VEXASI ACADEMY RESOURCE

AEC AI Workflow Starter Kit

7 practical workflows for architects, engineers, BIM/VDC teams, project managers, and AEC firm leaders.

Version

Version 1.0 | 2026

Brand

VexASI Academy

Audience

AEC professionals and firms

Inside the Starter Kit

- Safe AI usage rules for AEC teams
- Meeting notes to action log workflow
- RFI/submittal drafting workflow
- Drawing review / QA checklist workflow
- BIM data validation workflow
- Proposal and business development workflow
- Firm AI readiness checklist

How to Use This Kit

VexASI Academy provides practical AI operations training for AEC professionals and firms. This starter kit is a first-pass operating resource for teams that want safer AI usage, clearer review habits, and workflows that can be tested without pretending AI outputs are automatically correct.

Recommended Pilot Pattern

- Pick one workflow with low confidentiality risk.
- Define the source material, owner, expected output, and review step.
- Run a controlled test with non-sensitive or approved internal material.
- Document what worked, what failed, and what must be reviewed.

Intended Users

- Architects and design teams
- Engineers and technical discipline leads
- BIM/VDC teams
- Project managers
- AEC firm leaders
- Business development and marketing teams

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1. Safe AI Usage Rules for AEC Teams

AI tools can help with drafting, summarizing, classification, comparison, and workflow support. They should not be treated as independent professional judgment.

Do not paste confidential client, project, employee, financial, or proprietary data into unapproved tools.

Do not use AI output as final project advice without qualified human review.

Do not rely on AI for code compliance, life safety, sealed documents, or project-specific professional conclusions.

Keep original source material attached to any AI-assisted output that affects project records.

Label AI-assisted drafts clearly during internal review.

Confirm facts, dates, names, standards, quantities, and references against source material.

Use firm-approved tools and follow internal data-handling rules.

Escalate unclear, high-risk, or client-sensitive use cases before testing.

MINIMUM REVIEW GATE

- Source material is known and approved for the tool.
- Output has an assigned human reviewer.
- Reviewer checks facts, assumptions, omissions, and tone.
- Final use is documented according to firm policy.

2. Meeting Notes to Action Log Workflow

Purpose: Turn project meeting notes into a structured action log that can be reviewed by the project manager before distribution.

Best-Fit Inputs

- Internal meeting notes
- Approved transcript excerpts
- Agenda and attendance list
- Prior action log

Suggested Output Fields

- Action item, owner, and due date
- Source note and status
- Dependency
- Risk or escalation needed

AI-ASSISTED STEPS

1

Extract Structure

Ask the tool to extract decisions, open questions, action items, owners, due dates, and dependencies.

2

Flag Gaps

Ask it to flag unclear ownership, missing dates, and unresolved decisions.

3

Compare With Prior Log

Ask it to compare the new notes against the prior action log.

4

Review Before Distribution

Have the PM review every action item before it enters the project record.

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3. RFI/Submittal Drafting Workflow

Purpose: Support first-draft structure for RFIs, submittal comments, and response summaries while keeping qualified review in control.

Best-Fit Inputs

- Approved RFI or submittal text
- Relevant spec excerpts
- Drawing references supplied by the project team
- Prior approved response examples

Review Checklist

- Are all references traceable to supplied material?
- Did the tool invent requirements, dates, dimensions, products, or approvals?
- Is the response framed as a draft for review?
- Does the responsible professional agree with the conclusion?

Do not use this workflow to bypass professional review, contract requirements, client review, or authority having jurisdiction processes.

4. Drawing Review / QA Checklist Workflow

Purpose: Help project teams organize review comments and checklist coverage before formal QA/QC review.

AI-Assisted Steps

- Convert a QA checklist into a discipline-specific review table.
- Map comments by sheet, discipline, severity, owner, and status.
- Identify missing fields, duplicate comments, and vague issue language.
- Route final comments to discipline leads for review.

Suggested Output Fields

- Sheet or model area
- Discipline and issue summary
- Source comment and severity
- Owner, status, and required follow-up

5. BIM Data Validation Workflow

Purpose: Support structured review of model data exports, naming consistency, and coordination dashboards.

Best-Fit Inputs

- Approved model data exports
- Equipment schedules
- Room data sheets
- Naming standards
- Clash or coordination logs

Review Checklist

- Are validation rules explicitly supplied?
- Did the tool preserve IDs and source rows?
- Are exceptions grouped in a useful way?
- Are downstream changes made only through approved workflows?

6. Proposal and Business Development Workflow

Purpose: Help marketing and business development teams assemble pursuit research, win themes, and draft outlines with clear review.

AI-Assisted Steps

- Summarize client priorities and stated evaluation criteria from source material.
- Map relevant firm experience to those priorities.
- Draft a proposal outline, interview prep questions, or pursuit briefing.
- Route claims to BD, marketing, and technical leaders before external use.

Review Checklist

- Are all client claims source-backed?
- Are firm experience claims accurate and approved?
- Does the draft avoid unsupported guarantees?
- Has the technical team reviewed scope-sensitive language?

7. Firm AI Readiness Checklist

Purpose: Help leadership decide whether the firm is ready to expand AI usage beyond isolated experiments.

- Policy: Approved tools, restricted data, review expectations, and escalation are clear.
- Ownership: AI adoption has named business, technical, and risk owners.
- Training: Role groups know what AI can and cannot be used for.
- Workflow selection: Pilots are chosen by value, repeatability, and risk level.
- Review gates: Consequential outputs require qualified human review.
- Data boundaries: Teams understand client, project, employee, financial, and proprietary restrictions.
- Tool control: The firm knows which tools are allowed and why.
- Measurement: Pilots track time saved, quality issues, adoption, rework, and failure cases.
- Documentation: Prompt patterns, workflow steps, and review notes are captured for reuse.
- Roadmap: The firm has a sequence for pilot, revise, scale, or retire decisions.

> **Disclaimer:** This starter kit is educational material for professional training and workflow planning. It is not legal advice, code-compliance advice, sealed architectural or engineering review, project-specific professional advice, or a substitute for qualified professional judgment. AI outputs can be incomplete, inaccurate, or misleading and must be reviewed before use in project, client, contractual, regulatory, or business-critical contexts.

VexASI Academy is designed with professional training standards in mind and may support a future CE-ready pathway. This resource does not claim AIA CE approval, HSW approval, state licensure credit, certification status, or approved continuing education.

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Practical AI Operations Training for AEC Teams

For firm training, launch updates, or role-specific AI workflow support, contact VexASI Academy.

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vexasi.com/academy | intel@vexasi.com

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