

1. AI readiness review

Use this worksheet with the process owner, operations and technical team. Record evidence and unresolved dependencies before deciding whether to run a bounded pilot.

Workflow / project: _____ Date: _____

Readiness area	Evidence to bring to the review	Status / owner
Business problem	A named decision, process owner, baseline and measurable target.	_____ _____
Data	Source, timestamps, quality checks, access rights and representative evaluation data.	_____ _____
Process	Current workflow, exceptions, decision authority and a clear handoff to people.	_____ _____
Systems	Required ERP/MES/tools, read/write boundaries, test environment and integration owner.	_____ _____
Human review	Who approves consequential actions, what they see, and when the agent escalates.	_____ _____
Governance & recovery	Approved scope, least-privilege access, traceable records, stop conditions and recovery plan.	_____ _____
Evaluation	Baseline comparison, error costs, accepted outcomes, review effort and monitoring plan.	_____ _____

Record the decision

Decision: Hold / Prepare evidence / Bounded pilot

Accountable owner: _____ Review date: _____

Next evidence needed: _____

Use evidence, not an average readiness score. An unresolved permission, safety, ownership or recovery issue can block an action even when other areas are ready. This worksheet is a planning aid, not a certification.

Guide: [Manufacturing AI Agent Readiness Checklist](#)

2. Business value worksheet

Define an evaluation period and use the same currency throughout. Keep cash savings, released capacity and avoided risk separate; document which benefits can actually be realized.

Workflow / project: _____ Date: _____

Input	Unit / evidence	Your estimate
Evaluation horizon	Months; include ramp-up and adoption	_____
Implementation cost (I)	One-time integration, data, evaluation and training cost	_____
Operating cost (O)	Cost over the horizon: models, tools, hosting, monitoring and review	_____
Realizable cash benefit (B)	Incremental benefit over the same horizon; supported by a baseline	_____
Released capacity	Hours released, usable capacity and how it will be redeployed	_____
Quality / risk effects	Defects, rework, missed events and uncertainty; avoid double-counting	_____
Adoption and acceptance	Share of eligible work used; share of outcomes accepted	_____

Calculate and challenge the case

Net benefit = B - I - O

ROI over the chosen horizon = (B - I - O) / (I + O) x 100%

Use ROI only when total cost is positive. Simple payback = I / monthly net cash benefit, only when that monthly benefit is positive and reasonably stable.

Test conservative, central and optimistic assumptions. Vary adoption, accepted completion, supervision, ramp-up and ongoing cost together; do not label released hours as cash savings unless spending is actually reduced.

Decision measures	Baseline	Pilot / target
Accepted completion rate	_____	_____
Total cost per accepted outcome	_____	_____
Review and remediation minutes	_____	_____
Operational outcome (specify): _____	_____	_____

An ROI estimate supports a decision; it does not prove causality. Use a suitable baseline and record changes in volume, product mix and operating conditions.

3. Agent execution contract

Complete this record for one workflow before granting an agent access to business tools. Make boundaries specific enough for a reviewer and an implementation team to check.

Workflow / project: _____ Date: _____

Contract field	Record for this workflow
Objective & acceptance	Expected result and measurable completion criteria: _____
Owner & permitted scope	Accountable role, allowed tasks and prohibited actions: _____
Data & tool access	Approved sources, destinations, read/write rights and expiry: _____
Approval & escalation	Who approves which action, with what evidence and time limit: _____
Execution evidence	Inputs, tool parameters, result, versions, time and approval record: _____
Stop & recovery	Trigger, person taking over, rollback or compensating action: _____
Evaluation & change control	Acceptance test, monitoring owner and revalidation trigger: _____

Rehearse three failure scenarios

1. A required source is missing or stale: what action is blocked?
2. A tool requests broader rights: who decides and what is recorded?
3. An action fails midway: how does a person regain control?

Approval decision: _____ Role: _____

Evidence reference: _____ Next review: _____

Further reading: [AI Governance](#) | [Industrial AI Agents](#)

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