



ANVAYLO EXECUTIVE TOOLKIT

AI use-case readiness working records

Reusable working records.
Evidence with accountable owners.
Decisions with clear limits.

Anuj Saxena

Founder and CEO, Anvaylo

COMPANION WORKBOOK

ENGAGEMENT GUIDE | 20 OCTOBER 2026

01

Scope

02

Evidence

03

Decision

Inside the workbook

Sixteen working records for one defined use case. Duplicate repeatable source, requirement and finding pages as needed.

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

WORKING RECORD 01

Engagement and decision

Agree this record with the sponsor before requesting evidence.

Identity and participants: Use-case ID; business sponsor; technical lead; coordinator; decision authority

Decision requested: Current stage; next stage; decision date; business problem and intended benefit

Agreed work: Review depth; deliverables; jurisdictions/references; authorized activities; exclusions

Commercial and source handling: Proposal reference; timing; fees; sharing/retention arrangements; approval date

WORKING RECORD 02

Workflow and operating scope

Describe the real sequence. Include the people or systems acting after AI produces an output.

Workflow boundary: Inputs; AI task; output; user; downstream decision or action; system/version

People, places and data: Affected groups; locations/markets; data categories; sources; destinations

Authority and dependencies: Permitted/prohibited actions; identities; tools; suppliers; environment; scale

Stage and change boundary: Current/proposed operation; interim restrictions; scope owner; material-change triggers

WORKING RECORD 03

Inputs and evidence requests

Repeat this page for additional requests. Keep unavailable material visible.

Request and purpose: Request ID; source needed; claim/question to resolve; related review area

Custodian and handling: Owner/issuer; controlled location; sharing authority; redaction and access needs

Status and dependencies: Requested/received/unavailable; request date; due date; responsible contact; blockers

Decision consequence: What cannot be concluded yet; affected activity; interim restriction; next action

WORKING RECORD 04

Source and evidence record

Duplicate this record for each material source. Preserve exact references, not credentials.

Source identity: Source ID; title; issuer/owner; version; date; controlled location; access restrictions

Passage and claim: Page/section; relevant passage or reference; claim supported; use-case/version link

Evidence review: Reviewed by/date; documented/operating/tested; support and limits; conflicts or corroboration

Disposition and follow-up: Accepted/pending/disputed for this claim; rationale; related findings; additional proof needed

WORKING RECORD 05

Purpose and accountability

Review the actual influence of the AI and the authority of each responsible role.

Purpose and reliance: Business purpose; intended users; actual decisions influenced; downstream effects

Responsible roles: Business owner; operator; approver; risk acceptance authority; backups; specialists

Evidence and observations: Source IDs; evidence for responsibilities; ambiguity or conflict; finding IDs

Next action: Accountability gaps; proposed owner; closure evidence; restriction; customer decision needed

WORKING RECORD 06

Applicability review record

Repeat for each requirement considered. Record areas outside scope as not assessed.

Facts and reference: Jurisdiction; requirement/type; official source; version/review date; workflow facts

Scope disposition: Potentially relevant / applicable after review / outside scope on facts / insufficient facts / not assessed; rationale

Specialist and obligation record: Qualified reviewer/date; resulting obligations or open interpretation; evidence and limitations

Action and reassessment: Owner; source/finding IDs; next action; review date; factual or regulatory change trigger

WORKING RECORD 07

Consequences and safeguards

Assess impact and reversibility for this use. Do not convert this record into a legal classification.

Affected people and failure: Groups; harmful outcome; impact; reversibility; scale; vulnerable contexts

Safeguards and review scope: Privacy/security/fairness/reliability measures; prevention/detection/recovery; specialist scope

Evidence and residual concern: Source IDs; observed support; gaps; conflicting information; remaining uncertainty

Disposition and action: Finding IDs; affected activity; reviewer; owner; closure proof; interim limits

WORKING RECORD 08

Supplier and contract review

Evaluate evidence for the specific entity, product and customer use.

Supplier boundary: Entity; product/service; version/configuration; providers; customer workflow

Evidence and terms: Source IDs; covered features; exclusions; data reuse/retention; incident/change/exit commitments

Adequacy and dependencies: What evidence supports; unanswered questions; specialist disposition; finding IDs

Adoption conditions: Affected use; supplier request; owner; required proof; renewal/exit or review trigger

WORKING RECORD 09

Authority and human oversight

Specify exact actions and the enforcement evidence behind them.

Action boundary: Resource; identity; operation; destination; quantity; timing; allowed/prohibited scope

Approval and intervention: Approver; review information; exact binding; expiry/replay; escalation; stop authority

Enforcement evidence: Source/test IDs; configuration; denial/changed-request/queue evidence; pass/fail/not run

Open boundaries and conditions: Untested/failed paths; disabled activity; owner; retest/closure criteria; decision effect

WORKING RECORD 10

Evaluation and operations

New tests require agreed scope and authorization. A plan is not an observed result.

Evaluation basis: Acceptance criteria; dataset/scenarios; version/environment; authorization; test limitations

Results reviewed: Source IDs; pass/fail/not run; failures/exceptions; production differences; reviewer/date

Operating arrangements: Runbook; operator; incident routing; stop; queued/in-flight work; fallback; restart

Readiness gaps: Finding IDs; unexercised procedures; owner; closure evidence; prerequisite before activity

WORKING RECORD 11

Business value and cost

Use consistent scope and period. Keep capacity and supported cash realization separate.

Baseline and measures: Task; volume; effort; quality; adoption; comparison; period; source/estimate status

Benefit and realization: Capacity released; use of time; supported spending change; evidence; uncertainty

Full cost and sensitivity: Setup; operation; checking/rework; oversight; shared allocation; sensitive assumptions

Checkpoint and decision: Pilot measures; acceptance conditions; budget limit; finance reviewer; finding IDs; next step

WORKING RECORD 12

Finding and recommended action

Repeat for every material finding. Trace the action to a source-supported observation.

Finding identity and observation: Finding ID; review area; factual observation; affected activity; materiality and reason

Evidence and limitations: Source IDs/passages; support; contradictory material; unverified facts; reviewer/date

Recommendation and closure: Action ID; owner; target/checkpoint; objective closure evidence; reviewer; dependencies

Interim consequence: Restriction/prerequisite; escalation; customer response/dissent; status; remaining uncertainty

WORKING RECORD 13

Executive recommendation

Reference the detailed records. Do not average separate tools into deployment permission.

Assessed boundary: Use-case ID; stage; configuration; evidence cut-off; sources/findings; areas not assessed

Readiness recommendation: Proceed / conditions / hold / insufficient information; reasoning; material limitations

Leadership decisions: Conditions; resources; specialist decisions; accepted limitations; unresolved disagreement

Review and handover: Reviewer/date; factual correction record; customer attendees; actions agreed; next checkpoint

WORKING RECORD 14

Customer decision and closure

A reviewer recommendation and customer authorization are distinct records.

Customer authorization: Decision-maker/role; date; approve/restrict/defer/decline; exact stage/configuration/scope

Conditions and risk acceptance: Condition/action IDs; activities barred while open; accepted limitations; authority

Closure review: Evidence IDs; owner; closure reviewer/date; result; unresolved exceptions; resulting permitted scope

Communication and reopening: Operators informed; implementation verification; next review; stop/expansion/change triggers

WORKING RECORD 15

Platform handover record

Complete for a combined engagement. Verify the actual customer workspace and supported functions.

Workspace and agreement: Company/workspace record; subscription/proposal; authorized users; custodian; enabled scope

Record mapping: Use-case/source/finding/action IDs mapped to supported platform record IDs; unsupported items

Acceptance checks: Reviewer disposition; links/access verified; owner/status checked; report inspected; export alternative

Handover and limits: Customer acceptance/date; maintenance owner; training; unresolved setup; integrations/services separately agreed

WORKING RECORD 16

Change and follow-up review

Preserve the earlier decision. Explain whether its evidence still supports the changed use.

Event and prior record: Change/incident ID; date; reporter; prior decision; source/version; affected workflow

Effect and interim response: Purpose/data/model/permission/market change; impact on evidence; restriction/containment

Required review: Owner; specialist; new sources/tests; authorization; proposal if additional scope; due/checkpoint

Outcome and next record: Reviewed evidence; updated recommendation; customer decision; scope; authority; next trigger