciding what matters for each patient; final sign-off on outreach; adverse-event reporting

Time freed per week: _____ hours (e.g. ~15 hours)

Where should that time go? Tick what becomes more important for this role, then make it specific below.

- ☐ Deeper customer or patient relationships
- ☐ Strategic or cross-functional work
- ☐ Judgment on complex or unusual cases
- ☐ Taking on a new therapy area, indication, or patient group
- ☐ Handling exceptions and escalations
- ☐ Other: _____
- ☐ Coaching or supporting colleagues

New or expanded focus	Why it matters	Skills or support needed
Support patients on a second indication	More patients served without adding headcount	Training on the new indication; updated call guides

4 Define the hand-offs

Question	Your answer	Example
When must the agent stop and hand over to the human?		Any sign of a possible adverse event, complaint, or patient distress in a record
What needs human approval before it goes out?		Every follow-up letter or reminder to a patient
How does the human correct or override the agent?		Edits the draft directly; flags recurring errors to the technical owner
How are exceptions, complaints, and adverse events escalated?		Agent flags the signal; the specialist reports it through the standard pharmacovigilance process
Who is accountable for the final outcome?		The patient-support specialist, with the team manager as escalation
Who can switch the agent off?		The technical owner, on request from the business owner

5 Plan the transition

Action	Owner	By when
Training on working with the agent (reviewing, correcting, escalating)		
Training for new or expanded responsibilities (Step 3)		
Formal job description updated and signed off, with HR		
Team briefed using the Manager's Team Conversation Script		

6 Measure success

Take the "before" reading now. Check again at 30 and 90 days.

Measure	Before	Target	30 days	90 days
Hours per week on low-value tasks				
Quality (e.g. error rate, compliance findings)				
Employee confidence in the new role (1–5)				
Customer or patient impact (e.g. time to first contact, satisfaction)				
Adoption (share of eligible work routed through the agent)				

Check the redesign

- ☐ The person spends more of their time on higher-value work.
- ☐ Accountability for every outcome sits with a named human.
- ☐ Each person could describe their new role in one sentence.
- ☐ The role is better with the agent, beyond being lighter.
- ☐ You would be comfortable explaining this redesign face to face.

Any unticked box is the next thing to fix before the redesign goes live.

NEXT Brief the team with the **Manager's Team Conversation Script**.