

GIVE THE WORKFLOW the AI Starting-Point Test

Identify the first task you want to use AI for and use the checklist below to evaluate if the workflow you want to improve is a good “quick win” project.



Write the workflow you are considering improving with AI:

The task

Place a check next to each criteria that the task meets.

- ☐ The task is repetitive
- ☐ The process is reasonably consistent
- ☐ The desired output can be clearly described
- ☐ The task consumes enough time to make improvement worthwhile

The boundaries

Place a check next to each criteria that the task meets.

- ☐ AI will support the task rather than make a clinical decision
- ☐ A person can review the output before it is used
- ☐ Mistakes can be found and corrected before reaching a client
- ☐ The team can clearly define what AI may and may not do



The information

Place a check next to each criteria that the task meets.

- ☐ The tool is appropriate for the information involved
- ☐ Sensitive information will not be entered into an unapproved public tool
- ☐ The vendor can explain how data is collected, stored, and used
- ☐ Recording or transcription will be appropriately disclosed

The outcome

Place a check next to each criteria that the task meets.

- ☐ The practice can measure the time required before and after implementation
- ☐ The team can track corrections and errors
- ☐ The workflow can be tested on a limited scale
- ☐ The practice can stop or adjust the process if it does not work

YOUR
RESULT



10–16 checks

This may be a strong candidate for a first pilot.

6–9 checks

The workflow may need clearer boundaries or a better-defined process.

0–5 checks

Choose a simpler, lower-consequence task for your first project.



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