

The Worksheets

Four instruments you run with a pen, not a chatbot. Print them; they work better on paper, where nobody's testing you.

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- 1 **The Two-Sentence Problem Test**
The first gate on any AI build

 - 2 **The Decision Document**
One page before you commit

 - 3 **The Vendor Pitch Checklist**
Six questions for the vendor meeting

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Draw the AI/human boundary first
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All four are free at topfiveaitech.com/worksheets
From the *Before You Build* trilogy by Dr. Jeff Wurfel
This site sells nothing.

The Two-Sentence Problem Test

The first gate on any AI build

Fill in both sentences. No jargon. No vendor terminology.
Nothing you'd be embarrassed to say in front of a sharp
twelve-year-old.

The problem I'm trying to solve is _____.

The way I currently handle it is _____.

HOW TO READ YOUR ANSWER

- | | |
|-----------------------------------|--|
| Two clean sentences | → run the full decision at
Build / Buy / Skip. |
| Can't strip the borrowed
words | → stop. Spend a week with the actual
work -- the people, the data, your
own confusion -- until the plain
version comes. |
| Small honest version | → solve the small version. Don't
inflate it back to a size that
justifies the engagement. |

The Decision Document

One page before you commit

Build proposal: _____ Author: _____

Date: _____ Revisit date: _____

1. THE PROBLEM

In two sentences, your own words, no vendor terminology:

2. THE WORKFLOW

Instances per period: _____ Time per instance: _____

Total annual time cost: _____

3. THE CUT – classify each step:

AI (judgment, varies by case) / Automation (same input, same output) / Human (high-stakes, low-volume, or accountability)

Steps: _____

4. READINESS

The build depends on these capabilities: _____

Classification: Reliably ready / Almost ready / Not yet

Evidence: _____

5. HUMAN PLACEMENT

Humans are positioned at: _____

At each point, what specifically does the human do?

6. PROTOTYPE PLAN

Start: _____ End: _____

What I'll do manually during it: _____

What notes I'll keep: _____

7. THE DECISION

Build / Build smaller / Wait / Don't build

Budget gate (if building): _____

What evidence would change this decision:

The Vendor Pitch Checklist

Six questions for the vendor meeting

BEFORE THE MEETING

Write your problem in two sentences, in your own words,
using no vendor terminology:

DURING – ask each question; note how specific the answer is.

1. PROBLEM FRAMING

"Can you describe the problem we're solving in plain language,
without using any of your product's terminology?"

Look for: a description that matches your own two sentences.

Red flag: pitch language; a problem that isn't quite yours.

2. WORKFLOW VOLUME

"What workflow volume does this engagement assume – per period,
per instance, total annual time cost?"

Look for: numbers they know or explicitly asked you for.

Red flag: ROI math that needs volumes bigger than your reality.

3. THE CUT

"Which specific steps in this system require AI, and which are
deterministic automation?"

Look for: a clear step-level split, with AI only where
judgment lives.

Red flag: "the whole system is AI-powered."

4. CAPABILITY EVIDENCE

"Will you run this system on twenty of my actual inputs for
two weeks before I commit?"

Look for: yes, with reasonable terms.

Red flag: demo data, case studies, or a money-back guarantee
offered instead. (The guarantee returns your dollars, not
your months.)

5. HUMAN PLACEMENT

"Where exactly do humans fit? For each point – what do they do,
and how do they know when their attention is needed?"

Look for: named roles, defined triggers, real authority.

Red flag: "humans review the AI outputs."

6. STAGED COMMITMENT

"Can this be structured in phases, with the first phase as a
pilot whose results determine whether the rest proceeds?"

Look for: yes, with a defined pilot scope and criteria.

Red flag: full upfront commitment "to be able to deliver."

AFTER

Clean answers: ___ / 6 Red flags: ___ / 6

5-6 clean: engage seriously.

3-4: probe further before committing.

0-2: decline politely – the offering depends on you not asking.

Decision deferred until: _____

Tool / Toy / Trash — The One-Pager

The 3-second triage

Every AI product, workflow, or subscription in front of you is one of three things. The market prices all three the same and demos them the same. This page is how you tell them apart.

TOOL — It made your life measurably better. You could justify, out loud, that using it beats not using it: the output gets used, it subtracts from a bill you were already paying, and the fixing takes less than doing the work by hand.

TOY — It's fun, and it's honest about being fun. Nothing profitable happens, and nothing has to. Toys are allowed to exist — they're how most people learn what AI can do. The sin isn't playing; it's wiring a toy into the business and calling it a strategy.

TRASH — It wears the costume of a tool. It produces something, it looks busy, and it takes more than it gives. Most failed AI builds are a toy or a piece of trash that somebody mistook for a tool.

THE FIVE TESTS

(Ask • A tool sounds like • The trash tell)

1. If the output vanished overnight?
Tool: Someone feels it that day
Trash: Honestly? Nobody would notice
2. What does it do to your money?
Tool: Subtracts from a bill I already pay
Trash: Spends now, chasing money that hasn't shown up
3. How much fixing before it's usable?
Tool: Touch-ups — faster than by hand
Trash: So much I might be faster the old way
4. Where does the output land?
Tool: A real next step — person, process, decision
Trash: A folder nobody opens
5. Why do you keep running it?
Tool: It measurably helps — I could show you where
Trash: It feels productive

An honest toy answers differently: "it's fun, I know it's fun, and it isn't invoicing like a business move."

THE BUCKETS MOVE

These are verdicts on this thing, for you, right now — not on a technology forever. Things graduate two ways: the use changes (fun images become marketing content that converts), or the tech crosses a line (image generators lived in the toy bucket for years, until models learned text and consistency). Re-run the triage when either happens — and remember tools decay too: when the fixing starts climbing, last year's tool is becoming this year's trash while the subscription keeps billing.

THE MOVES

Tool → keep it, and re-check it quarterly.
Toy → enjoy it, or give its output a real job and a real bill, then re-test.
Trash → kill it without guilt. Killing it is a result: the time and money it was quietly eating are yours again, and the build that deserved them is still out there.

The Five Scoping Questions

Draw the AI/human boundary first

Answer in writing. Twenty to thirty minutes.

1. WHAT AM I PRODUCING?

Name the deliverable specifically – not "a market analysis" but length, contents, audience, and deadline.

2. WHAT'S THE QUALITY BAR?

Name what good enough looks like: "sendable to the client without embarrassment" / "publishable under my name" / "good enough to think with."

3. GIVEN THAT BAR, WHAT CAN AI RELIABLY CONTRIBUTE?

Drafting from my structure · transformation between formats · extraction · pattern recognition in known domains · code under supervision · expansion of my points · summarization. Which of these apply here?

4. WHERE'S THE HUMAN-ONLY CONTRIBUTION?

Novel reasoning · judgment only an expert in this can make · anything I can't verify. Which parts of this project are those? (Be honest – under-claiming this list is the expensive move.)

5. THE BOUNDARY, EXPLICITLY STATED

One or two sentences naming where AI's contribution ends and mine begins. Write it down. Pin it to the top of the working doc.