

AI Workflow Assessment Worksheet

Map a workflow, pinpoint pain points, and identify high-value AI opportunities.

Prepared for: [Client / Team]	Date: [DD MMM YYYY]
Facilitator: [Name]	Version: 1.0

When to use: before automating or buying tools. This worksheet helps you choose the right workflow, the right level of automation, and the right controls.

Output: A workflow map, an opportunity shortlist, and an effort vs impact view you can share with stakeholders.

How to use this worksheet

- **Pick one workflow.** Keep it narrow: a single outcome and a clear start/end trigger.
- **Map the current steps.** Capture who does what, in which system, and where time/quality issues appear.
- **Mark data sensitivity.** Note whether each step uses public, internal, confidential, or regulated data.
- **Spot AI opportunities.** Look for repetitive writing, information search, classification, extraction, or handoffs.
- **Score effort vs impact.** Impact = time saved + quality + risk reduction. Effort = data + integration + change.
- **Decide the automation level.** Assistive (human does final) vs semi-automated vs automated with controls.

Common AI opportunity patterns

- **Drafting:** first drafts for emails, docs, tickets, notes; human edits and approves.
- **Summarisation:** compress long threads into decisions, action items, and next steps.
- **Extraction:** pull fields from PDFs/emails/forms into a structured format.
- **Classification & routing:** tag and route work items to the right owner/team.
- **Decision support:** propose options and trade-offs; humans keep decision rights.
- **Quality checks:** consistency checks, policy checks, or completeness checks before sending.

Red flags (slow down and add controls)

- Workflow makes or materially influences decisions about individuals (employment, credit, benefits, safety).
- Sensitive data is involved (personal data, confidential client data, health data, legal privilege).
- High error costs (financial loss, compliance risk, customer harm).
- Process is unstable or constantly changing - automation will lock in the wrong thing.

Workflow Worksheet - Workflow 1

Workflow name	[Enter name]	Owner	[Name / role]
Team	[Team]	Frequency	[e.g., daily / weekly; volume]
Start trigger	[What starts it?]	End output	[What 'done' looks like]

Current workflow map

Step	Actor	System	Input	Action	Output	Pain point / issue	Data class	Time
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

AI opportunity shortlist

Opportunity type (tick)	Notes / where it fits	Potential benefit
<input type="checkbox"/> Drafting / rewrite		
<input type="checkbox"/> Summarisation		
<input type="checkbox"/> Extraction (structured fields)		
<input type="checkbox"/> Classification / routing		
<input type="checkbox"/> Search / retrieval of internal info		
<input type="checkbox"/> Quality check (policy, completeness)		
<input type="checkbox"/> Other: _____		

Effort vs impact (quick score)

	Impact: Low	Impact: High
Effort: Low	<input type="checkbox"/> Quick win	<input type="checkbox"/> Priority build/pilot
Effort: High	<input type="checkbox"/> Defer / simplify	<input type="checkbox"/> Strategic investment

Next steps: pick 1-2 opportunities to pilot; define success metrics; confirm data/security constraints; design human review and escalation.

Workflow Worksheet - Workflow 2

Workflow name	[Enter name]	Owner	[Name / role]
Team	[Team]	Frequency	[e.g., daily / weekly; volume]
Start trigger	[What starts it?]	End output	[What 'done' looks like]

Current workflow map

Step	Actor	System	Input	Action	Output	Pain point / issue	Data class	Time
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

AI opportunity shortlist

Opportunity type (tick)	Notes / where it fits	Potential benefit
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<input type="checkbox"/> Summarisation		
<input type="checkbox"/> Extraction (structured fields)		
<input type="checkbox"/> Classification / routing		
<input type="checkbox"/> Search / retrieval of internal info		
<input type="checkbox"/> Quality check (policy, completeness)		
<input type="checkbox"/> Other: _____		

Effort vs impact (quick score)

	Impact: Low	Impact: High
Effort: Low	<input type="checkbox"/> Quick win	<input type="checkbox"/> Priority build/pilot
Effort: High	<input type="checkbox"/> Defer / simplify	<input type="checkbox"/> Strategic investment

Next steps: pick 1-2 opportunities to pilot; define success metrics; confirm data/security constraints; design human review and escalation.

Workflow Worksheet - Workflow 3

Workflow name	[Enter name]	Owner	[Name / role]
Team	[Team]	Frequency	[e.g., daily / weekly; volume]
Start trigger	[What starts it?]	End output	[What 'done' looks like]

Current workflow map

Step	Actor	System	Input	Action	Output	Pain point / issue	Data class	Time
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

AI opportunity shortlist

Opportunity type (tick)	Notes / where it fits	Potential benefit
<input type="checkbox"/> Drafting / rewrite		
<input type="checkbox"/> Summarisation		
<input type="checkbox"/> Extraction (structured fields)		
<input type="checkbox"/> Classification / routing		
<input type="checkbox"/> Search / retrieval of internal info		
<input type="checkbox"/> Quality check (policy, completeness)		
<input type="checkbox"/> Other: _____		

Effort vs impact (quick score)

	Impact: Low	Impact: High
Effort: Low	<input type="checkbox"/> Quick win	<input type="checkbox"/> Priority build/pilot
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Next steps: pick 1-2 opportunities to pilot; define success metrics; confirm data/security constraints; design human review and escalation.