

Workshop Worksheet

Bring a pen. You'll use this twice today — and keep it forever.

ACTIVITY 1 — FIND YOUR ONE TASK

Step 1 (solo): List the three most repetitive tasks in your work week. Be specific — “Monday inventory count,” not “admin.”

1

2

3

Step 2 (with a neighbor): For each task, apply the test below. Circle the one task that passes most cleanly — that's your automation candidate.

The new-hire test:

“Could I write instructions for a new hire to do this?” If yes, a tool can likely draft it too.

My automation candidate (you'll use this exact task in Activity 2):

BEFORE YOU AUTOMATE ANYTHING — THE FOUR SAFETY RULES

1. Human reviews everything

Nothing AI writes reaches a customer without your eyes on it.

2. Never paste sensitive data

No customer lists, card numbers, health info, or employee records into public AI tools.

3. Start free, start small

Pilot one tool on one task for two weeks before paying or expanding.

4. One tool at a time

Master one, build the habit, then add the next.

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Activity 2 — run your task and one candidate tool through the filter.

ACTIVITY 2 — APPLY THE FIVE-QUESTION FILTER

My task (from Activity 1): _____

Candidate tool: _____

1 Does it solve a problem I actually have?

Not a problem the ad says you have.

☐

Yes

☐

No = stop

2 Can I try it free in under an hour?

Long setup or a required sales call = walk away.

☐

Yes

☐

No = stop

3 Does it save more time than it costs?

Count learning, fixing, and reviewing time — net minutes per week.

☐

Yes

☐

No = stop

4 What happens to my data?

Where does it go, who sees it, can you export and leave?

☐

Yes

☐

No = stop

5 Will I still use it in 90 days?

Does it fit a routine you already have?

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Yes

☐

No = stop

My verdict: ☐ Pilot it for two weeks (safety rules on)

☐

Skip it — that's a win too

The question that decided it: _____