

AI Workflow Readiness Gate Sheet

Domain Methods

WHAT THIS SHEET IS FOR

Use this when someone asks whether one workflow should stay manual, move to rules-based automation, or move into an AI-assisted workflow. The goal is to keep the decision honest instead of turning AI pressure into another systems mistake.

STEP 1: NAME ONE WORKFLOW ONLY

- Workflow name: _____
- Decision it influences: _____
- Team acting on the output: _____
- What happens if the output is wrong: _____

STEP 2: SCORE THE DECISION RISK

- Low-risk directional support only? yes / no
- Customer, revenue, routing, or compliance impact if wrong? yes / no
- Risk score (0-3): _____
- If the workflow is high-risk and there is no human checkpoint, stop here and keep it manual for now.

STEP 3: SCORE INPUT TRUST

- Are the key fields, joins, and owners trusted enough for this decision? yes / no
- Does the workflow already rely on manual cleanup, side spreadsheets, or caveats? yes / no
- Input trust score (0-3): _____
- If the team cannot explain the source path or owner, do not automate yet.

STEP 4: CHECK WHETHER RULES ARE ENOUGH

- Can a simple threshold, queue rule, or deterministic branch handle most cases? yes / no

- Are the exceptions narrow enough that a person can review them? yes / no

- Rules-first score (0-3): _____

- If rules solve the problem cleanly, do not force AI into the workflow.

STEP 5: EXCEPTION HANDLING AND REVIEW

- Who owns exceptions, overrides, and output drift? _____

- Is there a visible fallback when the model or workflow is wrong? yes / no

- Can the receiving team inspect why the output landed where it did? yes / no

DECISION

- Stay manual for now when risk is high, trust is weak, or ownership is fuzzy.

- Go rules-based first when the workflow is repeatable and deterministic logic covers most cases.

- Use AI only when trust, review, exception handling, and workflow value are all strong enough to defend.

NEXT MOVE

- Manual for now: fix the trust break, owner gap, or workflow shape before another pilot.

- Rules-based first: write the rule set, review queue, and fallback path.

- AI-assisted: document the inputs, review policy, audit checkpoints, and rollback path.