WORKING TEMPLATE

AI workflow pilot brief.

Describe the process, data, access, human control and acceptance criteria for an internal AI pilot.

Company or project	Prepared by	Date

1. Process

Name, trigger, owner, users, steps, handoffs, exception paths and final system of record.

2. Baseline

Cases per month, handling and review minutes per case, queue time, error or rework rate and current cost per completed case. Note the source and date of each measurement.

3. Data

Required sources, business owner, current version, quality gaps, update cycle and sample availability. Distinguish documents from live structured records.

4. Access

Allowed users and groups, account boundaries, read and write permissions, retention and hosting requirements, and logging owner. Check retrieval and actions against source permissions.

5. Proposed workflow

What is retrieved, summarised, drafted or changed? What can conventional search or rules already handle?

6. Human control

Who approves external messages, commercial commitments and system updates? Which cases must stop or escalate? What happens if a connected system fails?

7. Test set

Authorised, representative historical cases and separate held-out cases, with expected answers or actions and source evidence. Include ambiguous cases, outdated or missing data, restricted documents and misleading source instructions.

8. Acceptance

Task quality, error severity, review effort, cycle time, access tests, adoption and operating cost. Set thresholds before the pilot and name the decision owner.

9. Economics

Monthly cases × reduction in end-to-end handling minutes ÷ 60 = potential capacity hours. Confirm whether capacity becomes cash savings. Include implementation, licences, usage, support and evaluation cost. Do not count the same benefit twice.

10. Delivery

Responsible internal team or vendor, dependencies, timing, rollout limits, monitoring, rollback and go/no-go meeting.

> Use internally. Share process and system names first; do not send confidential datasets through an initial website enquiry.