

AI-FIRST WORKFLOW REDESIGN CANVAS

Pick one recurring workflow. Map how it works today. Rethink it through **Know → Strategize → Create**. Commit to one change you'll try this week.

Name:	Role:	Date:
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1 THE WORKFLOW	
What workflow are you redesigning? Be specific — one workflow, not a category.	
Workflow name	
How often	
Why does it matter	

2 TODAY'S WORKFLOW	3 AI-FIRST RETHINK
How does it actually work right now?	Where could AI move you upstream — Know, Strategize, Create?
Current steps	KNOW research, context, understanding
Friction points	STRATEGIZE decisions, planning, prioritization
Where AI is used today	CREATE drafting, building, producing

4 REDESIGNED WORKFLOW	5 NEXT STEP & GUARDRAILS
What does the new, AI-first version look like end-to-end?	Start small. Decide what stays human.
New steps	One thing I'll try this week
Expected impact (time / quality / capacity)	Guardrails (where I stay human)

EXAMPLE — WORKED CANVAS

Filled-in canvas for a marketing business partner redesigning the quarterly broker campaign brief workflow.

Name: Example		Role: Marketing Business Partner	Date: June 9, 2026
1 THE WORKFLOW What workflow are you redesigning? Be specific — one workflow, not a category.			
Workflow name		Quarterly broker campaign brief — building the strategic and creative plan for our top-tier broker partners.	
How often		Four times a year (one per quarter), plus ad hoc when a product launch lands mid-quarter.	
Why does it matter		Brokers carry 100% of our distribution. A weak quarterly brief means weak broker engagement, slow placements, and lost competitive ground.	
2 TODAY'S WORKFLOW How does it actually work right now?		3 AI-FIRST RETHINK Where could AI move you upstream — Know, Strategize, Create?	
Current steps 1. Pull last quarter's broker engagement data from the portal (manual export). 2. Read through broker feedback notes in Outlook + meeting recaps. 3. Draft a positioning angle in Word, mostly from scratch. 4. Send draft to Sarah for review; iterate 2-3 rounds. 5. Hand off final brief to creative + write copy myself for time. Friction points Reading broker feedback takes hours. Writing positioning from scratch is the slowest step. Iterations with Sarah always uncover gaps I should have seen. Where AI is used today Light Copilot use for polishing copy at the end. Nothing earlier in the workflow.		KNOW research, context, understanding Have Copilot synthesize broker feedback themes from last quarter's meeting recaps and engagement data. Surface the 3 patterns I should design around. STRATEGIZE decisions, planning, prioritization Use Copilot to draft 3 positioning angles based on broker insights + Cendara strategic priorities. Pressure-test each against tier-1 broker personas before I pick one. CREATE drafting, building, producing Once positioning is locked, Copilot drafts the brief structure and first pass of campaign messaging. I edit for voice and judgment. Sarah's review focuses on strategy, not surface.	

4 REDESIGNED WORKFLOW

What does the new, AI-first version look like end-to-end?

New steps

1. Prompt Copilot to synthesize broker feedback themes from Q1 inputs.
2. Prompt Copilot to draft 3 positioning angles tied to those themes + strategic priorities.
3. Pick the strongest angle; prompt Copilot to draft brief structure + initial messaging.
4. Edit for voice, judgment, and broker-specific nuance.
5. Send to Sarah — review focused on strategy, not drafting.

Expected impact (time / quality / capacity)

Saves ~6 hours per brief. More importantly: I start the strategic work, not the typing.

5 NEXT STEP & GUARDRAILS

Start small. Decide what stays human.

One thing I'll try this week

Run step 1 (broker feedback synthesis) on Q1's actual inputs. See if the themes match what I'd land on manually.

Guardrails (where I stay human)

I review every broker quote Copilot surfaces. I edit positioning for voice before showing Sarah. Final messaging goes through me, not direct from Copilot to brief.