Workflow Blueprint Template

Design the Workflow Before You Touch Tools

From: *Build Your First AI Employee* by Shawn Kercher | Chapter 4

Instructions

Complete this before choosing software. The goal is to describe the work clearly enough that a person, tool, or AI employee can follow it.

Keep the first version simple. One trigger, one primary outcome, and a clear human handoff beats a giant workflow nobody can maintain.

Workflow Summary

Workflow name: ____

AI employee role: ____

Business problem this solves: ____
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Success looks like: ____
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1. Trigger

What starts this workflow?

Examples: new website form, missed call, incoming text, booked appointment, unpaid invoice, no response after 48 hours.

Trigger: ____

Where does it happen? - [ ] Website form - [ ] Email - [ ] SMS/text - [ ] Phone/voice - [ ] Calendar - [ ] CRM - [ ] Payment system - [ ] Other: ______________________

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2. Inputs

What information does the AI employee need before it can act?

Input	Source	Required?
Customer name		Yes / No
Contact info		Yes / No
Service requested		Yes / No
Timeline		Yes / No
Budget or price range		Yes / No
Existing customer record		Yes / No
Other:		Yes / No

3. Actions

List what happens in order.

1.
2.
3.
4.
5.
6.

4. Conditions

Where does the workflow branch?

If this happens...	Then do this...

Examples: - If the lead is outside the service area, politely decline. - If the customer is qualified, offer booking times. - If the customer sounds frustrated, escalate immediately. - If there is no response after 48 hours, send follow-up.

5. Handoff

When does a human take over?

Escalate immediately when: - [ ] Customer asks for a human - [ ] Customer is angry or upset - [ ] Request involves custom pricing - [ ] Request involves legal, medical, financial, or compliance-sensitive advice - [ ] AI does not know the answer - [ ] Opportunity is above $__________ - [ ] Other: _______________________

Who gets notified: ____

How they get notified: ____

What context should the notification include? ____ ____

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6. Output

What should exist when the workflow is complete?

- [ ] Appointment booked
- [ ] Lead qualified
- [ ] Customer question answered
- [ ] Ticket created
- [ ] CRM updated
- [ ] Follow-up scheduled
- [ ] Human notified
- [ ] Other: _______________________

Final state: ____

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7. Measurement

How will you know this workflow is working?

Metric	Baseline	Target
Response time		
Tasks handled		
Escalation rate		
Accuracy / success rate		
Hours saved		
Revenue or booking impact		

Final Check

Before you build, confirm:

- [ ] The workflow has one clear trigger.
- [ ] The actions are listed in order.
- [ ] The AI has the information it needs.
- [ ] Human handoff rules are explicit.
- [ ] Success can be measured.
- [ ] The first version is small enough to build and test this month.
