

The AI Workflow Opportunity Snapshot

Choose what to measure before you choose what to automate.

Turn three AI ideas into comparable workflow cards, expose the evidence you are missing, and choose one candidate for disciplined discovery - without inventing an ROI score.

WHAT YOU WILL LEAVE WITH

- Three comparable workflow cards
- One candidate to measure next
- A list of evidence you still need
- A clean handoff into a deeper portfolio assessment

HOW TO USE IT

The task first. The evidence second. The model later.

Complete the Snapshot with the process owner and someone who does the work today. Use current records when they exist. Mark an unknown as unknown.

The result is a discovery priority, not an automation recommendation, savings estimate, safety finding, or production approval.

GROUND RULES

RULE	WHY IT MATTERS
1. Describe the business task before naming a model, vendor, or tool.	Prevents a product demo from defining the problem.
2. Use a recurring task with a clear trigger and completion point.	Makes three candidates meaningfully comparable.
3. Ask the process owner and someone who performs the work today.	Surfaces the real exceptions, handoffs, and workarounds.
4. Use current records when they exist; label estimates and unknowns.	Separates evidence from memory and optimistic assumptions.
5. Prefer assist or draft when useful value can be tested without autonomous consequential action.	Keeps the first evidence-gathering step bounded and reversible.

WORKING NOTE

A small sample can expose bad assumptions. It does not prove technical feasibility, production readiness, safety, compliance, or realized value.

WORKFLOW CARD

Workflow A

Use a task with a recognizable start and finish. A department, job title, or transformation program is too broad.

PROMPT	YOUR NOTES
Workflow name	
Accountable owner	
Trigger: what starts the work?	
Completion point: what makes it done?	
Current monthly volume: known or unknown	
Current minutes per case: measured, estimated, or unknown	
Evidence for volume or time	
Output a reviewer can check	
Most common exception	
Data: public, internal, confidential, regulated, or unknown	
External, financial, destructive, or permission-changing action	
Smallest useful AI role: assist, draft, automate, or unknown	
Human review path	

Do not turn a guess about time saved into a savings or ROI claim. Unknown is a useful answer because it names what to measure.

WORKFLOW CARD

Workflow B

Use a task with a recognizable start and finish. A department, job title, or transformation program is too broad.

PROMPT	YOUR NOTES
Workflow name	
Accountable owner	
Trigger: what starts the work?	
Completion point: what makes it done?	
Current monthly volume: known or unknown	
Current minutes per case: measured, estimated, or unknown	
Evidence for volume or time	
Output a reviewer can check	
Most common exception	
Data: public, internal, confidential, regulated, or unknown	
External, financial, destructive, or permission-changing action	
Smallest useful AI role: assist, draft, automate, or unknown	
Human review path	

Do not turn a guess about time saved into a savings or ROI claim. Unknown is a useful answer because it names what to measure.

WORKFLOW CARD

Workflow C

Use a task with a recognizable start and finish. A department, job title, or transformation program is too broad.

PROMPT	YOUR NOTES
Workflow name	
Accountable owner	
Trigger: what starts the work?	
Completion point: what makes it done?	
Current monthly volume: known or unknown	
Current minutes per case: measured, estimated, or unknown	
Evidence for volume or time	
Output a reviewer can check	
Most common exception	
Data: public, internal, confidential, regulated, or unknown	
External, financial, destructive, or permission-changing action	
Smallest useful AI role: assist, draft, automate, or unknown	
Human review path	

Do not turn a guess about time saved into a savings or ROI claim. Unknown is a useful answer because it names what to measure.

OPPORTUNITY SCREEN

Apply the same questions to all three workflows.

Mark Yes, No, or Unknown. This is a discussion screen, not a maturity score or industry benchmark.

OPPORTUNITY QUESTION	A	B	C
Specific recurring task with a named owner?	Y / N / ?	Y / N / ?	Y / N / ?
Trigger and completion point identifiable?	Y / N / ?	Y / N / ?	Y / N / ?
Current volume and handling time measurable?	Y / N / ?	Y / N / ?	Y / N / ?
Output checkable against evidence or a standard?	Y / N / ?	Y / N / ?	Y / N / ?
Useful value testable with assistance or drafting first?	Y / N / ?	Y / N / ?	Y / N / ?
Human review before consequential action?	Y / N / ?	Y / N / ?	Y / N / ?
Exceptions and manual route identifiable?	Y / N / ?	Y / N / ?	Y / N / ?
Controlled sample, replay, sandbox, or non-production test path?	Y / N / ?	Y / N / ?	Y / N / ?

TRIAGE LABELS

MEASURE NEXT - bounded, owned, checkable, and useful without autonomous consequential action.
Baseline evidence exists or is immediately obtainable.

MEASURE FIRST - promising, but volume, time, quality, exceptions, or ownership still depends on memory or guesswork.

NOT NOW - no owner, no checkable outcome, no controlled test path, or the value depends on unconditional high-risk authority.

WORKFLOW	LABEL	WHY	EVIDENCE MISSING
A			
B			
C			

MEASUREMENT PLAN

Choose one workflow to measure.

Select the workflow that deserves current evidence before the others - not the one with the flashiest demo.

PROMPT	YOUR NOTES
Selected workflow	
Why this one is worth measuring first	
One current-work metric	
Where the evidence lives	
Who will collect it	
Review date	

CURRENT EVIDENCE TO INSPECT

CHECK	EVIDENCE
☐	Tickets, cases, tasks, or transaction counts
☐	Timestamps or a short handling-time sample
☐	Corrections, rework, errors, or quality reviews
☐	Exception examples and their manual routes
☐	Current procedure, template, or work sample
☐	Owner, reviewer, and relevant data or system owners

Examples of current-work metrics include median handling time, review acceptance rate, rework rate, queue age, or time to a defined completion point. Choose what fits the task.

LAB-READY HANDOFF

Preserve the evidence boundary.

Complete what you can. Keep unsupported estimates visibly labeled. The paid Lab requires a positive hourly labor-cost input only to calculate buyer-supplied gross capacity scenarios.

PROMPT	YOUR NOTES
Assessment name and inputs verified on	
Hourly labor-cost assumption and source	
Short workflow ID	
Workflow name and accountable owner	
Bounded task definition	
Current monthly volume	
Current minutes per case	
Baseline evidence	
AI role: assist, draft, or automate	
Human review planned?	
Data classification	
One measurable pilot success metric	
Pilot sample size	
Exceptions documented?	
Rollback or manual fallback	

AUTHORITY HANDOFF

Do not hide consequential actions inside the workflow.

For a bounded pilot, classify each high-risk action as Deny, Human approval, or Unknown. Do not record one as unconditionally allowed.

ACTION	DENY	HUMAN APPROVAL	UNKNOWN
External write or communication	☐	☐	☐
Financial action	☐	☐	☐
Destructive action	☐	☐	☐
Permission change	☐	☐	☐

PROMPT	YOUR NOTES
Buyer-estimated minutes saved per case: estimate or not estimated	
Source or basis for the estimate	
Evidence that would make you reduce the estimate	

Gross capacity is planning arithmetic on buyer-supplied inputs. It is not realized savings, ROI, revenue, profit, or production authorization.

FICTIONAL EXAMPLE

Why the evidence-gathering order differs.

WORKFLOW	WHAT THE SNAPSHOT REVEALS	TRIAGE
Draft routine support replies	Named owner, ticket baseline, checkable draft, and human review before sending.	Measure next
Approve and pay supplier invoices	The proposed value depends on unreviewed financial and external action.	Not now
Prepare public-company research briefs	Bounded and reviewable, but no measured baseline or exception record exists.	Measure first

WHEN YOU NEED A PORTFOLIO DECISION

Compare documented workflows in the Lab.

The 013 AI Workflow Opportunity Lab applies deterministic checks to ownership, baseline evidence, proposed AI role, human review, data classification, pilot size, exceptions, rollback, and high-risk authority policies. It produces ranked JSON and standalone HTML reports.

013labs.gumroad.com//ai-workflow-opportunity-lab

METHOD NOTE

The worksheet is informed by the NIST AI RMF Core emphasis on documenting business context, task purpose, oversight, benefits, costs, and risk tolerance before a go/no-go decision. NIST does not endorse this worksheet or its labels.

airc.nist.gov/airmf-resources/airmf/5-sec-core/