One decision. A usable record.

Use this pack for one maintenance, handover or capital-planning question. Complete the fields on screen or print it. Save a separate copy for each decision.

Leave with five records: a decision statement; a source and gap register; named decision rights; acceptance checks; and an action and review record.

HOW TO USE IT

Name the accountable owner first. Use existing approved records. Mark what is unknown. Work through pages 2-4 with the people who supply, operate and approve the work. Record the outcome on page 5.

1 / DECISION AND DEADLINE

Write one question that can end in proceed, revise, defer or stop. Add the decision deadline.

2 / ACCOUNTABLE OWNER

Name the person who accepts the decision, their role and who must contribute.

3 / OPTIONS AND PRESENT BASELINE

Include doing nothing or fixing the present process. State how the work is done today and its known cost or effort.

4 / SCOPE AND DESIRED OUTCOME

Name the site, asset group and workflow; what is excluded; and the useful change you would test.

Fictional example: Should a facility team trial AI-assisted maintenance prioritization for 24 AHU records? The facility manager owns the decision. Compare the current manual process, record repair alone and a supervised read-only trial. No live BAS commands are included.

This pack is general working guidance. It does not authorize operational changes, certify readiness or establish an industry benchmark. Agree engagement scope and acceptance criteria separately.

Make each gap actionable.

Keep a source reference for every important statement. A similar equipment name is not proof that two records describe the same asset.

SOURCE REGISTER / FICTIONAL SAMPLE

SOURCE	RECORD / SCOPE	OWNER + CHECK	USE / LIMIT
A-01	Asset register: AHU-07, East Wing	Facilities data lead; check against the approved site register	Identity source pending reconciliation
W-01	Work-order export: AHU7, West Wing	Maintenance lead; confirm export date and coverage	Conflicting location; hold this asset

For your sources, record: ID; document/system and date or version; asset/time coverage; owner; checks made; access permission; limitations. Keep sensitive records in an approved location and refer to them here.

GAP REGISTER / FICTIONAL SAMPLE

ID	GAP + EFFECT	OWNER	CLOSE WITH	REVIEW
E01	4 of 24 asset identities unresolved; exclude from recommendations	Data lead	Approved asset map, or an explicit exclusion for each item	Before trial release
E02	2 of 12 outputs lack required references; hold release	Workflow lead	Corrected output + source links + retained retest result	Before trial release

YOUR SOURCE AND GAP REGISTER

Use one line per source or gap. Include the reference, owner, due date, closure evidence and status.

Closure rule: the reviewer checks the evidence and records the result. An action marked "done" by its assignee is not accepted closure. If a source is missing or conflicts remain, record the uncertainty and its effect on the decision.

A recommendation is not permission.

Name a person for each decision right. Keep advice, approval, execution and acceptance visible throughout the workflow.

ROLE	RESPONSIBILITY	FICTIONAL EXAMPLE
AI / workflow	Prepare a recommendation with source references and uncertainty	Suggest maintenance priority; flag conflicting identities
Evidence reviewer	Check sources and record accept, revise or hold	Facility engineer checks asset identity and source traceability
Decision owner	Accept the trial scope and release conditions	Facility manager accepts the evidence and affected retests
Designated operator	Approve permitted operational actions; stop and escalate	Retains control of live building operations; no AI BAS writes
IT / security owner	Approve access and verify agreed safeguards	Read-only export for the trial; no control-system connection

WRITE THE PILOT BOUNDARY BEFORE STARTING

Inputs: approved records and versions. **Permitted output:** recommendations for human review. **Excluded actions:** commands, record changes or wider asset groups. **Duration and workload:** agreed cases, reviewers and dates. **Stop conditions:** identity conflict, missing evidence, unauthorized access, unsafe output or lost reviewer capacity.

YOUR DECISION RIGHTS AND ESCALATION

Name the reviewer, approver, operator, access owner and backup. State who can stop the trial and who decides whether it restarts.

YOUR TRIAL BOUNDARY

Record the input set, permitted outputs, excluded actions, trial period and stop conditions.

Before release: confirm the required approvals, source access, tests and operator handover. A simulated access test does not demonstrate protection of a live BAS. Keep live controls outside this pack unless separately authorized and tested.

Agree the test before the result.

Define the evidence, expected behavior, reviewer and pass condition before running the trial. Choose thresholds for this use case; these are not industry benchmarks.

CHECK	AGREED CRITERION	FICTIONAL OBSERVATION	DECISION EFFECT
Asset identity	Every in-scope asset is matched or explicitly excluded	20 of 24 matched; 4 unresolved	Hold affected assets
12 reference cases	Each output is supported, or correctly withheld when evidence is missing	8 supported + 2 correct holds = 10 pass; 2 unsupported = fail	Correct and retest; hold release
Access boundary	Attempted writes denied in the agreed test environment	One simulated write denied; no live BAS connected	Test-only result; no live-control assurance
Operator handover	Owner accepts checklist, escalation and first review date	Acceptance not completed	Hold trial release

One test trace: AHU location conflicts in A-01/W-01. Expected: hold the recommendation and refer to the data owner. Observed: hold with both sources cited. Verdict: pass for that case. A correct hold does not resolve the underlying asset identity.

YOUR ACCEPTANCE CHECKS

For each test: source/case; expected behavior; threshold; actual result; reviewer; evidence reference; pass/fail and next action.

MEASURE VALUE AGAINST THE PRESENT PROCESS

Use comparable tasks and count all effort: preparation, handling, checking, correction and exceptions. Record case count and operating conditions. Track unsupported outputs and missed issues alongside time. Keep setup and ongoing costs separate. Compare outcomes before any expansion.

YOUR BASELINE AND REVIEW PLAN

Name the measure, current value and source, observation period, comparison method, owner and review date. Mark unknowns; do not invent savings.

Fictional decision: HOLD trial release. Close E01 and E02, complete handover acceptance and rerun affected checks. The example contains no measured operational savings.

Close the work. Check the outcome.

Carry each recommendation into an assigned action, then retain evidence of what changed and whether it helped. A meeting or a completed task alone is not an accepted outcome.

ACTION	OWNER + DUE POINT	STATUS	EVIDENCE / ACCEPTANCE	NEXT REVIEW
A01	Data lead; before release	Open	Approved identity map or exclusions, reviewed by facility engineer	Release meeting
A02	Workflow lead; before release	Open	Corrected references and retest, reviewed by facility engineer	Release meeting
A03	Facility manager; before release	Open	Accepted operator checklist + escalation route + first review date	Release meeting

The rows above continue the fictional example. For real actions, use a calendar due date. Record proposed, assigned, completed, accepted or deferred status, and the reason for any delay or rejection. Add a link or reference to evidence; keep restricted material in its approved system.

YOUR ACTION AND CLOSURE LOG

Action ID; owner; due date; status; evidence reference; accepting reviewer/date; observed outcome; next review.

FINAL DECISION AND RATIONALE

Record proceed, revise, defer or stop; options considered; evidence used; unresolved conditions; and why this decision is appropriate.

APPROVAL AND CONTINUING REVIEW

Decision owner and date; required approvals; next review date; and triggers to recheck after record, asset, permission or workflow changes.

A FOCUSED 30-MINUTE REVIEW

5 min: decision, options and baseline. **10 min:** evidence gaps and authority. **10 min:** acceptance results and actions. **5 min:** record the decision, owners, dates and review point. Afterward, issue the accepted pack with sources, tests, decision and open actions.

Companion: View the four-page fictional worked example
Discuss a building decision: cognitive-corp.com/contact