Workflow design checklist

AI for administrative tasks. Use this before you automate any task. Work down the list in order. If a step fails its test, redesign before you build.

1. Define the problem

- [ ] I can state the single bottleneck this workflow removes in one sentence.
- [ ] That sentence does not mention AI or any tool.
- [ ] I have confirmed the task is a real, recurring cost, not a one-off.

2. Locate the human gate

- [ ] I have identified every step that is irreversible or that defines a relationship.
- [ ] Each of those steps has one named owner who approves before it proceeds.
- [ ] Every gate is a defined stop point, not a vague intention to review later.

3. Classify each step

- [ ] Substitute: the step is repetitive, high volume, and reversible in effect.
- [ ] Complement: the step needs human judgement, factual accuracy, or human connection.
- [ ] I have written down which steps are substituted and which are only assisted.

4. Run the automation quadrant

- [ ] I have judged how often the task repeats: often or rarely.
- [ ] I have judged how reversible it is and how much trust is at stake: low or high.
- [ ] I have placed it in one quadrant: Substitute, Assist with a gate, Low priority, or Keep human.

5. Choose tools by layer

- [ ] For each layer I need (source of truth, intelligence, delivery, transcription, scheduling, publishing, glue) I have chosen a tool.
- [ ] Each tool was chosen because it fills a layer I need, not because it is the newest option.
- [ ] No tool holds an irreversible action that belongs behind a human gate.

6. Final safety check

- [ ] I have asked: if I removed the gate, what is the worst that could happen?
- [ ] I have confirmed whether that outcome would damage a relationship or be impossible to undo.
- [ ] Where the answer is yes, the gate stays, even though it is slower.

Rule of thumb: automate the repetitive and reversible, keep a named human at every irreversible or relationship defining gate, and do not automate where judgement, accuracy, or human connection is the actual value.