

Workflow Evaluation Checklist

A structured tool for identifying whether a specific workflow is a safe, appropriate, and measurable candidate for AI-assisted automation in your first controlled pilot.

How to Use This Checklist

This tool is designed to evaluate one workflow at a time. Work through each step in order — a "No" at any step is meaningful information, not a failure.

01

One workflow at a time

Apply this checklist to a single, specific workflow — not a department, role, or category of tasks.

02

Allow 10–15 minutes

Each evaluation should take 10–15 minutes. If it takes longer, the workflow may need to be narrowed first.

03

Prioritize low-risk starts

Use the Risk Level step to protect the organization. High-risk workflows should not move forward at Stage 2.

04

Treat "No" as guidance

A No answer is not a failure — it tells you what needs to change before the workflow is ready.

05

Document your reasoning

Complete the Selected Pilot Workflow slide before moving to Stage 3. Undocumented decisions are harder to revisit.

Ideal Pilot Characteristics

Strong pilot workflows share five qualities. Use this as a quick pre-screen before running the full checklist.

Repetitive

The task is performed frequently and follows the same steps each time. One-off or highly varied tasks are poor fits.

Low Risk

Errors in the output have minimal legal, financial, or reputational impact. Someone still reviews before anything is acted on.

Measurable

You can define what "good" looks like before you start — and confirm it after. Success cannot be defined only in hindsight.

Reversible

If the AI output is wrong, the error can be caught and corrected without significant downstream damage.

Clearly Owned

One named person is responsible for monitoring the pilot, reviewing outputs, and deciding when to stop or continue.

A workflow that lacks most of these qualities is not necessarily a bad candidate — but it will require more planning.

01

Workflow Identification

Name the workflow precisely. If you can't describe it in one sentence, it's probably too broad.

- What is the name of this workflow?
- Can you describe it in a single sentence?
- Who performs it today, and how often?
- Is this one task, or multiple tasks bundled together?

Guidance

If you cannot describe this workflow in one clear sentence, stop here and narrow the scope first. Vague workflows produce vague results.

Decision:

YES — Clearly Defined

**NEEDS NARROWING — Refine
First**

NO — Cannot Define

02 Repetition

AI assistance delivers the most value on tasks done the same way, again and again.

- Is this task performed at least weekly, or in significant volume?
- Does it follow a consistent, predictable sequence of steps each time?
- Would the steps be recognizable to someone new — without coaching?

Guidance

If the answer to most of these is No, this workflow is not a strong pilot candidate. Set it aside and evaluate a different one.

Decision:

YES — Repetitive

SOMETIMES — Inconsistent

NO — Too Variable

Notes:

03 Risk Level

Understand the impact of an error before you start — not after. Protect the organization.

What is the risk level if an AI output for this workflow is incorrect?

LOW

Minimal impact if an output is incorrect. Errors are easy to catch, correct, or ignore.

MEDIUM

Some impact if incorrect. Requires human review before the output is used or acted on.

HIGH

Significant impact — legal, financial, reputational, or operational. Do not proceed at this stage.

If you selected HIGH — do not proceed with this workflow at Stage 2.

✓ Selected risk level:

04 Measurability

If you can't define what success looks like before you start, you can't evaluate the pilot.

- Can you describe what "good" looks like before the pilot begins?
- Is there a current baseline you can compare against (time, volume, error rate)?
- Will you be able to confirm within weeks — not months — whether it's working?

Guidance

If you cannot define success before starting, reconsider this workflow. A pilot with no measurable goal is just an experiment with no accountability.

Decision:

YES — Measurable

**PARTIALLY — Needs Baseline
Work**

NO — Reconsider

Notes:

05

Reversibility

Pilots go wrong. The question is whether you can recover without lasting damage if this one does.

- If the AI output is wrong, can the error be caught before it causes damage?
- Can you stop or reverse the workflow quickly without significant cost?
- Is there a human checkpoint before any output is acted on?

Guidance

If NO, do not stop — but add explicit safeguards before proceeding. No fully automated output should touch a non-reversible process at Stage 2.

Decision:

YES — Reversible

PARTIALLY — Add Safeguards

NO — Proceed with Caution

Notes:

Evaluation Summary

Review your responses across all five steps and select one overall outcome for this workflow.

☐

PROCEED

This workflow is ready for a controlled pilot.

All five steps returned positive answers. Move forward with this workflow as your Stage 2 pilot.

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PROCEED WITH CONDITIONS

This workflow can move forward — with specific safeguards.

One or more steps returned a partial answer. Document the conditions below and confirm they are in place before starting.

☐

NOT SUITABLE AT THIS TIME

This workflow is not ready for a Stage 2 pilot.

One or more steps returned a definitive No, or the risk level was rated High. Set this workflow aside and evaluate a different one.

Conditions / notes (if Proceed with Conditions):

Selected Pilot Workflow

Complete this section once you have selected your Stage 2 pilot workflow. This becomes the reference document for Stage 3.

WORKFLOW NAME

One sentence. The specific task, not the department or role.

WORKFLOW OWNER

The named person responsible for monitoring and reviewing pilot outputs.

SUCCESS METRIC

How will you know if this is working? Define before starting.

STARTING BASELINE

Current state — time per task, volume, error rate, or equivalent.

PILOT TIMELINE

Start date and planned review date (recommend 4–6 weeks).

REVIEW DATE

When will leadership formally evaluate results and decide on next steps?

This document should be distributed to all pilot stakeholders before Stage 2 begins.

Your Next Step

If you selected Proceed or Proceed with Conditions, you are ready to begin your controlled pilot.

- 01** Confirm the workflow owner has reviewed and accepted responsibility for the pilot.
- 02** Distribute the Selected Pilot Workflow slide to all stakeholders before starting.
- 03** Establish your baseline measurement before the first AI-assisted task is run.
- 04** Schedule the review date — and hold it. Do not let the pilot run indefinitely.
- 05** At the review date, evaluate results against your defined success metric and decide: expand, pause, or stop.