First AI workflow checklist

Fill in one card per candidate AI workflow, starting with the busiest internal task. Fill in what you know; every blank line gets an owner and a date. Any blank line means: this workflow is not ready to be the first lever.

QUESTION	ANSWER	OWNER / BY WHEN
The candidate workflow (one task, done at volume)		
Margin per decision: what money rides on one decision		
Decision volume: how many of these decisions a week		
Does the output change a price, a promotion, an order or a shelf?	☐ Yes ☐ No	
If yes: guardrails in place before anything goes live		
If yes: the named owner to call when it goes wrong		
Forecasting, optimization or RPA already running on this task		
What the new buy adds over what already runs		
Vendor's specific problem already solved for a retailer (not the platform demo)		
When the vendor's claim runs on our data		
The one KPI we will measure		
The one business process the pilot runs in		
Baseline snapshot: value, date, taken before day one		
Where the pay sits on the margin map (price and markdown, stock and availability, assortment, the product page, store labor, media, shrink)		
Decision and date	**☐ FIRST LEVER ☐ WAIT FOR GUARDRAILS ☐ NOT READY, OWNER BY _____ Date _____ Signed _____**	

First AI workflow checklist

Example (fictional): product-page content rewrite at a housewares chain

QUESTION	ANSWER	OWNER / BY WHEN
The candidate workflow (one task, done at volume)	Rewrites product descriptions and bullets for the web shop, about 2,000 items a month	n/a
Margin per decision: what money rides on one decision	Small: no direct price change, each rewrite nudges conversion on one page	n/a
Decision volume: how many of these decisions a week	About 500 rewrites a week across 60,000 listed items	n/a
Does the output change a price, a promotion, an order or a shelf?	No: pages change, no shopper-visible price, promotion, order or shelf does	n/a
If yes: guardrails in place before anything goes live	n/a (the boundary test answered No)	n/a
If yes: the named owner to call when it goes wrong	n/a (the boundary test answered No)	n/a
Forecasting, optimization or RPA already running on this task	A 6-year-old rules template writes item titles; nothing AI-named runs on content	n/a
What the new buy adds over what already runs	Rewrites bullets and attributes, not just titles; the old template stays	n/a
Vendor's specific problem already solved for a retailer (not the platform demo)	Platform demo only; no named solved problem **Fails the bar**	E-commerce lead, answer by 4 Dec
When the vendor's claim runs on our data	A 200-item trial on our own catalog, week of 8 Dec	E-commerce lead
The one KPI we will measure	Conversion rate on rewritten pages	n/a
The one business process the pilot runs in	Weekly product-content refresh	n/a
Baseline snapshot: value, date, taken before day one	**Blank: not ready**	Data analyst, by 27 Nov
Where the pay sits on the margin map (price and markdown, stock and availability, assortment, the product page, store labor, media, shrink)	The product page	n/a
Decision and date	**☐ FIRST LEVER ☐ WAIT FOR GUARDRAILS ☒ NOT READY, OWNER BY 11 Dec Date 20 Nov "No baseline snapshot and the vendor claim is untested on our data."**	E-commerce director