

Project / Domain:

SME Name & Role:

Interviewer:

Date & Location / Call Link:

Primary Objectives (what decisions should the system support?)

Scope (inclusions / exclusions)

In scope:

Out of scope / defer:

Constraints & Policies (legal, safety, compliance, SLAs)

Rule Template (repeat as needed)

IF (conditions):

THEN (conclusion):

BECAUSE (rationale / guideline ref):

Confidence / Weight (0-1):

Exceptions (do not fire when...):

Priority / Salience & Notes:

Rule Template (repeat as needed)

IF (conditions):

THEN (conclusion):

BECAUSE (rationale / guideline ref):

Confidence / Weight (0-1):

Exceptions (do not fire when...):

Priority / Salience & Notes:

Rule Template (repeat as needed)

IF (conditions):

THEN (conclusion):

BECAUSE (rationale / guideline ref):

Confidence / Weight (0-1):

Exceptions (do not fire when...):

Priority / Salience & Notes:

Rule Template (repeat as needed)

IF (conditions):

THEN (conclusion):

BECAUSE (rationale / guideline ref):

Confidence / Weight (0-1):

Exceptions (do not fire when...):

Priority / Salience & Notes:

Conflict resolution policy (e.g., priority, specificity, recency):

Missing / Low-Quality Data

Defaults, imputation, or defer decision?

Required evidence vs. optional signals:

Case ID

Inputs / Evidence Summary

Expected Conclusion

Expected Confidence

Notes

Edge Cases & Counter-Examples (force rules to confront corner cases)

Acceptance Criteria (what success looks like)

Rule/KB ownership, reviewers, and rationale storage.

Link to guidelines / evidence base:

Change Management

- ☐ Version everything (rules, schema, transforms)
- ☐ Review workflow (propose → review → test → approve → release)
- ☐ Feature flags / staged rollout
- ☐ Deprecation policy & timeline

Monitoring & Review Cadence

Key metrics to monitor (accuracy, overrides, conflicts):

Weekly / monthly / quarterly tasks:

Open Questions / Follow-ups
