

AI Insights Review Checklist

A practical way to validate AI-generated insights before you act

Organization: _____

Site/Dept: _____

Prepared by: _____

Date: _____

How to Use This Checklist

AI can help you move faster. This checklist helps you make sure you are moving in the right direction.

Use it after generating AI output to:

- Confirm what is solid
- Identify what may be missing
- Guide where deeper review is needed

You do not need to answer every question perfectly.

The goal is to slow down just enough to ensure the output reflects what is actually happening.



Clarify the Starting Point

Before reviewing the output, take a step back.

☐

What question did we ask AI to answer?

☐

Did that question assume a cause or direction (for example, training, process, or performance)?

☐

Were we looking for understanding or trying to move directly to a solution?

Note: The way the question is framed will shape what AI prioritizes in its response.



Check the Inputs

The output can only reflect what was included.

☐

Did we capture perspectives from all relevant roles?

☐

Are there groups or voices that may be underrepresented?

☐

Are we relying heavily on one type of input (interviews, notes, system data)?

☐

Do we trust the accuracy and completeness of the source data?

If something feels missing, it probably is.



Compare to What you Heard

Reconnect to the original work and what you heard firsthand.

☐

Does the output match what stood out during conversations?

☐

Are important nuances or contradictions reflected, or were they smoothed into patterns?

☐

Were there moments that felt significant that are not showing up here?

AI organizes patterns. It does not always capture context.



Look at Patterns Closely

Not all patterns carry the same weight.

- ☐ Is the output highlighting what is most frequent or what is most important?
- ☐ Could repeated issues be symptoms rather than root causes?
- ☐ Are multiple factors being simplified into a single explanation?

A clear pattern is useful. It still needs interpretation.



Identify What May Be Missing

This is often where the most value comes from.

- ☐ What questions are still unanswered?
- ☐ What feels too clean or too simple?
- ☐ Where would additional context change how we interpret this?

If the output feels complete too quickly, pause and explore further.



Validate Before Solutioning

The goal is understanding first.

- ☐ Are we jumping to solutions based on this output?
- ☐ Have we confirmed that any AI-identified issues reflect how work actually happens?
- ☐ Do we need to revisit stakeholders or data before deciding what to do next?

Speed is helpful. Direction matters more.



Decide What to Do Next

Use the output as part of your thinking, not the final answer.

- ☐ What areas need deeper investigation?
- ☐ Where do we feel confident enough to move forward?
- ☐ What conversations should happen before decisions are made?