

The AI Workflow Playbook

A practical working guide for choosing an AI use case, defining data boundaries and planning human review. Available directly, without an email gate.

1. Describe the process

Record the trigger, inputs, people, decisions and intended output.

2. Assess the opportunity

Consider repetition, time, information quality and the impact of an error.

3. Define the boundaries

Agree on data, vendor review, permissions and human approval.

4. Plan a pilot

Specify sample cases, evaluation criteria, ownership and a stop condition.

5. Review and hand over

Document results, unresolved issues and operational responsibilities.

Darius Kaler / 18.10.2026

General information and practical frameworks. The legal requirements for a particular organization or use case require individual assessment.

Process and ownership

What triggers the process?

Which information is needed and where does it come from?

Who prepares, reviews and receives the work?

What is the intended output?

How often does it occur? What are preparation and review effort?

Opportunity and constraints

Which steps recur in a similar form?

Are suitable inputs available and is the intended use permitted?

Can a competent person check the result efficiently?

What could go wrong and how could consequences be contained?

Begin a pilot, resolve prerequisites or defer?

Data and responsibility

What are the input data categories and sources?

Which information and accounts are allowed or excluded?

What does review of the vendor, terms, retention and recipients show?

Who is responsible for operation and changes?

Where are approvals and escalation needed?

Make the pilot reviewable

What is included and what remains outside the pilot?

Which representative and exceptional cases will be tested?

How will quality, sources, completeness and time spent be evaluated?

Who can authorize each next action?

When does the pilot stop and who decides?

Evaluate and hand over

What changed compared with the starting point?

What is the combined preparation and human review effort?

Which cases still need manual handling?

Who owns operation and documentation?

When is the next review?

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Primary source / Primärquelle: GDPR / DSGVO, <https://eur-lex.europa.eu/eli/reg/2016/679/oj>