



Your first AI workflow · Workbook 3 of 4

The Workflow Spec

A one-page template for writing down an AI workflow before anyone builds it.



Overview

The spec takes about 20 minutes to fill in, and it forces the decisions that matter before any tool is opened: what starts the workflow, what goes in, who checks the output, and what counts as done. Once it exists, anyone on the team can run the workflow, a new hire can pick it up, and a builder can quote it accurately.

1. Why write it down first

Most AI workflows that fail were never written down. Someone built a prompt, it worked for them, and three months later nobody else can run it, measure it, or explain why it stopped working.

Use one spec per workflow, keep them in a shared folder, and update the spec when the workflow changes, which it will. If you haven't chosen which workflow to spec yet, part two of this set, Choose Your First AI Workflow, has the scorecard.



2. The spec

Fill in the right-hand column, because every field has a reason. If you can't fill one in, that's useful information, and it usually means the workflow isn't ready to build.

Field	What to write	Your answer
Workflow name	Plain words. What it does, not what tool it uses.	
Owner	One person. Accountable when it breaks, responsible for the next version.	
Trigger	What starts a run every time without someone deciding to, such as a publish, a calendar day, or an inbox rule.	
Frequency	How often the trigger fires. Daily, weekly, per event.	
Inputs	The exact files, links, or data each run needs, where they live, and who keeps them current.	
What the AI does	The steps, in order. Summarize, draft, reformat, tag, compare. Be specific about the output format.	
What the AI doesn't do	The lines it doesn't cross, such as publishing, inventing figures, changing approved claims, or writing in the leader's voice.	
Context it needs	Brand voice guide, approved messaging, examples of good output, and standing rules from past feedback, all linked.	
Reviewer	The named person who sees every output before it goes anywhere.	
Reviewer checks against	The trusted source, such as the published article, the policy, or the approved message bank.	
What sends a run back	The failure conditions. A claim that isn't in the source, a tone miss, a missing section.	
Output goes to	The destination after approval, such as a scheduling tool, an inbox, or a publishing queue.	
Baseline today	How long the task takes now and how often it happens, measured before you build.	
Success measure	The one or two numbers you'll report at 30 days, such as time per run or approval rate.	
Data rules	What may and may not go into the AI tool. Personal data, confidential material, client information.	
Review date	When the owner and reviewer review the log and decide to keep, fix, or stop.	



3. A worked example

Here's the spec filled in for the most common first workflow, approved-content repurposing. Yours will differ in the details, but the shape should look like this.

Field	Answer
Workflow name	Blog to social drafts
Owner	Content lead
Trigger	A new article is published on the company blog
Frequency	Two to three times a week
Inputs	The published article URL. The brand voice guide. The last ten approved LinkedIn posts as examples.
What the AI does	Reads the article. Produces three LinkedIn post drafts under 150 words each, one lead-with-insight, one lead-with-question, one lead-with-a-number. Pulls two quotable lines from the article. Suggests one image direction.
What the AI doesn't do	Doesn't publish. Doesn't add statistics or claims that are not in the article. Doesn't use hashtags. Doesn't write in the CEO's first person.
Context it needs	Brand voice guide (linked). Approved examples (linked). Standing rules from the feedback log, including no em-dashes and no "we're excited to announce".
Reviewer	Social media manager
Reviewer checks against	The published article. Every claim in a draft must appear in the source.
What sends a run back	A claim not in the article. A tone miss against the voice guide. Any draft over 150 words.
Output goes to	The social scheduling tool, as unscheduled drafts
Baseline today	About 50 minutes per article to write three posts. Roughly 2.5 articles a week.
Success measure	Minutes per article, from publish to three approved drafts. Share of drafts approved without edits.
Data rules	Public content only. No unpublished drafts, no customer names, no internal metrics in the prompt.
Review date	30 days from first live run



Notice how specific the "doesn't do" row is. That row is what earns the skeptic's trust, and it's usually the row teams leave blank.

4. Before you build

Run down this list once the spec is filled in. Every box should be ticked before anyone opens a tool.

- ☐ The person who does this task today helped write the spec
- ☐ The baseline is a measured number, not a guess
- ☐ The reviewer has agreed to the role and knows what they're checking against
- ☐ The "doesn't do" row has at least three lines in it
- ☐ The data rules have been checked with whoever owns privacy or security
- ☐ The inputs exist today and someone owns keeping them current
- ☐ The success measure can be reported in one sentence
- ☐ A review date is on the calendar

Once every box is ticked, part four of this set, Telling Your Team About AI, covers how to introduce the workflow to the people who will use it.



This is workbook 3 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

How to pick the one workflow that proves the operating model

Workbook 3: The Workflow Spec (this one)

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

Want someone to run this with your team? That's the work Austley does. AI training and workflow implementation, AI adoption and change communications, and marketing and comms leadership when you need it. Start at austley.com.

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