

The Pre-AI Process Audit

Do this **before you buy anything**. Walk the process you're about to put AI into, one step at a time, and write down what's actually happening. You are not looking for the tool. You are looking for the gaps your people have been quietly filling in, because those are the ones a machine will hand straight back to you.

PART ONE

Walk the process, step by step

One row per step, start to finish. The last two columns are the whole point of the exercise, and nobody else has to see this.

THE STEP	WHO OWNS IT	WHAT'S MISSING WHEN IT ARRIVES	WHO QUIETLY FIXES THAT	BREAKS IF A MACHINE DOES IT?
				Y / N
				Y / N
				Y / N
				Y / N
				Y / N
				Y / N
				Y / N

PART TWO

Four questions, once the walk is done

If you can't answer these, you don't yet know what you're buying.

01 Which step has no real owner?

02 What do we "know" that exists nowhere in writing?

03 Where is a person patching a gap nobody has ever documented?

04 Which step changes the most once a machine does the first draft?

Before They Approve It

What you tell the people approving this, **before** they approve it. The point isn't to lower the bar. It's to make sure the thing you get credit for is the thing you actually promised, and that the hard part is on the record from day one.

The problem we already have

Not the tool. The thing that's broken whether or not AI exists. If the room doesn't already agree this is a problem, stop here.

What we expect to get

In plain terms, and only what you'd bet on. One outcome, not a list.

What we are not promising

The most valuable line on this page. Name the thing they'll assume and you don't believe — usually "this gets faster right away."

The work that isn't the AI

Your best guess, in weeks. If the first box is the biggest one, go back and walk the process again.

BUILDING THE AI PART

FIXING WHAT COMES
BEFORE

FIXING WHAT COMES AFTER

PEOPLE WORKING
DIFFERENTLY

What we'll know by when

A date, and the specific thing you'll be able to say on it. This is what keeps a slow month from reading as a failed project.

What would make this take longer

Two or three real ones. Saying them out loud now costs you nothing; discovering them in week six costs you the room's trust.

If I build a house and install a smart thermostat, is that an AI project, or did I build a house?

WE CALLED IT AN AI PROJECT. IT WAS A PROCESS OVERHAUL.