

PROCESS BEFORE AI

If you cannot explain the rule to a person, do not encode it in automation yet.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- ☐ The trigger is unambiguous
- ☐ The record/source of truth is known
- ☐ One owner exists at each active stage
- ☐ Stage exit conditions are defined
- ☐ Required input data is available and trustworthy
- ☐ Exceptions are identified
- ☐ Human judgment points are explicit
- ☐ Failure/retry behavior is defined
- ☐ Someone can monitor the automation
- ☐ A useful business metric will tell us whether it helped

Design notes

- Start with a narrow workflow and real records.
- Automate repetitive coordination before high-judgment decisions.
- Design a manual fallback for failures.

How to use it. Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.