# Workflow Opportunity Canvas

Map the work before deciding where AI belongs.

For: Process owners, team leads, and domain experts | Use when: Before choosing a tool or starting a pilot | Suggested time: 25 minutes

Version 1.0 | October 5, 2026

Use synthetic or authorized information. Keep sensitive work in approved tools. A named person owns each decision. These tools support discussion and planning; they are not validated assessments.

## 1. Understand the current workflow

Map one recurring workflow from its trigger to a completed outcome. Include the people, waiting, and handoffs that make it work.

### Trigger and user

What starts the work, and who needs the result?

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### Steps and handoffs

List the actual sequence and who handles each step.

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### Inputs and outputs

Which sources enter, and what usable result leaves?

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### Friction and baseline

Where does work wait or get repeated? State evidence and uncertainty.

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## 2. Redesign the work

Separate what must change in the process from what an AI system could contribute.

### Desired outcome

What should improve for the person receiving the service?

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### AI contribution

Name a bounded task AI could perform.

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### Human contribution

Which judgment, approval, or exception stays with a person?

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### Simplify first

What could be removed, standardized, or fixed without AI?

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## 3. Set the first boundary

Choose a small experiment and decide what would justify continuing.

### Scope and exclusions

Which cases enter? What is deliberately excluded?

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### Sources and permission

What is available, current, and approved for this use?

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### Proof and owner

What will you test, who owns it, and when will you review?

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## Completed companion example

All organizations, workflows, numbers, and results in these examples are fictional and provided for learning. Targets are proposed decision criteria, not validated standards or promised outcomes.

### Trigger and user

A service-desk analyst receives a routine leave-policy question.

### Steps and handoffs

Classify question > find approved policy > draft answer > specialist reviews > analyst sends.

### Inputs and outputs

Question plus versioned policy; a cited draft answer or an escalation.

### Friction and baseline

Assumed baseline: 15 minutes active handling per routine question; validate with a two-week sample.

### Desired outcome

A correct policy answer with fewer handoffs.

### AI contribution

Retrieve approved passages and draft a response with citations.

### Human contribution

The specialist checks eligibility-related questions and approves every reply during the pilot.

### Simplify first

Remove duplicate policy versions and publish a clear escalation route.

### Scope and exclusions

General policy explanations only; no individual eligibility decisions or personnel-record access.

### Sources and permission

An approved synthetic policy corpus with named document owners.

### Proof and owner

Service-desk lead tests 40 synthetic cases, reviews citations and escalations, and decides after two weeks.

Original guide: https://builtinto.work/resources/workflow-opportunity-canvas