AI draft and review routing card

Fill in one card per piece of professional work you route. Fill in what you know; every blank line gets an owner and a date. Any blank line means: not ready to hand off.

QUESTION	ANSWER	OWNER / BY WHEN
The piece of work you are routing (contract, letter, response)		
Gate 1: encoded and routine? Contracts and positions already live in a platform? (yes / no)	☐ Yes ☐ No	
If gate 1 is yes: which team serves itself, and what stops it today?		
Gate 2: is it a draft, a summary or a search?		
Who starts from the AI version?		
Gate 3: how high are the stakes? (routine / high)	☐ Routine ☐ High	
Why that rating: dollar size, regulator or deadline?		
Review depth: close review of every AI suggestion and the decisions that follow, or a scan of the redlines?		
Who does that review, and by when?		
Gate 4: which diagnostics run before handoff, including year-over-year anomaly checks?		
Proof of work: how is each figure traced to the exact box or number in its source?		
Who verifies every fact, and who signs?		
What stays outside this card (sizing the review, document review depth, audit work, an agent carrying a whole engagement)		
Decision: route and review depth	☐ SELF-SERVE ☐ AI DRAFT + REDLINE SCAN ☐ AI DRAFT + CLOSE REVIEW ☐ HOLD, NOT READY Date _____ Signed _____	

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Example (fictional): supplier MSA renewal at a mid-size manufacturer

QUESTION	ANSWER	OWNER / BY WHEN
The piece of work you are routing (contract, letter, response)	Redraft of a supplier master services agreement, annual renewal on a routine template	n/a
Gate 1: encoded and routine? Contracts and positions already live in a platform? (yes / no)	Partly: 45 of 60 standard positions live in the contract platform; the rest sit in Word templates	Contract operations lead, finish by 28 Feb
If gate 1 is yes: which team serves itself, and what stops it today?	Sales self-serves standard contracts already; procurement still emails legal for renewals because the renewal clauses are not encoded	Contract operations lead, by 15 Mar
Gate 2: is it a draft, a summary or a search?	A draft: the platform rewrites the MSA against the encoded positions	n/a
Who starts from the AI version?	The procurement manager starts from the AI redraft; legal sees only the redlines	n/a
Gate 3: how high are the stakes? (routine / high)	☒ Routine ☐ High	n/a
Why that rating: dollar size, regulator or deadline?	Template renewal worth about $120,000 a year; no regulator and no negotiation deadline in play	n/a
Review depth: close review of every AI suggestion and the decisions that follow, or a scan of the redlines?	Scan of the redlines; escalate to close review if the supplier contests non-standard terms	n/a
Who does that review, and by when?	Senior counsel, within 2 working days of the redraft arriving	n/a
Gate 4: which diagnostics run before handoff, including year-over-year anomaly checks?	**Blank: not ready** (diagnostic checks and anomaly checks not yet configured in the platform)	Platform administrator, by 20 Feb
Proof of work: how is each figure traced to the exact box or number in its source?	Clause changes show as redlines; figures in the pricing schedule are not traced to the source document: **Fails the bar**	Contract operations lead, by 28 Feb
Who verifies every fact, and who signs?	Senior counsel verifies every fact; the head of procurement signs the renewal	n/a
What stays outside this card (sizing the review, document review depth, audit work, an agent carrying a whole engagement)	The document-review project and the engagement-level agent pilot sit under separate decisions	n/a
Decision: route and review depth	**☐ SELF-SERVE ☐ AI DRAFT + REDLINE SCAN ☐ AI DRAFT + CLOSE REVIEW ☒ HOLD, NOT READY · Date 14 Jan · "Route is AI draft with a redline scan once diagnostics and proof of work land." Signed: General counsel**	n/a