Northlight Supply AI Pilot Selection Workshop

Prepared from supplied materials. Review before use.

Workshop brief

Audience: Nine nontechnical business leaders at fictional Northlight Supply: operations, commercial and service managers. All can compare simple whole-number scores; none needs coding experience.

Goal: In 75 minutes, choose exactly one eligible AI pilot using the supplied gate, scoring rule and tie-breaker. Produce one decision card naming the chosen option, gate result, score, reason, supplied owner role, two-week pilot scope, success measure and stop rule, plus a reason for each rejected or deferred option.

Duration: 75 minutes · Format: in-person

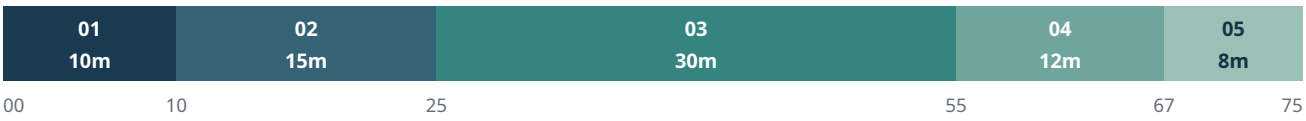
Constraints: Use only the two fictional sources. All companies, policies and figures are invented exercise inputs, not customer evidence. No live accounts, personal data, provider calls, automatic customer actions or implementation. Participants work in three tables of three using paper or a plain text worksheet included in the pack. Apply eligibility before scoring. Use the supplied owner roles and measure; do not invent savings, calendar dates or completed commitments. Keep the main exercise to a decision card and three option dispositions.

Intended outcome

Participants will evaluate three fictional AI pilot options against Northlight Supply's eligibility criteria, score eligible options, apply tie-breaking rules, and produce an agreed decision card selecting Option A (Public Product FAQ Drafting) owned by the Service Lead, along with clear disposition rationales for all three options.

Agenda

Session timeline



Session timeline. Section 1: 10 minutes, 0–10 elapsed; Section 2: 15 minutes, 10–25 elapsed; Section 3: 30 minutes, 25–55 elapsed; Section 4: 12 minutes, 55–67 elapsed; Section 5: 8 minutes, 67–75 elapsed.

The agenda and exercise below are proposed workshop design informed by the sources.

0–10 min · Introduction & Evaluation Framework Setup

Welcome the 9 operations, commercial, and service managers organized into three tables of three. Review workshop boundaries: fictional exercise inputs only, no live customer systems or provider calls, and strict sequence of applying the eligibility gate before any scoring or tie-breaking [Source: Northlight fictional pilot decision rules]. Introduce the three fictional pilot options A, B, and C [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

10–25 min · Option Review & Eligibility Gating

In three tables of three, participants evaluate options A, B, and C against the mandatory eligibility gate: only supplied public product text or synthetic requests allowed, outputs must be human-reviewed drafts, and no changing customer records, sending messages, or issuing refunds [Source: Northlight fictional pilot decision rules]. Tables record gate pass/fail status and specific failure reasons, filtering out ineligible options before calculating scores [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

25–55 min · Pilot Scoring & Decision Card Exercise

Working in small groups, participants complete the decision exercise. For eligible options, calculate total score (stated business value + stated readiness), apply the tie-breaker rule (lower effort number wins ties), select the winning pilot, and populate the final decision card and option dispositions worksheet [Source: Northlight fictional pilot decision rules]. Ground the decisions in the option cards [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

55–67 min · Table Readouts & Cross-Group Synthesis

Each table presents its completed decision card and disposition rationale. Compare results across tables to confirm consensus on Option A selection, tie-breaker logic (Option A effort 1 vs Option C effort 3), Option B gate rejection rationale, and Option C deferral rationale [Source: Northlight fictional pilot decision rules]. Review against the option criteria [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

67–75 min · Decision Card Alignment & Governance Wrap-up

Consolidate the final agreed decision card. Review the pilot boundaries: Option A two-week pilot scope, Service Lead ownership, success measure, and explicit stop rule [Source: Northlight fictional pilot decision rules]. Confirm that the two-week pilot duration begins only after an actual start is agreed, leaving start and follow-up dates undated [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

Exercise: Decision Card Formulation & Pilot Selection

Duration: 30 minutes

Agenda section 3: Pilot Scoring & Decision Card Exercise

Scenario and input

Fictional case details for Northlight Supply (all figures, options, and rules are invented exercise inputs):

Evaluation Gate Rules:

1. Input Restriction: Only supplied public product text or synthetic requests may enter the pilot.

2. Review Requirement: Output must be a draft reviewed by a person.

3. System Boundaries: The pilot may not change customer records, send messages, or issue refunds.

Rule: Reject an option that fails any gate before comparing scores.

Scoring and Tie-Breaker Rules:

- Score = Stated Business Value + Stated Readiness (each 1 to 5).

- Tied score resolution: Lower effort number wins. Do not invent new scores.

- Duration & Governance: The selected pilot lasts two weeks after an actual start is agreed; no calendar start or follow-up date is supplied.

Option Profiles:

- Option A: Public product FAQ drafting. Value 4, Readiness 4, Effort 1. Scope: Use supplied public product facts and 12 synthetic questions; a Service Lead reviews every answer before use. Proposed success target: At least 10 of 12 answers contain only supported facts, with zero unsupported warranty promises. Stop rule: Stop the pilot if any draft exposes personal data or would be sent without review. Trial input reference: Public facts state fictional Luma desk lamp costs 390 SEK, has two brightness levels, and a one-year warranty. Synthetic query asks if Luma has three brightness levels and a five-year warranty; supported draft clarifies it has two brightness

levels and a one-year warranty. Supplied owner role: Service Lead.

- Option B: Autonomous refund agent. Value 5, Readiness 5, Effort 1. Mechanism: Reads identifiable customer complaint records and immediately issues refunds without human approval.

- Option C: Synthetic sales-enquiry summary drafts. Value 5, Readiness 3, Effort 3. Scope: Uses synthetic enquiry messages; the Commercial Lead reviews summaries and no customer system changes occur. Supplied owner role: Commercial Lead.

Expected output

One completed decision card for the selected pilot (Option A) including gate result, score calculation, tie-breaker reason, supplied owner role, two-week pilot scope, proposed success measure, and stop rule, accompanied by explicit disposition records and reasons for all three evaluated options (A, B, and C).

Instructions

1. Review the fictional option details in the scenario. Do not invent any new numbers, external tools, customer accounts, or calendar dates [Source: Northlight fictional pilot decision rules]. Consult the option data [Source: Northlight fictional option cards and trial input].
2. Apply the eligibility gate to options A, B, and C using Gate Criteria: 1) Uses only supplied public product text or synthetic requests; 2) Output must be a draft reviewed by a person; 3) Does not change customer records, send messages, or issue refunds [Source: Northlight fictional pilot decision rules]. Disqualify any option that fails any gate before scoring.
3. For all eligible options, calculate Score = Business Value + Readiness (values 1 to 5). If scores are tied, resolve using the lower effort number [Source: Northlight fictional pilot decision rules]. Select exactly one winning pilot.
4. Fill in the blank Decision Card and Option Dispositions templates below on paper or plain text:

   --- DECISION CARD TEMPLATE ---

   Selected Option: [Fill Option ID and Name]

   Gate Result: [Pass / Fail]

   Score Calculation: [Business Value + Readiness = Total Score]

   Tie-Break Reason: [State effort comparison if tied]

   Supplied Owner Role: [Accountable Lead Role]

   Two-Week Pilot Scope: [Bounded input facts, synthetic question volume, review requirement]

   Proposed Success Measure: [Target accuracy / factual constraint]

   Stop Rule: [Specific safety / process breach triggering immediate stop]

--- OPTION DISPOSITIONS TEMPLATE ---

Option A Disposition: [Selected / Deferred / Rejected]

Option A Reason: [Explanation covering gate, score, and tie-break]

Option B Disposition: [Selected / Deferred / Rejected]

Option B Reason: [Explanation covering gate criteria]

Option C Disposition: [Selected / Deferred / Rejected]

Option C Reason: [Explanation covering gate, score, and tie-break]

Sample response

[ILLUSTRATIVE WORKED ANSWER KEY]

--- DECISION CARD ---

Selected Option: Option A (Public product FAQ drafting)

Gate Result: Pass (uses public product facts and synthetic questions; outputs are human-reviewed drafts; no customer record changes, messaging, or refunds)

Score Calculation: Value 4 + Readiness 4 = Total Score 8

Tie-Break Reason: Tied with Option C on total score (8 vs 8); Option A wins because its effort rating is 1, which is lower than Option C's effort rating of 3

Supplied Owner Role: Service Lead

Two-Week Pilot Scope: Run for two weeks after start is agreed; use supplied public product facts and 12 synthetic questions; Service Lead reviews every answer draft before use

Proposed Success Measure: At least 10 of 12 answers contain only supported facts, with zero unsupported warranty promises

Stop Rule: Stop the pilot immediately if any draft exposes personal data or would be sent without review

--- OPTION DISPOSITIONS ---

Option A Disposition: Selected

Option A Reason: Passes all eligibility gates; ties Option C with total score 8 (Value 4 + Readiness 4); wins tie-breaker with lower effort number (1 vs 3).

Option B Disposition: Rejected

Option B Reason: Fails eligibility gate before scoring. It reads identifiable customer complaint records and autonomously issues refunds without human review, violating data input, human-in-the-loop draft review, and customer transaction restrictions.

Option C Disposition: Deferred

Option C Reason: Passes eligibility gate (uses synthetic enquiry messages, Commercial Lead reviews summaries, no customer system changes) and achieves total score 8 (Value 5 + Readiness

3), but is deferred because Option A has lower effort (1 vs 3).

Debrief

- Review Table Consensus on Eligibility: Confirm why Option B is disqualified before scoring (reads identifiable customer complaint records and immediately issues refunds without human approval, violating data and customer impact gates) [Source: Northlight fictional pilot decision rules]. Verify details from the option card [Source: Northlight fictional option cards and trial input].
- Review Scoring and Tie-Breaker: Confirm that both Option A (Value 4 + Readiness 4 = 8) and Option C (Value 5 + Readiness 3 = 8) tie on score, but Option A is selected because lower effort number breaks the tie (Option A effort 1 vs Option C effort 3) [Source: Northlight fictional pilot decision rules]. Check stated figures [Source: Northlight fictional option cards and trial input].
- Verify Governance and Boundaries: Ensure every table identified the supplied Service Lead role for Option A, recorded the exact success measure and stop rule, and preserved the rule that no calendar start date is assumed [Source: Northlight fictional pilot decision rules]. Verify against option specifications [Source: Northlight fictional option cards and trial input].

Sources: Northlight fictional pilot decision rules; Northlight fictional option cards and trial input

Facilitator notes

- Room Setup & Materials: Arrange room for 9 nontechnical participants into three tables of three. Supply paper or plain-text worksheets. Emphasize that all scenarios, figures, and rules are fictional exercise inputs and no live customer accounts, provider APIs, or external data may be used [Source: Northlight fictional pilot decision rules].
- Enforcing Gating Before Scoring: Remind facilitators to ensure tables apply the three eligibility gates to Option B prior to any calculation. Option B must be disqualified immediately for processing identifiable customer complaints and issuing refunds autonomously without human review [Source: Northlight fictional pilot decision rules] [Source: Northlight fictional option cards and trial input].
- Guiding Tie-Breaker & Owner Assignment: Ensure participants calculate Option A (4 + 4 = 8) and Option C (5 + 3 = 8), then apply the tie-breaker where the lower effort number wins (Option A effort 1 beats Option C effort 3). Confirm participants assign the source-mandated Service Lead role to Option A rather than inventing new roles [Source: Northlight fictional pilot decision rules] [Source: Northlight fictional option cards and trial input].
- Managing Dates & Boundaries: Clarify that the workshop selects a proposal and does not launch a live pilot. The two-week pilot scope begins only after an actual start date is agreed; facilitators must not invent calendar start or follow-up dates during the exercise or readouts [Source: Northlight fictional pilot decision rules].

Source-supported claims

Claim 1

An option that fails any part of the eligibility gate must be rejected before comparing scores, and eligible options are scored by summing business value and readiness.

Evidence from Northlight fictional pilot decision rules

> Reject an option that fails any gate before comparing scores. For eligible options, score = stated business value + stated readiness, each from 1 to 5.

Claim 2

Option A and Option C tie on total score, but Option A wins the tie-breaker due to lower effort.

Evidence from Northlight fictional option cards and trial input

> C is eligible, but A wins the score tie on effort.

Supplied sources

- Northlight fictional pilot decision rules
- Northlight fictional option cards and trial input

Quality and review

Automated checks

75 minutes; required sections and source reference integrity passed.

These checks establish structure, timing and reference/passage integrity, not factual accuracy or instructional quality.

Content review

Model-assisted judgment: passed for revision 2.

- goal: passed — The pack fully meets the brief: exercise instructions and sampleResponse produce a complete decision card for Option A (gate result, score calculation 4+4=8, tie-break rationale, single accountable Service Lead owner, 2-week pilot scope, success measure, stop rule) and provide explicit disposition reasons for options A, B, and C as required by Northlight fictional pilot decision rules and Northlight fictional option cards and trial input.
- audience: passed — The design fits nontechnical commercial, operations, and service leaders: tasks rely on basic whole-number scoring (1-5) and straightforward qualitative gates without coding, technical terminology, or external policy prerequisites.
- grounding: passed — All statements, scores, gate rules, and roles are grounded in Northlight fictional pilot decision rules and Northlight fictional option cards and trial input. Option B is disqualified before scoring due to unreviewed refunds, and Option A breaks the score tie with Option C based on lower effort (1 vs 3) under Service Lead ownership.
- constraints: passed — All brief constraints are honored: total duration is 75 minutes across 5 segments; participants work in 3 tables of 3; eligibility precedes scoring; no live customer systems, provider calls, savings estimates, or calendar dates are introduced.
- completeness: passed — The exercise is self-contained with complete scenario data, explicit instructions, worksheet templates, debrief prompts, and an answer key. It is accurately mapped to agendaSectionIndex 2 with a 30-minute allocation matching the segment duration.

A model-assisted pass is not certification. Human review is still required.