

AI Activation Contract Worksheet

Use this before an AI-assisted revenue workflow suggests, assists, routes, updates, or automates live GTM work.

1. Workflow scope

- Workflow name: _____
- Business decision influenced: _____
- Destination surface: CRM / Slack / CS tool / lifecycle platform / forecast note / other
- Expected behavior change: _____

2. Trusted inputs

- Source systems and models: _____
- Entity grain: account / contact / lead / opportunity / subscription / user
- Stable identifiers and match rules: _____
- Freshness threshold: _____
- Reason codes/context shown to users: _____

3. Authority level

- Choose one: suggest / assist / route / act
- Lowest useful launch mode: _____
- What the AI must never do without human review: _____
- Evidence needed before expanding authority: _____

4. Suppression and exclusion rules

- Exclude customers/open renewals/open opportunities: yes / no / needs review
- Exclude opt-outs/legal/privacy/region restrictions: yes / no / needs review
- Exclude support escalations or strategic accounts: yes / no / needs review
- Exclude low-confidence matches or stale records: yes / no / needs review
- Manual review queue owner: _____

5. Owners and rollback

- Business owner: _____
- Data/model owner: _____
- Destination owner: _____
- Exception owner: _____
- Rollback path: pause / revert field / disable route / review queue / other
- Audit trail location: _____

6. Launch decision

- Greenlight only if source trust, owner names, suppression, reason codes, and rollback are all named.
- Launch mode: suggest / assist / route / act
- First review date: _____
- Pause trigger: _____
- Next step if blocked: AI Readiness Audit / Data Foundation / Data Activation / Translate the Ask

How to use the result

- If the contract is incomplete, do not increase AI authority yet.
- Use AI Readiness Audit when authority, review gates, or exception paths are unclear.
- Use Data Foundation when source precedence, identity, CRM hygiene, or model trust is weak.
- Use Data Activation when the contract is clear and the workflow needs governed implementation.