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FREE WORKSHEET · BUSINESS

AI Opportunity & Workflow Audit

Identify one workflow worth improving.

01 Choose a workflow

Describe the trigger, owner, inputs, steps and expected output. Avoid choosing a whole department.

YOUR NOTES

02 Establish a baseline

Record frequency, typical minutes per run, rework and the evidence source. Mark estimates.

YOUR NOTES

03 Check suitability

Is the task repeatable? Are inputs accessible? Can a person check quality? Identify sensitive data and required permissions.

YOUR NOTES

CONTINUE YOUR WORKSHEET

04 Choose a small experiment

Specify one step AI will assist, a human review point, a quality threshold and a stop condition.

YOUR NOTES

05 Decide what happens next

Compare the trial against baseline. Keep, revise or stop; assign an owner and review date.

YOUR NOTES

Worked example

Illustrative example: a team tests drafting internal meeting summaries from approved notes. A person checks every action and owner before sharing. No time savings are assumed.

Your next practical step

Discuss AI Strategy with Elevate Thrive Consulting.

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TRY · REVIEW · IMPROVE

Come back with what happened.

Your first 15 minutes

List three recurring tasks, pick one with approved inputs and a reviewable output, and record a baseline before testing.

01 Set a seven-day review date

Next review date: _____

YOUR NOTES

02 What worked? What failed?

Record the evidence, errors and uncertainty. A decision to stop is useful too.

YOUR NOTES

03 What will you change?

Choose Continue, Revise, Stop or Gather more evidence. Name your next action.

YOUR NOTES

Review your experiment online

Open Free Resources → Review my experiment.

www.raghvendrasingh.com