Field Guide: 3 Workflows to Check First

A practical field read for ops leaders at 10-200 person companies. Use it before buying another AI tool, adding another dashboard, or asking the team to carry a messy process faster.

The useful question is not whether AI can touch a workflow. The useful question is whether the workflow is repeated, owned, bounded, fed by reliable data, and safe enough to improve.

Quick rule

AI helps with the work around team judgment. It should not replace the judgment itself. Workflow before tool. The tool is not the workflow.

The 3 to inspect first

1. Follow-up ownership after handoffs: Fix now if ownership is clear

AI can draft no-news updates, surface stale-record reminders, and keep open loops from eroding customer or stakeholder trust.

2. Status update preparation: Fix now for draft prep if source data is clean

AI can aggregate defined sources, generate a structured first draft, and flag mismatches before your team adds context.

3. Pre-outbound research preparation: Fix now for research prep only

AI can shorten background research and surface relevant context while your team keeps the message and relationship.

The 2 that can backfire

1. Intake: Clean up first

If intake is inconsistent, AI organizes the inconsistency and produces polished incomplete briefs.

2. Outbound at scale: Kill autonomous sending

Personalization at scale can train customers and stakeholders to treat your team like noise. Automate the research, not the relationship entry point.

Decision rule

A workflow is ready when the basics are boring: it repeats often, has a clear owner, has a narrow trigger and output, uses reliable data, and gets reviewed before it touches the relationship.

If any of those are missing, the first move is cleanup. If they are present, AI can start reducing the work around team judgment. Score one workflow, then decide whether to fix it now, clean it up first, defer it, or kill it.