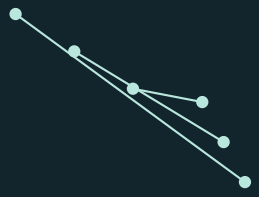
Stratos House

WORKFLOW / SCOPING WORKSHEET



One task.
A clear boundary.

Before choosing an AI tool, choose a task you can describe clearly. Use this canvas to turn “we need automation” into a small, reviewable piece of work.

Trigger and owner

What starts the task? Who owns it?

Inputs and sources

What documents, systems or notes are needed?

Useful output

What should the operator receive?

Human review

What can be drafted? What needs approval?

Failure path

What happens when the context is missing or unclear?

WORKFLOW / VALIDATION

Prove the workflow before expanding it.

A normal example

Use a representative input and compare the output with the operator's current process.

A missing source

Remove something important. The workflow should ask for context or pause, rather than invent it.

Conflicting information

Include two different versions of the same decision. Identify which source governs the work.

An action outside the scope

Ask it to send, change or publish something it has no permission to handle. Confirm it stops at the review boundary.

An observable improvement

Record accuracy, review effort and time spent. Decide together whether it helps enough to continue.

This canvas is a planning aid, not a performance promise. Editable version and full guide: links.stratosagency.ai/r/workflow/