

Automation Risk Ladder Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this sheet to decide how much authority one workflow should have right now: Suggest, Assist, Route, or Act.

1. NAME THE WORKFLOW

- Workflow in scope: _____

- Business decision or action it changes: _____

- Team living with the output first: _____

2. SCORE THE OPERATING RISK

- If the workflow is wrong, what breaks first? _____

- How reversible is the action after it fires? _____

- How often do weird exceptions show up today? _____

3. CHECK THE MINIMUM SAFEGUARDS

- Is there a named owner for review and override? yes / no

- Is there an audit trail someone will actually read? yes / no

- Is there a fast pause or rollback path? yes / no

- Can weak records be held out of the workflow cleanly? yes / no

4. CHOOSE THE FIRST SAFE RUNG

- Suggest: surface a recommendation only

- Assist: let a human approve the action

- Route: move work into a queue or path with guardrails

- Act: trigger the action only when the evidence is stable and reversible

- Which rung fits today? _____

5. WRITE THE STEP-DOWN TRIGGER

- What signal should force the workflow down one level? _____
- What exception pattern should stop automatic action immediately? _____
- What source-data gap still makes the rung unsafe? _____

6. DECIDE THE NEXT MOVE

- Keep the workflow at this rung for how long? _____
- What proof would justify moving up one level later? _____
- What should stay manual or rules-based for now? _____

NEXT STEPS

- Use AI Readiness Audit when the room needs a grounded answer on scope, risk, and workflow authority.
- Use Translate the Ask when the real blocker is still decision clarity, not implementation.
- Use Data Foundation when the ladder keeps exposing weak source data or brittle owner paths.