

Workflow pilot measurement template

A practical template for defining a baseline, permission boundary, test set, and stop-or-scale decision. This document contains no customer results.

Example workflow

Inbound lead follow-up: capture a request, check required fields, prepare a response, and hold it for human approval.

Baseline to record before build

- Median minutes from inquiry to first reviewed draft: [measure]
- Percentage of requests missing required information: [measure]
- Weekly staff minutes spent routing and preparing replies: [measure]
- Unapproved messages sent: 0 required

Permission boundary

MAY READ	Approved form fields and routing rules
MAY PREPARE	A draft response and internal handoff summary
MAY NOT	Send, change pricing, promise availability, or update a customer record without approval
HUMAN OWNER	[name or role]

Acceptance test set

- Complete request follows the correct route.
- Missing information is identified without invention.
- Conflicting information stops for review.
- Sensitive or out-of-scope requests escalate.
- Tool failure leaves the original record unchanged.
- Every proposed external action remains pending approval.

Decision gate

- Scale only if the agreed primary measure improves and all safety tests pass.
- Revise if the outcome improves but a recoverable test fails.
- Stop if the workflow cannot preserve the permission boundary or does not beat the baseline.

Required handoff

- Workflow map
- Permission map
- Tested examples and failure report
- Event and approval log
- Operating guide
- Stop, revise, or scale recommendation