

Workflow Exception Ownership Model Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this sheet after a workflow already looks worth piloting. The goal is to name who reviews, who overrides, who pauses the workflow, and when the honest answer is still rules-based handling instead of AI.

1. NAME THE WORKFLOW IN SCOPE

- Workflow name: _____

- Business action it changes: _____

- Downstream team living with the output: _____

- What breaks first if the output is wrong: _____

2. CLASSIFY THE EXCEPTION SURFACE

- Expected cases we already know about: _____

- Risky cases that need named review: _____

- Customer-facing cases that should slow down: _____

- Revenue-impacting cases needing tighter authority: _____

- Unknown patterns that should stop the workflow: _____

3. NAME THE OWNERS

- Review owner: _____

- Override owner: _____

- Pause or rollback owner: _____

- Data owner watching freshness and drift: _____

- Workflow owner accountable for business use: _____

4. DEFINE THE DEFAULT POSTURE

- What can pass with review? _____
- What can be overridden without escalation? _____
- What must pause the workflow immediately? _____
- What should fall back to rules-based handling instead of AI? _____

5. PRESSURE-TEST THE RULES BOUNDARY

- If a plain-English rule handles most cases, what is it? _____
- Which exceptions are truly judgment-heavy after the rule path? ____
- Which cases are only messy because source data is weak? _____

6. FINAL DECISION

- Ready for pilot with named owners: yes / no
- Stay rules-based for now: yes / no
- Stay manual until trust improves: yes / no
- First fix to make next week: _____

NEXT STEPS

- Use AI Readiness Audit when leadership needs an honest answer on workflow scope, review, and operating risk.
- Use Data Foundation when exception ownership keeps exposing weak fields, joins, or source-of-record confusion upstream.