AI readiness worksheet

Assess one workflow. Fill this out with the people who do the work and the person who can approve a change. Use record types and sample IDs in place of private data.

Workflow and business outcome	Workflow owner	Review date

1. Map the work as it happens today

Include manual handoffs, queues and what happens when a record is missing.

	Owner and action	Input, output and exception
Intake		
Work		
Review		
Closure		

2. Identify the evidence

Record where each fact comes from, how current it is, and what it can prove.

	Record or system	Owner and freshness	Evidence and gaps
Source 1			
Source 2			
Source 3			

Constraints and permissions (systems, actions and data outside scope)

Make the decision

Compare the options against the same workflow. If a pilot is justified, agree on the sample, acceptance criteria and who reviews exceptions before running it.

3. Compare the options

	What changes	Why it fits, or why it should wait
Process change		
Conventional rule		
Human-reviewed AI		
Hold or gather data		

Selected option, reason and accountable owner

4. Set the test and acceptance criteria

Use normal, incomplete and conflicting cases. Record the sample and time period.

	Current baseline and sample	Target or pass threshold
Median time per case		
Correction rate		
Drafts supported by evidence		

Sample, test period and review date

Stop conditions, escalation owner and actions that need human approval

Reviewer, decision and next step