



Great Lakes AI
INSTITUTE

FREE RESOURCE · TEAM WORKSHEET

Redesign One Workflow With AI

A ten-step worksheet for leaders and teams

A practical worksheet for leaders and teams who want to move from AI curiosity to useful, responsible adoption.

CORE IDEA



One redesigned workflow will teach you more than another abstract conversation about AI.

BEFORE YOU BEGIN

How to Use This Worksheet

Choose one workflow your team already performs on a regular basis. Do not start with an AI tool. Start with the work. Use the prompts below to identify the current pain, define where AI might help, classify risk, assign human review, and decide what improvement would look like.

Good workflow candidates

WORKFLOW	WHY IT WORKS WELL
Meeting summaries and action items	Repeated often, easy to test, clear output.
Board reports or leadership updates	Document-heavy work that benefits from clearer synthesis.
Donor, customer, member, or parent communication	Improves speed and consistency with human review.
Grant or proposal drafts	Strong drafting support while keeping human judgment involved.
Policy summaries, training materials, or internal documentation	Helps organize knowledge and reduce administrative drag.
Financial narrative explanations	Turns complex information into clearer leadership communication.

The ten steps

1. Identify the workflow
2. Describe the current pain
3. Identify where AI could help
4. Assess the risk
5. Define human review
6. Assign final ownership
7. Define what better means
8. Design the new workflow
9. First test
10. Next action



1 Identify the workflow

What recurring workflow is slow, frustrating, inconsistent, or overly manual?

Workflow name _____

Current owner _____

How often does this workflow happen? _____

Who depends on the final output? _____

2 Describe the current pain

Where does the work get stuck?

CONSIDER THESE FRICTION POINTS

- | | |
|--|---|
| ☐ Too many handoffs | ☐ Unclear ownership |
| ☐ Slow drafting | ☐ Too much rewriting |
| ☐ Missing information | ☐ Inconsistent quality |
| ☐ Repetitive manual steps | ☐ Knowledge trapped in one person's head |

Notes

3 Identify where AI could help

What could AI draft, summarize, organize, or analyze?



Draft

First versions, emails, reports, outlines



Summarize

Notes, documents, meetings, feedback



Organize

Messy inputs, checklists, action items



Analyze

Patterns, comparisons, questions, gaps

AI opportunity

4 Assess the risk

What data, privacy, accuracy, or judgment risks exist?

☐ Sensitive personal information

☐ Financial information

☐ Legal or compliance issues

☐ HR or personnel matters

☐ Student, donor, client, member, or patient information

☐ Public-facing communication

☐ Decisions that require expert judgment

☐ Risk of inaccurate or incomplete output

OVERALL RISK LEVEL



Low



Medium



High

Risk notes

5 Define human review

Who reviews the AI-supported output before it is used?

Reviewer _____

THE REVIEWER CHECKS FOR

- | | | | |
|-----------------------------------|--|--|--|
| ☐ Accuracy | ☐ Completeness | ☐ Tone | ☐ Confidentiality |
| ☐ Bias | ☐ Missing context | ☐ Compliance concerns | ☐ Organizational values |

Review requirements

6 Assign final ownership

AI can assist with the work, but a human must remain accountable for what is used, sent, approved, or decided.

Final owner _____

What decision does the human owner need to make?



7 Define what better means

How will we know if the workflow improved?

POSSIBLE SUCCESS MEASURES

- ☐ Faster turnaround time
- ☐ Less staff frustration
- ☐ Fewer errors
- ☐ Better follow-through
- ☐ Improved customer, donor, member, student, or staff experience
- ☐ Better quality
- ☐ Clearer communication
- ☐ More consistent output
- ☐ Stronger documentation

Success measure

How will we compare before and after?

8 Design the new workflow

CURRENT WORKFLOW	AI-SUPPORTED WORKFLOW
Step 1	Step 1
Step 2	Step 2
Step 3	Step 3
Step 4	Step 4



9 First test

What is the smallest safe version of this workflow we can test?

Test date

People involved

Tool or tools used

Review process

What will we learn?

10 Next action

Our next step is

Owner

Deadline

BOTTOM LINE

Do not start with the tool. Start with the work.

AI creates value when it helps real people improve real workflows with clear boundaries, human review, and practical judgment.

PUT IT TO WORK

Use This With Your Team Next Week

A simple 30-minute working session is enough to move from general AI interest to a useful first experiment.

0 to 5
MIN

Choose one recurring workflow that is slow, frustrating, or inconsistent.

5 to 12
MIN

Map where the work gets stuck and who depends on the final output.

12 to 20
MIN

Identify what AI could draft, summarize, organize, or analyze.

20 to 25
MIN

Classify the risk and define the human review standard.

25 to 30
MIN

Assign an owner, set a test date, and decide how improvement will be measured.

One redesigned workflow will teach you more than another abstract conversation about AI.

Need a practical next step?

Great Lakes AI Institute helps leaders and teams move from AI curiosity to practical operating capacity through readiness assessments, workshops, workflow redesign, and responsible adoption support.

Schedule an AI Reality Check

greatlakesai.institute