



AI Strategy Co.

AI Strategy Tools - Practical managed AI workflows

FREE AI WORKFLOW CHECKLIST

Find one workflow AI should improve first

A practical 10-minute workbook for Australian SMEs still running important work through emails, forms, calls, spreadsheets, and manual follow-up.

Use before buying tools, hiring developers, or launching another unsupported AI experiment.

Find

Identify the best workflow opportunity.

Build

Shape one practical AI workflow around the existing process.

Run

Keep it working, improve it monthly, and avoid tool drift.

Use this before you try to "do AI" everywhere

Most small and medium businesses do not need AI everywhere. They need one practical place where AI can reduce repeated admin, improve customer response, clean up handoff, or make business knowledge easier to use.

This checklist helps you choose that first workflow before spending time or money on disconnected tools.

Goal: leave with one clear workflow candidate that is useful, narrow, and practical enough to test in 30-60 days.

What counts as an AI workflow?

An AI workflow is not just a chatbot. It is a repeated business process where AI can help ask questions, summarise information, route work, draft replies, retrieve knowledge, or prepare a handoff for a person.

Simple test: if your team repeats the same admin steps every week, it may be a workflow candidate.

1 Find

Spot the repeated work that slows response, creates admin drag, or keeps knowledge stuck in one person.

2 Choose

Score the opportunity for value, simplicity, repeatability, and risk before committing to the first build.

3 Run

Plan how the workflow will be managed, monitored, improved, and supported after launch.

Start with business symptoms, not AI ideas

Use this page to identify where AI may help in a practical, operational way. Tick what applies today.

Customer response

- Customers wait too long for a reply.
- After-hours enquiries are not handled well.
- Staff ask the same first questions repeatedly.
- Paid leads or website enquiries go cold.

Repeated admin

- Details are copied from emails into spreadsheets or systems.
- Forms come in incomplete and need chasing.
- Staff manually summarise jobs, requests, or cases.
- Updates are sent manually across multiple channels.

Handoff problems

- Sales, admin, and operations do not receive the same information.
- Jobs start with missing context.
- Owners or managers are interrupted to clarify basics.
- Different people handle the same process differently.

Knowledge access

- Answers sit in documents, emails, folders, or one person's head.
- New staff need repeated guidance.
- Policies, prices, SOPs, or product details are hard to find.
- The business would be harder to transfer if the owner stepped away.

Quick read: If you ticked six or more boxes, you likely have at least one practical AI workflow opportunity. If most ticks are in one box, start there.

Score the first workflow opportunity

Pick one repeated process and score it. Use 1 = low, 3 = moderate, 5 = strong. Record evidence, not guesswork.

Driver	What to look for	Score
Frequency	Does this happen every day or every week?	<input type="checkbox"/>
Admin time	Does it consume staff time through copy-paste, chasing, summarising, or retyping?	<input type="checkbox"/>
Customer impact	Does slow response, missing information, or poor handoff affect customers?	<input type="checkbox"/>
Revenue impact	Could better handling protect leads, quotes, bookings, renewals, or repeat work?	<input type="checkbox"/>
Handoff complexity	Does information need to move from customer to admin, sales, operations, or management?	<input type="checkbox"/>
Knowledge dependency	Does the answer depend on someone knowing where to look or what to ask?	<input type="checkbox"/>
Owner dependency	Does the owner or senior person still have to clarify, approve, or remember too much?	<input type="checkbox"/>
Ease of first version	Can a useful first version be built without replacing core systems?	<input type="checkbox"/>

Total score

_____ / 40

24+ usually means worth investigating. 30+ may justify a pilot if the process is narrow and repeated.

Evidence to note

Use numbers where possible: hours per week, number of enquiries, missed callbacks, quote delays, repeat questions, or jobs affected.

Choose the safest first workflow

The best first workflow is not always the most exciting. It is usually the one that is repeated, visible, useful, and simple enough to launch without a long custom software project.

High value + easier to start

Best first workflow. Start here if the process is repeated and can be tested with a narrow scope.

High value + harder to start

Plan later. Useful, but may need integrations, data cleanup, or more stakeholder agreement first.

Low value + easier to start

Do only if strategic. Good for learning, but unlikely to justify ongoing managed service value.

Low value + harder to start

Avoid for now. This is how small AI experiments become expensive distractions.

Your shortlist

Workflow candidate	Why it matters	Value 1-5	Ease 1-5	First?
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Decision rule: choose one workflow, one team, one handoff, and one measurable outcome. Do not combine several problems into the first build.

Map the first workflow before building

Use this canvas to describe the process in plain business language. This prevents the first AI project from becoming too broad.

1. Workflow name

2. Main business outcome

3. Trigger

What starts the workflow?

4. Inputs needed

What information, files, photos, or context is required?

5. AI can help by

Asking questions Summarising Routing
Drafting Finding answers

6. Human remains responsible for

7. Handoff/output

What should be produced at the end?

8. Exceptions

When should it stop and escalate to a person?

Good first output examples: clean enquiry summary, job-ready handoff, support draft, internal answer with source, booking request summary, quote-ready intake, or monthly admin summary.

What a practical AI workflow needs

Before anything is configured, confirm the basics below. This keeps the build focused, testable, and useful.

Build-ready checklist

- The workflow has one clear purpose.
- The target user group is known.
- The questions or information needed are clear.
- The knowledge sources are approved and current.
- The handoff destination is known.
- The escalation path is defined.
- Success can be measured in 30-60 days.

Keep the first version narrow

For the first workflow, avoid trying to connect every system or automate every decision.

- One assistant or workflow
- One team or business unit
- One main handoff
- One measurable outcome
- One monthly improvement rhythm

What not to automate first

High-risk decisions

Anything requiring judgement, pricing authority, legal advice, safety assessment, or formal approval should stay human-led.

Messy processes

If nobody agrees how the process works today, define it before applying AI.

Deep integration first

Do not start with major system integration unless the business case is already clear.

Plan the monthly management before launch

A useful AI workflow is not finished on launch day. It needs monitoring, content updates, tuning, exception review, and reporting.

Monthly run checklist

- Review usage and common questions.
- Check failed or escalated cases.
- Update approved content and knowledge sources.
- Improve prompts, routing, forms, or summaries.
- Review lead quality or workflow completion.
- Report practical outcomes to the business owner.

Useful measures

- Speed to first response
- After-hours enquiry capture
- Qualified handoff volume
- Admin time saved
- Workflow completion rate
- Common exception patterns
- Owner interruptions reduced

30-day pilot plan

Week	Focus	Decision
Week 1	Confirm scope, content, workflow steps, handoff, and exceptions.	Ready to configure?
Week 2	Configure first workflow and test with internal examples.	Ready for small launch?
Week 3	Launch to selected users or traffic source.	What breaks or needs tuning?
Week 4	Review usage, exceptions, handoff quality, and next improvement.	Continue, refine, or stop?

Examples of good first workflows

Use these examples to translate the checklist into something concrete for your business.

Quote-heavy services

Problem: enquiries arrive without job type, location, photos, urgency, or access details.

First workflow: guided quote request and clearer handoff summary.

Workshop or repair business

Problem: customers describe issues inconsistently and staff chase missing context.

First workflow: service intake assistant with job-ready summary.

Professional services

Problem: repetitive intake questions, document requests, and internal knowledge lookups.

First workflow: enquiry triage and internal knowledge assistant.

Manufacturing or distribution

Problem: product, stock, order, or support questions are answered manually.

First workflow: staff knowledge assistant or customer support intake.

Multi-location service business

Problem: each site handles enquiries differently.

First workflow: standardised enquiry flow with branch routing.

Owner-led business preparing to scale or sell

Problem: too much depends on owner memory, phone calls, and informal process.

First workflow: owner-dependency reduction through SOP and workflow capture.

Your first AI workflow decision

Complete this summary

The workflow I would improve first is:

It matters because:

The first measurable outcome should be:

The main risk or exception is:

Good first workflow test

- Repeated often
- Painful enough to matter
- Narrow enough to test
- Uses approved business knowledge
- Has a clear human handoff
- Can be improved monthly

Want help choosing the first workflow?

AI Strategy Tools helps Australian SMEs find, build, and run practical managed AI workflows around existing business processes.

Book a 15-minute workflow check:
www.aistrategy.au/contact-us

Boundary: AI should support response, admin, workflow, and knowledge access. It should not replace human judgement, responsibility, or approval where those are required.