

Workflow Automation

- [The Workflow Blueprint](#)
- [The Reusable Prompt](#)
- [The Prompt Chain](#)

The Workflow Blueprint

“ **One-liner:** Design, document, and test a complete AI-automated workflow for a real business process — from trigger to output, with error handling and quality gates.

? Jump in (Tinkerers start here)

Pick a real business process that currently takes you 30+ minutes and involves multiple steps. Examples: weekly reporting, content production, customer onboarding documentation, project status updates, invoice processing.

Phase 1 — Map the current process. Send this:

“ I'm going to automate this business process: **[describe the process]**.

Help me map the current manual workflow:

- 1. What triggers the process? (time-based, event-based, request-based)
- 2. What are the sequential steps from trigger to final output?
- 3. What inputs does each step require?
- 4. What decisions are made at each step? (if/then logic)
- 5. Where are the bottlenecks or error-prone points?
- 6. What's the final deliverable and who receives it?

Present this as a numbered workflow with decision points marked.

Phase 2 — Design the AI workflow. Send:

“ Now redesign this as an AI-automated workflow. For each step, specify:

Step	Human or AI?	If AI: what prompt template?	If Human: what decision?	Input	Output	Quality gate

Rules:

- Some steps should remain human (judgment calls, approvals, sensitive decisions)
- Every AI step needs a quality gate — how do you know the output is good enough to proceed?
- Include error handling — what happens when an AI step produces bad output?
- Include a feedback mechanism — how does the workflow improve over time?

Phase 3 — Write the prompt templates. For each AI step in the workflow:

“ Write the production-ready prompt template for Step **[N]**: **[step name]**

The template should include:

- Role definition for the AI
- Clear input specification with [PLACEHOLDERS]
- Exact output format requirements
- Quality criteria the output must meet
- An example of good output vs. bad output

This prompt should work reliably every time with different inputs. It should be usable by someone who didn't design the workflow.

Phase 4 — Run the workflow end-to-end. Execute the full pipeline with real data. Track:

- Time per step (manual vs. AI-assisted)
- Quality gate pass/fail rates
- Where you had to intervene or override
- Total time saved vs. the manual process

Phase 5 — Document the blueprint. Create a 1-page workflow document:

“ Write a "Workflow Blueprint" for this process that includes:

1. **Trigger:** What starts the workflow
2. **Flow diagram:** Step-by-step with decision points (use text-based flowchart)

3. **Prompt templates:** Reference to each template (step number and name)
4. **Quality gates:** What to check at each stage
5. **Error handling:** What to do when something fails
6. **Maintenance:** How to update the workflow as requirements change
7. **Metrics:** How to measure whether the workflow is working well

? Plan first (Planners start here)

Here's what you're about to do:

1. **Choose a process** — Pick something that takes 30+ minutes, involves multiple steps, and happens regularly. The more manual the current process, the bigger the payoff.
2. **Map the current workflow** — Document every step, decision point, and handoff. You can't automate what you don't understand.
3. **Design the hybrid workflow** — Decide what AI handles vs. what stays human. Add quality gates and error handling. Not everything should be automated.
4. **Build the prompt templates** — Write production-grade prompts for each AI step. These should be reusable by anyone, not just you.
5. **Test end-to-end** — Run the full workflow with real data. Measure time, quality, and failure points.
6. **Document the blueprint** — Create a shareable document that anyone could use to run this workflow.

"Done" looks like: A complete, tested workflow blueprint with prompt templates, quality gates, and measured time savings. Something you could hand to a colleague and they could execute without additional explanation.

? Why this matters (Strategists start here)

In [WA-Intermediate-01](#), you built a 3-step prompt chain. Here, you're building a **production-grade workflow** — the kind of thing that saves hours per week and can be delegated. The key differences from an intermediate prompt chain: quality gates (not just chaining outputs blindly), error handling (what happens when AI fails), and documentation (others can run it without you). This is directly transferable to tools like n8n, Make, or Zapier with AI steps. The blueprint format is also the deliverable that organizations pay consultants to produce.

Reflection

- How much time did the automated workflow save compared to the manual process? Is the saving worth the design effort?
- Which quality gates caught real problems? Which were unnecessary overhead?
- Where did AI fail and require human override? Was that predictable from the design phase, or did it only emerge during testing?
- ☐ *Walk a colleague through your workflow blueprint and ask them to find the step most likely to fail. Fresh eyes spot single points of failure you've normalized. (Social Learners)*

?? Level up

You've reached the advanced level for Workflow Automation. From here, consider:

- Implementing this workflow in an automation tool (n8n, Make, Zapier) for true hands-free execution
- Combining this with [AC-Advanced-01](#) to add multi-agent architecture to your workflow steps
- Measuring workflow performance over 4 weeks and iterating based on failure data

Back to [Workflow Automation](#)

The Reusable Prompt

“ **One-liner:** Turn a task you do repeatedly into a reusable AI prompt template that works every time — your first step toward automation.

? Jump in (Tinkerers start here)

Think of something you do at least once a week that involves writing, analyzing, or summarizing. Examples: writing a status update, summarizing meeting notes, drafting an email to a client, reviewing a document.

Step 1 — Do it once with AI. Open any AI chat and do the task the way you normally would — just ask the AI to help. Don't overthink the prompt. Just get the job done.

Step 2 — Reverse-engineer your prompt. Now send this:

“ Look at the prompt I just gave you and the output you produced. Help me turn this into a **reusable template** that I can use every time I need to do this task. The template should have:

1. **Clear placeholders** — marked with [BRACKETS] for the parts that change each time
2. **Fixed instructions** — the parts that stay the same every time
3. **Output format specification** — exactly what the result should look like (length, structure, tone)

Write the template so someone else on my team could use it without any additional explanation.

Step 3 — Test it. Copy the template. Start a new chat. Paste the template and fill in the placeholders with a different example of the same task. Does the output match the quality of your original? If not, adjust the template.

Here's a concrete example:

Original task: "Summarize this meeting for my team"

Reusable template:

“ Summarize the following meeting notes for a team update.

Meeting notes: [PASTE NOTES HERE]

Output requirements:

- Start with a 1-sentence summary of the main decision or outcome
- List action items with owner names in bold
- Flag any unresolved questions
- Keep the total summary under 150 words
- Tone: professional but informal

? Plan first (Planners start here)

Here's what you're about to do:

1. **Identify a repeatable task** — Pick something you do weekly that involves text: writing, summarizing, analyzing, or formatting. The more repetitive, the better.
2. **Do it once with AI** — Complete the task normally. Don't try to be clever — just get a result you're happy with.
3. **Extract the template** — Ask the AI to help you identify what's fixed (instructions, format, tone) vs. what changes (the input data). Build a reusable template with clear placeholders.
4. **Test with a new example** — Use the template on a fresh instance of the same task. Compare quality to the original.
5. **Refine if needed** — If the template didn't produce equally good output, identify what was missing and add it.

"Done" looks like: You have a saved prompt template with clear placeholders that consistently produces good output for your repeatable task.

? Why this matters (Strategists start here)

Most people use AI in one-off conversations that disappear. This exercise introduces the shift from **ad-hoc prompting to systematic workflows** — the foundation of all AI automation. A reusable

template is the simplest form of an AI workflow: defined input, consistent process, predictable output. At the intermediate level, you'll chain multiple templates together into multi-step workflows. Every automated AI process in production started as someone's reusable prompt.

Reflection

- What did you have to add to the template that wasn't obvious from the original prompt?
- Did the template produce consistent quality with different inputs, or did you need to tweak it? What was missing?
- How much time will this template save you per week? Is it enough to justify the setup effort?
- ☐ *Send your template to a colleague who does the same task. Can they use it without any explanation? Their confusion points reveal where the template needs more specificity.*
(Social Learners)

?? Level up

Ready for more? Try [WA-Intermediate-01](#) — where you'll chain multiple prompt templates into a multi-step workflow.

Back to [Workflow Automation](#)

The Prompt Chain

“ **One-liner:** Build a multi-step AI workflow where each step's output feeds into the next — turning a complex task into a repeatable pipeline.

? Jump in (Tinkerers start here)

Pick a task that has at least 3 distinct phases. Examples: writing a blog post (research, outline, draft, edit), analyzing a dataset (clean, analyze, summarize, recommend), or preparing a presentation (topic research, slide structure, talking points, Q&A prep).

Build a 3-step chain. Each step is a separate prompt. The output of each step becomes the input of the next.

Step 1 — Research/Gather:

“ You are a research assistant. Your job is to gather the raw material for **[your task]**.

Topic/context: **[describe what you're working on]**

Produce a structured collection of: key facts, relevant examples, important considerations, and any constraints. Organize by theme. Do not draft anything — just collect the ingredients.

Copy the output. Start a new prompt (or clearly reset context).

Step 2 — Structure/Draft:

“ You are a content architect. Your job is to turn raw research into a structured draft.

Here is the research material: **[paste Step 1 output]**

The final deliverable is: **[describe what you need — a blog post, a report, a strategy doc, etc.]**

Create a structured draft. Include clear sections, key arguments in order, and placeholders for any examples or data points from the research. Focus on logical flow and completeness.

Copy the output. Start a new prompt.

Step 3 — Polish/Critique:

“ You are a senior editor. Your job is to make this draft publication-ready.

Here is the draft: **[paste Step 2 output]**

The audience is: **[describe who will read this]**

Do three things:

1. Improve clarity — simplify any convoluted sentences, cut unnecessary words
2. Strengthen weak points — flag any claim that needs better support and add it
3. Check consistency — ensure tone, terminology, and formatting are uniform throughout

Produce the final version with an editor's note listing your key changes.

Now document the chain. Write down the 3 prompts as a reusable template (with [PLACEHOLDERS] for the parts that change). You've just built a prompt pipeline.

? Plan first (Planners start here)

Here's what you're about to do:

1. **Choose a multi-phase task** — Something that naturally has distinct stages (research → create → refine). The more phases, the more the chain helps.
2. **Design the chain** — Write 3 prompts, each with a clear role, input expectation, and output format. The key constraint: each step's output must contain everything the next step needs.

3. **Run the chain** — Execute each step sequentially, passing the output forward. Use fresh contexts between steps to prevent bleed-through.
4. **Evaluate information flow** — Notice where context was lost between steps. What did Step 3 need that Step 2 didn't preserve?
5. **Document as a template** — Save the chain with placeholders so you can reuse it for the same type of task.

"**Done**" looks like: A completed deliverable that went through a 3-step pipeline, plus a documented prompt chain template with placeholders for reuse.

? Why this matters (Strategists start here)

In [WA-Basic-01](#), you built a single reusable prompt. Here, you're learning to **chain prompts into a workflow** — the building block of all production AI automation. Every AI-powered pipeline (content generation, data analysis, document processing) is fundamentally a prompt chain with handoffs. The skill you're building — decomposing a task into stages, defining clear inputs and outputs, managing context between steps — is the same skill used in tools like n8n, Zapier AI, or custom LLM pipelines. Manual chaining teaches you what to automate and where the bottlenecks live.

Reflection

- Where did context get lost between steps? What information did a later step need that an earlier step didn't pass along?
- Did the 3-step chain produce better output than a single "do everything" prompt? Where specifically was the improvement?
- Which step in the chain was the weakest link? How would you redesign it?
- ☐ *Have a colleague run your documented chain on a different task of the same type. Their experience reveals whether your chain is truly reusable or depends on your implicit knowledge. (Social Learners)*

?? Level up

Ready for more? Try [WA-Advanced-01](#) — where you'll design and document a complete AI-automated workflow for a business process.

Back to [Workflow Automation](#)