

AI Workflow Audit Worksheet

How to use: With your team, or by yourself, work through this audit template step-by-step to discover and plan for high-value AI workflow integrations. For best results, re-run this audit bi-annually.

STEP 1

Identify AI opportunities

1a: Pick a goal to focus on

Let's start at the highest level. Choose your top OKR, metric, or other strategic equivalent that ladders up to company-wide goals. What would have the biggest impact on your business if you were able to improve it by 10-20%?

EXAMPLE GOALS BY TEAM:

Marketing and Sales

Increase sales in top five product categories by 10%

Customer Experience

Prioritize improving our technology and training to drive customer engagement

People and Culture

Revamp recruitment process to attract more values-driven colleagues

Product

Refine our product development cycle to create products our customers love

Operations

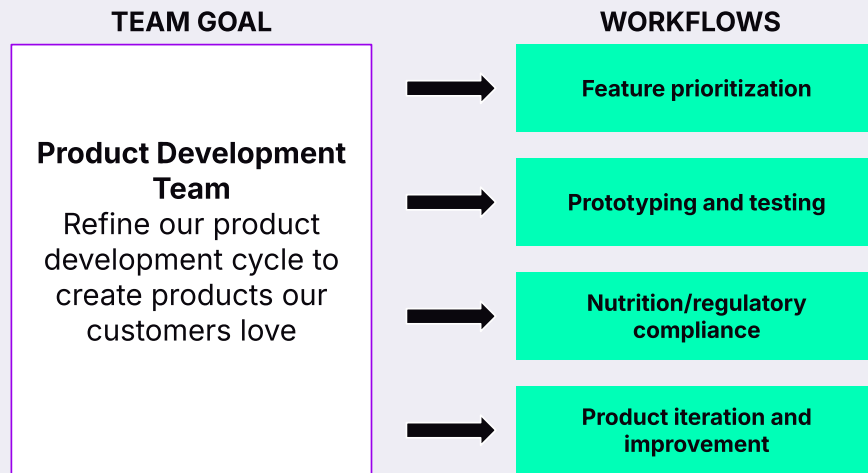
Consolidate number of supply vendors to make procurement process faster

Innovation

Develop and launch groundbreaking products that lead market trends and enhance customer satisfaction.

1b: Break down how you currently work to achieve that goal on a daily basis

Now that you've picked a goal, let's break that down into the sequence of actions (aka workflows) you have to take to achieve your chosen goal.



DO IT WITH AI

Try this prompt:

"I need to break down the sequence of actions, workflows, I take to achieve a business goal. For example, if I had the goal of improving customer service, some workflows would be "employee training," "script writing," "follow-up process," and "tracking customer satisfaction (CSAT)".

I need you to work as an expert business strategist to help me with this task. I work on the [YOUR TEAM] team at a(n) [YOUR INDUSTRY] company. My team's top goal for the year is to [YOUR TOP GOAL].

I need to identify at least 5-10 workflows that pertain to this goal. What do you recommend?"

STEP 2

Prioritize AI opportunities

Now that you’ve identified all the workflows that contribute to achieving your top goal, let’s pick one workflow to augment. AI has the biggest impact on workflows that are:

- **High frequency:** performed consistently – daily, weekly, etc.
- **High effort:** takes a lot of time and/or brainpower
- **High importance:** requires high quality / a second opinion

Rate each of the workflows you identified from 1-3 (1 = low, 2 = medium, 3 = high) for those 3 criteria. **The highest scoring workflow is your priority.**

Workflow	Frequency	Effort	Importance	Total
EXAMPLE: Feature prioritization	3	2	3	8

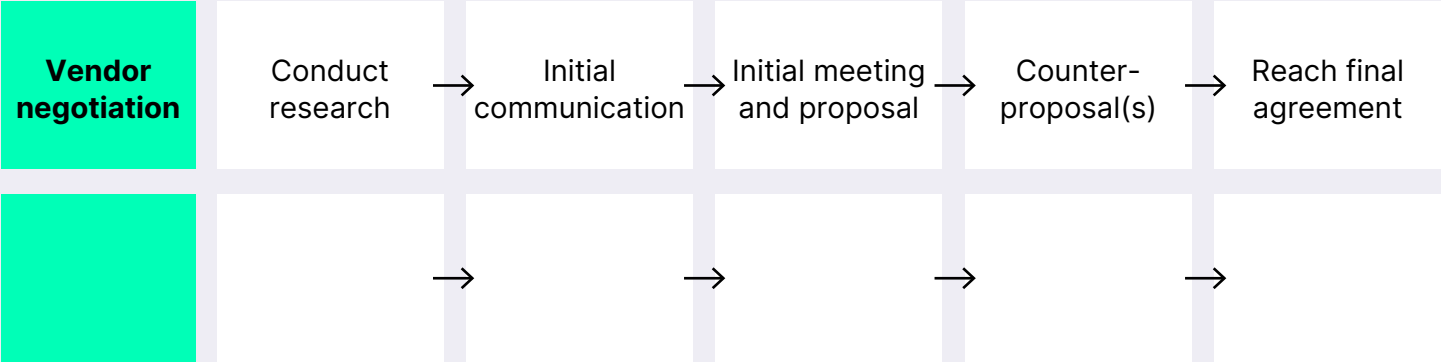
STEP 3

Map AI to your priority workflow

3a: Break your priority workflow out into tasks

Now that you identified your priority workflow, it's time to map out the order of **tasks** that you take to complete this **workflow**.

Note: Team members may accomplish this workflow in different ways, so you should interview all the team members that use this workflow and align on the breakdown of tasks.



DO IT WITH AI

Try this prompt:

"I need you to help me again as an expert business strategist. I work on the [YOUR TEAM] team at a [YOUR INDUSTRY] company. My team's top goal for the year is [YOUR TOP GOAL].

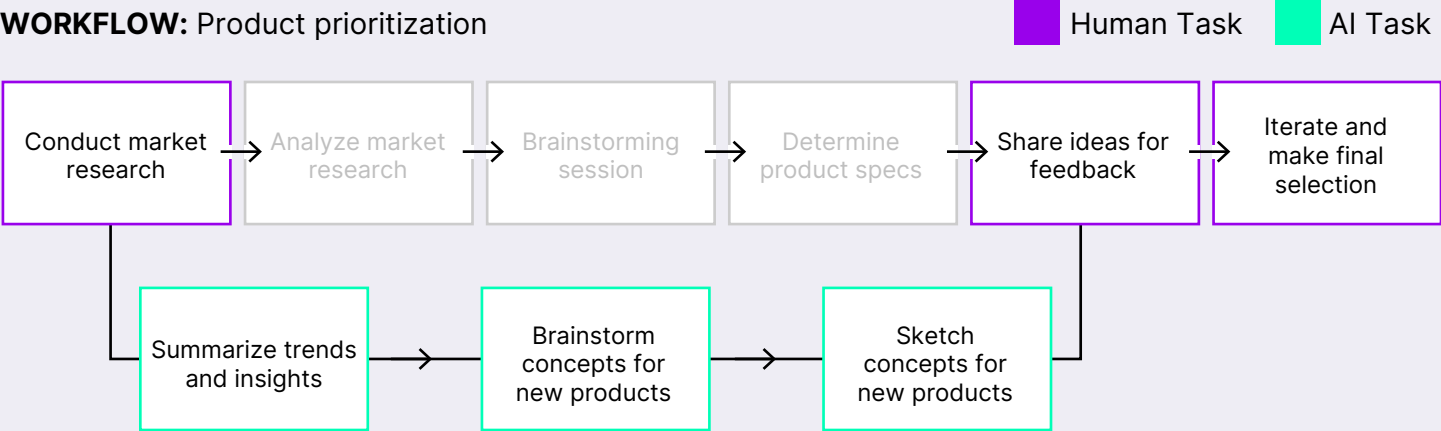
The top workflow I selected is "[YOUR PRIORITY WORKFLOW]". Now, I need to map out 4-6 concrete, sequential steps that a [YOUR TEAM] team would typically take when working on [YOUR PRIORITY WORKFLOW]. Suggest 4-6 steps I should include based on this context and your rationale for each."

3b: Map AI's superpowers to your tasks

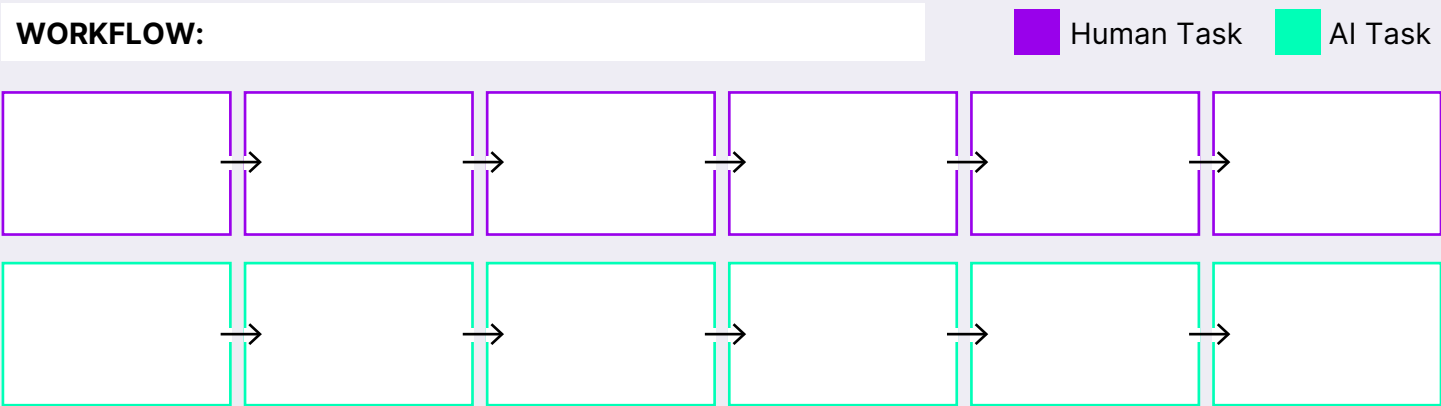
Once you have a task breakdown of your workflow, it's time to map generative AI's superpowers to the tasks that it can augment or automate

Generative AI Superpowers		
Generate ideas	Give feedback	Generate content
Analyze content	Research	

Brainstorm ways that AI can help with each task in your workflow, based on these superpowers. Here's an example to get your juices flowing:



Note: Some tasks may remain human tasks, and that's okay. Not all workflows are fully automatable. But where possible, move tasks from the human side to the AI side. If you need some inspiration, check out the appendix for a starter list of tasks that align with AI's superpowers.



3c: Detail out AI's role in each task

For each task you're outsourcing to AI, break down what specifically you'll prompt it to do:

Step number	AI's task	What it will do
3	Brainstorming session	Create an initial list of potential concepts for products

STEP 4

Build out your prompt pack

Now that you’ve aligned with your team on one solid way to accomplish this workflow, and the steps AI will help with and how, document the prompts each team member should use for the AI tasks to create consistency and repeatability.

WORKFLOW:

Task number	Task goal	Prompt
3	Brainstorm initial ideas for products	You are a product manager in the food and beverage industry building a roadmap for Q3 based on feasibility and potential ROI. Brainstorm 2-3 products based on XYZ and the attached resource...

Appendix: AI use case inspiration for each superpower

If you're stuck on ideas for where AI can plug in, here's a quick list of tasks AI can do really well.

Generate ideas

- Leverage for creative problem-solving
- Identify market gaps and opportunities
- Suggest process improvement across departments
- Brainstorm strategic plans and priorities
- Generate innovative project concepts
- Propose risk assessment and mitigation ideas
- Suggest sustainability initiatives
- Identify new technology adoption areas through AI
- Propose customer engagement strategies
- Generate scenarios for future planning

Analyze content

- Create sentiment analysis of customer feedback
- Analyze large datasets for trends
- Analyze trends in performance metrics and KPIs
- Show a competitive market analysis
- Optimize operational processes for efficiency
- Help with trend prediction and forecasting
- Analyze survey results and customer data
- Analyze and summarize social media interactions
- Evaluate team and project performance

Generate content

- Create automated reports and documents
- Outline presentations
- Build email templates and correspondence
- Create informative newsletters
- Automate social media content generation
- Create training and educational materials
- Develop FAQs and help guides
- Generate data visualization and infographics
- Create blogs and articles
- Draft procedural and policy documents

Give feedback

- Give suggestions for process improvements
- Anticipate frequently asked questions in project proposals
- Assess and enhance customer experience
- Give feedback on strategies and campaigns
- Improve team collaboration and efficiency
- Provide insights on product or service quality
- Give feedback on how proposals align with strategic goals
- Provide insights on communication effectiveness
- Assess and advise on strategy execution / implementation

We partner with organizations like yours

to integrate AI into processes long-term and redesign workflows
with AI. Get in touch if we can help you take this further.

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