

AI workflow pilot readiness checklist

Prepare a narrow pilot with observable outputs, clear permissions and a safe exception path.

Pilot workflow / boundary

Pilot owner

- ☐ **Set the operational outcome**
Define the measurable problem and record the current baseline.
- ☐ **Map records and handoffs**
Name each system of record, owner and upstream/downstream dependency.
- ☐ **Confirm that AI is needed**
Separate deterministic steps from the interpretation task.
- ☐ **Approve data and permissions**
Identify permitted data, provider handling and least-privilege access.
- ☐ **Define validation and approvals**
Specify structured outputs, checks and consequential actions needing review.
- ☐ **Create a representative test set**
Include missing data, conflicts, duplicate triggers and untrusted instructions.
- ☐ **Plan failure and recovery**
Assign monitoring, exception queues, stop conditions and rollback ownership.
- ☐ **Agree the pilot decision gate**
Measure quality, human review, cost and full-workflow outcomes before scaling.

MAKE THE NEXT DECISION

Next decision: start in recommendation-only mode, resolve a control gap, redesign the process, or proceed to a bounded pilot. Completion alone is not permission to grant system access.

What must the pilot demonstrate, and who can stop it when it fails?