One-Workflow Pilot Workbook

Aspen Peak Consulting | English | Version 1.0 · November 10, 2026

Pick one recurring task. Use this workbook to decide what to try, what to check, and whether to keep it. A completed worksheet is a plan, not a guarantee of results or a certification of safety.

Keep customer names, financial details, employee information, passwords, and other confidential material out of this worksheet unless your business has approved the way you store it. Start with fictional or appropriately redacted examples.

1. Describe the work

Task:

What starts it:

Who does it today:

Tools already used:

Approximate number of comparable cases each week:

What goes wrong or takes too much effort:

What a correct, finished result looks like:

Where a template, reminder, or ordinary rule could solve the problem without AI:

2. Define the smallest useful pilot

One step AI may help with:

Approved inputs and where they come from:

Output and where it will be kept:

Decisions and actions that stay with a person:

Named reviewer and backup:

What the reviewer checks:

When the pilot pauses:

Manual fallback:

Person who can stop the workflow:

Do not treat a draft as permission to send a message, change a record, spend money, or create a commitment. Define those permissions separately.

3. Measure the starting point

Record a representative set of cases. Use a case label instead of a person's name.

For each case, record: date; task type; active work minutes; waiting time; corrections required; and whether the result met your quality requirements.

Keep active work and waiting time separate. Include work done by anyone else on the team. A few easy examples are not enough to establish a reliable baseline.

4. Test the awkward cases

For each test, write down: input; expected result; actual result; reviewer; pass or fix; and the prompt or workflow version tested.

- ☐ Ordinary complete request: produces an accurate draft grounded in the supplied facts.
- ☐ Missing detail: flags what is missing instead of inventing it.
- ☐ Conflicting information: shows the conflict and asks a person to resolve it.
- ☐ Duplicate request: does not repeat an external action or create an extra record.
- ☐ Untrusted instructions inside a document: treats them as source material, not authority to change the workflow.
- ☐ Expired connection or unavailable source: pauses, identifies the problem, and preserves work for a person.
- ☐ Wrong recipient or restricted information: holds the output for review.
- ☐ Uncertain send outcome, if sending is later authorized: checks delivery history before any retry.

These are starter tests. Add cases specific to your work and its consequences. High-risk or regulated work needs appropriate specialist review.

5. Run a limited trial

Trial owner:

Start and review dates:

Work included and excluded:

Approved account and data-handling checks completed:

Where held work and failures will be reviewed:

How staff report problems:

During the trial, count preparation, checking, corrections, exceptions, and maintenance. Record failed and abandoned cases as well as successful ones.

6. Decide what happens next

Did output quality meet the requirements set before the trial?

Did the whole task take less effort, including review?

Did the work become easier for the customer and the team?

What did it cost to set up and operate?

What remains uncertain?

Decision: continue a limited trial / revise / expand carefully / stop.

Reason and evidence:

Owner of the next step:

Next review date:

7. Leave a usable handover

Record the account owner, configuration location, approved prompt version, source-document owner, access-removal process, maintenance owner, manual fallback, and last review date. Do not put passwords or secret keys in the workbook.

Read next

Plan your first 30 days with AI

Compare seven workflow candidates

Understand AI automation costs

Want to talk through one task? Call Aspen Peak Consulting at 303-900-2670. This workbook does not send information or book a call. You decide whether to share a copy.