

AI Pilot Exception-Handling Worksheet

Domain Methods

USE THIS WORKSHEET BEFORE AN AI-ASSISTED WORKFLOW REACHES PRODUCTION PRESSURE

The goal is not to make every case look automated. The goal is to name what happens when the workflow leaves the happy path so the team can still trust the output.

PILOT BASICS

- Workflow name:
- Decision owner:
- Downstream action:
- Tool or queue where the action lands:
- Business cost if the output is wrong:

HAPPY PATH VS EXCEPTION PATH

- Happy path: what inputs, record quality, and downstream action count as normal?
- Exception path: what missing context, conflicts, or risky outputs push the case out of the happy path?

EXCEPTION TYPES TO MAP

- Expected: known small breaks such as partial context or low-information records.
- Risky: output is plausible, but a wrong action would hurt trust or create rework.
- Customer-facing: the workflow could change messaging, routing, or support behavior a customer feels.
- Revenue-impacting: the output affects pipeline, spend, forecast, or executive reporting.
- Unknown: the reviewer cannot explain the case or the pattern does not fit a known bucket.

REVIEW THRESHOLD TABLE

- What can pass automatically?

- What requires human review before action?
- What should stop the workflow immediately?
- What gets routed back to rules or manual handling?

OWNER MAP

- Reviewer:
- Override owner:
- Rollback owner:
- Data owner:
- Workflow owner:

LOGGING AND ROLLBACK

- Where will exceptions be logged?
- What fields must every exception record include?
- What queue size, error rate, or trust break forces rollback?
- What is the manual or rules-based fallback?

PILOT STOP CONDITIONS

- Review queue exceeds capacity for more than one cycle.
- Unknown exceptions repeat without a clean fix.
- Source freshness or linkage problems distort the output.
- The receiving team starts building workarounds because they do not trust the workflow.

FIRST 30-DAY REVIEW

- Which exceptions were expected?
- Which exceptions surprised us?

- Which cases should become deterministic rules?
- Which cases prove the pilot needs narrower scope?

NEXT STEP

Use this worksheet when the AI use case looks promising but the operating model still feels fragile. If the same exceptions keep exposing weak source systems, ownership, or joins, fix the foundation before scaling the pilot.