Workflow Finder

Find one useful piece of work to test with AI

Moxie free guide | Printable worksheet

Start with a task you understand well enough to check. You need to know what starts it, where the information comes from, and what a useful finished result looks like. That gives you a sensible first experiment without reorganizing your entire business before lunch.

Use this worksheet with the person who does the work today. Replace the blanks, choose one candidate, and keep the first test small. Use fictional or approved, non-sensitive information until you have checked your tool's data settings and your company's rules.

1 List three recurring tasks

Write specific tasks rather than departments. “Prepare a draft weekly inquiry summary” is something you can test. “Fix marketing” needs a little more unpacking.

Copy this card for each candidate:

Task name:

_____

Person doing it today:

_____

What starts the task:

_____

_____

How often it happens:

_____

Typical hands-on minutes per run:

_____

Information needed and where it lives:

_____

_____

Finished output and who uses it:

_____

_____

The most common mistake or delay:

_____

_____

Measure a few recent runs if possible. If a number is a guess, label it “estimate.” Include the time spent checking, fixing, and moving the result to its final home.

2 Check whether a candidate is ready

For each task, mark yes, no, or unknown:

The work repeats often enough to evaluate
☐ Yes ☐ No ☐ Unknown

Someone can show a good finished example
☐ Yes ☐ No ☐ Unknown

The source information is available and reasonably current
☐ Yes ☐ No ☐ Unknown

A person can verify the output against those sources
☐ Yes ☐ No ☐ Unknown

The first test can stay private and avoid live system changes
☐ Yes ☐ No ☐ Unknown

A mistake can be caught before it affects a customer
☐ Yes ☐ No ☐ Unknown

An unknown is a question to resolve, not permission to let AI guess. Park tasks that depend on missing records, unclear ownership, or decisions nobody has agreed on. AI can make an untidy process move faster. That is not always a favor.

3 Choose the right kind of help

Use these practical starting points. Tools can overlap, so describe the work before picking a product.

- **A chat session:** useful for a bounded question, draft, or analysis you start and review yourself.
- **A fixed automation:** worth considering when the trigger, rules, and next step are predictable, such as moving an approved value between systems.
- **An AI employee workflow:** worth considering when recurring work needs company context, several steps, connected tools, and a defined human owner.
- **A process cleanup:** start here if the team cannot agree on the inputs, decisions, or finished result.

Likely fit for my candidate:

_____

_____

Why it fits:

_____

_____

4 Write a small test brief

Selected task:

Human owner and reviewer:

Test dates or number of runs:

Approved input files and versions:

Output format and private destination:

What AI may read:

What AI may draft:

What requires my approval:

What is excluded entirely:

Evidence the reviewer will check:

Conditions that stop the test:

Date to decide whether to continue:

For the first test, keep sending, publishing, spending, deleting, and changing live records outside the workflow. Written instructions help communicate boundaries, but they do not replace tool permissions. Check the actual access before connecting anything.

5 See a completed fictional example

Fictional business: Cedar Lane Organizing.

Task: Draft a weekly summary of inquiry topics from ten invented intake records. **Owner:** the office manager. **Inputs:** one fictional CSV and a short list of approved service categories. **Output:** a private document listing topic counts, missing fields, and questions for the owner. **Boundary:** no customer replies or CRM updates. **Review:** reconcile all ten records and check that no inquiry is counted twice. **Stop:** any invented customer detail. **Decision point:** after three trial summaries, compare review effort and usefulness with the existing method.

6 Copy this planning prompt

> Help me scope one small AI workflow test using the completed worksheet below.
>
> Identify missing information before recommending a setup. Do not invent business facts, tool access, or expected savings. Recommend a chat session, fixed automation, AI employee workflow, or process cleanup, and explain the fit in plain English.
>
> Return a short test brief with approved inputs, one output, a human reviewer, evidence to check, exclusions, and stop conditions. Keep the proposed test private and draft-only. Ask up to three questions if an answer would change the scope. Do not connect tools or perform the task.
>
> My completed worksheet:
>
> [PASTE HERE]

Before you start

- ☐ One task has a named owner.
- ☐ Inputs are approved for the selected tool.
- ☐ The output and review checks are specific.
- ☐ Access matches the test, with unnecessary permissions removed.
- ☐ You have a baseline and a review date.

Want help choosing a sensible first workflow? Talk with Moxie about the task you keep doing, the tools involved, and what a useful result would look like.