

How to choose your first AI workflow

Five criteria for choosing a repeatable, measurable and controlled first workflow.

01 Start with a repeated frustration

Choose a workflow that happens often enough to inspect. “Help with admin” is too broad. “Sort incoming customer enquiries and prepare a reply for review” has a clear beginning, an output and an owner.

02 Use five practical filters

Frequency: does it happen every week? Rules: can someone explain what a good result looks like? Access: are the inputs available in a supported tool? Review: who catches an exception? Value: is there enough recurring effort or delay to justify implementation? A workflow does not need to be perfect, but it needs a boundary.

03 Write down the exceptions

Collect ten ordinary examples and five awkward ones. Include a missing attachment, an ambiguous request, an unexpected sender, an incorrect number and a message that needs the owner. A system that only handles the easiest examples will create more supervision than it removes.

04 Choose one definition of done

A useful definition might be: every in-scope enquiry receives a category, a named owner and a draft that makes no unverified promises. It does not include sending that draft, inventing a price or resolving every customer issue. Keep the first outcome narrow enough to verify.

05 Make a baseline before changing anything

For one working week, record the number of items, handling time, response delay and rework. This is your starting point. Use the same measures during a pilot, including the time spent checking the AI. If the problem is too small, improve the checklist or existing software first.

[Read the current guide online](#)

Make it specific to your team.

A working sheet for a focused discussion. Keep sensitive information in your own systems.

01 One workflow, one result

What triggers it? What should be ready at the end?

02 Frequency and current effort

Items per week / minutes per item / common delays

03 Inputs, tools and owner

Where does the information live? Who reviews the output?

04 Rules and exceptions

One normal example, one exception, and when AI must stop

05 A clear acceptance rule

What result would make a small pilot worth continuing?

Put this into practice.

Keep this worksheet for your team. Remove client names and confidential details before sharing examples.

[Find your starting point](#) / [Book a free fit call](#)