

01 / CHOOSE A USEFUL FIRST WORKFLOW

Start with a repeated task.

Compare candidate workflows with the people doing the work. This score structures a conversation; it does not predict savings, feasibility or return on investment.

Task / team / owner: _____

01 How often does the work repeat?

☐ 0 / Occasionally

☐ 1 / Monthly

☐ 2 / Weekly or daily

02 How much hands-on effort does it take?

☐ 0 / Little effort

☐ 1 / Some repeated effort

☐ 2 / Substantial repeated task

03 Can you access an approved input?

☐ 0 / Access unresolved

☐ 1 / Needs preparation

☐ 2 / Available and approved

04 Can someone check the result?

☐ 0 / Quality hard to define

☐ 1 / Needs review checklist

☐ 2 / Clear, checkable output

05 Who will own the pilot?

☐ 0 / No owner yet

☐ 1 / Potential champion

☐ 2 / Named owner with time

Total: _____ / 10

If access, review or ownership scores zero, resolve it before committing.

8-10 with those foundations: discuss a scoped pilot. Otherwise prepare the workflow.

Write down the input, output, owner, baseline and exceptions on the next page.

Write a baseline you can check.

Time three representative runs. Keep hands-on work, review and waiting separate.
Use approved or synthetic examples. Do not paste confidential client records here.

Define the workflow

Task, approved input source, desired output, frequency and named owner:

Three representative runs

Run	Hands-on min	Review min	Waiting min	Quality / exceptions
1				
2				
3				

What makes the result usable?

Acceptance conditions, reviewer and examples that must match:

What could stop the pilot?

Missing inputs, unusual cases, permissions, licences or access:

Repeat the same checks on the pilot. Count review and exception handling.
Compare like-for-like examples. State the sample size, period and scope.
Keep API, licence and maintenance costs separate from time saved.

03 / AGREE A SMALL PILOT

A useful result, clearly scoped.

Choose one input source and one output destination. Confirm the environment and human review before work starts. These examples are illustrative, not client results.

Pilot brief

Input -> steps -> output; named owner; intended controlled or production environment:

Acceptance checks

Ordinary example, missing input, exception, approval and saved / exported output:

Ownership and handover

Source / configuration, operating instructions, reviewer and support responsibilities:

After the first version

14-day support scope, 30-day measurement review and next priorities:

Three candidate patterns

Weekly summary

Approved figures -> assisted draft -> source checks before release.

Spreadsheet transformation

Explicit rules -> editable tables -> calculations matched to a baseline.

Document review

Approved library -> recommendations -> human approval and version check.

Discuss your AI Implementation Week

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