

AI Project Brief

Agree on a small, useful problem before choosing tools. Complete both pages and obtain the project owner review before a pilot.

Project or record

Owner

Date

User and problem

Who has the need, what goes wrong today, and why does it matter?

Decision and desired output

Name the decision to improve and the output that will support it.

Current process and baseline

Describe current steps, frequency, time, quality, error rate, and evidence for the baseline.

Scope and exclusions

Define what the project will deliver and what it will not attempt.

Success criteria

Choose measurable thresholds for quality, time, reliability, or user acceptance.

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Data and permissions

Name inputs, data owner, permission, sensitivity, retention, and approved sharing.

Proposed solution and tools

Explain the design, key manual steps, dependencies, and why the approach fits.

Cost and value assumptions

Record setup effort, recurring costs, review/maintenance time, and expected net value.

Risks and controls

Name failure cases, human approval points, stop conditions, and recovery owner.

Delivery and approval

Record deliverables, milestones, accountable owner, reviewer, and approval date.