

Choose Your First AI Workflow

How a marketing and communications team decides which workflow to build first, and how to know it worked.



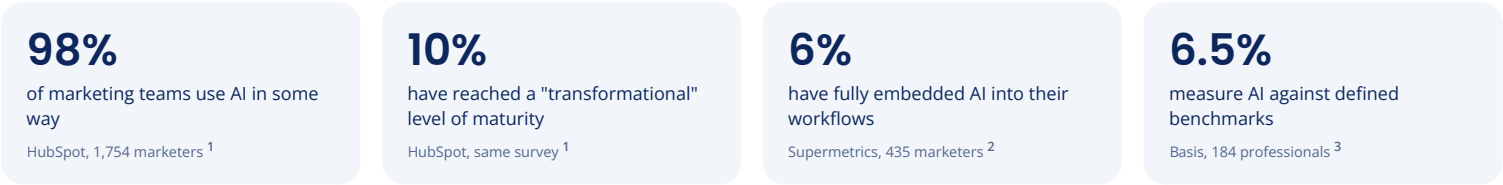
Overview

Pick the workflow your team already repeats every week, can describe step by step, and can check before anything goes out. Start with one, put a person between the AI and the audience, and measure the hours it gives back and whether the quality held. Expand only after it has run for 30 days without drama.

Most marketing and comms teams already use AI, but very few have changed how the work gets done. The first workflow is where that changes, so it matters more than the tool you pick or the policy you write. This guide walks through how to choose it, what to avoid, and what the first month should look like.

1. The importance of the first workflow

Adoption is no longer the story, depth is, and the numbers from 2026 say the same thing from every angle.



What the research found	Figure	Source
Marketers who feel pressure to put AI into workflows	80%	Supermetrics ²
PR pros using generative AI	76%	Muck Rack ⁴
Internal comms teams using AI	78%	PoliteMail and Ragan ⁶
Of those IC teams, still in early or ad hoc experimentation	75%	Gallagher ⁶

The pattern is the same across marketing, PR, and internal comms. Nearly everyone is using AI to draft and rephrase. Almost no one has redesigned a process around it, and almost no one is measuring the result.

MIT's NANDA group looked at 300 enterprise AI deployments in 2025 and found about 95% produced no measurable impact on the P&L.⁵ The lead author's explanation for the 5% that worked was simple: they picked one pain point and executed well. That's the whole argument for choosing your first workflow carefully.



2. What each stakeholder needs from it

The first workflow has to work for everyone who touches it, and they aren't starting from the same place. Here's what each of them is actually thinking.

The leader

You own the function and someone above you has asked what you're doing about AI. In the Supermetrics survey, 89% of marketers said the pressure comes from the C-suite or board, and 37% said leadership has given them no clear AI strategy.²

You need something you can point to in a quarterly review. You also know a flashy pilot that quietly dies in month four is worse than nothing.

Wants a result stated in one sentence, with a number in it.

The practitioner

You already use ChatGPT or Claude or Copilot most days. It drafts, cleans up sentences, and summarizes the long thing you didn't have time to read. An "AI workflow" sounds like one more process on top of the work.

In the Adaptavist survey, 42% of knowledge workers said they spend more time verifying AI output than they save, and 52% regularly fix AI-generated work from colleagues.⁸

Wants the annoying part of the week to shrink without the work getting worse.

The skeptic

You might be the senior writer, the comms lead who has seen a bad statement go out, or the person closest to legal. You aren't against AI. You're against a process where nobody checks the facts and a mistake reaches a journalist or an employee before anyone sees it.

In Dexian's Work Futures 2026 survey, more than two in three workers said they were worried about AI's effect on their jobs.⁹ The skeptic is often carrying that worry for the room.

Wants a visible checkpoint and a clear line on what AI doesn't touch.

A good first workflow satisfies all three. It gives the leader a number, the practitioner relief, and the skeptic a checkpoint. If your candidate only works for one of them, keep looking.

3. The difference between a prompt and a workflow

Most teams that say they "use AI" mean individuals typing into a chat window. That's a prompt, and it helps one person on one task, and the result lives in their head.

A workflow is different in four ways. It has a trigger, something that starts it every time without someone deciding to. It has defined inputs, the same files or data each run. It has a checkpoint, a named person who reviews before the output goes anywhere. And it has an owner who is accountable when it breaks.

Prompt. "I ask Claude to turn the blog post into LinkedIn posts."

Workflow. "Every published article triggers three draft posts in the brand voice, the social lead reviews and approves in the shared doc, and we track approval rate and time to publish."

It's the same AI, but the second one changes how the team works, survives when the person who built it goes on leave, and produces a number you can report. The Workflow Spec, part three of this set, is the one-page template for writing it down.

- 1 **It happens often.** Weekly at least, because a monthly task doesn't give you enough runs in 30 days to learn anything, and nobody feels the time back.
- 2 **Someone can describe it step by step.** If the person who does it today can't write down the steps and the inputs, the AI won't be able to follow them either. Ambiguity in the process becomes ambiguity in the output.
- 3 **The result can be checked against something trusted.** A reviewer should be able to compare the output with an approved source, such as social posts against the published article, a coverage summary against the clips, or a draft FAQ against the policy document. If the only way to check it is to redo the work, the workflow saves nothing.
- 4 **A mistake is reversible.** The output goes to a reviewer first, and a bad run costs an hour, not a headline. Anything that reaches a journalist, a regulator, or every employee without a human in between is off the list for now.
- 5 **The person doing it today wants it gone.** This is the one teams skip. If the workflow only sounds important from the leader's chair, adoption will be thin. The best first candidate is the one where the practitioner says "yes, please" without being asked twice.

5. Scorecard

Criterion	Score 1	Score 3	Score 5
Frequency	Monthly or less	Weekly	Daily or several times a week
Clarity of steps	Nobody can write it down	Mostly documented, some judgment calls	Fully documented with examples
Checkable	Only by redoing the work	Spot checks against a source	Direct comparison to an approved source
Reversible	Goes external or company-wide with no review	Reviewed, but a miss is embarrassing	Reviewed, a miss costs under an hour
Team appetite	Leadership idea only	Some interest	The person doing it asked for this
Data you can share	Needs confidential or personal data	Needs some internal data, with care	Runs on public or approved content

6. Workflows that make good first choices

These are the workflows that pass the five tests most often for marketing and comms teams. Use them as a starting list for the scorecard, not as a ranking. The right one for your team depends on where the hours are going today.

Workflow	What the AI does	Where the human sits	What you measure
Approved-content repurposing	Turns one published piece into channel-specific drafts in the brand voice	Social or content lead approves each draft against the source	Hours per piece, approval rate, time from publish to post
Coverage and media briefing	Summarizes the day's or week's clips, flags tone and emerging themes, drafts the exec summary	Comms lead checks against the clips and adds context	Prep time per briefing, exec feedback
Meeting to draft	Takes the transcript of a planning call or interview and produces the recap, action list, or first draft	The person who ran the meeting edits before sending	Time from meeting to sent recap
Weekly performance report	Pulls the standing metrics, writes the narrative, flags anomalies	Marketing ops reviews numbers and signs off	Hours per report, errors caught
Request intake and triage	Reads incoming asks from sales, HR, or leadership, structures them into a brief, routes by type	Team lead confirms priority and owner	Time to acknowledge, briefs that need rework
FAQ and message bank upkeep	Drafts updated Q&A when a policy, product, or announcement changes	Subject owner and comms approve before it goes in the bank	Time to update, questions that still reach the inbox
Audience adaptation for internal comms	Reworks one leader message for frontline, manager, and office audiences	IC lead reviews for tone and the leader's voice	Time per adaptation, read rates by audience
Feedback log	Captures every stakeholder comment, dedupes, turns repeated notes into standing rules	Account or project lead keeps the log honest	Repeat comments per round, revision cycles

Two notes on this list. The Agility PR 2026 survey found 67.9% of comms pros spend over an hour preparing a typical media briefing,⁷ which is why briefing work scores well on frequency and appetite. And the Basis survey found that when marketing orgs do run AI agents, reporting and analytics is the most common use at 72.3%, ahead of briefs and content, because the inputs are structured and the output is easy to check.³

If you're a lean team, repurposing and meeting-to-draft are usually the fastest wins.

If you're an internal comms team, audience adaptation and FAQ upkeep tend to be where the hours hide.

If you're a PR team, start with the briefing.



7. Workflows to save for later

Some workflows look like obvious wins and are the fastest way to lose the room. Save these for later.

- **Anything that goes external without a review step.** Press releases straight to the wire, auto-replies to journalists, social posts that publish on approval of nobody. One miss and the skeptic was right.
- **Crisis or sensitive communications.** Holding statements, layoff notes, regulatory responses, anything with legal exposure. Muck Rack's guidance for PR teams puts these in the full-human-authorship column, and so do we.⁴
- **Leader voice at scale.** Running a CEO's message through AI and publishing the output, which employees notice. Edelman's Trust Barometer found 68% of employees already believe leaders withhold or misrepresent information.⁶ Flattened AI prose makes that worse.
- **The big integration.** The workflow that needs the CRM, the intranet, and the analytics platform all talking to each other. MIT's research found internal builds succeed about a third as often as purchased, well-scoped tools.⁵ Prove the operating model on something small first.
- **The thing nobody does today.** A new capability sounds exciting, but there's no baseline to measure against and no practitioner who wants it. Pick something that already exists and is painful.
- **Anything that needs customer or employee personal data to work.** Not for round one, since you'll want the data governance conversation to happen before the AI one, not during it.

8. What to do in the first 30 days

One workflow, one owner, one reviewer, one number. That is the whole plan. Here is how it lays out.

When	What happens	Who
Week 1	Hold the scorecard session, pick the workflow, and write the one-page spec. Record the baseline, meaning how long it takes today and how often.	Team lead plus the people who do the work
Week 1	Name the owner and the reviewer. Agree what the reviewer checks against and what sends a run back.	Team lead
Week 2	Build the smallest version that runs. A prompt template with the brand voice and examples, a shared doc for review, a simple log. No new software unless it's already in the stack.	Owner
Week 2	Run it on three real jobs side by side with the old way, compare, and fix the prompt, the inputs, or the checkpoint.	Owner and reviewer
Weeks 3 and 4	Run it for real on every instance. Log time, approval rate, and anything the reviewer had to fix.	Owner and reviewer
End of week 4	Review the log and decide one of three things: keep and expand, keep and fix, or stop. Tell the team which one and why.	Team lead

A few things that make the month go better. Tell the whole team on day one what you're trying, who's involved, and what you'll decide at the end. Ask the reviewer to keep a running list of what they changed, because that list becomes the next version of the prompt. Keep the old way available for the full 30 days so nobody feels trapped.

And write the spec before you build. Teams that start with the tool spend the month configuring it. Teams that start with the spec spend the month learning.



9. How to measure success

The Basis survey found that 65.1% of marketing organizations either don't measure AI ROI or don't know if anyone does.³ Don't join them. Four signals tell you whether the first workflow earned a second one.

Time came back

And you can say how much. Baseline minus the new average, times the number of runs. "The briefing went from 70 minutes to 25, five days a week" is the sentence the leader needs.

Quality held

The reviewer's fix list got shorter over the month, and nothing went out that wouldn't have gone out before. If the fix list is still long at week four, the workflow isn't ready to expand.

People kept using it

When nobody was watching. If the practitioner quietly went back to the old way in week three, the workflow failed the appetite test, whatever the time savings say.

The reviewer still had a job

This is the quiet one. If the checkpoint became a rubber stamp, the team stopped learning. If it was still catching real issues, you have a workflow that can be trusted with more.

When all four hold, pick the next workflow from the scorecard. When they don't, fix or stop. Either way, the team now knows what it takes to make one work, and that's the capability you were building the whole time.



Sources

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This is workbook 2 of 4.

Together, they walk a marketing or comms team from no AI guidelines to one workflow running, measured, and understood by the team.

Workbook 1: AI Use Guidelines Starter

The key decisions to make before AI use becomes a shared way of working

Workbook 2: Choose Your First AI Workflow (this one)

How to pick the one workflow that proves the operating model

Workbook 3: The Workflow Spec

A one-page template that turns a prompt into a workflow

Workbook 4: Telling Your Team About AI

A message kit for leaders rolling AI out to their own team

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