

# Is this AI use case ready for its next step?

Define the decision.  
Examine the evidence.  
Keep conditions accountable.

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01

Scope

02

Evidence

03

Decision

# Inside the guide

Understand the engagement, prepare useful inputs and connect a recommendation to evidence, accountable action and ongoing review.

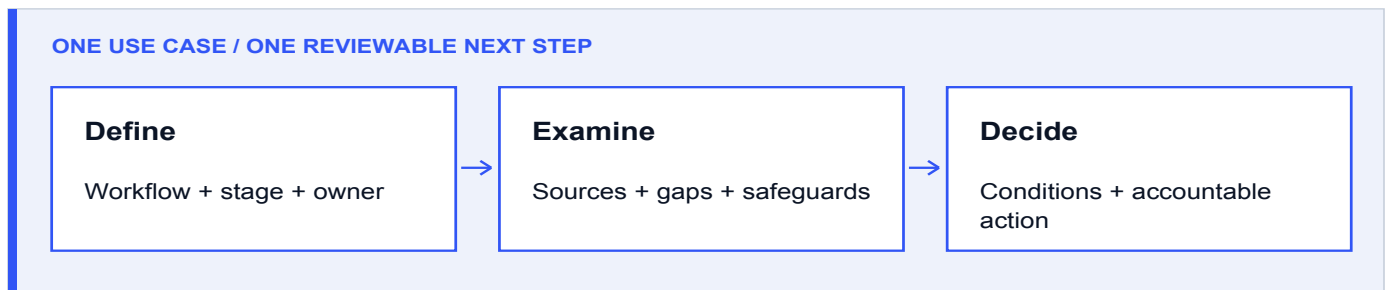
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Engagement materials | 20 October 2026. Scope, deliverables and fees are agreed in a written proposal.

## 01 / AI USE-CASE READINESS

# Prepare the next decision

A paid, human-led review of one AI workflow, its intended use and the evidence behind the next stage.



Before you pilot, deploy or expand an AI workflow, establish what it will do, who is accountable, what supports its use and which questions remain unresolved. The AI Use-Case Readiness Assessment brings those questions into one review.

**The outcome:** A documented recommendation, a record of supporting evidence and limitations, and a practical action plan. Your organization retains deployment approval and risk acceptance.

**Who participates:** A responsible business sponsor, a technical contact and the people who will operate or review the workflow. Relevant legal, privacy, security, procurement and risk specialists join the agreed review areas.

**When to use it:** Before a new pilot, a production launch, an expansion of agent authority or a material change to an existing deployment. Readiness always refers to a defined next stage; readiness for a synthetic pilot does not establish readiness for live operation.

Use the companion workbook to capture the engagement record. Existing calculators and checkers can inform the review, but their scores remain separate and do not authorize deployment.

## 02 / AI USE-CASE READINESS

# Agree a useful boundary

Start with the business decision. Bound the work before requesting evidence.

**BOUND THE ACTUAL WORK****Purpose**

Business task + affected people

**Operation**

Data + actions + environment

**Decision**

Next stage + acceptance owner

**One defined use case:** Name the workflow, its users, affected people, system and suppliers. Describe what happens before AI is used, what it produces and what people or systems do afterward.

**One operating context:** Specify the environment, data categories, locations, intended scale, relevant versions and permitted actions. An assistant that drafts a reply and an agent that sends it have different review boundaries.

**A written proposal:** Confirm participants, reference requirements and jurisdictions, source handling, review depth, timing, fees, deliverables and the decision date. State which records or demonstrations will be examined and which activities are excluded.

**A controlled change:** If a new market, supplier or permission changes the boundary, record the change and its effect on the review. Agree additional work before treating it as covered.

**The starting package:** The assessment covers the agreed use case. Implementation, technical testing, specialist opinions, additional deployments and recurring support are separately scoped. Platform setup and subscription terms are identified separately.

## 03 / AI USE-CASE READINESS

# What your team provides

An accountable owner and accurate context matter more than a polished submission.

Provide existing records rather than creating documents just to complete intake. Mark facts that are unknown, estimated or disputed. We identify which missing information matters to the next decision.

**Required to start:** A business owner, a technical contact, a description of the workflow and the decision requested. Identify the relevant locations, affected groups, data categories and deployment stage.

**Needed during the review:** Explain the system, supplier and configuration; the permissions and integrations; the operator and reviewer roles; and the timetable and constraints. Bring relevant specialists when the scope requires their judgment.

**Your responsibility:** Confirm the accuracy of the operational facts, arrange access to agreed people and evidence, resolve factual questions and identify the person authorized to approve scope or accept risk.

Use workbook records 01-03 to preserve the scope, participants and requests. An unavailable document remains an open request, with an owner and a decision consequence.

| Customer input                      | Purpose in the review                         |
|-------------------------------------|-----------------------------------------------|
| Workflow and intended benefit       | Establish the task and next-stage decision.   |
| People, locations and data          | Identify consequences and scope questions.    |
| System, supplier and authority      | Locate dependencies and operating boundaries. |
| Plans, constraints and known issues | Prioritize the evidence needed first.         |

## 04 / AI USE-CASE READINESS

# Bring evidence with context

A document can support a claim only within its actual scope, version and limitations.

**FOLLOW THE CLAIM TO ITS SUPPORT****Source**

Issuer + version + passage

**Review**

Use-specific support + limits

**Finding**

Reason + uncertainty + action

**Existing materials:** Supply relevant policies, procedures, architecture or workflow descriptions, vendor documentation, agreements, evaluation results, approval records and incident or exception records where available.

**Preserve provenance:** For each source, keep its identifier, title, owner or issuer, version, date, relevant passage, controlled location and access restrictions. Identify which claim the source supports and what remains unverified.

**Match the deployment stage:** For a planned use, bring design and pilot evidence. For an operating use, include examples of actual review, intervention, exceptions and follow-up. A procedure alone does not demonstrate that the procedure operated.

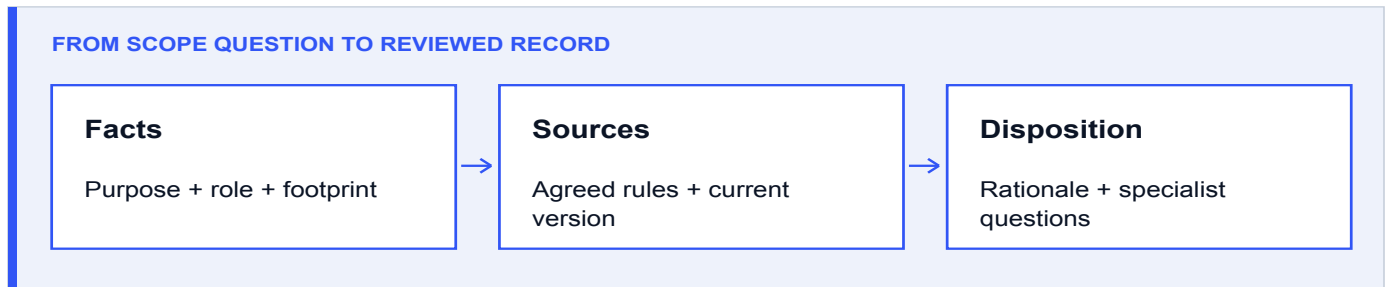
**Handle sources deliberately:** Agree the transfer channel, authorized recipients, redaction and retention arrangements before sharing. Do not submit confidential records through the public contact form. Credentials and unnecessary personal or customer data are not required.

**Treat uncertainty explicitly:** Missing evidence is a limitation, not automatic proof that a control is absent. Conflicting records are preserved for resolution rather than silently reconciled. The customer may need to obtain further supplier or specialist evidence.

## 05 / AI USE-CASE READINESS

# Review purpose and requirements

Assess the actual workflow before interpreting which requirements may matter.



**Purpose and accountability:** Examine whether the intended use, operating boundary, business owner, approval authority, operator and escalation route are clear. Distinguish stated purpose from what the system can influence in practice.

**Regulatory and policy scope:** Consider only the jurisdictions, sources and reference requirements agreed for the engagement. Record the facts behind each scope finding, source version and review date, unresolved interpretations and matters needing qualified specialist review.

**Different types of requirement:** Keep binding law, voluntary frameworks, internal policy and contractual commitments distinct. A framework reference does not become a legal duty simply because it appears in a checklist.

**Visible limits:** Areas outside the engagement are recorded as not assessed. Potentially relevant means investigate; it is not a legal conclusion. Applicable following qualified review and outside scope based on stated facts require recorded rationale.

Use the existing Regulatory Applicability Screener as an initial prompt where relevant. Its selected EU AI Act and NYC employment-tool questions do not establish complete coverage. The engagement may use additional agreed sources without implying that the free tool covers them.

## 06 / AI USE-CASE READINESS

# Review consequences and suppliers

Connect possible harm and supplier assurances to the exact use being considered.

**THREE DISTINCT QUESTIONS****Consequence**

Who is affected if it fails?

**Evidence**

What does the supplier prove?

**Condition**

What must close before use?

**Potential consequences:** Examine who could be affected, the impact of a wrong result, whether it can be reversed and what safeguards are appropriate. Consider privacy, security, fairness, reliability and other relevant concerns within the agreed scope.

**Actual reliance:** A person making the final decision does not by itself establish effective oversight. Ask what they see, what they can challenge, whether they have time and authority to intervene, and how exceptions are handled.

**Supplier evidence:** Examine the entity, product, service, version and configuration covered by the available documentation. Separate evidence received from evidence adequate for the customer workflow.

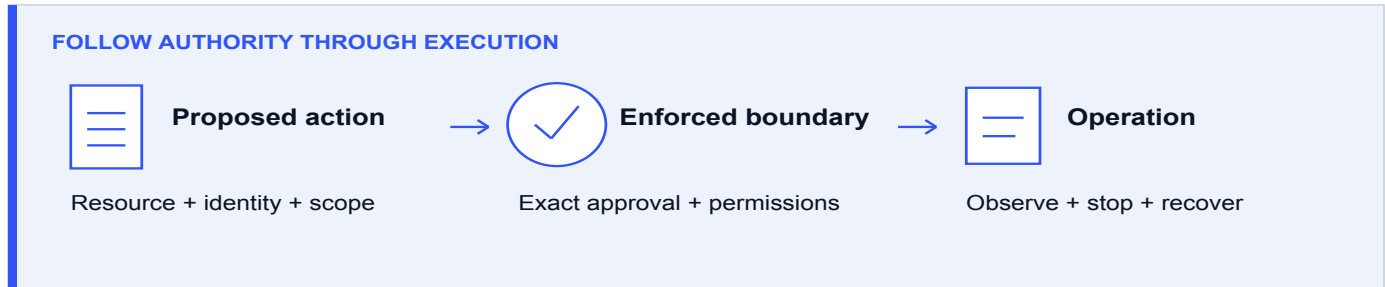
**Dependencies and terms:** Review relevant commitments, data use, retention, incident arrangements, change notification, service limitations and exit dependencies. Identify questions for procurement, legal, privacy, security or technical specialists.

Use the Vendor Review Toolkit for a deeper supplier workstream. Record each unresolved supplier dependency with its affected activity, owner and evidence needed. A vendor questionnaire or general assurance report is not blanket approval for every use.

## 07 / AI USE-CASE READINESS

# Review authority and operations

An approval policy is useful only when the operating boundary can be demonstrated.



**Decision authority:** Define permitted and prohibited actions, resources, destinations, quantities, timing and identities. Examine how approvals bind to the exact action and how changed or reused requests are handled.

**Human intervention:** Review escalation, stop controls, queued or in-flight work, fallback, reconciliation and restart criteria. Identify who can act, what they need to see and how their decision is recorded.

**Evaluation:** Review available acceptance criteria, test coverage, observed failures and limitations. Keep planned tests, tests passed, tests failed and tests not run separate. Evidence from a sandbox does not automatically establish production behavior.

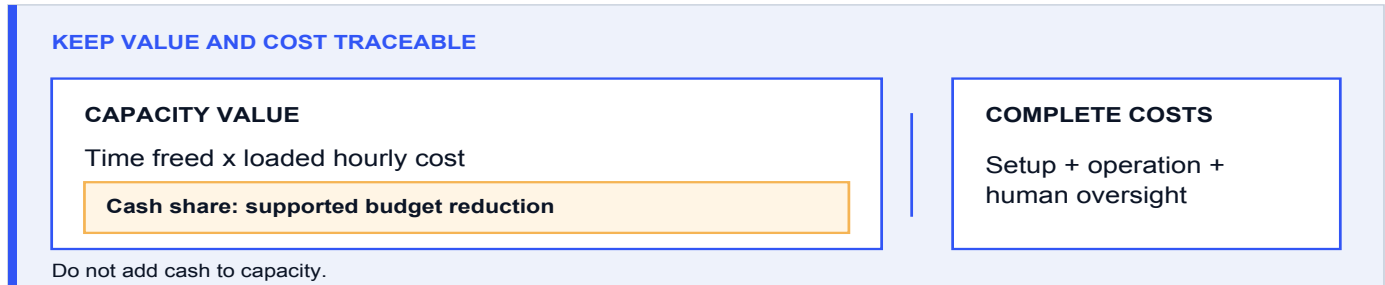
**Operational readiness:** Examine operator instructions, exception handling, incident responsibilities and the evidence required before release. A walkthrough may clarify a design; a claim of tested enforcement requires appropriate test evidence.

Existing test evidence is reviewed within the proposal. New technical tests, red teaming or witnessed exercises are included only when explicitly authorized and scoped. Use the Agent Oversight Toolkit for detailed action, test and recovery records.

## 08 / AI USE-CASE READINESS

# Review the business case

Useful AI must deliver an acceptable outcome at a supportable total cost.



**Baseline and benefit:** Define a comparable task, current effort and quality, expected use and adoption. Identify how a pilot will measure the outcome and what would disprove the initial case.

**Complete cost:** Include setup, integration, supplier charges, operator effort, checking, rework, exceptions and ongoing governance. Allocate shared costs once and preserve the period and workflow boundary.

**Capacity and cash:** Time freed can create capacity without reducing spending. Treat supported cash realization as a share of capacity value where appropriate, rather than adding the same benefit twice.

**Decision sensitivity:** Identify the assumptions most likely to change the recommendation. Estimates remain estimates until corroborated. A positive business case does not override an unresolved material safeguard or approval prerequisite.

Use the Investment & Business Case Toolkit and the relevant calculators for detailed modeling. The assessment identifies the measurement and funding conditions needed at the next checkpoint; it does not promise a return or certify financial projections.

## 09 / AI USE-CASE READINESS

# Receive a decision package

The outputs connect the recommendation to sources, owners and a usable next step.

The written proposal fixes the final deliverable scope. The standard package below is designed to be useful independently of a platform subscription.

**A findings walkthrough:** Discuss results with designated stakeholders, correct factual inaccuracies, preserve unresolved disagreements and agree the handover. Corrections to facts do not erase professional judgment or evidence limitations.

**Working records:** Editable registers accompany the report. Each material finding has an identifier and supporting references so it can be traced into an action and later closure review. Review dates and the assessed version remain visible.

| Deliverable                      | What the customer receives                                          |
|----------------------------------|---------------------------------------------------------------------|
| Executive decision brief         | Scope, principal findings, recommendation and leadership decisions. |
| Use-case record                  | Purpose, owner, people, data, suppliers, authority and stage.       |
| Applicability review record      | Agreed sources, facts, dispositions and areas not assessed.         |
| Evidence and findings register   | Source references, observations, conflicts and limitations.         |
| Prioritized action plan          | Owners, dates, dependencies and closure evidence.                   |
| Decision and reassessment record | Customer decision, conditions and reopening triggers.               |

## 10 / AI USE-CASE READINESS

# Interpret the recommendation

Readiness is a bounded recommendation. Deployment authorization remains a customer decision.

**THE RECOMMENDATION MUST NAME THE STAGE****Proceed**

Within reviewed boundary

**Conditions**

Restrictions + closure gates

**Hold**

Resolve material prerequisites

**Proceed within the assessed scope:** The reviewed evidence supports the defined next stage, subject to stated limitations. Record the scope and configuration supported; avoid treating this as permission for all future uses.

**Proceed with conditions:** A bounded next stage may be appropriate with restrictions, assigned actions and checkpoints. A prerequisite must close before the activity it governs. It cannot be deferred merely by giving it a later date.

**Hold pending further work:** Material evidence, safeguards or required decisions remain unresolved. Name the affected activity, interim restrictions and evidence needed to reconsider.

**Insufficient information:** If a defensible recommendation cannot be made, explain why and identify the facts, evidence or specialist judgment needed to complete the review. Unknown is not a favorable result.

**No combined approval score:** Risk triage, governance maturity, economics and deployment evidence answer different questions. Do not average them into permission to deploy. Record specialist dependencies, disagreements, accepted limitations and the accountable customer decision.

## 11 / AI USE-CASE READINESS

# Worked example: a bounded pilot

Fictional example. All organizations, people, sources and findings on pages 13-14 are invented.

Harbor Services wants ReplyAssist to draft customer-service replies and eventually send them. The requested next stage is a staff pilot using synthetic cases; live customer data and external sending are outside that stage.

The review considers four fictional records: S01 pilot brief v1; S02 sandbox permission export v2; S03 test summary v1; and S04 supplier terms v1. The export describes external sending as disabled. Independent enforcement testing is not included. The demonstration is an editorial example, not a product screen or customer result.

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The recommendation shown supports only the synthetic pilot. It does not authorize real-data use or external messages.

## 12 / AI USE-CASE READINESS

# Turn findings into conditions

Fictional continuation. Each workstream follows an observation and a specific evidence gap.



**F01 / Authority:** S02 describes external sending as disabled, but no negative-path test is recorded. Technical lead Arun owns a separately authorized boundary test. Required closure evidence: configuration-linked results showing blocked sending and the test limitations. Live sending remains prohibited.

**F02 / Supplier and data:** S04 leaves retention and reuse questions unresolved for real customer data. Privacy reviewer Lena owns source clarification and the specialist disposition. Real customer records remain outside scope until the required decision is recorded.

**F03 / Operating readiness:** S03 contains drafting examples but no fallback exercise. Operations lead Maya owns a synthetic exercise of pause, manual routing and restart. Record the result, unresolved cases and operator acknowledgment before broader operating use.

**Decision checkpoint:** The business sponsor may authorize a synthetic drafting pilot after its own prerequisite checks. Production remains on hold. The pilot measures draft usefulness, checking effort and exceptions; it does not establish cash savings.

**Reopen the review:** Real-data introduction, external sending, a supplier or model change, new permissions or a material incident require a fresh scope decision. A completed action updates the evidence record; it does not silently expand authority.

## 13 / AI USE-CASE READINESS

# Carry the work into Anvaylo

The assessment establishes a reviewed starting point. A workspace can support its ongoing maintenance.

For a combined engagement, agree the records to establish, the enabled platform functions, access roles, subscription capacity and handover responsibilities. Platform availability is confirmed for the customer workspace; public examples do not prove a customer setup is complete.

**A reviewed handover:** Set up the agreed system or agent record and link supported sources, requirements, observations and actions. Record reviewer disposition before treating proposed material as accepted. Accepting a source assertion is different from approving use or accepting risk.

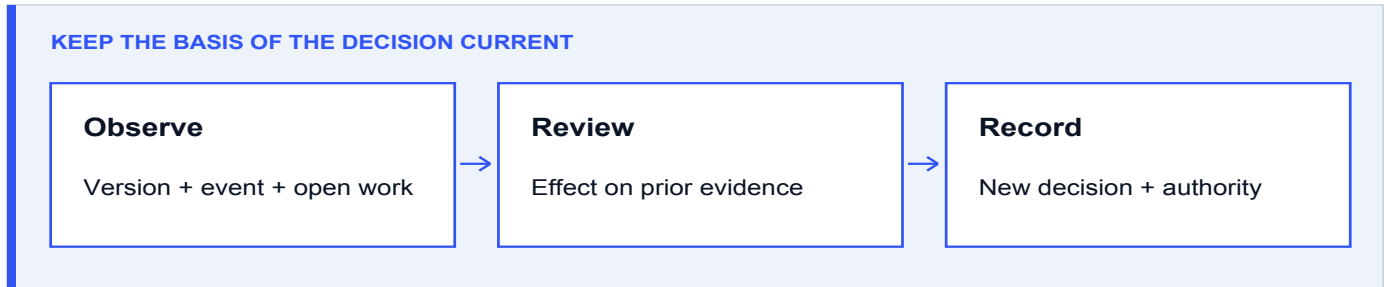
**A practical completion check:** Walk through one finding from source to action, confirm the owner and status, inspect an available report and identify who will maintain the record. Export or register-based handover remains the agreed alternative where a specific record type is unsupported.

| Assessment record              |             |     | Intended platform connection |
|--------------------------------|-------------|-----|------------------------------|
| Purpose, dependencies          | owner       | and | AI & Agent Inventory         |
| Requirements and rationale     |             |     | Policy & Obligation Mapping  |
| Sources and finding references |             |     | Decision & Evidence Graph    |
| Conditions and actions         | accountable |     | Risk & Review Workflows      |
| Supplier dependencies          | terms       | and | Vendor & Contract Assurance  |
| Priorities and review history  |             |     | Oversight & Reporting        |

## 14 / AI USE-CASE READINESS

# Maintain the decision over time

A useful handover names the custodian, review rhythm and changes that require another look.



**Customer ownership:** Assign the person who keeps the use-case scope, source versions, action status and review dates current. Confirm who reviews closure evidence and who has authority to change deployment conditions.

**Change triggers:** Revisit the record after a new purpose, market, affected population, supplier version, model, permission, data source or material incident. Decide whether the previous evidence still supports the changed use.

**Agreed service boundaries:** Automatic transfer from free browser tools, custom integrations, continuous regulatory monitoring, additional workflows and recurring expert review are not assumed. Each is separately scoped and confirmed before it is promised.

**Assessment only:** Receive the report, editable registers, walkthrough and handover without a mandatory subscription. **Assessment with Anvaylo:** Add agreed setup and record handover.

**Follow-up review:** Arrange later review of closure evidence, pilot results or material changes.

Assessment fees, platform charges, setup, optional services, timing and renewal terms are stated separately in the proposal. A subscription supports record maintenance within its agreed functions; it does not itself supply a continuing expert opinion.

## 15 / AI USE-CASE READINESS

# Start with one accountable use

Bring a short workflow description, its current stage and the decision your team needs to make.

**Before work begins:** Agree the use case, source handling, stakeholders, references, timing, fees and deliverables. Identify specialist dependencies and any authorized test activity. Do not send confidential records through the public website.

**Engagement boundaries:** This assessment documents observations and recommendations against agreed references and available evidence. It is not legal advice, certification, an independent statutory bias audit or an assurance opinion. Your organization retains deployment approval and risk acceptance.

**Using these materials:** This guide explains the engagement and accompanies blank working records. The customer proposal defines the actual review and deliverables. Illustrations explain the method and are not customer findings.

**Source and platform context:** The public Anvaylo pages below informed this package. They were checked on 20 October 2026. Their descriptions are not a substitute for checking enabled functions and agreed scope in a customer workspace.

| Reference                   | Read more                                                                             |
|-----------------------------|---------------------------------------------------------------------------------------|
| Assessment approach         | <a href="https://anvaylo.com/assessments">https://anvaylo.com/assessments</a>         |
| Platform functions          | <a href="https://anvaylo.com/capabilities">https://anvaylo.com/capabilities</a>       |
| Product and service options | <a href="https://anvaylo.com/get-started">https://anvaylo.com/get-started</a>         |
| Executive toolkit library   | <a href="https://anvaylo.com/resources">https://anvaylo.com/resources</a>             |
| Companion browser tools     | <a href="https://anvaylo.com/resources/tools">https://anvaylo.com/resources/tools</a> |