



AI INITIATIVE PRE-SCREEN

Turn an idea into an initiative that is clear enough to decide whether it deserves validation.

Use in 10–15 minutes. The purpose is not to validate AI, but to make the initiative assessable.

01 FRAME THE INITIATIVE

Current situation What happens today? Where is the loss, delay or uncertainty? _____ _____	Decision / event to improve Which decision, task or event needs to change? _____ _____
Desired improvement What should become faster, earlier, more accurate or less costly? _____ _____	Business owner Who owns the expected business outcome? _____ _____

The initiative in one sentence We want to [improve / anticipate / reduce] _____ in order to _____.

EXAMPLE OF A STRONGER FORMULATION

TOO VAGUE	“Use AI in procurement.”
ASSESSABLE	“Detect supplier disruption risk earlier in order to reduce production stoppages and emergency purchasing.”

02 MAKE THE VALUE LOGIC EXPLICIT

Economic driver Margin · Cash · Working capital · Cost · Risk · Quality · Service · Growth _____	Current baseline What is the current baseline? _____
Frequency How often does the situation occur? _____	Value at stake Per occurrence, per month or per year. _____
Possible action What will we do differently if the system produces the right signal? _____	Cost of action Order-of-magnitude cost required to act. _____

DECISIVE QUESTION

If the system works perfectly, what will we actually do differently?

03 TEST THE INITIATIVE BEFORE INVESTING

A. Feasibility

What we know today

B. Execution risk

Real ability to turn the output into sustained use

Question	Yes	Part.	No	?	Factor	Low	Med.	High	?
Do the relevant data exist?	☐	☐	☐	☐	Business owner identified	☐	☐	☐	☐
Is there enough history?	☐	☐	☐	☐	Number of functions involved	☐	☐	☐	☐
Are definitions stable?	☐	☐	☐	☐	Process change required	☐	☐	☐	☐
Are the data accessible?	☐	☐	☐	☐	User acceptance / adoption	☐	☐	☐	☐
Is quality sufficient for an initial test?	☐	☐	☐	☐	IT integration / dependencies	☐	☐	☐	☐
Are security / privacy / compliance constraints identified?	☐	☐	☐	☐	Governance / controls	☐	☐	☐	☐
Is integration into the process feasible?	☐	☐	☐	☐	Ability to act on the outputs	☐	☐	☐	☐

Main execution obstacle: _____

Critical unknown: _____

C. Compare before choosing AI

Process improvement Yes ☐ No ☐ Test ☐	BI / analytics Yes ☐ No ☐ Test ☐
Business rule Yes ☐ No ☐ Test ☐	Traditional automation Yes ☐ No ☐ Test ☐
AI Yes ☐ No ☐ Test ☐	Do nothing Yes ☐ No ☐ Test ☐

What would AI add that is sufficiently superior to justify its additional cost and risk?

04 STATUS AT THIS STAGE

☐ Clear enough to be assessed	☐ Needs clarification before assessment
☐ Blocked by an identified prerequisite	☐ Probably better addressed by a simpler solution

Most important assumption to verify : _____
 What evidence would justify going further? : _____
 What would make us stop? : _____

05 NEXT STEP

Action What is the next concrete action? _____	Owner Who is responsible for it? _____
Deadline When should it be completed? _____	Decision expected What decision will be made after this step? _____

This pre-screen does not replace validation on real data. It helps determine whether the initiative deserves that validation.