Before-you-buy understanding check

Fill in one card for each AI purchase you are about to approve. Fill in what you know; every blank line gets an owner and a date. Any blank line means: not ready to buy.

QUESTION	ANSWER	OWNER / BY WHEN
The purchase this card is for, and what the vendor claims it does		
What our people wrongly believe AI can do (asked, or assumed?)		
The disappointed: who they are here, and who digs deeper with them before they write AI off		
The convinced majority: what they get taught on how the systems work and where they stop, in plain language		
The over-trusting: who they are, and who tells them production keeps a person in the loop		
Education ahead of this purchase: what the board, executives and employees get, and by when		
One-stop shop: does the pitch promise one system for several jobs (tickets, campaigns, sales)?		
What the vendor has said, in plain words, the system will not do		
The use being funded: does it run without a person? Who catches the first wrong answer?		
Training data: is anyone waiting on a pile we don't need? Who defined the job instead?		
Job description, responsibilities and KPIs for this system, written and owned		
The habit to break here (AI as code, or AI as insight-only), and who owns the change		
Who signs off that the understanding gap is closed before this purchase		
Decision and date	☐ BUY ☐ EDUCATE FIRST ☐ SEND BACK Date _____ Signed _____	

Before-you-buy understanding check

Example (fictional): an AI suite pitched to a furniture retailer

QUESTION	ANSWER	OWNER / BY WHEN
The purchase this card is for, and what the vendor claims it does	A vendor's "AI suite" said to answer support tickets, write product campaigns and score sales leads	n/a
What our people wrongly believe AI can do (asked, or assumed?)	Asked at the team-leads meeting: the support lead expects it to send customer replies unreviewed; two managers expect a six-month training-data project first	n/a
The disappointed: who they are here, and who digs deeper with them before they write AI off	Two store supervisors tried a demo and gave up; their area manager sits with them to dig deeper before they write AI off	Area manager, by 12 Dec
The convinced majority: what they get taught on how the systems work and where they stop, in plain language	A 45-minute session for support and marketing, run monthly	Learning and development lead, from 8 Dec
The over-trusting: who they are, and who tells them production keeps a person in the loop	The marketing lead drafts campaigns with an assistant all week and wants it sending customer email unreviewed; the COO tells her production keeps a person in the loop	COO, at the 1 Dec review
Education ahead of this purchase: what the board, executives and employees get, and by when	Board briefing on what the system will and will not do, 9 Dec; executive and employee sessions through January	Learning and development lead
One-stop shop: does the pitch promise one system for several jobs (tickets, campaigns, sales)?	Yes: one system claimed for tickets, campaigns and lead scoring	n/a
What the vendor has said, in plain words, the system will not do	**Blank: not ready**: the vendor answered with an "orchestration layer" slide; not plain words yet	Procurement lead, in writing by 3 Dec
The use being funded: does it run without a person? Who catches the first wrong answer?	The funded use sends customer replies; no one named to catch the first wrong answer: "the team will notice" **Fails the bar**	Support lead, a named reviewer per shift by 5 Dec
Training data: is anyone waiting on a pile we don't need? Who defined the job instead?	No pile: the project starts from the job: first-line replies to order, delivery and returns questions	n/a
Job description, responsibilities and KPIs for this system, written and owned	Draft written: answer first-line order, delivery and returns questions; KPI: share of replies a person edits before sending	Support lead
The habit to break here (AI as code, or AI as insight-only), and who owns the change	Treating AI as code ("IT sets it up and it just runs"); the COO owns the shift to managing it like a new hire	COO, first review 1 Dec
Who signs off that the understanding gap is closed before this purchase	COO, with the head of support	n/a
Decision and date	**☐ BUY ☒ EDUCATE FIRST ☐ SEND BACK · Date 28 Nov · "Plain-words limits and a named reviewer first; education runs before signatures."**	COO