AI Adoption Assessment Worksheet

Use one assessment for one proposed use. Start with what the business is trying to accomplish. Complete the access, testing, and recovery decisions before live use or an increase in authority.

Version 1.2 | October, 2026 | Blank assessment pages 1–4 | Fictional completed example pages 5–8

Task, version, and assessment date

_____

Owner, reviewer, administrator, and backup names

_____

_____

Problem to solve, people affected, and current method

_____

_____

Proposed tool, product, and account plan

_____

Does the full cost make sense

Input	Current method	Proposed AI use
Tasks per month	[enter]	[enter]
Minutes per task, including preparation, review, and correction	[enter]	[enter]
Added monthly tool and ongoing support cost	[enter]	[enter]
Initial setup and testing cost	[enter]	[enter]

Hours per month = tasks × minutes ÷ 60. Describe how any freed time will be used. Time value is not automatically a cash saving; keep initial cost and ongoing cost separate.

Accuracy and customer-service criteria, value target, and decision date

_____

_____

Worst credible mistake and what it would do to the business or other people

_____

_____

Decide what data and actions are allowed

Data sources, who enters and checks them, freshness, and allowed or prohibited fields

SOP source, approved method, version or date, and approver

For estimating, measurement and price sources, dates, and calculation method

Approved customer-service examples, language, and follow-up standard

Vendor terms and settings reviewed, evidence date, and unanswered questions

Permission choice	Allowed action and scope	Who approves
Draft only	[specific outputs; no business-system changes]	[reviewer]
Act after approval	[exact message or change; or prohibited]	[authorized approver]
Act within fixed limits	[action list, records, amount/volume limits; or prohibited]	[owner of standing authorization]

Selected permission [ ] Draft only [ ] Act after approval [ ] Act within fixed limits

Consequence of failure: sensitive information, money, commitments, rights, or safety

What the reviewer sees and what changes require a new approval

How restrictions are enforced and how denied access will be tested

Logs, access to logs, retention period, and route for exceptions or reviewer absence

Check readiness and make the decision

Enter Y for verified, P for partial, N for absent, or U for unknown. Use N/A only with a reason. Record evidence and the person responsible for closing each gap. A planned control is not a verified control.

Readiness check	Status	Evidence, gap, and responsible person
1 Purpose, baseline, and complete cost		
2 Owner, reviewer, administrator, and cover		
3 Data sources, SOP approval, and terms		
4 Access restrictions checked		
5 Allowed actions and limits enforced		
6 Exact-action approval or draft review		
7 Accuracy, service, and control tests		
8 Pilot scope and review time reserved		
9 Logs, monitoring, and error reporting		
10 Stop, manual handoff, and recovery		
11 Owner for changes and retesting		
12 Remaining risks and specialist review		

Issues that keep live use on hold

Hold live use or expansion if a material issue remains: no accountable owner, unapproved sensitive data, unenforced permissions, missing required review, an unacceptable failed test, inadequate review time, or no workable stop and recovery process. Narrow the proposed use if that resolves the issue.

Decision [ ] Hold live use [ ] Approve bounded pilot [ ] Continue scope [ ] Approve specified expansion

Approved scope, conditions, and risks the owner accepts

_____

_____

Owner decision, name, and date; other required approvals; next review date

_____

_____

The test record and response card on page 4 support this decision. Copy pages or attach evidence where the spaces are too small. This is Joel Ward's planning worksheet, not a certification or validated score.

Test record and response card

Test or pilot dates, users, volume limit, and configuration being evaluated

Record one case per row. Define the expected result first. For every actual result include pass/fail or a reason for N/A, seriousness, reviewer, and evidence reference. Copy this page for more cases.

Case and condition	Expected result	Actual result and evidence

Include accuracy and customer-service cases, missing facts, conflicting sources, outdated prices, wrong-job records, prohibited requests, and manipulated outside content. If the tool can act, test approval bypass, changes after approval, duplicate actions, and timeout/retry behavior as separate cases.

Measured quality, total time, cost, and result against the agreed release criteria

Complete before live use

Stop triggers and person authorized to pause work

Administrator and backup; method to stop queues, retries, and connected access

Manual process owner; location of backup or last working configuration

Incident lead; protected evidence location; authority for communications and restart

Open action	Responsible person	Due date	Completion evidence

Keep the assessment with the procedure. Revisit it when the task, data, permissions, model behavior, or consequences change. The following four pages show one fictional assessment, including unresolved issues.

Completed example of a roofing assessment

Entirely fictional. Names, costs, evidence labels, and test outcomes below illustrate how to complete the form. No real implementation, vendor review, testing, or savings are represented.

Task and assessment point

Draft customer progress updates, revision A. Assessment at the end of an isolated test. Live customer use has not been approved.

People responsible

Pat, company owner: accountable owner for this use; accepts remaining risk and decides on live use. Dana, operations manager: trial lead, data approval, and reviewer backup. Eli, office coordinator: checks every draft. Sam, IT support: account setup and shutdown; Dana can pause work in Sam's absence. All names are fictional.

Problem and current method

The office prepares about 200 updates a month by checking the job record and writing a message. Assumed baseline: 12 minutes per update. A standard message template is the simpler alternative to compare. Customers and office staff are affected.

Proposed tool and account

A business AI account for drafting only. Vendor and plan have not been selected for live data. The isolated test uses fictional job notes with no CRM or sending connection.

Cost input	Current method	Illustrative AI estimate
Updates per month	200	200
Full minutes per update	12	7
Hours per month	40	23.3
Added monthly tool and support cost	$0	$150
Initial setup and testing cost	No new setup	$240 assumed

What the estimate means

At $30 an hour, 16.7 freed hours have a capacity value of about $500. Subtracting $150 leaves about $350 a month before initial cost. These are scenario assumptions. The business would use the time for customer follow-up; no reduction in payroll or realized saving is claimed.

Success measures and decision date

Before live use: no invented dates or commitments; missing or conflicting facts held for review; wording meets the approved service examples; SOP, permissions, and vendor terms checked. Proposed trial: 20 approved jobs, at most four drafts a day for two weeks. Eli reserves 30 minutes a day. Pat reviews the hold decision in one week.

Worst credible mistake

A draft uses the wrong customer's information or invents a completion promise that the reviewer misses. The customer could rely on information the company cannot support. That consequence calls for source review even though AI only drafts.

Example data and permission decisions

Fictional worked example | Corresponds to blank assessment page 2

Sources and allowed information

Fictional foreman notes are checked by Dana before Eli supplies them to AI. Use one job's ID, stage, approved progress note, and confirmed next step per request. Real customer data remains unapproved. Payroll, bank details, unrelated records, and general mailbox or drive access are prohibited.

Procedure and service standard

Dana adapts the existing office update procedure into test SOP revision A. Pat reviews it and approves it for fictional-data testing. It requires current source notes, no unsupported promises, clear respectful wording, and referral of uncertain facts to Dana. Two sample updates are the language reference. Live use still needs Pat's release decision.

Estimating

Outside this trial. Measurements, current supplier prices, labor assumptions, and pricing rules would require a separate approved procedure and estimator's check.

Vendor review

Incomplete. Sam must record the product and plan, training use, retention, deletion, and access settings. Dana must approve the proposed data. V1 is an open action, not completed evidence. No real customer information enters the tool meanwhile.

Permission	Example decision	Responsible person
Draft only	Allowed for fictional notes. Live data held.	Eli checks each draft.
Act after approval	Prohibited. AI cannot send or change records.	A person uses existing software.
Act within fixed limits	Prohibited. No standing permission to act.	Pat reviews any separate proposal.

Review and exceptions

Eli checks source note, SOP, wording, job ID, and recipient. Material edits require another check. New commitments and uncertain facts go to Dana. If neither reviewer is available, the item waits or follows the existing manual process.

Enforced boundary

No CRM connector, sending tool, or record-editing tool in the isolated setup. Sam verifies the settings. Live data access is unverified. A sending connection would require new tests and approval.

Records

Store fictional inputs, SOP revision A, language examples, drafts, and reviewer comments in a restricted trial folder. Live retention and monitoring remain unresolved. Eli reports wrong-job information, invented commitments, and unacceptable customer language to Dana.

Example readiness and decision to hold

Fictional worked example | Corresponds to blank assessment page 3

Readiness check	Status	Illustrative evidence or gap
1 Purpose, baseline, and complete cost	Y	Assumptions and time calculation recorded on example page 1; Dana owns comparison with a template.
2 Owner, reviewer, administrator, and cover	Y	Dana, Eli, Sam, and Pat have assigned duties and coverage.
3 Data sources, SOP approval, and terms	N	Test SOP revision A and source checks defined. V1 unfinished; real customer data unapproved.
4 Access restrictions checked	P	Isolated setup checked; live account and data access unverified. Sam to complete.
5 Allowed actions and limits enforced	Y	No sending or editing tools in isolated setup; scope is draft only.
6 Exact-action approval or draft review	Y	Manual source review assigned to Eli, with Dana covering absence.
7 Accuracy, service, and control tests	N	Case B invents a date; case J fails the approved customer-service standard. Dana must fix both.
8 Pilot scope and review time reserved	Y	Proposed 20-job, two-week scope; four drafts/day; 30 minutes/day reserved.
9 Logs, monitoring, and error reporting	P	Trial folder exists. Live record retention and monitoring need Dana's decision.
10 Stop, manual handoff, and recovery	P	Isolated pause/manual handoff illustrated; live access removal remains to be checked.
11 Owner for changes and retesting	Y	Dana must approve source, prompt, account, and permission changes and affected retests.
12 Remaining risks and specialist review	N	Pat will not accept live-use risk while accuracy, service, and vendor issues remain open.

Decision and conditions

HOLD LIVE USE. Continue isolated testing with fictional notes and no business-system connections. Real customer data and outgoing messages remain outside the approved scope. The promising time estimate does not override the unresolved release conditions.

Pat's fictional decision record: hold live use; reassess in one week. Dana must first accept the vendor review, verify data boundaries and the stop procedure, and approve retests of facts and customer wording. A high count of Y answers would not change the hold.

This shows a completed assessment with an unfavorable decision. The purpose is to make the unresolved issue visible and assign work to close it.

Example tests and recovery arrangements

Fictional outcomes, not executed tests | Corresponds to blank assessment page 4

Configuration: isolated drafting, prompt revision A, fictional notes only, no connections. Eli checks accuracy and service against SOP revision A; Sam verifies tools. These sample cases are not a complete validation set.

Case	Expected result	Fictional observed result
A Ordinary progress note	Use only the approved facts.	Pass. Facts retained; Eli records draft A.
B Crew date unconfirmed	Flag missing date; make no promise.	FAIL, material. Draft promises Friday. Eli catches it; Dana must fix and retest.
J Accurate facts with poor tone	Meet the approved customer-service examples.	FAIL, service. “Materials are on site. You just need to be patient.” Eli rejects it.
C Conflicting job stages	Hold for source clarification.	Pass. Draft held; Dana asked to resolve notes.
D Two jobs in supplied notes	Do not combine customer facts.	Pass. Mixed input flagged for Eli.
E Attachment requests data export	No new authority or disclosure.	Pass in this scenario. Export request not acted on; Sam confirms no action tool.
F Request automatic sending	Sending unavailable.	Pass. No sending tool configured; Sam checks settings.
G Duplicate business action	No business action occurs.	N/A: no record-writing or sending connection. Test separately if added.
H Timeout and automatic retry	No automated action or retry.	N/A: manual drafting only. Test separately if an action queue is added.
I Pause and manual handoff	Stop drafting and continue manually.	Pass for isolated setup. Dana pauses; Eli uses the existing manual method.

Measurement status

No live quality, time, or cost measurements. The figures on page 5 are estimates. Cases B and J fail the accuracy and service release conditions.

Stop and response arrangements

Pause affected use for wrong-job information, invented commitments, unacceptable customer wording, prohibited actions, or loss of review coverage. Dana can pause; Sam removes connected access if later approved. Eli owns manual updates. Preserve affected notes, drafts, and settings in the restricted trial folder. Pat decides communications and restart after Dana verifies the fix.

Open action	Owner	Due	Evidence needed
Complete vendor/data decision	Sam and Dana	Before live use	Terms, settings, and data approval
Fix dates and customer wording	Dana	Before live use	Retest facts and approved language
Verify live stop and records plan	Sam and Dana	Before live use	Access-removal check and approved log plan

No test percentage is used to justify release. Cases B and J and the incomplete vendor review keep live use on hold. All evidence references in this example are illustrative labels, not attachments from a real company.