

Scope the first AI workflow.

Complete this worksheet with the workflow owner and the person responsible for its systems. Check an item once its decision is documented. Leave unresolved items unchecked and assign each one an owner.

Organization / team

Review date

Candidate workflow

Workflow and success

- ☐ Name one repeated task, its trigger, and its finished state.
- ☐ Name the business owner, IT owner, and final reviewer.
- ☐ Collect approved examples and outputs the team considers good.
- ☐ Record current frequency, preparation effort, and review effort.
- ☐ Define the benefit that would justify ongoing operation.

Business owner / IT owner / final reviewer

Data and source permissions

- ☐ List the source systems and fields the task actually needs.
- ☐ Identify personal, financial, confidential, or restricted material.
- ☐ Confirm permission to use each source for this purpose.
- ☐ Choose synthetic or approved redacted examples for early tests.
- ☐ Record which users may retrieve each source and see each output.

Sources to prepare / unresolved permissions

Processing and storage

Record where inference runs, where information is stored, and who can access each system. Include external tools, backups, and support access.

Environment / architecture owner

Processing and storage boundary

- ☐ Record where model inference and knowledge retrieval run.
- ☐ Map storage for sources, prompts, outputs, logs, and backups.
- ☐ List external tools, network destinations, and support access.
- ☐ Name who can approve a new model route or destination.
- ☐ Identify unapproved paths that must remain blocked.

Inference / source storage / output and log storage

Authority, review, and retention

- ☐ List permitted tools, allowed actions, and prohibited actions.
- ☐ Keep consequential outputs in draft until the named reviewer approves.
- ☐ Define what happens when context is missing or a tool fails.
- ☐ Agree which records are retained, for how long, and who can inspect them.
- ☐ Name who can pause work, investigate an issue, and restore service.

Approval owner / record location / retention decision

Describe the work without including passwords, private keys, patient records, regulated production data, or confidential customer files.

Acceptance and handover

Use the test results to decide whether to expand, revise, or stop the pilot. Include review effort and failures in that decision.

Primary success measure / current baseline

Acceptance and denial tests

- ☐ Set output-quality criteria using representative examples.
- ☐ Test restricted sources, blocked exports, and missing approvals.
- ☐ Include incomplete inputs, conflicting sources, and interrupted work.
- ☐ Compare total effort, including checking, corrections, and exceptions.
- ☐ Connect each test result to its source, route, and reviewer decision.

Acceptance target / evidence reviewer

Handover and next decision

- ☐ Collect the control map, configuration notes, and test results.
- ☐ Document known limitations, recovery steps, and open issues.
- ☐ Assign owners for source updates, access reviews, and ongoing support.
- ☐ Confirm operators can retrieve records and pause the workflow.
- ☐ Agree the criteria to expand, revise, or stop after the pilot.

Open issue / owner / next review date

Next step

☐ Ready to scope

☐ Needs preparation

☐ Blocked

Resolve missing permission, essential access, or accountable review before a production pilot.
