

Redesign one recurring workflow with AI

Improve how your team gets work done by redesigning one recurring process using AI. Define what should work better and why it matters, where AI may help, and where people must still review, approve, or decide. Capture that design in a completed first draft of the AI Workflow Design Spec.

Choose a real recurring workflow that you understand and own or can influence. If you do not know something, note [Needs input] and name the person or role who can confirm it.

00 FOCUS THE WORKFLOW

Focus on one repeatable workflow with a clear beginning and end. Describe the work, not an AI product, feature, or prompt.

Who does this work?

Who receives or depends on the result?

What observable event starts the work?

What observable result shows that the work is complete?

What does this workflow accomplish today?

Which team goal or business priority does that result support?

Who is accountable for the workflow result today, even if several people or systems perform the steps?

What nearby work is outside this redesign?

Scope check

Complete the sentence below using the answers above:

When [copy the start event], [copy the people who do the work] need to [copy the completion point] so that [copy the current result and the priority it supports]. This redesign does not cover [copy what is outside scope].

Scope check response:

01 MAP THE CURRENT STATE

Start with the beginning and end from the prerequisite. Trace the work people actually do today, including meaningful handoffs and decisions.

Information, access, materials, or guidance needed to do the work

Current flow

Use arrows or one line per step. Include where work or responsibility moves to another person, team, or system.

[Start event] → [Step or handoff] → [Step or handoff] → [Completion point]

Where does a person interpret information, make a judgment, or approve something?

Where does the work wait, repeat, break down, create rework, or become inconsistent?

Describe what you can observe. This friction is a clue to investigate; it does not prove that AI is the answer.

Which friction matters most for this redesign?

Current-work check: Complete this sentence using your answers from the prerequisite and Step 1:

When [copy the start event], [copy the people] need to [copy the completion point], but today [copy the main friction] gets in the way.

Current-work check response:

02 DEFINE A BETTER OUTCOME

Use the main friction from Step 1 and the priority from the prerequisite. Name a better result for the people doing or receiving the work—not “use AI.”

Better outcome

What should become better, for whom, and why?

Success signal

What would you observe or measure if the redesign helps?

Failure signal

What would show that the redesign is creating harm, more work, or a worse result?

What must stay true while the workflow improves?

Name a standard, safeguard, approval, or outcome that cannot be compromised.

Step 2 check

Does the better outcome address the main friction, and would the success and failure signals show help or harm without compromising the safeguard?

What assumption or unknown could change this part of the design?

Mark it [Needs input] if it could change the design.

Who can confirm or correct it?

03 MAKE RESPONSIBILITY VISIBLE

For each step, choose whether AI may complete, support, or if people must own the work. Do not choose a product or write a prompt yet.

AI completes: AI handles a bounded, repeatable step with clear inputs and outputs; errors can be monitored and reversed quickly.

AI supports: AI prepares, compares, drafts, summarizes, recommends, or flags something, and a named person checks or authorizes it before use.

People own: A person handles sensitive, ambiguous, consequential, policy-required, or hard-to-reverse work.

Which step(s) may AI complete?

Which step(s) may AI support?

Who reviews or approves, and exactly what do they check or approve?

Which step(s) must people own?

What conditions should interrupt the routine path and require someone to take over?

Who receives that exception, and what do they do next?

Who remains accountable for the overall workflow result?

Copy the current owner from the prerequisite, or name the proposed owner and what would need to change.

Complete your AI Workflow Design Spec

READINESS CHECK

Compare the completed first draft. Keep every material unknown marked [Needs input] and name who can confirm or correct it.

Do the trigger, endpoint, steps, handoffs, friction, judgment points, and owner describe the same bounded workflow?

Yes | No

Does every proposed AI contribution lead to a named human control, with the owner, stop condition, exception recipient, and next action visible?

Yes | No

What material unknown or contradiction remains, who can confirm or correct it, and what could change?

What is the single most material gap or contradiction, and what in the spec shows it?

Check scope and current path / observable outcome under current permissions, tools, and policy / standards and decision criteria / ownership, accountability, and escalation.

Readiness Decision

Proceed | Revise | Stop

This is an organizational readiness check: a sound draft may still reveal a foundational condition that AI cannot resolve and the organization must close first. The spec is the Design output; this final check directs the next work.

Proceed: The workflow, outcome, responsibilities, owner, exception path, and material assumptions are clear enough, and no foundational readiness gap blocks defining requirements and representative tests.

Revise: The opportunity may still be viable, but the design needs confirmation, repair, or a narrower boundary—for example, clarify the workflow path, outcome signal, human review, exception route, or owner.

Stop: The draft reveals a foundational organizational readiness gap that AI or a better design cannot resolve. Close the prerequisite first—for example, standardize the process or decision criteria; assign ownership or authority; make required information usable; approve necessary permissions, policy, or controls; or provide capacity for review and exceptions. A [Needs input] item does not automatically mean Stop: if it can be confirmed, clarified, repaired, or narrowed in the design, choose Revise.

If you chose Revise

What confirmation, repair, or narrower boundary would make the design ready to check again?

If you chose Stop

What foundational organizational condition must change first?

What evidence or change should trigger another readiness check, and when?

Next Steps

What is the next action?

Who owns that action?

By when?

Validate the completed first draft with the people who do and own the work. Complete means all sections are assembled and unknowns are visible, not that the design is validated. Others can review and challenge it before requirements or testing.

Turn your notes into an AI Workflow Design Spec

Copy the prompt below into ChatGPT or an AI tool approved by your organization, and paste your completed worksheet after MY NOTES.

Title the output AI Workflow Design Spec. Use only my notes; invent nothing. Follow the headings in order. Mark missing information [Needs input]; preserve assumptions and unresolved gaps; ask no more than three questions. Do not claim the workflow is built, tested, approved, validated, or proven.

Prerequisite – Focus on a bounded workflow: Include start, end, people involved or affected, purpose and supporting priority, owner, and outside scope.

Step 1 – Map the current state: Include trigger, inputs, steps and handoffs, judgment points, endpoint, friction, and owner.

Step 2 – Define a better outcome: Include the better outcome, success and failure signals, and the safeguard the redesign must protect.

Step 3 – Make responsibility visible: Include the future flow; permitted information; responsibility choices (AI completes, AI supports, or People own); outputs and handoffs; named human review or approval and checks; human decisions; owner; stop conditions; and exception recipient and next action.

Design output – AI Workflow Design Spec: Assemble the prerequisite and Steps 1–3. Run the Design check | Compare questions. Keep material unknowns marked [Needs input], name who can confirm or correct them, and note what could change.

Final readiness check – Proceed, Revise, or Stop: Inside the spec, record the recommendation and reason; next action, owner, and date; the confirmation, repair, or narrower boundary for Revise; the foundational organizational condition for Stop; and the evidence or change that should trigger another check and when.

MY NOTES

[Paste completed prerequisite, Steps 1–3, Design check | Compare, and final readiness check here]