



WONDERWAVE TECH

# Private AI Pilot Readiness Checklist

Use this worksheet to choose one sensitive workflow, map the data boundary, and prepare for a private AI pilot review before exposing customer, patient, financial, legal, or operational data.

## Strong first pilot

Repeats often, has clear inputs, can use sample or redacted data first, and includes human approval before action.

## Needs boundary work

Touches regulated records, private customer files, credentials, finance decisions, legal judgment, or actions without review.

## 1. Identify the business context

PLANNING ITEM	ANSWER
Business type: clinic, law firm, accounting/finance, local service, other	
First workflow candidate	
Workflow owner	
Current software stack	
Sample or redacted data available?	

## 2. Score the workflow

QUESTION	SCORE 1-5	NOTES
How often does this workflow happen?		
How much time does the team spend on it?		

Are the inputs consistent enough to test?		
Can a human review outputs before action?		
Can success be measured clearly?		

### 3. Map sensitive data

DATA CATEGORY	PRESENT?	HANDLING NOTES
Patient, client, customer, or account records		
Legal, privileged, or case/matter information		
Financial, tax, payment, or identity information		
Employee, applicant, or contractor data		
Credentials, private keys, or system secrets		
Operational records, pricing, vendor, or customer notes		

### 4. Define the pilot controls

CONTROL	DECISION
Approved source documents or systems	
People allowed to use the workflow	
Data that should be redacted, blocked, or warned on	
Human approval point before customer/client/patient impact	
What the AI should never decide or say	
Audit events the team wants to review	

### 5. Pilot review prep

**Bring**

- One workflow you want to improve.
- Current tools and source locations.
- Sample or redacted examples.
- Known restrictions, timeline, and owner.

**Avoid sending**

- Passwords or private keys.
- Production regulated records.
- Confidential files before a written agreement.
- Data you cannot authorize for review.

**Decision rule:** If the workflow scores high on repetition, measurable value, and reviewability, it may be a strong

private AI pilot. If sensitivity is high and reviewability is low, begin with a data-boundary review before building.