

01 / UNDERSTAND THE WORK

Choose your first AI workflow.

Start with one recurring task. Use this page to describe the work and check readiness.

Company / team: _____

Date: _____

01 Name the recurring task

When an input arrives, who does what, and why?

Workflow owner and people doing the work

02 Make the current cost visible

Frequency, total team hours per week, and measurable rework or delays

Blended hourly cost and working weeks per year

Current staff-time value = weekly team hours x blended hourly cost x working weeks.
This is a baseline, not promised savings. Include implementation, review, and ongoing costs.

03 Check the information

Inputs / source of truth, one ordinary example, and one known exception

Approved information and tools; access or retention constraints

02 / DESIGN A SMALL PILOT

Choose your first AI workflow.

Use a limited sample to compare assisted work with the current process.

Workflow: _____

Date: _____

04 Define the pilot and human review

Pilot sample and expected result

Review owner, required checks, and actions needing approval

Baseline effort and quality; acceptable accuracy and usefulness

Preparation, review, correction, and tool / ongoing costs

05 Decide what earns a next phase

Errors, limitations, and evidence from the pilot

☐ Build ☐ Refine ☐ Prepare ☐ Stop

Why this decision? Consider whether ordinary automation would be enough.

Next action, owner, and review date
