

Assess an AI use case before you build

Start with one task your team performs today. Use this worksheet to describe the current process, identify the decisions people need to control and define a small test with clear success criteria.

01 Task and owner

Name the task you want to assess and the person responsible for it.

02 Current process

Describe how the task is performed today, step by step, and the tools involved.

03 Baseline time and errors

Record how long the task takes today and the errors or rework it currently involves.

04 Available data and access

List the data the task requires, where it is stored and who can grant access to it.

05 Decisions requiring review

Identify the decisions a person must validate before an output is used or an action is applied.

06 Test scope

Define a small test: the cases included, the period, the people involved and what is excluded.

07 Success criteria

Set the measures that will show whether the test meets its objective, compared with the baseline.

08 Stop or scale decision

State the conditions for stopping the test, adjusting its scope or planning the next stage.

Review the findings with the people who perform the task. Use the evidence to refine the scope, stop the test or plan the next stage.

Discuss a tailored training session: epicflare.io/contact · contact@epicflare.io