

goldrenmai

Procurement asset

Pilot intake questionnaire

A practical questionnaire for turning one repeated workflow into a scoped AI Agent pilot.

Use this questionnaire to collect workflow context, available materials, systems to connect, owners, risk actions, and the timeline / budget window.

- Current workflow
- Data materials
- Systems to connect
- Timeline / budget

Sample / redacted procurement material. Not a public named-client endorsement.

Pilot intake questionnaire

Use this questionnaire to collect workflow context, available materials, systems to connect, owners, risk actions, and the timeline / budget window.

Current workflow

The buyer describes the repeated process, owner, pain point, current tools, volume, and failure modes.

Data materials

Approved documents, exported tables, sample tickets, meeting notes, FAQs, or SOPs are listed with sensitivity notes.

Systems to connect

CRM, website chat, document repository, ticket queue, spreadsheet, or approval tools are scoped for the first pilot only.

Timeline / budget

The buyer shares urgency, review window, decision process, and expected commercial path.

Buyer review focus

- Current workflow
- Data materials
- Systems to connect
- Timeline / budget

Pilot intake questionnaire

Current workflow

- Which repeated workflow should be improved first?
- Who owns the workflow today?
- What breaks, slows down, or becomes inconsistent?
- How many tasks, questions, leads, tickets, or approvals occur each month?

Data materials

- What approved documents can be used?
- Are there spreadsheets, tickets, CRM exports, SOPs, manuals, or meeting notes?
- Which materials are sensitive or excluded?
- Who can approve the source whitelist?

Pilot intake questionnaire

Systems to connect

- Which systems are necessary for the first pilot?
- Can the pilot begin with exports before live integration?
- Who can authorize sandbox or read-only access?
- Which external actions must remain in human review?

Timeline / budget

- When should the first workflow be reviewed?
- Who attends the pilot acceptance meeting?
- Is budget already allocated or under review?
- What result would justify expansion?

Pilot intake questionnaire

Success metric

- Accuracy and citation quality.
- Handoff quality for the human team.
- Time saved or response consistency.
- Risk cases escalated correctly.

Procurement review table

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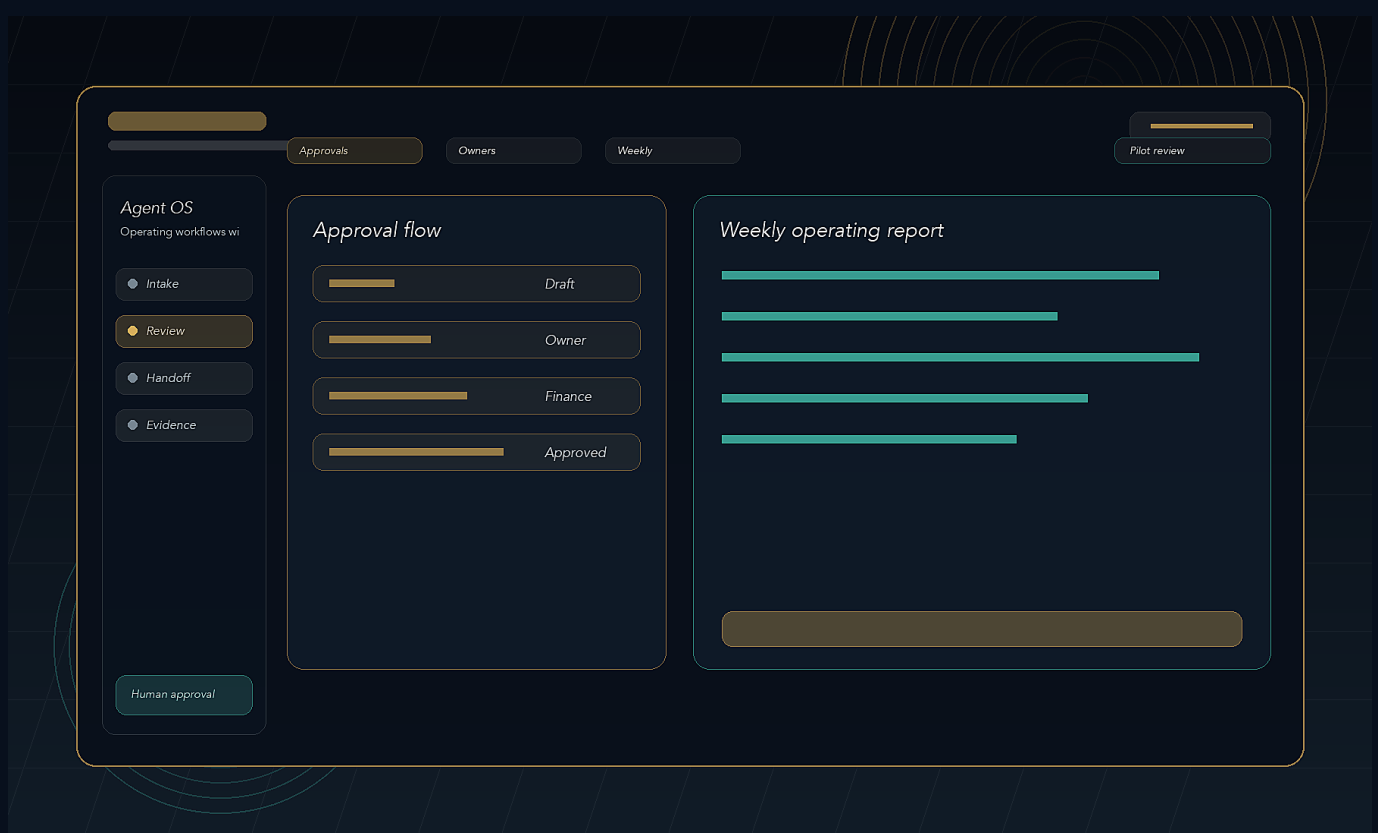
Contact

Share your website, process description, or a small document set. We will reply with a recommended pilot scope, required materials, and a practical deployment path.

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Procurement workspace visual

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Pilot intake questionnaire

- Current workflow
- Systems to connect
- Data materials
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Next review steps

- 01 A practical questionnaire for turning one repeated workflow into a scoped AI Agent pilot.
- 02 Send one workflow and a small approved material sample.
- 03 Confirm owner / reviewer / approver before implementation.
- 04 Agree the first acceptance metric before any expansion.
- 05 Keep sensitive client data out until a written scope is approved.

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