Team Checklist (Adoptable + Repeatable)

1. Use Case Approval (Before You Start)

- ❑ Use case is clearly defined (input → output → user)
- ❑ AI adds value (speed, consistency, volume, or variation)
- ❑ Risk level assigned: **Low / Medium / High**
- ❑ Data allowed (no sensitive data unless approved)
- ❑ Human owner assigned for final accountability

2. AI Boundaries (Guardrails)

- ❑ AI is **not** making final approvals
- ❑ AI is **not** performing irreversible actions (money, access, account changes)
- ❑ High-risk content will be human-reviewed every time
- ❑ Exceptions have a fallback process

3. Quality Review (Before Publishing/Sending)

Must pass:

- ❑ Accuracy checked (facts validated where needed)
- ❑ Completeness checked (required sections included)
- ❑ Policy/tone/style followed
- ❑ No sensitive info or unsafe content
- ❑ Output is clear and usable

If any fail:

- ❑ Revise prompt or inputs
- ❑ Escalate to subject matter reviewer
- ❑ Do not publish until corrected

4. Automation Readiness (If You're Scaling)

- ❑ Process Owner named: _____
- ❑ Automation Owner named: _____
- ❑ Workflow documented (steps + systems touched)
- ❑ Prompts/workflows versioned and logged
- ❑ Rollback plan exists
- ❑ Access controls configured
- ❑ Monitoring/alerts defined
- ❑ Audit trail enabled

5. Measurement (Ongoing)

- ❑ Baseline captured (before AI)
- ❑ Targets defined (after AI)
- ❑ Metrics tracked weekly/monthly:
  - ❑ Cycle time
  - ❑ Error/rework rate
  - ❑ Review pass rate
  - ❑ Incidents/escalations

Decision rule applied:

- ❑ Scale if targets hit
- ❑ Pause/rollback if issues exceed thresholds