The workflow card

Plan, write and test a repeatable AI workflow: five tests, steps, standing instructions, a checklist and a test log.

Time **about 45 minutes** Updated **11 Nov 2026** Fill in online at **Learn › Worksheets**

HOW TO USE IT

1. Fill in the card for one task you do every week.
2. Run your standing instructions on three past examples (one easy, one messy, one tricky) and log what went wrong.
3. Keep the card where you'll find it next week, and re-test when your tool or model changes.

1. Task

What this workflow does, in one sentence

How often you run it

What a good result looks like (so you can judge it in two minutes)

2. Five tests

Tick all five before you build it.

This task is a good fit because

- [ ] It repeats (weekly or more)
- [ ] The input looks similar each time
- [ ] I know what a good result looks like
- [ ] Mistakes are cheap to catch, and I'll check every output
- [ ] I'm allowed to paste this data into the tool I'll use

3. Steps

Mark who does each one.

Steps

	What happens
1. Prepare the input (me)	
2. Draft (AI)	
3. Check (me)	
4. Send, file or use it (me)	

4. Standing instructions

Paste these at the start of a new chat each time, or save them in your tool if it supports saved instructions. Keep the two rules below in every version.

Goal

Rules

Start with: Use only the input below. Don't add facts, names or dates that aren't in it. If something I need is missing, write NOT IN INPUT. Never guess.

Output format (exact)

5. Checklist

Run it on every output before you use it.

Every time

- [ ] Every item can be traced to the input
- [ ] No invented names, dates or numbers
- [ ] Nothing important missing

Checks specific to your task

6. Test log

Run three past examples before you rely on it: one easy, one messy, one tricky.

Test log

	What went wrong	Rule I changed
Easy example		
Messy example		
Tricky example		

7. Version

Tool and model used

Versions

Example answers

> The example is the meeting-notes workflow from the guide. Its test log records what happened in our own test on 11 November 2026 with one Claude model; other tools may fail differently.

1. Task

What this workflow does, in one sentence

> Turns meeting notes into a short summary and an action table, ready to paste into an email.

How often you run it

> After every team meeting, about twice a week.

What a good result looks like (so you can judge it in two minutes)

> Every agreed action is listed once, with the owner and date exactly as said, and nothing invented.

2. Five tests

Tick all five before you build it.

This task is a good fit because

- [x] It repeats (weekly or more)
- [x] The input looks similar each time
- [x] I know what a good result looks like
- [x] Mistakes are cheap to catch, and I'll check every output
- [x] I'm allowed to paste this data into the tool I'll use

3. Steps

Mark who does each one.

Steps

	What happens
1. Prepare the input (me)	Paste the notes as text. Convert PDFs or Word files to text first.
2. Draft (AI)	Run the standing instructions in a new chat.
3. Check (me)	Check every row with the checklist.
4. Send, file or use it (me)	Resolve or forward the TO CONFIRM items, then send.

4. Standing instructions

Paste these at the start of a new chat each time, or save them in your tool if it supports saved instructions. Keep the two rules below in every version.

Goal

> Turn meeting notes into a short summary and an action table.

Rules

Start with: Use only the input below. Don't add facts, names or dates that aren't in it. If something I need is missing, write NOT IN INPUT. Never guess.

> Use only the notes below. Do not add actions, names or dates that aren't in them.
> If an owner or due date is missing or unclear, write NOT IN NOTES. Never guess.
> One row per action. If one line holds two actions, split them.
> Copy names and dates exactly as written.

Output format (exact)

> 1. SUMMARY: up to 5 bullet points, decisions or key facts only.
> 2. ACTIONS: a table with columns # | Action | Owner | Due | From the notes (exact words, up to 15).
> 3. TO CONFIRM: up to 5 things a person should check, or "None".

5. Checklist

Run it on every output before you use it.

Every time

- [x] Every item can be traced to the input
- [x] No invented names, dates or numbers
- [x] Nothing important missing

Checks specific to your task

> Read the action table, not just the summary (summaries can leave items out).
> Anything changed later in the meeting shows its final version.
> TO CONFIRM items resolved or sent on as questions.

6. Test log

Run three past examples before you rely on it: one easy, one messy, one tricky.

Test log

	What went wrong	Rule I changed
Easy example	A one-line request turned "by Friday" into a date not in the notes	Copy names and dates exactly as written
Messy example	A one-line request assumed an owner who had only said "maybe"	NOT IN NOTES, never guess
Tricky example	A one-line request merged "write" and "send" into one action	One row per action; split them

7. Version

Tool and model used

> One Claude model (our test on 11 Nov 2026)

Versions

> v1 (11 Nov 2026): first version, tested on three example notes.

A workflow makes results consistent and easy to check. It doesn't make them right: the check does. Don't paste confidential or personal information into a tool your organisation hasn't approved. Free to use and adapt for your own work.