



OPERATIONAL WORKFLOW BUILDER

AI Systems for Small Business
Chapter 8 Worksheet

This template walks you through three stages: auditing your operational friction, building a structured workflow for your highest-priority process, and documenting it as a reusable SOP. Use it once to get started, then repeat for each additional workflow you want to systematize.

Time estimate: 60–90 minutes for the full process (audit through documented SOP).

Stage 1: Operational Friction Audit

Identify where you're losing the most time to repetitive, manual, or unstructured tasks. Be honest. This isn't about looking efficient. It's about seeing clearly where your time is going.

Suggested prompt:

“Acting as an operations consultant, I want to identify where I’m losing the most time to repetitive, manual, or unstructured tasks in my business. I’m going to describe a typical week and the tasks that fill my time. Ask me questions that will help you identify where the biggest operational friction exists.”

Describe a typical week: where does your time go?

Your Friction Points

List your top friction points from the AI conversation. Rate each one for time consumed (H/M/L) and business impact if improved (H/M/L).



Task / Process	Time Consumed	Impact if Improved	Priority (1–5)
1.			
2.			
3.			
4.			
5.			
6.			
7.			

My #1 priority workflow to systematize

How to prioritize:
Focus on tasks that score high on BOTH time consumed and business impact. A process that eats two hours a week and creates inconsistent client experiences is a better first target than one that’s annoying but low-impact.

Stage 2: Build the Workflow

Take your #1 priority and build a structured, repeatable workflow with AI. Describe how you currently do it, and let AI help you formalize it.

Suggested prompt:
“Acting as an operations specialist, I want to build a structured workflow for [this process]. I’m going to describe how I currently do it, and I want you to help me formalize it into a documented, repeatable system. Ask me questions about the current process before we start building.”



Workflow Definition

Process name
What triggers this process? (e.g., new client signs, support request comes in, monthly task)
What is the desired outcome when the process is complete?
Who is involved? (just you, team members, clients, vendors?)
Tools used in this process (email, CRM, project management, etc.)

Workflow Steps

Document each step from the AI conversation. Include decision points (where you need to choose between options) and any steps that require human judgment vs. steps that could be templated or automated.

#	Step Description	Owner / Tool	Human / Templated
1			
2			



3			
4			
5			
6			
7			
8			
9			
10			

Human vs. Templated:
Mark each step as “Human judgment” (requires thinking, personalization, or decision-making) or “Templated” (can follow a standard template or checklist every time). The templated steps are where AI and automation create the most efficiency.

Stage 3: Create Supporting Assets

Most workflows need supporting materials: email templates, checklists, intake forms, project boards, etc. Identify what this workflow needs and build them with AI.

Asset Checklist

- Email template(s): _____
- Checklist(s): _____
- Intake form / questionnaire: _____
- Project board / task list setup: _____



Script / talking points: _____

Knowledge base article: _____

Other: _____

Other: _____

Suggested prompt:

“For this workflow, I need the following supporting materials: [list them]. Help me draft each one. Use my brand voice for any client-facing materials. Each asset should be ready to use, not just described.”

Notes on supporting assets created

Stage 4: Document as an SOP

Turn your workflow into a formal Standard Operating Procedure. This is the document you (or someone else) can follow to execute this process consistently every time.

Suggested prompt:

“Acting as an operations specialist, take the workflow we just built and produce a clean, formal SOP document. Include: the process name, the trigger, the steps in order, decision points, tools used, the desired outcome, and links to any supporting assets. Write it so that someone unfamiliar with the process could follow it successfully.”

SOP Quality Checklist

Clear process name and description

Trigger is defined (what starts this process)



- Steps are in clear sequential order
 - Decision points are identified
 - Tools and templates are referenced
 - Desired outcome is defined (how you know it's complete)
 - Someone else could follow this without additional explanation
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Stage 5: Test, Refine, Repeat

Use the workflow the next time the process comes up. Note what works and what needs adjustment.

First use: date _____ What worked well

First use: What needs adjustment

Refinements made after first use



Review Schedule

After first use: Refine immediately based on what you learned.

After third use: Review again. By now you'll know if the workflow is solid or needs structural changes.

Quarterly: Review all SOPs. Are they still accurate? Has anything changed? Update as needed.

Next workflow:

Once this one is tested and running, return to your friction audit in Stage 1 and pick the next highest-priority process. Each workflow you systematize frees up time and mental energy for the work that actually drives growth.

For more resources and tools:

fistbumpmedia.com/ai-for-business