

Choosing your first workflow

A checklist for finding work worth handing off

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Abstract

The first workflow you hand to AI matters more than any other, because it decides whether your team trusts the next one. This paper is a practical guide to picking it. It covers the signs that a task is a good fit, the signs that it isn't, a simple way to compare candidates, and what to bring to a demo so the conversation is useful from the first minute.

1. Start with the work, not the technology

The most common mistake is starting with "where can we use AI?" That question leads to impressive pilots that never get used. A better question is "what does my team do every week that they wish they didn't?"

Ask the people doing the work. They know which tasks are tedious, which ones pile up during busy weeks, and which ones cause mistakes. The owner's guess and the team's answer are often different, and the team is usually right.

2. Signs a task is a good fit

- **It happens often.** Daily or weekly work pays off faster than something that happens twice a year.
- **It follows roughly the same steps each time.** The inputs can vary, but the process shouldn't.
- **It involves reading and retyping.** Copying details from emails, PDFs, or forms into your systems is where agents help most.
- **It has a clear finish line.** You can tell when it's done and whether it was done right.
- **Someone can say no.** There's a natural point where a person can review the work before it counts.

3. Signs it isn't, at least not yet

- **Every case is different.** If there's no pattern, there's little to repeat.
- **The steps live in one person's head.** It can still work, but writing the process down comes first.
- **The main value is judgment.** If the hard part is the decision, an agent can help prepare it, but the time savings will be small.
- **A mistake would be hard to undo.** Start somewhere a correction is cheap, and build trust before moving to higher-stakes work.

4. Comparing your candidates

Write down three or four tasks and score each one from 1 to 3 on these questions:

QUESTION	1	3
How often does it happen?	A few times a month	Every day
How similar is each case?	Every one is different	Almost always the same steps
How much is reading and typing?	Mostly thinking	Mostly copying
How easy is it to check?	Hard to tell if it's right	Obvious at a glance
How cheap is a mistake?	Expensive or permanent	Easy to fix

The highest total is usually your best first workflow. A tie usually goes to whichever task your team complains about most, because their enthusiasm will carry it through the first few weeks.

5. What to bring to a demo

You'll get the most out of a demo if you bring:

- **One task, described step by step.** Where it starts, what happens in the middle, and how you know it's done.
- **A few real examples.** Two or three recent cases, with anything sensitive removed.
- **The software involved.** Which systems the details go into, and how your team reaches them today.
- **The person who does the work.** They'll catch the steps everyone else forgets.

From there, we'll map which steps an agent could handle and where a person should sign off, and tell you plainly whether we think it's worth building.