APPENDIX A | COMPANION TO CHAPTER 1: SETTING SAIL

Workflow Development Template

Map the process, find the friction, then decide if AI belongs there.

Before AI can help you, you need to know exactly where your process breaks down. Map the workflow you actually run (not the one in the SOP binder), find the step eating your week, then decide whether AI is the right fix. One worksheet per workflow.

Workflow name	Analyst	Date

STEP 1 Document your current process

List every task in order, from first input to finished product. Don't skip the boring steps. They are usually where the friction lives.

#	Task (plain words)	Inputs: what you receive	Outputs: what you hand off	Time spent	Friction (errors, delays, rage)	AI? Y / N / Mix
1						
2						
3						
4						
5						
6						
7						
8						

HOW TO FLAG AI CANDIDATES

Y = repetitive, structured, rule based. N = needs human judgment, context, or sensitive handling. Mix = AI can help, but a human reviews it. Once this is filled in, the Y and Mix rows show where to test AI first, and the Friction column shows your best return.

STEP 2 Find your biggest friction point

Friction point (step #)

Hours lost per week (est.)

Errors it causes per week (est.)

Describe it in one sentence.

Why does this step hurt? (check all that apply)

- [ ] Manual, repetitive work
- [ ] Volume too big to do by hand
- [ ] Cross-referencing multiple sources
- [ ] Language, translation, or format barriers
- [ ] Messy data handed to me
- [ ] Waiting on people or systems

Other

STEP 3 Decide whether AI is actually the fix

One sentence: how could AI help with this friction point?

One sentence: what could go wrong if this step were automated?

Risk level if this step goes to AI: ○ Low ○ Medium ○ High

If Medium or High, what human checkpoint stays in place?

STEP 4 Pick your first test

Run this checklist against the step you picked. If you can't tick most of these boxes, pick a different step.

- [ ] It matches the roadblock I identified
- [ ] It is low stakes, mistakes would be easy to spot
- [ ] It doesn't break the bank (check built-in AI features first)
- [ ] It takes less time to learn than the process takes to do
- [ ] I can measure the process before and after
- [ ] The tool is approved by my organization

Tool I will test

Baseline time for this step

STEP 5 Your first 30 days

Week	Goal	What I did	Time saved / result
Week 1	Choose the task and the AI tool		
Week 2	Run the old process and the AI process side by side		
Week 3	Compare outputs, track the time saved		
Week 4	Review the results, decide to keep it or kill it		

Decision at day 30: ○ Keep it ○ Adjust and retest ○ Kill it

Why?

Reminder: duct tape AI to a broken process and you just get a faster broken process. Carry your friction point into Appendix B.