

Fit assessment

Fill this in for one use case, using the figures from the process baseline. A use case that fails a question can often pass in a narrower form. Write the narrower version down and run it through the questions again.

Use case

Process

Completed by

Date

1 Does checking the output cost less than doing the work?

Time to do one item today

Time to check one AI output

Checking as a share of doing

☐ Yes

☐ No. Make the output quicker to check, and leave the decision to a person.

2 Is this step the bottleneck?

Where items wait longest, from tracing a few through the whole process

☐ Yes, the step to automate is one of them

☐ No. Put the effort into the step where work waits.

3 Does the AI have the information a person uses to decide?

Ask the people doing the work what they look at, including email threads, notes and conversations.

SOURCE PEOPLE USE BEFORE THEY ACT

CAN THE AI ACCESS IT?

☐ Yes, all of it

☐ No. Connect the sources, or limit the AI to cases where its information is enough.

4 Would something simpler do the job?

Simpler options considered: a rule, a form, a template, a status field or a query

Items per month

How consistent the cases are

☐ No, AI is needed

☐ Yes, for some or all cases. Use the simpler option there.

RESULT

☐ Passes all four as it is

☐ Passes in a narrower form, described below

☐ Does not fit. Do not pilot it.