

COMPANION WORKSHEET · ORGANIZING FOR WORK

WORKFLOW MAP

Use this map to break one business workflow into clear steps. The goal is to see the work before deciding where AI might help.

WORKFLOW NAME

BUSINESS / TEAM

DATE

WORKFLOW OWNER

00

REFERENCE · READ THIS ONCE BEFORE MAPPING

CONTROL ZONE GUIDE

Sort each step by responsibility.

After the workflow is listed, mark each step with the right control zone. This keeps the map focused on responsibility, risk, and where human judgment still matters.

ZONE A

■ HUMAN HANDLED

A PERSON OWNS THE TASK

Use for tasks where mistakes have real consequences, human judgment is required, or the task touches sensitive data, money, customers, access, or important systems.

ZONE B

■ AI + HUMAN

AI PREPARES. HUMAN APPROVES.

Use when AI can prepare most of the work, but a person should review, approve, personalize, send, or make the final decision.

ZONE C

▣ AI HANDLED

AI CAN RUN THE TASK AFTER SETUP

Use for repetitive, low-risk tasks that are easy to define, easy to check, and do not need judgment once the rules are clear.

When in doubt — if the answer is unclear, mark the step **Human Handled** or **AI + Human** for now. You can always promote it to **AI Handled** once the rules and review process are proven.

01

STEP 1 OF 2

DEFINE THE WORKFLOW

Write what starts the workflow, what finished looks like, and where the work currently gets stuck.

01. WORKFLOW NAME

03. WHAT COUNTS AS FINISHED?

05. WHAT SYSTEMS OR TOOLS ARE INVOLVED?

07. WHAT INFORMATION IS NEEDED TO COMPLETE IT?

02. WHAT STARTS IT?

04. WHO OWNS THE RESULT TODAY?

06. WHERE DOES IT SLOW DOWN OR BREAK?

08. WHAT SHOULD NOT BE AUTOMATED WITHOUT APPROVAL?

02

STEP 2 OF 2 · MAPPING SHEET

MAP THE WORKFLOW STEPS

List the workflow from start to finish. Use small, plain steps. Just make the work visible.

#	STEP / TASK	OWNER TODAY	INPUT NEEDED	OUTPUT PRODUCED	SYSTEM / TOOL	FRICTION OR RISK	CONTROL ZONE
01							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
02							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
03							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
04							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
05							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
06							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
07							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
08							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI

02

STEP 2 OF 2 · CONTINUED · ROWS 09-16

MAP THE WORKFLOW STEPS

Continue listing steps. Use the same row format. Mark each with its control zone.

#	STEP / TASK	OWNER TODAY	INPUT NEEDED	OUTPUT PRODUCED	SYSTEM / TOOL	FRICTION OR RISK	CONTROL ZONE
09							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
10							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
11							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
12							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
13							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
14							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
15							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
16							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI

02

STEP 2 OF 2 · CONTINUED · ROWS 17-24

MAP THE WORKFLOW STEPS

Continue listing steps. Use the same row format. Mark each with its control zone.

#	STEP / TASK	OWNER TODAY	INPUT NEEDED	OUTPUT PRODUCED	SYSTEM / TOOL	FRICTION OR RISK	CONTROL ZONE
17							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
18							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
19							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
20							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
21							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
22							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
23							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI
24							<input type="checkbox"/> HUMAN <input type="checkbox"/> AI+H <input type="checkbox"/> AI

02 GUIDE FOR STEP 2

CHECK THE CONTROL ZONE

Use these prompts while filling in the Control zone column on the workflow map.

PROMPT	LIKELY ZONE	NOTES
Could a mistake create legal, financial, safety, customer, or reputation risk?	■ HUMAN HANDLED	<i>A person must own the call.</i>
Does this require judgment, empathy, negotiation, trust, or accountability?	■ HUMAN HANDLED	<i>Soft skills that can't be scripted.</i>
Does this touch sensitive data, payments, admin access, or private systems?	■ HUMAN / ■ AI + HUMAN	<i>Guard the keys; AI may prep.</i>
Can AI draft, summarize, sort, compare, format, or prepare most of it?	■ AI + HUMAN	<i>AI does heavy lift; human signs off.</i>
Should a person approve the final result before it leaves the business?	■ AI + HUMAN	<i>Approval gate before send.</i>
Is it repetitive, low-risk, rule-based, and easy to verify?	☑ AI HANDLED	<i>Automate once rules are stable.</i>
Can the result be logged and checked after completion?	☑ AI HANDLED	<i>Spot-check, don't pre-approve.</i>

→ EXAMPLE · REFERENCE

FILLED-IN WORKFLOW MAP

Website inquiry to booked consultation — the level of detail to capture without designing the full solution.

#	STEP / TASK	OWNER TODAY	INPUT NEEDED	OUTPUT PRODUCED	SYSTEM / TOOL	FRICTION OR RISK	CONTROL ZONE
01	Customer submits inquiry form	Admin	Form details	New inquiry received	Website form	Missing details	AI HANDLED
02	Review inquiry for fit	Owner	Customer need, location, budget	Qualified or not	Email / CRM	Judgment needed	HUMAN HANDLED
03	Draft first reply	Admin	Inquiry details, service notes	Draft response	Email	Slow response time	AI + HUMAN
04	Approve and send reply	Owner	Draft email	Sent reply	Email	Wrong promise or tone	HUMAN HANDLED
05	Offer booking times	Admin	Calendar availability	Booking options sent	Calendar	Back and forth	AI + HUMAN
06	Confirm appointment	Admin	Selected time	Calendar event	Calendar / CRM	Double booking	AI + HUMAN
07	Update CRM record	Admin	Inquiry + appointment info	Updated client record	CRM	Repetitive data entry	AI HANDLED
08	Send prep note	Admin	Meeting type, client info	Prep note sent	Email	Wrong details	AI + HUMAN