AI scoping worksheet

Describe the need before choosing a solution. Complete this worksheet with your team.

Project: _____ Owner: _____ Date: _____

01 / Process and user

Which task? Who performs it? Who uses the output?

02 / Current baseline

Volume, frequency, handling time and observable errors.

03 / Data and tools

Available sources, quality, tools, access and integrations.

04 / Risks and approvals

Sensitive information, unacceptable errors and human review.

05 / First scope

One focused task, representative cases and an owner.

06 / Decision criteria

Which observations would justify continuing, adjusting or stopping?