

AI Workflow Readiness Checklist

A practical check before a workflow is structured, governed or automated with AI.

What this checklist is for

Use it for one concrete workflow, not the whole company at once. The goal is to see whether context, evidence, boundaries and value are clear enough to start a small pilot safely.

1. Workflow and ownership

- The workflow repeats weekly or monthly.
- There is a clear responsible person or team.
- Input, decision and output can be explained simply.
- The first pilot can be scoped narrowly.

2. Context and sources

- The key screens, documents, emails, spreadsheets or tools are known.
- Sources can be linked or stored in a traceable way.
- Exceptions are visible, not only the normal case.
- Knowledge is not locked in one person only.

3. Evidence and quality

- Outputs should show sources or assumptions where relevant.
- People can check why a suggestion was produced.
- Errors or uncertainty are flagged instead of hidden.
- There is a simple success criterion for the pilot.

4. Boundaries and governance

- Data boundaries are clarified before integrations.
- Roles, access and approvals are named.
- Critical actions require human approval.
- Logging and traceability are part of the design.

5. Business value

- Time loss, rework or coordination cost is visible.
- The first value can be measured with a few metrics.
- Automation does not blindly replace the whole process.
- The pilot improves the highest-friction point first.

Quick decision

0-8 points	Not ready yet. Clarify context and boundaries first.
9-16 points	Pilot possible, but scope it tightly.
17-20 points	Good candidate for a controlled AI workflow pilot.

Brevity builds AI workflows with context, evidence and control. This checklist is directional and not an ROI promise.