

# AI Workflow Candidate Scorecard

A practical screen for deciding whether a workflow deserves deeper review.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

## How this asset operates

|                 |                                                                                                        |
|-----------------|--------------------------------------------------------------------------------------------------------|
| Funnel stage    | Awareness to qualification                                                                             |
| Audience        | Operations, technology, transformation, product, finance and risk leaders                              |
| Trigger         | A specific workflow is being considered for AI-enabled improvement                                     |
| Objective       | Identify evidence gaps and the appropriate next decision                                               |
| Primary CTA     | Complete with the operating owner and request human review if the evidence supports it                 |
| Delivery method | PDF download or workshop handout                                                                       |
| CRM action      | Record asset download; create assessment or briefing activity only on explicit action                  |
| Follow-up       | Resource-delivery sequence; no sales sequence without appropriate permission                           |
| Compliance      | A score is a planning aid, not legal, security, privacy, procurement, technical or financial approval. |
| KPI             | Qualified downloads, assessment starts and briefing conversion                                         |

Choose one workflow. Score each dimension from 0 (not established) to 4 (well established with evidence). Record the evidence behind every score.

## Workflow identity

Workflow name

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Operating owner

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Executive sponsor

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Users affected

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Decision deadline

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## Scoring dimensions

| Dimension               | Definition                                                              | Score     | Evidence                   |
|-------------------------|-------------------------------------------------------------------------|-----------|----------------------------|
| Business impact         | Material effect on cost, cycle time, quality, capacity, revenue or risk | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Volume and repetition   | Occurs often enough for improvement to matter                           | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Workflow stability      | Main steps, decisions and exceptions are understood                     | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Baseline evidence       | Current performance can be measured                                     | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Data access             | Authorized, reliable data is available                                  | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Integration feasibility | Required systems can be accessed through controlled interfaces          | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Evaluation method       | Representative test cases and failure criteria can be defined           | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Human authority         | Approvals and escalation are explicit                                   | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Risk and reversibility  | Errors can be detected, contained and reversed                          | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| User adoption           | Frontline users will participate                                        | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Operating ownership     | Monitoring, incidents and change have an owner                          | 0 1 2 3 4 | Evidence / owner:<br>_____ |
| Decision timing         | A real sponsor, deadline and budget path exist                          | 0 1 2 3 4 | Evidence / owner:<br>_____ |

## Interpretation

| Score | Interpretation                                                                                   |
|-------|--------------------------------------------------------------------------------------------------|
| 0-15  | Evidence first - clarify the workflow, baseline, ownership and data before selecting technology. |
| 16-27 | Readiness work - material dependencies remain.                                                   |
| 28-39 | Pilot candidate - confirm scope, acceptance and controls before testing.                         |
| 40-48 | Strong candidate subject to technical, security, privacy, legal and operating review.            |

## Evidence gaps and next decision

### Three weakest evidence areas

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### Evidence owner for each

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### Smallest next test

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No-go condition

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Recommended next decision

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# Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

## Important

A score is a planning aid, not legal, security, privacy, procurement, technical or financial approval.

PlanckCyber resources are general planning tools. They do not create a client relationship or substitute for qualified legal, privacy, security, financial, accounting, engineering, regulatory or procurement review.