

AI Workflow Audit Worksheet

Find one workflow worth improving. Decide where AI helps, where a person must check, and how to tell whether the change works.

-
- | | | |
|----|---------------------------|---|
| 01 | Choose a goal | Name the business result that matters. |
| 02 | Map and rank | Find the workflow worth testing first. |
| 03 | Assign the work | Give AI a task and keep judgment visible. |
| 04 | Make it repeatable | Write the prompt and the human check. |
-

Use this with the people who actually do the work. Revisit it when the workflow changes.

STEP 1 · CHOOSE A GOAL

Identify AI opportunities

Begin with a business goal, not a tool. Pick a result your team owns and can recognize when it improves.

1A / CHOOSE ONE GOAL

What would make a meaningful difference this quarter? Name the measure and the work behind it. Avoid goals such as “use more AI”; they do not tell you whether the work got better.

EXAMPLES BY TEAM

Sales

Respond to qualified enquiries sooner.

Customer service

Reduce repeated follow-up after a case is closed.

Operations

Shorten the time from drawing to approved quote.

People

Help new colleagues find the right policy faster.

Procurement

Catch missing order details before supplier contact.

Finance

Reduce rework in monthly reporting.

YOUR TEAM GOAL

HOW WILL YOU NOTICE AN IMPROVEMENT?

STEP 1 · MAP THE WORK

Map the work behind the goal

List the recurring workflows that contribute to the goal. Ask the people doing them; the official process and the actual sequence may differ.

1B / FROM GOAL TO WORKFLOWS

Example goal: Shorten the time from customer drawing to approved quote.

- | | | | | | |
|---|-----------------|---|---------------|---|----------------------|
| 1 | Receive request | 2 | Check drawing | 3 | Resolve open details |
| 4 | Draft quote | 5 | Approve terms | 6 | Send reply |

LIST THE WORKFLOWS THAT SUPPORT YOUR GOAL

01	
02	
03	
04	
05	
06	

IF YOU NEED A STARTING POINT

Ask your assistant: "Our goal is [GOAL]. Which recurring activities move it forward? Suggest a short list, then ask which steps may be missing." Check the list with the team before ranking it.

STEP 2 · CHOOSE WHERE TO START

Prioritize one workflow

Score the workflows from the previous page. Start with the one that happens often, takes effort, and matters if the output is weak.

Score 1–3: Frequency (how often it happens), Effort (time or concentration), Importance (how much the result matters). Add the three numbers. A high score is a discussion starter, not an automatic decision.

WORKFLOW	FREQ.	EFFORT	IMPORT.	TOTAL
Preparing customer quotes	3	2	3	8

PRIORITY WORKFLOW

Before automating anything, note where a wrong answer could cause harm or rework.

STEP 3 · BREAK IT INTO TASKS

Map the priority workflow

Break the chosen workflow into the steps people actually take. Talk to more than one colleague if their approaches differ.

3A / WRITE THE TASKS IN ORDER

Example: Preparing a customer quote

- | | | | | | |
|---|-----------------|---|--------------|---|-----------------|
| 1 | Receive request | 2 | Read drawing | 3 | Clarify details |
| 4 | Draft response | 5 | Check terms | 6 | Send quote |

YOUR WORKFLOW / ONE TASK PER BOX

01		02		03	
04		05		06	

3B / WHAT COULD AI CONTRIBUTE?

Give AI a specific role in a step. It may **summarize** supplied material, **compare** two versions, **draft** a first pass, **challenge** a proposal, or **organize** information for a person to decide. Name the source it must use and the decision it must leave open.

IF YOU NEED A STARTING POINT

Ask: "Our goal is [GOAL] and the workflow is [WORKFLOW]. Here are its steps: [LIST]. Suggest where AI might help, what information it needs, and what a person should still decide. Do not assume every step should be automated."

STEP 3 · ASSIGN AND REVIEW

Assign AI's role and the human check

A draft is not a finished workflow. Name the output, the source it comes from, and the person who decides whether it is ready.

EXAMPLE / CUSTOMER QUOTE

STEP	AI ROLE	HUMAN CHECK
Read the drawing	Extract listed specifications	Confirm against drawing
Resolve ambiguity	List unclear details	Ask customer or engineer
Draft reply	Draft from approved details	Check terms before sending

YOUR WORKFLOW / MAKE THE HANDOFF EXPLICIT

STEP	AI OUTPUT	PERSON + CHECK

3C / CONFIRM THE HANDOFF

Before you move on: can the reviewer tell what AI used, what it produced, and which parts still need a human answer?

STEP 4 · MAKE IT REPEATABLE

Build a prompt pack

Write the instructions a colleague could actually reuse. A useful prompt names the task, the source, the limits and the output. Add the review that follows.

PRIORITY WORKFLOW

EXAMPLE / DRAFTING A CUSTOMER QUOTE

"Using the attached request and approved product sheet, draft a short quote email. Flag any unclear dimensions as questions. Do not invent a price or delivery date. Return the draft and a list of unresolved details."

Human check: Confirm the drawing, price, delivery commitment and the final wording before sending.

TASK	INSTRUCTIONS FOR AI	HUMAN CHECK

After the first run, keep the prompt only if a colleague gets a useful result and understands what to verify.

A short menu of AI tasks

Use these examples if the mapping page feels too abstract. A role for AI is useful only when it helps the workflow you chose.

Prepare a first draft

- Turn interview notes into a customer summary.
- Write a first version of an internal brief.
- Outline a response from approved material.
- Structure a rough training guide.

Analyze supplied material

- Pull differences from two versions of a policy.
- Find open questions in a specification.
- Summarize customer comments by theme.
- Organize recurring issues from support cases.

Challenge an answer

- List what a proposal assumes without evidence.
- Suggest objections to a recommendation.
- Identify a missing customer constraint.
- Point out where a source and draft disagree.

Prepare a handoff

- Draft actions and owners from meeting notes.
- Create a briefing for the next shift.
- Separate decisions from unresolved questions.
- List documents a reviewer needs to check.

Start with one role in one workflow. Keep the source and the human check visible; then compare what happened with the original way of working.

THE NEXT STEP

Make the change observable.

A promising workflow is only a starting point. Put a realistic task in front of the team and see how people use AI: what they give it, what they question, and what they catch before the answer is used.

Proveo makes those decisions visible, so the next coaching step is based on work people actually did.

BOOK A DEMO