CHECKLIST

Plan a Repeatable Workflow

Turn one recurring task into clear steps, review points, and a useful first improvement.

1. Choose one task

Start with a small task you repeat, such as preparing a weekly summary or organizing incoming requests. Write what starts the task and what a finished result looks like. Avoid trying to redesign the whole business at once.

2. Write down the steps

List the steps in the order you actually perform them. For each step, note the information needed, the person responsible, and the output. Mark anything that depends on a judgment call.

3. Find the friction

Look for repeated copying, missing information, unclear ownership, and unnecessary handoffs. Choose one problem to improve first. Sometimes a shared checklist or clearer template is enough.

4. Decide where review belongs

Keep a person responsible for checking accuracy and approving anything that affects customers, spending, or public communications. A draft can be automated without automatically sending or publishing it.

5. Try a small example

Use made-up or non-sensitive information. Run through the steps, including a missing-input example. Check whether the result is understandable and whether errors can be corrected easily.

6. Keep what helps

Record what worked and what still needs attention. Compare the effort required before and after the change without assuming that automation always saves time. Update the checklist when the process changes.

WORKING NOTES

Make it your own

Use this space to apply the guide to one task. Keep notes simple and avoid sensitive information.

Task:

Trigger:

Finished result:

Required information:

Steps and owners:

Human review point:

What happens when information is missing:

One improvement to test:

What we learned: