

Assessment prep checklist

A short checklist before you request a written AI Workflow Assessment. Tick what you already know. Empty boxes are risk. If more than a third stay blank, you are not ready for a 21-day project.

1. Goal and limits

- ☐ One main goal in one sentence (what gets better for the business).
- ☐ A success number named (time saved, cost per job, fewer tickets, more deals).
- ☐ Hard limits listed: budget ceiling, where data must live, rules you must follow, how you want to sound.
- ☐ Non-goals written down (what this first version will not do).
- ☐ For each important action: a person checks it, or the software may act on its own — written down.

2. People, access, and logins

- ☐ Who uses it: your team, a customer, an admin.
- ☐ How companies are split (one company, many companies, workspaces).
- ☐ How people sign in (company login, magic link, social, API keys for machines).
- ☐ Who is allowed to approve actions the software wants to take.
- ☐ Do you need a history log? If yes, how long do you keep it?

3. Tools, actions, and safety

- ☐ Allowed tools listed (email, CRM, browser, payments, and so on).
- ☐ Each tool has a purpose, login scope, rate limit, and what happens when it fails.
- ☐ Dangerous actions need a person to confirm, or two people.
- ☐ Spend and usage caps per day.
- ☐ A kill switch exists — a way to pause the software — and it has been tested.
- ☐ Risks of tricking the software or leaking data have been reviewed for every tool.

4. Data and memory

- ☐ Source systems listed with owners and how you get in.
- ☐ What is stored vs looked up on demand is explicit.
- ☐ Rules for private data and secrets (redact, encrypt, never log).
- ☐ How the software remembers context (this thread only, a search store, a database, or a mix).
- ☐ A set of at least 20 real tasks ready before go-live.

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5. Running it day to day, and cost

- ☐ Where the screens, API, and background jobs will live — and why.
- ☐ How long jobs retry without doing the same work twice.
- ☐ Logs, traces, and cost views owned by a named person.
- ☐ Who to call when the software behaves badly.
- ☐ Cost per successful job at the volume you expect.
- ☐ A rollback plan if quality or vendor prices change.

6. First slice of work

- ☐ A first slice that can ship in 21 days, with a clear demo.
- ☐ Pass/fail checks written down (not vibes).
- ☐ Who decides prompts, tools, and go-live.
- ☐ Legal / terms / disclosure for software-written actions reviewed.
- ☐ After the first three: three improvements ranked by value vs risk.

Next step

Request a written AI Workflow Assessment. LogiQ — the studio team that builds the software — replies by email. This is not a call with Ashley. If it is a fit, the 3-job automation project follows: we automate 3 jobs in your business in 21 days. Public band R50,000–R150,000 ZAR, quoted after assessment.

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