Plan a sample of business data for AI

Start with a decision your team makes and an outcome you can verify. Describe the records and permissions before sharing any raw export.

1. Pick one workflow

A repair dispatcher receives a ticket, decides whether to escalate it, and closes it after a technician confirms the result. The sequence can support evaluation of an assistant that recommends the next action. Keep the evidence that lets a reviewer distinguish a correct decision from a plausible guess.

2. Make a fabricated example first

Use artificial names, dates and identifiers. Replace real free-text notes and screenshots with a representative example you wrote for this purpose. When a buyer wants real records, agree on the field list, handling process, acceptance criteria and permission requirements first.

3. Verify who can authorize the records

Check employer, client and software terms. Identify regulated or confidential data, and review whether linked fields, rare events or metadata could reveal an individual or company. Keep restricted exports in the approved environment until the use and safeguards are documented.

4. Ask for a bounded evaluation

Define which sample fields can be shared, who can see them, how long they are retained, and what uses are permitted. Separate evaluation access from production training. Agree on how the buyer will test the sample.

Fill in the sample brief

Field	What to write down
Workflow and intended model task	Name the decision and what a correct outcome looks like.
Records and unit	List the ticket, action sequence, labels or other material. Define one complete example.
Permissions and exclusions	Name the approving role, contracts to check and fields to leave out.
Review and acceptance	Specify the outcome evidence, held-out sample and who can check it.

Public program examples show interest in structured operational records. Each program sets its own eligibility and terms. A sample brief does not establish a purchase or a price.

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