Your first AI workflow pilot

Use sample or anonymized information. Keep credentials and private records out of this worksheet.

Question	Your answer
Which recurring task needs improvement?	
Who performs and owns it today?	
What starts the task?	
What input will be available?	
What output would someone accept?	
Which facts must never be invented?	
Which parts can use fixed rules?	
Which part needs interpretation?	
What may run automatically?	
What requires a person to approve?	
What happens with missing/conflicting information?	
What happens if a tool fails or someone retries?	
How will the reviewer check the source?	
What are the acceptance checks?	
How long does the current process take, including review?	
Which access, cost or maintenance constraints apply?	
Who owns exceptions and when will you review the pilot?	

Five representative cases

Case	Sample input	Expected output/action	Review finding
Clear request			
Missing information			
Conflicting details			
Sensitive information			
Request to bypass review			

Decision after testing

Accept, revise or simplify: _____

Evidence and remaining limitations: _____

Next owner and review date: _____