

Appendix I: Workflow Blueprint Library

A blueprint is Chapter 11’s pattern page: the one-page record of a workflow that worked. It follows Chapter 22’s five steps (trigger, context, AI, validation, action) and adds the gate, the exception owner, the measures, and the level from Chapter 2’s Five Levels of AI Process Adoption. Copy the blank page for your own workflows; treat the library pages as starting points, not finished designs. A pattern makes BUILD and GOVERN cheaper but never skips MAP.

The library pages describe Northstar Home & Appliance, a fictional home furnishings and appliance retailer; every name, rule, and number is modeled for teaching, not evidence of what your workflow will achieve.

The blank blueprint page

Table 1: The blank blueprint page.

Field	Your answer
Workflow; problem shape (what goes in, what comes out, who decides)	
Before: who does it, how often, minutes each	
No-AI changes made first	
Trigger: an event or a schedule	
Context: systems and fields used, and fields kept out	
AI step: one job; output fields and allowed values	
Validation: one rule per field; retry limit	
Human approval: who, backup, what they check against, time limit	
Action: where the result is written; what the workflow cannot do	
Exception owner: human queue, aging limit, fallback	
Owner; maintainer; second person; off switch	
Logs: what is kept, for how long, who reads them	
Test set: past cases, hostile input, forced failure	
Metrics: measure, baseline, line; adoption line	
Measured costs: build hours, running hours, monthly spend	
Level and tier; what changes each time it is reused	

Meeting to action (Chapters 8, 9, and 11)

Table 2: Meeting to action (Northstar; fictional; modeled).

Field	Entry
Trigger	An in-scope internal meeting ends; the organizer confirms it is not HR or a confidential negotiation
Context	The transcript, treated as untrusted input; attendee list
AI step	Lists each decision and action beside its transcript lines; proposes owners and dates only if said aloud
Validation	Owner must be an attendee, or blank; quote must appear word for word, or the item is rejected
Human approval	Organizer, or named backup, approves, edits, or rejects each item by end of next working day
Action	Tasks created for approved items only; the task system sends reminders
Exception owner	Organizer: rejected items go on the next meeting's list; a timeout creates nothing and actions are sent by hand by noon the next working day
Metrics	Follow-through minutes per meeting, review included; errors passed at the Friday spot-check; unprompted use; fallback rate
Level	Level 3, with Level 2 as fallback; owner Tom, maintainer Owen

Weekly management briefing (Chapter 12)

Table 3: Weekly management briefing (Northstar; fictional; modeled).

Field	Entry
Trigger	Thursday 5 p.m. exports, the single as-of time
Context	Fixed exports from point of sale, the online store, inventory, and the helpdesk; task system, HR form; owners' commentary; the metric dictionary (each figure's definition, source, owner, who may see it)
AI step	Words only, from the numbers table, commentary, and decisions; describes changes, never causes
Validation	Rejects any figure that does not match the table; unrefreshed figures blanked, never estimated
Human approval	Tom verifies with Checklist 12.1, Aisha as backup, by 4 p.m.
Action	Friday pre-read; leaders decide on Monday
Exception owner	Tom: a failed, rejected, or late draft becomes the numbers-only briefing, marked if not verified

Field	Entry
Metrics	Preparation hours a week, verification included; figures without source and timestamp; errors the verifier passed
Level	Level 3; Confidential data

Quote and proposal drafts (Chapter 13)

Table 4: Quote and proposal drafts (Northstar; fictional; modeled).

Field	Entry
Trigger	A trade salesperson asks for a quote draft on the CRM opportunity
Context	Notes, meeting record, product, delivery, and installation descriptions, every price removed. Customer meetings recorded only after announcing it and getting consent at the start
AI step	Words only, with a placeholder wherever a number belongs
Validation	Fixed steps price every line from one owned, dated price source; checks reject unfilled placeholders, an old version, or any number no placeholder supplied
Human approval	Salesperson, with Checklist 13.1 on the approval screen; the pricing owner approves any off-list line
Action	The salesperson sends from the CRM; the workflow writes drafts only and cannot send
Exception owner	Salesperson: a failed check or rejection returns with the reason; a stale price list produces no draft
Metrics	Median effort and turnaround per standard quote; quotes sent with a price not from the price list
Level	Fixed steps around one AI step (Level 3 under Table 2.1); every commitment stays with a person; owner Ben

Customer service triage and reply drafts (Chapter 14)

Table 5: Customer service triage and reply drafts (Northstar; fictional; modeled).

Field	Entry
Trigger	A message arrives by email, web chat, web form, or marketplace message
Context	Word rules run first; order, delivery, and account facts by lookup; owned, dated articles

Field	Entry
AI step	Sets category and queue and may add a flag; drafts routine replies with a citation on every factual sentence
Validation	Withholds any uncited sentence with warranty, charge, or deadline words, an amount, or a date; a lookup that finds nothing says so
Human approval	The specialist checks with Checklist 14.1, edits, and sends; the AI cannot close, lower a priority, or send
Action	Reply sent by the specialist; wrong drafts reported to fix articles
Exception owner	Safety words (for example a gas smell after installation) alert the delivery dispatcher by phone; legal goes to the operations manager the same day; unsure or uncited items go to the uncertain queue, cleared by a named person
Metrics	Median first response; unsupported statements, sampled weekly; reopens
Level	Routing Level 3; drafting Level 2; exceptions Level 0. Owner Tom; Owen and the IT provider's named engineer hold the off switch

Supplier invoice reading (Chapter 15)

Table 6: Supplier invoice reading (Northstar; fictional; modeled).

Field	Entry
Trigger	A supplier or freight invoice reaches the one accounts payable address
Context	The invoice; vendor record; purchase orders
AI step	Reads the invoice and proposes the fields; cannot create a vendor, post, approve, or pay
Validation	Rules check vendor, purchase order, duplicates, unchanged bank details, and sanity limits
Human approval	Finance reviews each staging row beside the source; the approver uses Checklist 15.1 within a written limit, with a second approver above it
Action	A person pays and posts, only to the details in the vendor record
Exception owner	A person other than the approver clears flags with a written reason; changed bank details confirmed by calling the vendor record's number, or hold
Metrics	Invoice and document hours a month; payments without approval, PO check, or cleared flag (line: zero)
Level	Reading Level 3; payment Level 0; owner Aisha

Work-order intake (Chapter 17)

Table 7: Work-order intake (Northstar; fictional; modeled).

Field	Entry
Trigger	An emailed or form delivery or installation request enters the helpdesk; every voicemail is heard by a person within 15 minutes
Context	The request and the customer's address record; the building access-code field is unreadable to the workflow
AI step	Drafts fields, missing items, a customer question, and a suggested priority
Validation	Safety words alert the on-call delivery dispatcher first; the protection plan or trade agreement response term sets a priority floor; a fixed check rejects values not in the request or address record
Human approval	The delivery dispatcher checks every field and releases the work order; below the floor only with a recorded reason
Action	Scheduling rules propose a delivery slot; the delivery dispatcher confirms the booking; the work order links one controlled installation procedure
Exception owner	Lead delivery dispatcher: the 7 a.m. overdue list; a monthly sample of accepted suggestions
Metrics	Work orders missing information; intake and chasing hours a month
Level	Level 3; Confidential data

Parts quote comparison (Chapter 18)

Table 8: Parts quote comparison (Northstar; fictional; modeled).

Field	Entry
Trigger	A supplier quote for appliances or spare parts reaches the parts mailbox
Context	The quote; the vendor record; the last price paid
AI step	Fills the comparison row from quotes that ignore the response table; unit of measure required
Validation	Rules compute delivered cost and flag expired or expiring quotes, unknown suppliers, and prices more than 30% off the last paid
Human approval	The lead delivery dispatcher checks every AI-filled row against its page; Tom approves orders up to \$10,000, Helen above that

Field	Entry
Action	A person raises the purchase order; the workflow cannot create vendors, raise orders, or send email
Exception owner	Flags go to Tom; Aisha reviews quote waivers and corrections monthly
Metrics	Parts hours a month; orders on expired quotes; no-PO parts invoices
Level	One AI reading step inside fixed rules (Level 3 under Table 2.1); ordering and payment stay with people

Company knowledge assistant (Chapter 19)

Table 9: Company knowledge assistant (Northstar; fictional; modeled).

Field	Entry
Trigger	An employee asks a question in the approved AI workspace
Context	Only the approved library (product specs and manuals, store SOPs, delivery and installation rules, policies, training), one home per document, each with an owner and dates; nothing beyond the user's own access
AI step	Answers from library documents, citing them
Validation	Test questions, including paired access tests; documents past review flagged weekly and pulled after 30 days
Human approval	The asker checks the cited source before relying on it
Action	An answer with its source; no records change
Exception owner	Each document owner fixes stale or conflicting copies; policy emails link to the library copy
Metrics	Search hours a month; test questions correct; answers beyond access (line: zero); weekly users
Level	Level 2 copilot; owner Owen, with the IT provider's named engineer as second person on the off switch

Campaign drafting (Chapter 20)

Table 10: Campaign drafting (Northstar; fictional; modeled).

Field	Entry
Trigger	A one-page campaign brief whose capacity window sets dates and delivery and installation crew hours
Context	The brief and the owned claims list; customer segments stay in the CRM

Field	Entry
AI step	Drafts copy from the brief and the claims list
Validation	Review against the claims list; suppression removes customers on the aging list, with an escalation flag, or with an open Complaint ticket
Human approval	Ben approves final copy; Tom confirms delivery, installation, and protection plan terms; Aisha confirms prices
Action	The account coordinator sends in waves timed to open crew hours
Exception owner	Account coordinator: matches every send list against open Complaint tickets and the aging list, with no AI step
Metrics	Staff hours per campaign; promoted installation visits booked inside the window; sends to customers with open complaints
Level	Level 1, Starter tier

Escalation summary (Chapter 22)

Table 11: Escalation summary (Northstar; fictional; modeled).

Field	Entry
Trigger	A ticket is escalated
Context	The thread, each message labeled by author; named account fields only
AI step	Problem, request, steps tried, promises made, and a sensitivity flag that can only add reviewers
Validation	Fields present; flag from the allowed list; promises quote Northstar staff word for word; two retries at most
Human approval	The escalating specialist confirms the draft note
Action	An internal note on the ticket
Exception owner	After two failed retries, the specialist writes it by hand the same day
Metrics	Confirming hours a month; weekly sample of confirmed summaries against rubber-stamping
Level	Level 3; owner Tom, maintainer Owen, second person the IT provider's named engineer

Sales-to-operations handoff (Chapter 22)

Table 12: Sales-to-operations handoff (Northstar; fictional; modeled).

Field	Entry
Trigger	A quote is marked won in the CRM
Context	Quote without prices or terms; meeting record; delivery access requirements (building, unit, lift, loading times), never codes
AI step	Scope, access requirements, and promised dates
Validation	Dates appear in the quote or meeting record; access matches the customer's address record
Human approval	The lead delivery dispatcher approves the work-order draft before booking
Action	Delivery and installation work order booked
Exception owner	After two failed retries, the salesperson writes it by hand before booking
Metrics	Checking hours a month against the manual baseline
Level	Level 3; owner Ben, maintainer Owen, second person the IT provider's named engineer