

PRACTICAL AI / CHOOSE ONE USEFUL TASK

AI Workflow Starter Checklist

Choose one repeatable task a person can check. Leave with a defined workflow, a limited pilot, success measures, a named reviewer and a recorded decision.

Define, test, decide. Work with the person who does the task and the person accountable for the result. Keep the first pilot small enough to pause, correct or reverse.

Good first candidates	Summarise non-sensitive meeting notes; classify non-sensitive documents; prepare a first-pass research brief; generate a routine checklist.
Use extra care	Customer email drafts; supplier comparisons; marketing or performance claims; pricing recommendations.
Avoid for a first pilot	Final legal, tax or medical advice; safety-critical instructions; unsupervised customer decisions; hiring, credit or eligibility decisions.

These examples are starting points, not automatic approvals. The information used, the tool, the review process and the consequences determine the risk.

- ☐ The workflow occurs at least weekly.
- ☐ The pilot uses authorised synthetic or non-sensitive material.
- ☐ One accountable person will review the output.
- ☐ Customer-facing actions remain manual while the process is tested.
- ☐ The current baseline will be recorded before introducing AI.

Our first workflow

Accountable owner

Fill the shaded fields in a PDF reader that supports forms, or print and write. Save a copy, close it and reopen it to check your entries. Keep answers brief; use a separate sheet for more detail. Do not enter passwords or other secrets.

General operational guidance only. This checklist does not replace legal, financial, medical, safety-critical or other professional judgement. A completed checklist is not a compliance certification.

Current resource: [AI Workflow Starter Checklist](#)

AI WORKFLOW / DEFINITION AND INSTRUCTION

Define the job precisely

Describe the current work before choosing a tool. A person should be able to tell whether the proposed output is acceptable.

Who performs it today?

How often does it occur?

Typical inputs today

Current output

Where does delay or rework occur?

Workflow sentence: When [trigger occurs], use [approved inputs] to create [specific output] for [intended user]. Then [named reviewer] checks [quality and risk] before [next action].

Our one-sentence workflow definition

Fictional example, not client evidence

A coordinator turns an approved non-sensitive topic list into an internal agenda. They check every item against the list and leave missing dates marked "to confirm" before adding the draft to the meeting pack.

First instruction or saved instruction reference

Include task, permitted inputs, output format, no invention and required human review.

- ☐ Inputs and expected output are clear and repeatable.
- ☐ The task can be explained in plain language.
- ☐ A person can check quality and a named owner handles exceptions.
- ☐ There is a clear stopping point before any external action.

AI WORKFLOW / INFORMATION CONTROLS

Decide what information may enter

Identify what the task needs and who may authorise its use. An approved business account does not make every input suitable.

Leave the decision blank until the owner has reviewed it. Record Approved, Excluded or Needs review, with a reference to the evidence.

Public: decision and evidence

Check currency, permitted use and unnecessary personal details.

Internal: decision and evidence

Use an approved business account and the minimum necessary extract.

Confidential: decision and evidence

Check authority, contracts and safeguards before use.

Personal or sensitive: decision and evidence

Keep out of the first pilot. Designated privacy and risk review is needed before later use.

Never put passwords, API keys, recovery codes or authentication tokens into prompts, uploaded documents or this worksheet. Credentials are excluded, not an approval option.

Information excluded from this pilot

- ☐ The business is authorised to share the pilot information.
- ☐ Provider access, retention, training use and deletion settings have been checked for this use.
- ☐ Removing names is not being treated as proof of de-identification.
- ☐ A person must approve output before external sending or publication.

Information reviewer

Review date and evidence reference

Use the AI Data Handling Pre-Flight Guide

AI WORKFLOW / EVIDENCE BEFORE ROLLOUT

Test the difficult cases

Write the expected result before each test. Record omissions, inventions and the correction required. Keep full inputs and outputs with the test record.

Simulate higher-risk cases with safe synthetic material; do not introduce real sensitive records just to test.

Fictional example, not client evidence

The topic list says "meeting date to confirm". The draft assigns Tuesday. Record Revise, remove the invented date, improve the instruction and retest. A fluent draft has still failed this check.

Typical: expected result	Actual result or evidence reference	Pass or Revise, and next action
Incomplete: expected result	Actual result or evidence reference	Pass or Revise, and next action
Ambiguous: expected result	Actual result or evidence reference	Pass or Revise, and next action
Exception: expected result	Actual result or evidence reference	Pass or Revise, and next action
Higher-risk simulation: expected result	Actual result or evidence reference	Pass or Revise, and next action
Person reviewing the tests	Full test record reference	

Test normal work, missing information, ambiguity and exceptions. A pass records this test only; it does not approve the pilot.

AI WORKFLOW / HUMAN ACCOUNTABILITY

Set the review and recovery controls

Make the person, review standard and stop rule explicit before increasing volume or adding automation.

- ☐ A named person remains accountable for the final output.
- ☐ The reviewer checks accuracy, completeness, context and tone.
- ☐ Claims, numbers and quotations are checked against source material.
- ☐ Missing information and assumptions are clearly identified.
- ☐ External messages remain drafts until a person approves them.
- ☐ Failures and corrections are recorded, with a way to stop or revert.

No customer message, publication, purchase, contract, website change or consequential decision should proceed solely because an AI output recommends it.

Named output reviewer

Manual fallback or rollback

Success measures agreed before the pilot

Known failure modes and stop triggers

Task, sample and units being compared

Use the same task and definition before and during the pilot.

An example 30-day sequence

Days 1-3: select and define; retain workflow, baseline and risk screen.

Days 4-10: test manually; retain five representative cases and findings.

Days 11-20: refine instruction, review list and exception path.

Days 21-30: run a limited pilot; retain results and the decision.

The dates are a planning example, not a deadline or a promise of results. Extend testing or stop if the workflow is unreliable or the controls are incomplete.

AI WORKFLOW / BEFORE AND PILOT COMPARISON

Measure the whole task

Include review and correction time in the total completion time. Record it separately to show where effort went; do not add it to the total again.

Time to complete: before	Pilot result	Decision or notes
Review and correction time: before	Pilot result	Decision or notes
Error or rework rate: before	Pilot result	Decision or notes
Consistency: before	Pilot result	Decision or notes
User confidence: before	Pilot result	Decision or notes
Risk or privacy concerns: before	Pilot result	Decision or notes

Fictional figures, not client results

Agenda preparation takes 12 minutes plus 6 to check: 18 total. AI drafting takes 4 minutes plus 10 to check: 14 total. The 8-minute drafting gain is a 4-minute gain for the whole task. The invented-date failure still needs fixing before adoption.

These figures teach the comparison; they are not a savings forecast. For rates, record cases checked and cases needing correction. Describe consistency and confidence rather than inventing a score.

OAIC: privacy and commercially available AI products

National AI Centre: Guidance for AI Adoption

AI WORKFLOW / DECISION AND NEXT REVIEW

Record the authorised next step

Keep the tests and settings evidence with this record. Adopt limited pilot means only the scope and conditions recorded here, not unrestricted rollout.

Workflow name	Business owner
Trigger	Approved inputs or evidence reference
Required output	AI tool and business account
Human reviewer	Information excluded

Success measures, known failures and fallback are recorded on page 5. Include any changed condition in the decision below.

Choose one decision

- ☐ Adopt limited pilot
- ☐ Revise and retest
- ☐ Stop

Reason for the decision and any conditions

Decision recorded by and date	Next review date and change trigger

Revisit the decision when the provider, settings, data, purpose, users or consequences change. Expand only when the owner is satisfied that quality and controls remain adequate.

Praxistra: AI Data Handling Pre-Flight Guide

Source references carried forward from the 2 October 2026 edition. General operational guidance; check applicable obligations and obtain qualified advice where needed.