

Worked buying decision

Hypothetical example. No real vendor was evaluated; findings, prices and counteroffer terms are teaching assumptions.

1. Outcome being offered

The vendor offers document assessment, creation of pending supplier records and activation after approval, at \$6,000/month for up to 1,000 cases. The immediate business need is faster preparation of assessments. Payment changes, purchase commitments and external messages are excluded.

2. Evidence and uncertainty

In the example record, one ordinary assessment can be traced to the correct entity and source documents in a test environment. This supports only that demonstrated case/configuration. Rejection of a wrong-entity approval and reconciliation after a lost confirmation have not been demonstrated. These are unverified claims, not failed tests.

3. Operating and commercial decision

The monthly operating comparison is \$12,500 against \$12,000 of existing assessment effort, before integration and transition. The proposed five-minute retained assessment effort is unvalidated. No labor-cost saving has been demonstrated.

Decision: defer the full purchase

Authorize procurement to negotiate a ten-business-day, read-only assessment pilot capped at \$1,000 total, with no annual minimum or automatic production renewal. This is permission to negotiate, not to commence the pilot. The vendor has not accepted the counteroffer.

Conditions before any pilot begins

Agree case count/mix, quality checks and end decision. Use approved synthetic data in isolation; disable production credentials and prohibited writes, and restrict outbound destinations. Name process, technical, operating and control owners. Agree training use, output rights, retention/deletion, evidence access, suspension, export and support within the fee cap. No agreed terms or controls means no pilot.

The synthetic trial tests feasibility, not production economics. Representative real-document assessment needs separate approvals and comparable effort measurement. Activation stays excluded until the vendor demonstrates approval and both recovery branches in a separate test environment. Quality/turnaround benefits need their own evidence.

Worked evidence and economics

Hypothetical evidence register. “Unverified” means the claim is not established; it does not mean a test was executed and failed.

Assessment preparation

Traceable ordinary-case output in the test environment. **Decision consequence:** Limited to that case; synthetic trial tests feasibility, real-work evidence remains open.

Action approval

Wrong-entity approval rejection not demonstrated. **Decision consequence:** Activation excluded; technical owner requests execution-boundary evidence.

Recovery

Action trace lacks a reliable committed/uncommitted determination. **Decision consequence:** Production writes excluded; technical owner requires both recovery branches.

Data and operation

Real-data processing, operating capacity and intervention remain unassessed. **Decision consequence:** Control owners must clear the actual pilot setup before commencement.

Monthly teaching calculation

Item	Assumption	Monthly amount
Existing assessment effort	$1,000 \times 12 \text{ min} \times \$60/\text{hour}$	\$12,000
Vendor fee	Up to 1,000 cases	\$6,000
Retained assessment work	$1,000 \times 5 \text{ min} \times \$60/\text{hour}$	\$5,000
Added external checks	Assumed monthly total	\$500
Added operating support	Assumed monthly total	\$1,000
Proposed operating total	Excludes one-time costs	\$12,500

Result: \$500/month above baseline. With \$7,500/month of vendor, external and operating costs, review can consume at most \$4,500 at break-even: 4.5 minutes/case at \$60/hour. To beat the baseline, review must be below that level, or other costs must fall. Integration and transition would raise the required saving.

The 12-minute baseline covers assessment preparation/checking; five minutes covers retained review and average exception/error handling. Record creation/activation and common costs are excluded from both sides. External checks/support are added charges. Loaded labor values capacity, not payroll savings. Full-bundle pricing is not an assessment-only quote. Validate real-work volume/mix, quality and pending work; check overages and billable cases. No automatic calculation or scoring.

1. Define your proposed purchase

Complete for the actual vendor and workflow. Keep investigation, contract, pilot and production decisions distinct.

AI vendor, product, configuration/version and decision requested

Business outcome, existing baseline and intended benefit

Users, business entities, countries, languages and case types

Permitted actions, prohibited actions and required approvals

Data/model/tool/support flows; privacy, security and applicability owners

Sponsor, process owner, technical owner, operating/exception owner

Volume, vendor terms, external/model/human/operating and one-time costs

Pilot limits, duration, fee cap, measurement and end decision

Evidence register location, access limits and evaluated version

2. Record evidence and gaps

Record the source/version, independent check, gap, affected scope, next action and exit criterion. N/A requires a reason.

E01 Outcome and scope

Not assessed	Accountable owner

E02 Geographic / regulatory exposure

Not assessed	Accountable owner

E03 Privacy and data handling

Not assessed	Accountable owner

E04 Identity, authority and untrusted inputs

Not assessed	Accountable owner

E05 Outcome quality

Not assessed	Accountable owner

E06 Exceptions and human oversight

Not assessed	Accountable owner

2. Record evidence and gaps

Record the source/version, independent check, gap, affected scope, next action and exit criterion. N/A requires a reason.

E07 Reliability and recovery

Not assessed	Accountable owner

E08 Observability and intervention

Not assessed	Accountable owner

E09 Governance and supplier changes

Not assessed	Accountable owner

E10 Commercial and operating viability

Not assessed	Accountable owner

E11 Portability and exit

Not assessed	Accountable owner

E12 Scope-specific readiness

Not assessed	Accountable owner

3. Trace a case and decide

Use one copy per important acceptance case. Retain fuller evidence separately; record only appropriate references here.

Case / requirement / business consequence / input and source versions

Product/configuration, environment, identities and permissions

Test condition, expected action, approval binding and destination state

Actual action/state, destination audit ID, evidence/checker/date or unverified gap

Decision, decision maker/date, evidence register and accepted configuration

Authorized scope, exclusions, required supervision and commencement conditions

Blockers, affected scope, risk acceptance, owners, next action and retest criteria

Monitoring/suspension/incident owners, change/exit terms, review date and pilot end

A material unmet authorization, security, privacy, legal or functional requirement blocks the scope that depends on it. A high average or cost saving cannot cancel that requirement. This record supports accountable diligence; completing it does not establish compliance or readiness.