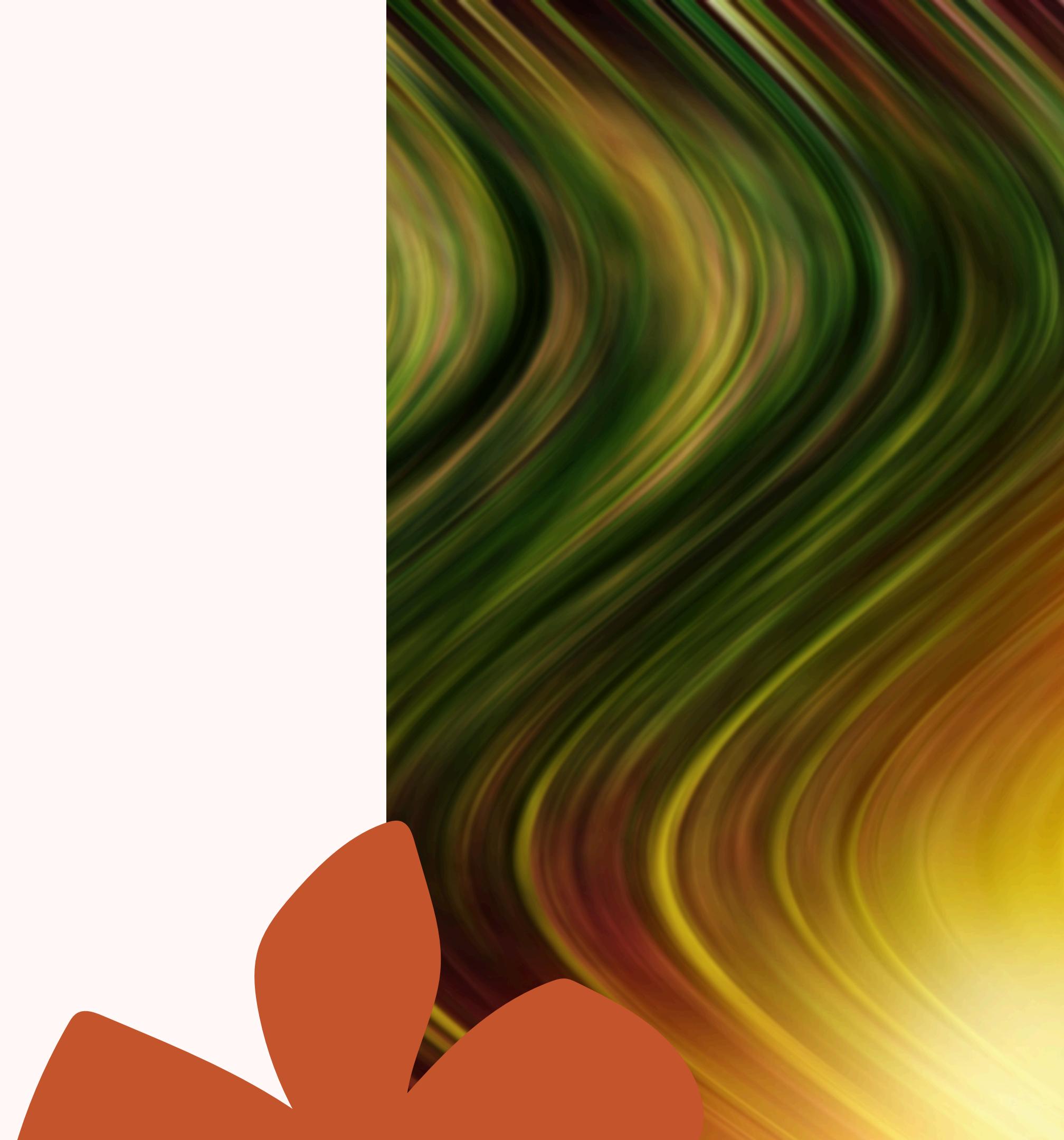


By Ethan Lawrie

Session 5 - Operationalise With Workflows

PRACTICAL AI LITERACY FOR WORK



Learning Outcomes Overview

KEY SKILLS TO ACHIEVE BY SESSION END

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Agenda Overview

PRE-QUIZ

LEARNING 1

ACTIVITY 1



Agenda Overview Cont.

LEARNING 2

ACTIVITY 2

LEARNING 3

POST QUIZ



Pre Quiz

*This quiz is to gauge your current understanding of AI,
high correct rates are not expected*



Pre Quiz - Question 1

WHICH BEST DESCRIBES A WORKFLOW, NOT JUST A ONE OFF PROMPT?

- A) A request that asks the model to summarise a document
- B) A repeatable set of steps with inputs, owners, outputs, and checks
- C) A long written instruction that covers tone and style
- D) A fast way to get a first draft



Pre Quiz - Question 1

WHICH BEST DESCRIBES A WORKFLOW, NOT JUST A ONE OFF PROMPT?

- B) A repeatable set of steps with inputs, owners, outputs, and checks

Pre Quiz - Question 2

IN A SAFE WORKFLOW, WHAT IS THE PURPOSE OF A GATE?

- A) To speed up low value steps
- B) To let the model fix its own mistakes
- C) To pause for a required human check before anything moves forward
- D) To remove steps that seem redundant



Pre Quiz - Question 2

IN A SAFE WORKFLOW, WHAT IS THE PURPOSE OF A GATE?

- C) To pause for a required human check before anything moves forward



Pre Quiz - Question 3

YOU WRITE A STEP THAT SAYS: "SEND THE UPDATE TO THE CLIENT." WHAT IS MISSING?

- A) Who approves the content before it leaves the company
- B) A timestamp
- C) Brand tone
- D) Emoji usage



Pre Quiz - Question 3

YOU WRITE A STEP THAT SAYS: "SEND THE UPDATE TO THE CLIENT." WHAT IS MISSING?

- A) Who approves the content before it leaves the company



Pre Quiz - Question 4

DURING A RUN, THE MODEL OUTPUT SAYS "INVALID" BECAUSE A REQUIRED FIELD IS MISSING. WHAT SHOULD HAPPEN NEXT IN A SAFE WORKFLOW?

- A) Retry the step until it looks right
- B) Guess a value that fits the format
- C) Drop that row and keep going
- D) Stop that branch and escalate to the named human owner



Pre Quiz - Question 4

DURING A RUN, THE MODEL OUTPUT SAYS "INVALID" BECAUSE A REQUIRED FIELD IS MISSING. WHAT SHOULD HAPPEN NEXT IN A SAFE WORKFLOW?

- D) Stop that branch and escalate to the named human owner

Pre Quiz - Question 5

WHEN IS A STEP CONSIDERED DONE?

- B) When the output matches the required format and is handed off to the next step

Pre Quiz - Question 6

A STEP IN A WORKFLOW LISTS AN ACTION BUT NOT AN OWNER. WHY IS THAT A PROBLEM?

- A) The wording might be too formal
- B) You cannot know when to run it
- C) No one can be held responsible if it fails
- D) It will take longer to run

Pre Quiz - Question 6

A STEP IN A WORKFLOW LISTS AN ACTION BUT NOT AN OWNER. WHY IS THAT A PROBLEM?

- C) No one can be held responsible if it fails



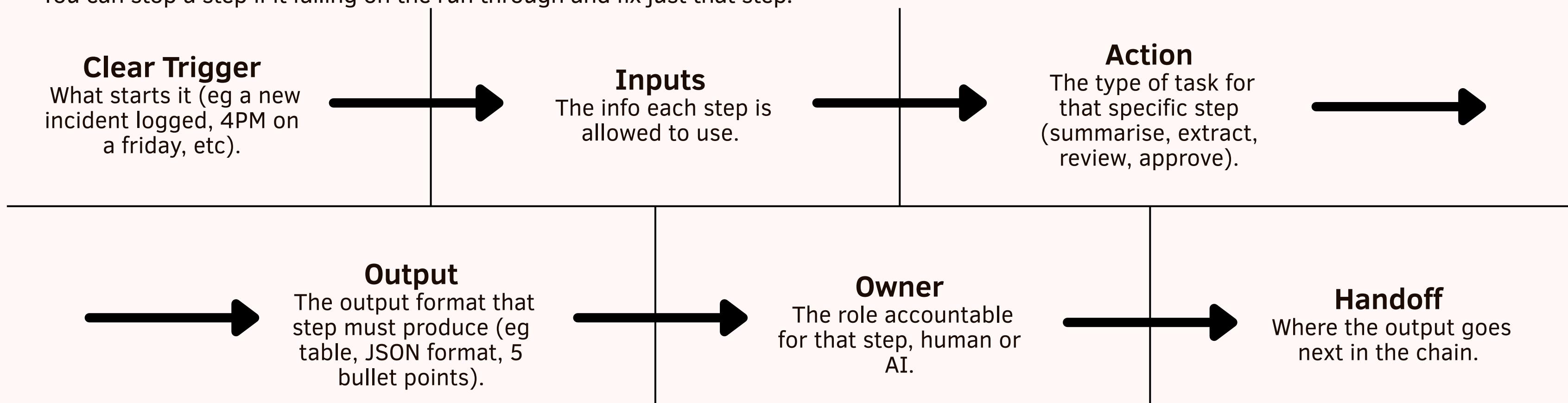
What is a Workflow?

Definition

Workflows are chains of steps that are made repeatable and can be run consistently in the same way each time, with parts with AI and human parts interleaving.

Why Workflows Matter:

- You can test and check each step individually, and not just hope that the output is a good answer
- You can monitor each step where there are humans and gate those steps
- You can stop a step if it failing on the run through and fix just that step.



Single Prompt vs Workflow

Why one 'good prompt' is not enough

Single Prompt

"Summarise this and trigger a flow to send it to leadership."

- Assumes that the input is actually correct.
- Assumes that the tone the model would respond with is safe.
- Assumes it knows who will receive it.
- Assumes it's actually okay to send.

Hidden problems:

- Where did the input come from?
- Who checks the accuracy of the output?
- Who removes the risky language?
- Where does the result actually go?

Workflow

- Step 1: Collect source notes (done by a person)
- Step 2: Model drafts summary in fixed format
- Step 3: Human approval gate (edit tone, remove any promise)
- Step 4: Send (human owner)

Why this matters

- The workflow shows who is responsible.
- The workflow stops safely if approval fails.
- The workflow is repeatable next week by someone else.

The Anatomy of a Workflow Step



- 1. Who exactly runs this step?**
 - Human role or “model assist”.
 - Make sure it is the role not name that is specified. (eg support lead, model using extract-structure pattern)
- 2. What is the allowed input?**
 - Give the exact source.
 - Make sure there is no guessing, and most times no web search.
- 3. What do they do in this step?**
 - One clear verb that shows the step
 - eg “Extract fields”, “Rewrite for exec audience”, “Approve tone”, “File record”.
- 4. What does ‘good’ look like for the output?**
 - Make sure to have a success metric for the step so it is clearly defined.
- 5. What format do they have to produce?**
 - Have a output contract.
 - JSON schema, table row, 10 bullet points with the owner + due date ref.
- 6. Where does it go next?**
 - Designate a handoff target for the output to go to
 - eg “Goes to Step 3 for human approval” or “Pasted into risk tracker”.
- 7. What if it fails?**
 - Have a stop rule for when the step is not working.
 - eg “If any field is missing or sensitive info appears, escalate to manager and do not continue.”

Gates

What is a gate?

A gate is a point in the workflow where a person needs to check it before it continues on.

Where you must have a gate

- Gate needs to be on anything sent to a customer (outside) or higher leadership
- Anything that involves things like money, HR, legal, policy, or compliance
- Anything that will be stored in an official system of record

What happens at a gate

- The person checks and reviews the output from the previous step/model and agrees whether it fits with the format and rules that are wanted
- If it's acceptable then continue the workflow
- If it's not acceptable then stop the workflow and escalate



Key Rule

If there's no gate on a risky step, it's not a safe workflow.



Failure Handling

A workflow is only safe if you know exactly when it must stop.

Failure branch rules

- For every step in the workflow a clear failure branch/condition should be defined for when it fails.
- If any of the failure rules trigger, the workflow then stops and goes to a named human owner to check it.

Stop the workflow if

- The input for the current step is missing or unclear in context.
- If it has been defined, if the model output returns Invalid.
- The info required to complete the task is gone and the model can no longer meet the criteria for success
- If the step would require guessing or inventing facts.

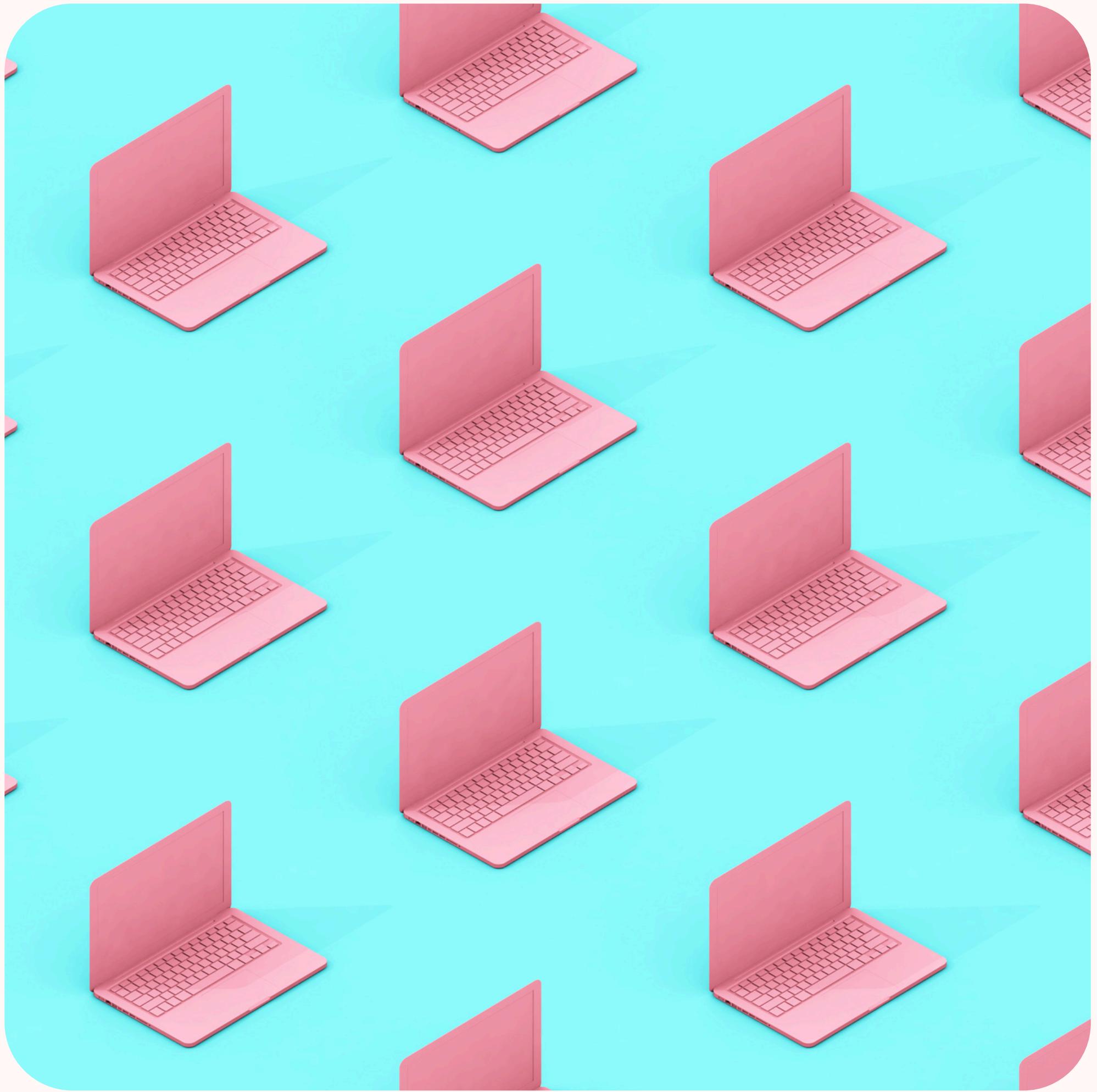
What happens next

- Escalate (or get the model if it can) to the named owner for that step (make sure its a person role, not a tool).
- Take a record if useful of why that step stopped and why.
- Make sure the workflow doesn't continue to the next step until that owner clears it.



Activity: Operationalise the Workflow

*Turn one pilot task into a repeatable,
reviewable workflow that a teammate could
run tomorrow*



Workflow Patterns

This block introduces reusable workflow shapes. These connect to what you already taught in Session 4 but at system level.

Decompose - Plan - Do

Flow -----

1. The model proposes a step by step plan for the task.
2. A human edits or approves that plan.
3. The model runs only the first approved step and returns output in the required format.
4. The human says continue or stop before the next step runs.

Use When -----

- The task has multiple steps.
- You do not want anything to go out without review.
- You want a record of who approved what.

Key Rule -----

- The model never runs the full task end to end without a human checkpoint.
- Each step has an approval moment and a saved output you can trace later.

Human Gate After Machine Extraction

Flow	-----	Use When	-----
<ol style="list-style-type: none">1. The model runs Extract Structure on messy input and produces structured fields.2. A human checks those fields for correctness and redaction.3. Only after that check does the data get written into any system of record.	-----	<ul style="list-style-type: none">• Support tickets• Audit intake• Compliance logging• Anything that will live in an official tracker	-----
		Key Rule	-----
		<ul style="list-style-type: none">• The human gate is mandatory.• If the human does not approve, the workflow stops. It does not push data forward.	-----

Draft Then Final

Flow -----

1. The model creates a draft in a strict format. For example 5 bullet points with owner and due date.
2. A human edits tone, removes risky promises, and makes sure nothing commits to price, policy, or workload.
3. The human sends or publishes.

Use When -----

- Leadership updates
- Change announcements
- Messages to customers or partners

Key Rule -----

- The model never sends directly.
- Human approval is the last step before anything leaves the team.

Score and Select

Flow

1. You give options plus scoring criteria with weights.
2. The model returns a scored table and a recommended option.
3. A human signs off or overrides.

Use When

- Vendor choice
- Picking which risk to handle first
- Backlog ordering

Key Rule

- Human sign off is final.
- Cost, risk, and commitment sit with the human owner, not the model output.

Log and Audit

Flow -----

1. The model tags and logs events in a tracker using Extract Structure.
2. A human reviews a small sample every day.
3. If quality drops, you pause use.

Use When -----

- High volume, low stakes monitoring
- Trend logging
- Tagging incoming reports

Key Rule -----

- You do not set and forget.
- Sampling is continuous.
- If drift shows up, you stop the workflow and fix it before continuing.



Activity: Workflow Audit

Work in pairs to audit each other's workflow setups from activity 1.

Time: 20 minutes.

When a Workflow is Safe to Pilot

Checklist for pilot ready

- The workflow has a clear enough trigger, the steps are named, each step has an owner, and any approval gates are marked.
- Each step lists allowed inputs. The inputs are legal for that step to use.
- Each step produces an output in a defined format. That output has a real destination and a consumer.
- The workflow has already been run on real examples. Results were captured, not just guessed.
- There is an escalation path. If something fails, it is clear who stops the process and who takes over.

If you cannot point to all five in writing, it is not ready to pilot. It's still a draft

Drift and Maintenance

Action if it drifts

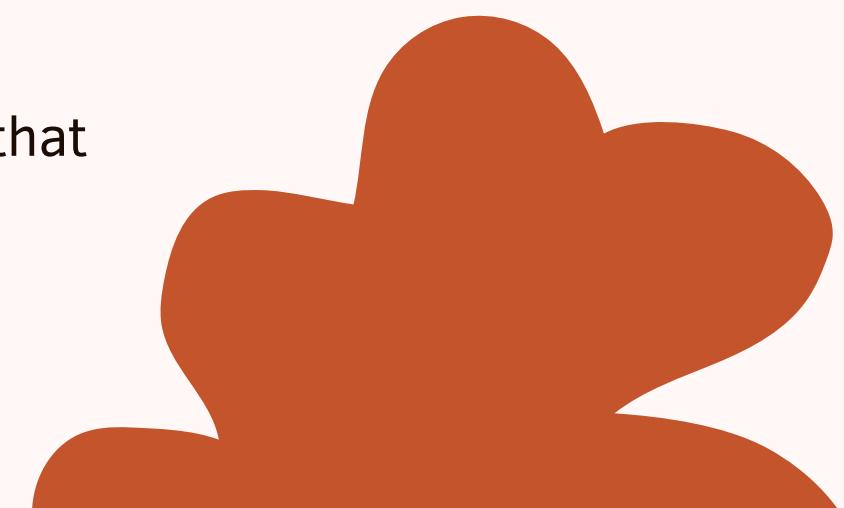
- If quality drops, pause the workflow.
- If policy changes, pause the workflow.
- Update the workflow card plan, retrain the new staff, then resume.

What this means

- Every workflow needs to have an owner at all times if possible. One named role is responsible for checking that that step still works.
- Each workflow needs a review cycle to check up on it and decide if it is still being effective. eg weekly for customer facing work, monthly for internal reporting.

Why this matters

- Models can drift over time perhaps due to updates or other things like input. This means that the same prompt can give different output next month.
- Policy changes in the company may now cause certain information to be restricted.
- New staff run the workflow who did not help design it.



Post Quiz

This quiz is to see your learning progress over this session



Post Quiz - Question 1

A TEAM SAYS THEIR WORKFLOW IS PILOT READY. IT HAS STEPS, OWNERS, AND A FINAL HANDOFF. WHAT IS STILL REQUIRED BEFORE IT IS ACTUALLY SAFE TO RUN?

- A) A style guide
- B) A time saving estimate
- C) A weekly rollout plan
- D) A named escalation path if a step fails



Post Quiz - Question 1

A TEAM SAYS THEIR WORKFLOW IS PILOT READY. IT HAS STEPS, OWNERS, AND A FINAL HANDOFF. WHAT IS STILL REQUIRED BEFORE IT IS ACTUALLY SAFE TO RUN?

- D) A named escalation path if a step fails

Post Quiz - Question 2

A STEP READS: "SUMMARISE THE WEEKLY REPORT IN 5 BULLETS AND SEND TO LEADERSHIP." WHAT IS THE MAIN PROBLEM?

- A) Bullet count is vague
- B) There is no human approval before it goes out
- C) It uses the word "summarise"
- D) It does not mention tone

Post Quiz - Question 2

A STEP READS: "SUMMARISE THE WEEKLY REPORT IN 5 BULLETS AND SEND TO LEADERSHIP." WHAT IS THE MAIN PROBLEM?

- B) There is no human approval before it goes out

Post Quiz - Question 3

A REVIEWER TRIES TO FOLLOW A WORKFLOW AND HITS: "IF DATA IS MISSING, CREATE A REASONABLE VALUE AND CONTINUE." WHAT SHOULD THAT REVIEWER SCORE THIS AS?

- A) Unsafe, because the workflow allows guessing instead of stopping
- B) Safe, because gaps are handled
- C) Needs polish, but fine to run
- D) Fine if the guess is documented

Post Quiz - Question 3

A REVIEWER TRIES TO FOLLOW A WORKFLOW AND HITS: "IF DATA IS MISSING, CREATE A REASONABLE VALUE AND CONTINUE." WHAT SHOULD THAT REVIEWER SCORE THIS AS?

- A) Unsafe, because the workflow allows guessing instead of stopping

Post Quiz - Question 4

WHICH EVENT SHOULD IMMEDIATELY PAUSE A RUNNING WORKFLOW?

- A) A new person joins the team
- B) A step took longer than usual
- C) The output format switched from table to bullets
- D) Private pay data appeared in text that is meant for a client



Post Quiz - Question 4

**WHICH EVENT SHOULD IMMEDIATELY PAUSE A
RUNNING WORKFLOW?**

- D) Private pay data appeared in text that is meant for a client

Post Quiz - Question 5

WHICH CASE BEST FITS THE SCORE AND SELECT PATTERN?

- A) Turn notes into a weekly summary
- B) Turn tickets into a clean log
- C) Rank two vendors using weighted criteria and pick a preferred option
- D) Rewrite draft email in a friendlier tone



Post Quiz - Question 5

**WHICH CASE BEST FITS THE SCORE AND
SELECT PATTERN?**

- C) Rank two vendors using weighted criteria and pick a preferred option



Post Quiz - Question 6

YOU ARE DOING A FINAL SAFETY CHECK. WHICH SINGLE MISSING ITEM IS THE BIGGEST PART TO CHECK?

- A) Step numbers
- B) JSON vs table choice
- C) Trigger timing
- D) Gate on any step that leaves the company

Post Quiz - Question 6

YOU ARE DOING A FINAL SAFETY CHECK. WHICH SINGLE MISSING ITEM IS THE BIGGEST PART TO CHECK?

- D) Gate on any step that leaves the company

Next Steps

SESSION 6
Staying Current