

01 / CHOOSE A STARTING POINT

AI or ordinary automation?

Use the simplest tool that does the job. Work through one task at a time.

Company / team: _____

Date: _____

01 Describe the task

Input, expected output, and the person who owns the result

02 Does the task follow clear, repeatable rules?

☐ Yes - predictable steps ☐ No - interpretation ☐ Not sure yet

RECOMMENDED APPROACH

Predictable steps: ordinary automation

Use rules for known fields, approved records, and scheduled reminders. Write down exceptions and handoffs.

Interpretation: a small AI pilot with review

Summaries, drafts, and classification may benefit from AI. Define approved sources, useful results, and human checks.

Not sure: map the workflow first

List inputs, decisions, exceptions, and people. Clarify the task before selecting a tool.

Your recommended approach and the evidence behind it

02 / KEEP PEOPLE AT THE DECISION POINTS

AI or ordinary automation?

A suggested next step is different from an approved action. Make review explicit.

Task: _____

Date: _____

03 Plan checking and correction

Reviewer and source information they need

What must be checked before records change or customers see a result?

How can a person correct a result or handle an exception?

04 Combine tools only when useful

A combined workflow can use AI to prepare information, rules to validate and route it, and a person to approve it. Judge the whole process, including review work.

Proposed steps: input > rules / AI > human review > approved action

Small test: sample, usefulness, reliability, review time, and cost

Next action, owner, and review date
