Workflow guide / 05

A pilot is ready when someone else can run it.

A useful first version needs a path into the team's actual work. Agree the outcome, decisions and operating responsibility from the start.

For revenue leaders and transformation sponsors

AI workflow assessment, implementation and operational handover

Input: workflow + test runs + user feedback + named owners

Five gates before routine use.

Mark READY / GAP / UNKNOWN

GATE	EVIDENCE TO LOOK FOR	WHO OWNS THE DECISION?
01 / OUTCOME **A useful result**	A defined task, a quality floor and an output that supports a real decision.	Process owner and sponsor
02 / EVIDENCE **Reliable inputs**	Correct records, authorised access, source dates and visible gaps.	Data owner and builder
03 / JUDGMENT **Clear authority**	Named approval points; AI drafts, fixed rules and human decisions distinguished.	Process owner
04 / OPERATION **A recoverable system**	Retries, duplicate prevention, failure alerts and a usable manual fallback.	Technical maintainer
05 / ADOPTION **Everyday use**	A second user completes the work, spots a bad output and knows how to recover.	Team manager and users

Process owner reviews the five gates

Go	Revise	Hold
Checks pass: begin owned use.	A fix is testable: assign and retest.	Purpose, authority or access unresolved: stop expansion.

FIRST VERSION

Prove the important assumptions.

Test real work with the team. Record rejected outputs and corrections as well as successful runs.

HANDOVER

Make responsibility explicit.

The client can own operation, Worklabs can deliver it, or the work can be shared. Agree the split before the build.

Ready means someone else can run it. A working demo is an important step. Reliable access, ownership and recovery make it usable after the builder leaves.

Make the first version ready for everyday work.

Bring a pilot or a workflow to redesign. We can define the gaps, delivery scope and ownership.

Let's talk ↗

Use the field tool / 05

Define what ready means. Test the handover.

Use these checks with the process owner and a second user. Record the evidence behind the decision to go, revise or hold.

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ACCEPTANCE TESTS

Try the awkward cases.

- Missing input: the workflow asks or stops at the right point.
- Conflicting evidence: the contradiction stays visible.
- Failed integration: the original work is recoverable.
- Repeated trigger: no duplicate action or message.
- Second user: completes, corrects and recovers the task.

HANDOVER CONTENTS

Leave an operable system.

- Named process owner and technical maintainer.
- Access, configuration and source locations.
- Versioned prompts, rules and test cases.
- Failure handling and manual fallback instructions.
- Usage review, maintenance cadence and change route.

CAPACITY CHECK

Count the human work that remains.

Weekly cases × (old human minutes per case - new human minutes per case) - added weekly maintenance.

Include checking, correction and manual completion of failed runs. Compare similar cases and keep elapsed waiting time separate. Track software cost separately; recovered capacity is not automatically cash savings.

The handover decision

DECISION	WHEN IT FITS	NEXT ACTION
Go	Quality, ownership, access and recovery checks pass.	Agree an initial usage review and the change owner.
Revise	The output is useful, but a specific gap remains.	Name the fix, its owner and the retest.
Hold	The workflow lacks a clear purpose, authority or viable access.	Resolve the operating decision before expanding the build.

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