

The First-Workflow Worksheet

A one-page, fill-in worksheet to pin down the single job worth handing to an AI workforce first — and to prove, on your own numbers, whether it will pay off. Print it, fill it in, decide.

Outpace · outpace.sanafai.com · 2026

Most automation goes wrong before it starts — by picking the wrong job. This worksheet fixes that. Work through it once, honestly, and you will know exactly which task to hand off first and whether the math works. It pairs with the [Small Business AI Workforce Playbook](#); the playbook explains the thinking, this puts it to work.

Print it, or copy the prompts into a doc, and fill in the blanks.

Step 1 — Name the candidate task

Pick the one that makes you or your team groan the most.

The task, in one sentence: _____

Who does it today: _____

Which tools it touches (inbox, calendar, CRM, spreadsheet, accounting):

Good candidates are repetitive, rule-guided, and frequent. If the task needs empathy, negotiation, or a judgment call, pick a different one.

Step 2 — Do the before-math

This is the number that decides everything. Be honest.

How long it takes each time (minutes): _____

How many times it happens each week: _____

Weekly cost = minutes × times ÷ 60 = _____ **hours/week**

Monthly cost = weekly hours × 4.3 = _____ **hours/month**

If the monthly number is small, this is not your first workflow — find a more frequent task.

Step 3 — Mark the approval line

A workforce should prepare everything and stop for you only on the steps that matter.

Steps it can do on its own: _____

The one step that must always need my approval (sending money, promising a price, anything you sign): _____

Step 4 — Define "good"

You cannot judge success without deciding what it looks like first.

The number I want to move (hours saved, response time, no-shows, unpaid invoices, leads followed up in an hour): _____

Where it is today: _____

Where I would call this a win: _____

Step 5 — The gut-check

Tick the ones that are true. Three or more, and a workforce will likely pay for itself fast.

- ☐ This task crosses three or more tools.
- ☐ It happens after hours or when we are too busy to keep up.
- ☐ We lose time — or customers — when it is slow.
- ☐ The steps are mostly rule-guided.
- ☐ I can already picture the exact hand-off I would automate.

Step 6 — Decide

My first workflow is: _____

It costs me _____ hours/month today.

A win looks like: _____

That is everything a good partner needs to scope the work — and everything you need to start on your own.

When you are ready for a second opinion, [tell us your process](#). We will give you a straight read on whether this is the right first workflow, and if it is not, we will tell you which one is.

Outpace — Your AI strategy-to-execution partner. You own everything we build; no lock-in.
outpace.sanafai.com · admin@sanafai.com