

PRACTICAL AI FOR SMALL BUSINESS

AI Workflow
 Starter Checklist

A practical way to choose, test and control your first useful AI workflow.
 For Australian small-business owners and managers

Start with a workflow, not a tool

Begin with a repeatable business task, define the data and quality controls, then test whether AI improves the work. This checklist is a structured pilot guide, not a substitute for legal, financial, medical, safety-critical or other professional judgement.

The outcome

By the end, you should have one clearly defined workflow, a limited pilot, measurable success criteria, a documented human-review step and an evidence-based decision to adopt, revise or stop.

Before you begin

- ☐ Choose one workflow that occurs at least weekly.
- ☐ Use non-sensitive or synthetic test data for the first pilot.
- ☐ Nominate one accountable person to review the output.
- ☐ Avoid customer-facing automation until the internal process is reliable.
- ☐ Record the current baseline before introducing AI.

Good first candidates

Good first candidate	Use caution	Avoid for a first pilot
Meeting-note summary	Customer email draft	Final legal, tax or medical advice
Document classification	Supplier comparison	Safety-critical instructions
First-pass research brief	Marketing or performance claims	Unsupervised customer decisions
Checklist generation	Pricing recommendations	Hiring, credit or eligibility decisions

1. Choose and define the workflow

A strong first workflow is frequent, bounded and easy to check. It should reduce repetitive effort without moving final accountability away from a person.

Workflow name

Who performs it today

How often it occurs

Typical inputs

Current output

Where delays, rework or inconsistency occur

2. Define the job precisely

AI performs better when the task has a clear boundary. Define what the system may do, what it must not do, and what a reviewer needs to check.

- ☐ The input is known and repeatable.
- ☐ The expected output has a consistent format.
- ☐ The task can be explained in plain language.
- ☐ A person can judge whether the output is acceptable.
- ☐ The workflow has a clear stopping point.
- ☐ Exceptions can be routed to a person.

One-sentence workflow definition

Template

When [trigger occurs], use [approved inputs] to create [specific output] for [intended user], then have [named role] review [defined quality and risk checks] before [next action].

Your one-sentence definition

3. Map data and risk

Before testing, identify what information enters the workflow and whether the selected AI service is approved to receive it. Privacy, confidentiality and sector-specific obligations depend on the organisation and use case; obtain qualified advice where needed.

Data type	Example	Initial pilot rule	Owner decision
Public	Published website information	Usually lower risk; still verify accuracy and usage rights	☐ Approved
Internal	Procedures or non-sensitive notes	Use an authorised business account and documented controls	☐ Approved
Personal	Customer or employee details	Do not use until privacy obligations and product settings are reviewed	☐ Reviewed
Sensitive / confidential	Health data, contracts, pricing, credentials	Exclude from the initial pilot unless specifically authorised and protected	☐ Excluded / approved

- ☐ No passwords, API keys, recovery codes or authentication tokens are included.
- ☐ The pilot uses only the minimum information needed.
- ☐ The chosen account is owned or authorised by the business.
- ☐ The provider's retention, access and model-training settings have been reviewed.
- ☐ Human approval is required before any output is sent or published externally.

4. Create the minimum viable instruction

The first instruction should be short enough to understand and test. Avoid building a complex automation before the reasoning, output format and review process are reliable.

Part	What to specify
Role	What the AI is helping with.
Task	The exact job to perform.
Inputs	What information it may use.
Output	Required structure, length and format.
Rules	What it must not assume, invent or claim.
Review	What a person must verify before the next action.

Draft your instruction

5. Test with representative examples

Run a small set of examples that reflect normal work, incomplete inputs, ambiguity, exceptions and higher-risk cases. Record the results rather than relying on a general impression.

Test	Input type	Expected result	Actual result	Pass / revise
1	Typical			☐
2	Incomplete			☐
3	Ambiguous			☐
4	Exception			☐
5	Higher risk			☐

6. Set quality and approval controls

- ☐ A named person remains accountable for the final output.
- ☐ The reviewer checks factual accuracy, completeness, context and tone.
- ☐ Claims, numbers and quotations are checked against source material.
- ☐ The workflow labels assumptions and missing information.
- ☐ External messages remain drafts until approved.
- ☐ Failures and corrections are recorded.
- ☐ The business can stop or revert the workflow quickly.

Approval gate

No public post, customer email, promotional send, purchase, contract, legal registration, website change or material outcome claim should occur solely because an AI output recommends it.

7. Measure the pilot

Measure	Before	Pilot result	Decision / notes
Time to complete			
Review time			
Error or rework rate			
Consistency			
User confidence			
Risk or privacy concerns			

A simple 30-day rollout

Period	Focus	Required output
Days 1–3	Select and define	Workflow statement, baseline and risk screen
Days 4–10	Test manually	Five representative tests and recorded findings
Days 11–20	Refine controls	Approved instruction, review checklist and exception path
Days 21–30	Run a limited pilot	Measured result and adopt / revise / stop decision

Keep the first win deliberately small

One dependable workflow is more valuable than ten disconnected experiments. Document what works, what fails and what requires human judgement before increasing volume or automation.

One-page workflow record

Record field	Completed detail
Workflow name	
Business owner	
Trigger	
Approved inputs	
Required output	
AI tool / account	
Human reviewer	
Sensitive data excluded	
Success measures	
Known failure modes	
Rollback / manual process	
Decision date	
Decision	☐ Adopt ☐ Revise ☐ Stop

Important note

This checklist provides general operational guidance only. It does not determine whether the Privacy Act 1988, Australian Privacy Principles, consumer law, employment law or sector-specific rules apply to a particular business or use case. Check current official guidance and obtain professional advice where appropriate.

Current Australian guidance to consult

- [Office of the Australian Information Commissioner — Guidance on privacy and the use of commercially available AI products](#)
- [Australian Government's National AI Centre — Guidance for AI adoption: foundations](#)
- [Australian Government's National AI Centre — Guidance for AI adoption: implementation guidance \(for complex or higher-risk use\)](#)

Next step

Complete the checklist with your team, review the results together and decide whether your proposed AI workflow should be adopted, revised or stopped before expanding its use.