

Copilot Use-Case Worksheet

Identify use cases that are valuable enough to test and controlled enough to pilot.

Complete one worksheet for each proposed use case. Prefer a narrow, repeatable task with an accountable reviewer and a measurable baseline.

1. Current task

What happens today?

2. Person responsible

Role or named owner.

3. Time currently required

Time per occurrence and frequency.

4. Information used

Files, email, meetings, systems, and sensitive data.

5. Desired outcome

What should be faster, clearer, or more consistent?

6. Potential risk

Privacy, permissions, accuracy, legal, client, or operational risk.

7. Human reviewer

Who checks the output before it is used?

8. Expected time savings

Estimate per occurrence and per month.

9. Pilot success measurement

Baseline, target, method, and review date.

Decision	☐ Test in pilot ☐ Revise first ☐ Reject or defer
Pilot owner	
Review date	

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