

PORTABLE BUYER WORKSHEET - NO EMAIL GATE

AI Automation Consultant Brief

Give every provider the same operating facts. Ask for evidence that survives the demo: scope, authority, exceptions, acceptance, recovery, ownership, and complete commercial terms.

Safe sharing: use sanitized operating facts. Do not include passwords, private keys, payment data, regulated records, confidential client material, or live production access.

1. Define the same buying boundary for every provider

01. Workflow + owner

One repeatable workflow; one person accountable for the outcome.

02. Trigger + accepted output

What starts the work; what accepted result ends it.

03. Current handoffs

People, systems, queues, and decisions from start to finish.

04. Required information

Authorized sources of truth, required fields, and missing-data behavior.

05. Exceptions + stop signals

Replies, opt-outs, disputes, ambiguity, policy conflicts, duplicates, or unsafe states.

06. Human authority

Decisions that stay with authorized people, including price, scope, contracts, sensitive replies, and payments.

07. Baseline evidence

Current volume, delay, rework, quality, or completion evidence - no invented savings.

08. Acceptance + rollback

Test cases, unacceptable outcomes, reviewer, sign-off, fallback, and recovery owner.

09. Security + privacy boundary

Least privilege, secret storage, vendors, data location, retention, deletion, and access removal.

10. Commercial boundary

Deliverables, exclusions, timeline, budget, third-party fees, support, change terms, and handoff ownership.

PROVIDER RESPONSE REVIEW

Evidence to request before commitment

Mark Ready only when the answer is specific enough to place in the written scope or contract. Unclear means clarify before selection. Stop means the proposal crosses an authority, security, truthfulness, or commercial boundary.

#	QUESTION	EVIDENCE TO REQUEST	STATUS
01	What exact workflow changes?	Trigger, finish, owner, output, systems, and exclusions.	☐ Ready ☐ Unclear ☐ Stop
02	What baseline will be verified?	Source, period, calculation, owner, and limitations.	☐ Ready ☐ Unclear ☐ Stop
03	Which systems are authoritative?	Access method, owner, permission, and retention boundary.	☐ Ready ☐ Unclear ☐ Stop
04	What happens when facts are missing?	Pause, review, fallback, or rejection - never confident guessing.	☐ Ready ☐ Unclear ☐ Stop
05	Which exceptions stop automation?	Named stop conditions and escalation routes.	☐ Ready ☐ Unclear ☐ Stop
06	Which decisions stay human?	Named approvers for consequential actions.	☐ Ready ☐ Unclear ☐ Stop
07	How is correctness accepted?	Realistic tests, reviewer, pass/fail evidence, and sign-off.	☐ Ready ☐ Unclear ☐ Stop
08	How are security and privacy bounded?	Least privilege, secrets, logs, vendors, deletion, and incident path.	☐ Ready ☐ Unclear ☐ Stop
09	How does failure stay safe?	Monitoring, retry rules, deduplication, rollback, continuity, and recovery owner.	☐ Ready ☐ Unclear ☐ Stop
10	Who owns changes after launch?	API, model, platform, policy, data, and process change terms.	☐ Ready ☐ Unclear ☐ Stop
11	What do we own at handoff?	Code, configuration, accounts, tests, runbook, exports, and access inventory.	☐ Ready ☐ Unclear ☐ Stop
12	What is the complete cost boundary?	Discovery, build, software, usage, support, maintenance, changes, and cancellation.	☐ Ready ☐ Unclear ☐ Stop

2. Record the decision without false precision

☐ Build proposal ready	☐ Audit or clarify first	☐ Repair ownership or permissions first
Decision owner: _____	Decision date: _____	Next review: _____
Reason and unresolved evidence:		

ARIIA boundary: the separate USD \$497 audit covers one workflow diagnostic, as-is handoff map, one priority system blueprint, and practical 30-day action plan. The deliverable is portable; implementation is separate. No savings, revenue, lead, reach, or automation outcome is guaranteed. A fit request creates no invoice, purchase, payment request, subscription, or marketing opt-in.