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Free diagnostic worksheet

WHERE SHOULD WE USE AI FIRST?

The AI Workflow Triage Scorecard

A free diagnostic worksheet for finding the workflow worth improving before you spend money on the wrong AI project.

Use this to score one real workflow by pain, frequency, ownership, process clarity, data readiness, risk, complexity, and expected time saved.

Built for	Operators, founders, COOs, GMs, plant leaders, recruiting leaders, and service managers trying to make AI practical.
Not for	Picking a chatbot first, buying tools because AI is popular, or automating a process nobody owns.
Outcome	A clear decision: fix now, investigate, defer, or avoid.

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8

scoring factors
pain / frequency / risk
ownership / clarity

Why this worksheet exists

Most companies do not need to start with an AI roadmap. They need to find one workflow where manual drag is real, frequent, owned, measurable, and safe enough to improve.

The trap is starting with the tool. A chatbot demo can look useful while the actual workflow still has missing data, unclear ownership, review loops, and edge cases nobody has mapped.

This scorecard forces a more practical question:

Which workflow is worth improving first?

Rule: Score one workflow at a time. If you score the whole company, the result will be too vague to act on.

Good candidate workflows usually sound boring:

- Lead intake and quote requests
- Candidate follow-up and status updates
- Customer scheduling and dispatch handoffs
- RFQ / quote drafting
- Internal knowledge lookup
- Daily or weekly reporting
- SOP and documentation support
- Service intake, parts lookup, or compliance follow-up

The first useful AI win is usually buried in admin work, not strategy decks.

How to use it

Step	Action	What to do
1	Pick one workflow	Use a real workflow that repeats. Avoid vague categories like "operations" or "customer service."
2	Name the current owner	If nobody owns the workflow today, do not automate it yet. Start with ownership.
3	Score all eight factors	Use 0-3 for each factor. Do not give a high score because you want AI to fit.
4	Apply the gating rules	A high total score does not override unclear ownership, unclear process, or high risk.
5	Choose the next action	Fix now, investigate, defer, or avoid. Then decide assist, automate, buy, or build.

Before you score

Workflow name	_____
Current owner	_____
Systems involved	_____
What keeps breaking?	_____
What outcome would matter?	_____

The one-page scorecard

Score each factor from 0 to 3. Use the rubric on the next pages if you are unsure.

Factor	Question	Score 0-3	Evidence / notes
Pain	How much time, delay, frustration, or rework does this create?	___	_____ _____ _____
Frequency	How often does this workflow happen?	___	_____ _____ _____
Ownership	Who owns it today, including review and exceptions?	___	_____ _____ _____
Process clarity	Can the current process and edge cases be explained?	___	_____ _____ _____
Data readiness	Is the needed information available and reliable?	___	_____ _____ _____
Risk if wrong	What happens if AI misses a detail or acts too soon?	___	_____ _____ _____
Implementation complexity	How hard is this to plug into the real workflow?	___	_____ _____ _____
Expected time saved	What measurable drag should be reduced?	___	_____ _____ _____

Total score	___ / 24	Gate check	Ownership >= 2? <input type="checkbox"/> yes <input type="checkbox"/> no Process clarity >= 2? <input type="checkbox"/> yes <input type="checkbox"/> no Risk score >= 2 or human review plan? <input type="checkbox"/> yes <input type="checkbox"/> no
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Do not let a high total score hide a broken workflow. Ownership, process clarity, and risk are gates.

Scoring rubric: fit factors

Score	Pain	Frequency	Ownership	Process clarity
0	Mild annoyance. No clear business cost.	Rare or one-off. Less than monthly.	No clear owner or approver.	Nobody can explain the steps consistently.
1	Creates occasional frustration or cleanup.	Monthly or inconsistent.	Shared ownership or unclear handoff.	Main path depends on tribal knowledge.
2	Creates weekly drag, delays, or rework.	Weekly or tied to recurring cycles.	Owner exists, but exception handling is unclear.	Main path is clear; some exceptions are not.
3	Constant bottleneck, visible delay, or expensive manual work.	Daily or multiple times per day.	Clear owner, reviewer, and escalation path.	Main path and common exceptions are mapped.

Interpretation

- **Pain + frequency** tell you whether the workflow matters enough.
- **Ownership + process clarity** tell you whether the workflow is stable enough.
- If ownership or process clarity is weak, the better first move is process cleanup, not automation.

Blunt filter: If the workflow needs three people to explain it and they disagree, it is not ready for automation.

Scoring rubric: execution factors

Score	Data readiness	Risk if wrong	Implementation complexity	Expected time saved
0	Data is scattered, unreliable, or inaccessible.	High legal, safety, financial, or customer risk.	Requires heavy integration, security review, or custom platform work.	Less than 1 hour per month.
1	Some data exists but requires manual hunting or cleanup.	Mistakes create material customer, financial, or compliance cleanup.	Multiple systems and unclear access path.	1-4 hours per month.
2	Data is accessible but needs normalization or review.	Moderate risk if output is reviewed before action.	One main system plus light workflow changes.	1-5 hours per week.
3	Data is reliable, accessible, and tied to the workflow.	Low risk, reversible, or naturally human-reviewed.	Can start with prompt, SOP, tool, or lightweight automation.	5+ hours per week or faster critical response.

Risk note

Risk is scored as safety to implement. A 3 means the workflow is relatively safe or reviewable. A 0 means do not automate it without deeper controls, human review, and probably a different implementation path.

The goal is not to prove AI can touch the workflow. The goal is to find where it can reduce manual work without making the business messier.

Decision rules

Use the total score, then apply the gates. The gates matter more than the number.

Result	Score range	Meaning	Next move
Fix now	18-24 and gates pass	High-pain, frequent, owned, clear, and safe enough to improve.	Define a small implementation experiment. Measure time saved or cycle-time reduction.
Investigate	13-17 or one gate weak	Potential value, but ownership, process, data, or risk needs review.	Map the workflow and identify the missing requirement before building.
Defer	8-12	Not strong enough as a first AI project. Could matter later.	Keep it on the backlog. Look for a higher-pain or higher-frequency workflow.
Avoid	0-7 or major gate failure	Too low-value, too risky, or too messy to be a good first use case.	Do not force AI here. Clean the process or leave it human for now.

Hard gates

Gate	If this is true	Decision
No owner	Ownership score is 0-1.	Do not automate yet. Assign ownership first.
Unclear process	Process clarity score is 0-1.	Map the workflow before adding AI.
High risk	Risk score is 0-1 and there is no review plan.	Assist only, or avoid until controls exist.
Low frequency	Frequency score is 0-1 unless pain is severe.	Usually not the first project.

Choose the right implementation path

A good workflow score does not automatically mean custom build. The first useful step may be a better prompt, a tighter SOP, an off-the-shelf tool, or a lightweight automation.

Path	Use when	Example
Assist	Human judgment still matters, risk is moderate, or process clarity is incomplete.	Draft quote notes, summarize service calls, prepare candidate updates for review.
Automate	The workflow is frequent, low-risk, clearly owned, and has stable input/output rules.	Route intake forms, generate first-pass status updates, populate standard fields.
Buy	The workflow is common and a mature tool already handles most of it.	Scheduling, CRM cleanup, document management, ticket summarization.
Build	The workflow is high-value, specific to your operation, and existing tools do not fit.	Custom RFQ intake, production handoff, governed internal assistant, recruiter ops workflow.

Smallest useful implementation

- Start with the smallest workflow improvement that can be measured.
- Keep a human in the loop when risk is not clearly low.
- Measure one useful outcome: time saved, faster response, fewer missed handoffs, less rework, or better consistency.
- Only expand after the workflow proves it helps in the real operating environment.

A demo is not an implementation plan. The real test is what happens with missing data, exceptions, handoffs, and review.

Example first workflows by business type

Use these as prompts. The best workflow is still the one your team feels every week.

Business type	Strong first candidates	Be careful with
Manufacturing / job shop	RFQ intake, quote drafting, customer status updates, production handoff notes, maintenance log summaries.	Fully automated quoting without review; high-risk QA decisions.
Recruiting / staffing	Req intake, candidate follow-up drafts, ATS cleanup prompts, client status summaries, recruiter admin recaps.	Automated candidate rejection or screening decisions without governance.
Home services / franchise	Lead intake, quote follow-up, scheduling prep, install coordination, customer update drafts.	Autonomous customer promises around pricing or timelines.
Professional services / agency	Client intake, meeting summaries, project status reports, internal knowledge search, handoff documentation.	Replacing expert judgment or client-facing advice without review.
Ag / industrial distributor	Parts lookup assistance, service intake, compliance follow-up drafts, order status summaries, supplier follow-up.	Advice tied to safety, compliance, or regulated decisions without controls.

Better wording for the first conversation

Instead of asking, "Where can we use AI?" ask:

- What workflow keeps repeating?
- Where do handoffs break?
- What gets retyped every week?
- Where does the owner keep stepping in manually?
- What would save time without increasing risk?

Workflow decision brief

Use this page to summarize the result for an owner, manager, or leadership team.

Workflow scored	_____
Current owner	_____
Total score	_____ / 24
Decision	<input type="checkbox"/> Fix now <input type="checkbox"/> Investigate <input type="checkbox"/> Defer <input type="checkbox"/> Avoid
Best path	<input type="checkbox"/> Assist <input type="checkbox"/> Automate <input type="checkbox"/> Buy <input type="checkbox"/> Build <input type="checkbox"/> Process cleanup first
Main reason	_____
Biggest risk	_____
First small test	_____
Success metric	_____
Decision owner	_____

If the brief is hard to complete, that is useful evidence. The workflow probably needs more discovery before implementation.

What to do next

If one workflow scores high on pain, frequency, ownership, process clarity, and feasibility, it may be worth a focused triage review.

If everything scores low, do not force an AI project. That is also a useful result.

30-Minute Workflow Triage Review

Bring one workflow. We pressure-test whether AI is worth applying, what could break, and what the smallest practical next step should be.

Good fit if:

- the workflow repeats weekly or daily
- the current process is painful or slow
- there is a clear owner
- you need help deciding assist, automate, buy, or build

About Sean King

Sean helps operators separate useful AI from expensive distraction. His work starts with workflow triage: finding where manual work repeats, where ownership is unclear, where process breaks, and where AI can reduce drag without making the business messier.

CLC Labs is the operating brand behind Sean's AI workflow triage and implementation work.

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