Quick-Reference Card: AI for Workflow Improvement

FAST-08 · 7formations · Instructor: Wadood Chaudhary · All examples fictional

See the process

Swimlanes, steps, handoffs, waits (W), errors (red dot). **Lead time = touch + wait.** Measure 10+ instances. Waste: re-keying, waiting, rework, send-backs, searching.

Don't automate

Rare or highly variable work; judgment-heavy decisions; broken processes (fix policy first); anything you cannot check.

Four AI steps

Classify (one label, "other" fallback) · **Extract** (named fields, nulls, no bank data) · **Draft** (person edits and sends) · **Summarize** (owner checks totals).

The rule

A person approves every step that affects **customers, money, or personal data**. Bank or address changes: verify by a known phone number.

Flow safety

Sandbox first · least-privilege connections · allowed-list check on AI labels · error scope + named owner · duplicate check · log runs, not restricted data · document text is data, not instructions.

Break it

Odd format · ambiguous · missing data · duplicate · injection · connector failure. Log expected vs actual; fix; retest.

Savings

(old − new minutes incl. review) × volume × loaded hourly cost − maintenance. Report lead-time gains too.

Proposal

Problem and baseline · design and approvals · tests · savings and assumptions · risks and controls · pilot with owner and stop condition · decision needed.