

AI workflow design sheet

Connect a request to a useful result, with named information sources and human responsibilities.

A diagram of the main steps

Rules for missing information and approval

A completed client-content example

A free worksheet from ailevrg.com/guides/ai-workflow

Start with one recurring job. Use fixed software rules for checks that can be stated clearly; mark where a model or a person needs to interpret something.

01 Job

Request that starts the work

Useful result the user should receive

What the workflow is not permitted to do

02 Steps

Fixed software steps

Tasks that need a model

Decisions that need a person

Tools and information for each step

03 Evidence and exceptions

Source records and validity checks

What evidence must accompany the output

Missing information route

Conflicting information route

Failed tool or connection route

04 Release and learning

Who can approve which action

Where the accepted version is recorded

Test cases and acceptance checks

Person responsible for improvements

A client asks for a content draft

Invented teaching example. No client outcome is claimed.

Request

Prepare a short draft for an agreed audience, using the current client brief.

Rules

Use records for this client only.

Do not publish or create an unsupported factual claim.

Work

Retrieve the approved brief and relevant context.

Prepare a draft and preserve the records used.

Exceptions

If the brief does not support a claim, leave it out and explain the gap.

If records conflict, show the disagreement to the named reviewer.

Review

The reviewer checks the draft and authorises the next step.

The accepted decision is recorded for later work.

Proposed content-request workflow

1. Client

Receive a specific request

Name the audience, purpose and kind of content required.

2. Software rules

Check which information may be used

Select this client's approved records and check their validity and access.

3. **AI model**

Prepare a draft with supporting records

Use the selected brief and context. Attach the evidence needed for factual claims.

4. **Client or named expert**

Review the draft and the evidence

Check accuracy, suitability and whether the request needs specialist advice.

5. **Approved publishing process**

Release and record the decision

Publish only through the agreed route and retain the approved version.

Missing evidence returns an unknown or a question. A draft is not permission to publish, spend money or change the client's systems.