Workflow canvas, card and value tracker

A practice file for Chapter 23, Designing Workflows. Harbor & Pine Coffee Co., Daniel Reyes and Hana Sato are fictional, and so is every figure in this file.

What's inside

- Page 2: a blank workflow canvas (Section 23.2; Exercises E23-02 and E23-05)
- Page 3: Daniel's canvas for the Monday summary (walkthrough Step 3)
- Page 4: a blank workflow card (Section 23.5; Exercise E23-05)
- Page 5: Daniel's workflow card, version 1.1 (walkthrough Steps 5 and 8)
- Page 6: Daniel's value tracker and a blank one (walkthrough Steps 1 and 7; Exercise E23-04)
- Pages 7 to 8: every Chapter 23 prompt and template

The eight zones of the canvas

1. **Trigger:** What starts the job, and how often.
2. **Outcome:** The deliverable, who gets it, what done means.
3. **Inputs:** Files, facts and people, and where each lives.
4. **Steps:** Four to eight steps: input, process, output.
5. **Lanes:** Who does each step: you or ChatGPT.
6. **Checks:** Where you check, and how hard.
7. **Tools:** Where each ChatGPT step lives.
8. **Measures:** Time per run, quality test, baseline.

How to use it

- Time two runs of the job the old way before you change anything.
- Fill the trigger and the outcome first; then the steps, each as input, process and output.
- Put each step in a lane. Deciding, sending, paying, deleting and checking stay in your lane.
- Copy the finished canvas onto the card, test the card on someone else, and file it on the Workflows shelf of your library.
- Log four runs on the value tracker. Keep the workflow only if time drops and quality holds.

Workflow canvas

Name _____ Version _____ Owner _____ Date _____

1 Trigger

What starts the job, and how often

2 Outcome

The deliverable, who gets it, what done means

8 Measures

Time per run, quality test, baseline

3 Inputs

Files, facts and people, and where each lives

4 Steps

Four to eight steps: input, process, output

5 Lanes

Who does each step: you or ChatGPT

6 Checks

Where you check, and how hard

7 Tools

Where each ChatGPT step lives

Fill 1 and 2 first. Write each step as input, process and output, with one verb per step.

Daniel's Monday summary: workflow canvas

Composite example. Name: Monday summary Version: 1 Owner: Daniel Date: April 28, 2027

1 Trigger

What starts the job, and how often

- Every Monday morning, once last week's till reports are in.

2 Outcome

The deliverable, who gets it, what done means

- Summary for Hana: one phone screen, under 120 words.
- Done means: every figure matches the till reports; [CHECK] for any missing figure; Hana can act on it without asking a question.

8 Measures

Time per run, quality test, baseline

- Time per run, including checking
- Baseline: 56 and 52 minutes by hand (54)
- Quality: no error reaches Hana; corrections caught at checks
- Target: under 30 minutes, quality unchanged

3 Inputs

Files, facts and people, and where each lives

- Till reports: filed by date in the office (21 daily totals: 3 shops x 7 days)
- Sales sheet: one row per shop per day; totals only, no customer details
- Numbers project instructions: skeleton, profile rule, house rule

4 Steps

Four to eight steps: input, process, output

- 1 Copy till totals
- 2 Profile new rows
- 3 Decide fixes, log them
- 4 Calculate, with working
- 5 Recompute with SUM
- 6 Draft from skeleton
- 7 Read, then send

5 Lanes

Who does each step: you or ChatGPT

- Daniel: 1, 3, 5, 7 (supplies, decides, checks, sends)
- ChatGPT: 2, 4, 6 (profiles, calculates, drafts)

6 Checks

Where you check, and how hard

- After 2: read the problem list; decide fixes
- After 4: recompute with SUM against the till reports
- After 6: read against the skeleton (rung 3: shared with Hana)

7 Tools

Where each ChatGPT step lives

- Numbers project (rung 2 of the automation ladder)
- Not a scheduled task: Daniel types the till totals, and a task made in a project can't read its files

Fill 1 and 2 first. Write each step as input, process and output, with one verb per step.

Workflow card

NAME: _____ **VERSION:** _____ **OWNER:** _____ **LAST REVIEWED:** _____

TRIGGER

What starts it, and how often:

_____

OUTCOME AND DONE MEANS

Deliverable and reader: _____

Done means: _____

#	WHO	DO THIS	USES	CHECK
1				
2				
3				
4				
5				
6				
7				
8				

RULES THAT CARRY THROUGH

1. _____
2. _____
3. _____

MEASURES

Baseline: _____ Latest run: _____

Quality test: _____

WHERE IT LIVES

Project, library entries, plugin or task for each step: _____

Daniel's Monday summary: workflow card, version 1.1

NAME: Monday summary VERSION: 1.1 OWNER: Daniel LAST REVIEWED: June 14, 2027

TRIGGER

Every Monday morning, once last week's till reports are in.

OUTCOME AND DONE MEANS

Summary for Hana: one phone screen, under 120 words.

Done means: every figure matches the till reports; [CHECK] for any missing figure; Hana can act on it without asking a question.

#	WHO	DO THIS	USES	CHECK
1	**Daniel**	Copy last week's 21 daily totals into the sales sheet	Till reports	Three shops, seven days, Monday to Sunday
2	ChatGPT	Profile the new rows	Profile rule in the project	Daniel reads the problem list
3	**Daniel**	Decide each fix and log it	Problem list; change log	Every fix has a line in the log
4	ChatGPT	Calculate sales, drinks and new members against the week before, showing working	Cleaned sheet	Step 5
5	**Daniel**	Recompute the three totals with SUM; compare with the till reports	Sheet; till reports	CHECK: cross-check
6	ChatGPT	Draft the summary from the skeleton	Skeleton in the instructions	Step 7
7	**Daniel**	Read against the skeleton and table; choose Hana's question; send	Draft; table	Rung 3: shared with Hana

RULES THAT CARRY THROUGH

A week runs Monday to Sunday.
Totals only; no customer details (house rule).
[CHECK] for any missing figure.
Give no reasons the sheet can't show.
Under 120 words; fits one phone screen.

MEASURES

Baseline: 54 minutes (two runs by hand: 56 and 52)
Latest: 24 minutes (Monday, May 24, 2027)
Quality test: no error reaches Hana; corrections caught at checks

WHERE IT LIVES

Numbers project: instructions hold the skeleton, profile rule and house rule; project-only memory; shared with Hana (chat access)
This card: a file in the numbers project, and on the Workflows shelf of Daniel's library
Till reports: filed by date in the office (21 daily totals: 3 shops x 7 days).

Value tracker

Daniel's Monday summary (composite example)

Monday	Run	Minutes (incl. checking)	Corrections caught	Errors that reached Hana
April 19, 2027	By hand	56	—	0
April 26, 2027	By hand	52	—	0
May 3, 2027	Workflow	36	2	0
May 10, 2027	Workflow	29	1	0
May 17, 2027	Workflow	25	0	0
May 24, 2027	Workflow	24	0	0

Baseline: (56 + 52) ÷ 2 = 54 minutes.
Minutes saved per workflow run: 18, 25, 29, 30 (total 102).
Setup: 90 minutes on Wednesday, April 28, 2027. Paid back by workflow run 4 (Monday, May 24).
Quality: every correction caught at a check; no error reached Hana. Decision: keep.
Hand-over test: Hana ran it on Monday, June 7, 2027 in 33 minutes with 1 question; the card became version 1.1.

Your workflow: _____

Date	Run	Minutes (incl. checking)	Corrections caught	Errors that reached the reader
By hand				
By hand				

Baseline (average of the runs by hand): _____ minutes Setup: _____ minutes

Saved per run: _____ Runs to pay back: _____ Quality test held? Yes / No

Decision after four runs: Keep / Adjust (move a step back to your lane, or add a check) / Drop

Every Chapter 23 prompt and template

Copy everything inside a box, and nothing else. Replace everything in [BRACKETS] in the templates.

P23-01 List the steps of a job

```
I want to turn a job I repeat into a workflow. Here's how I do it now, in my own
words: [DESCRIBE THE JOB, FROM WHAT STARTS IT TO WHAT YOU HAND OVER]. Ask me up to
five questions, one at a time, about anything you'd need to know to do it the same
way every time. Then list the steps in order, one line each, verb first. For each
step, say who does it now and what it uses. Don't suggest improvements yet.
```

P23-02 Run it: sketch my canvas

```
Here is a job I repeat: [DESCRIBE IT, OR PASTE YOUR STEP LIST]. Sketch a workflow
canvas for it with eight labeled zones: TRIGGER, OUTCOME (with "done means"),
INPUTS (with where each lives), STEPS (verb first), LANES (me or ChatGPT, as a
suggestion), CHECKS, TOOLS, MEASURES. Use only what I've told you, and write [CHECK]
for anything I haven't settled. Keep each zone to five lines or fewer.
```

P23-03 Run it: check the joins

```
Here are the steps of my workflow, each with its input, process and output:
[PASTE YOUR STEPS]. Check the joins. For each step, tell me: is its input the
output of an earlier step, or something I supply? Does its process have exactly one
verb? Is its output's shape clear enough for the next step? List every gap you find,
one line each, and suggest the missing step. Don't rewrite the workflow.
```

P23-04 Run it: suggest lanes, then let me decide

```
Here are the steps of my workflow: [PASTE YOUR STEPS]. Suggest a lane for each: ME or
CHATGPT. Put a step in my lane if it supplies facts only I have, decides anything,
sends, pays, publishes or deletes, checks an earlier step, or would cost a lot if
wrong. For each of your steps, give one reason it's safe to hand over. Then list
every handoff between lanes and the check I should run there. These are
suggestions; I'll decide.
```

P23-05 Run it: a value tracker you can check

```
Create a spreadsheet to track a workflow. Columns: date, run type (by hand or
workflow), minutes including checking, corrections caught at my checks, errors that
reached the reader, notes. Add a summary row with formulas, not typed numbers: the
average minutes for runs by hand, the average for workflow runs, minutes saved per
run, and how many runs it takes to pay back [SETUP MINUTES] of setup time. Add a
line chart of minutes per run.
```

P23-06 Daniel's job, in his own words

```
I want to turn my Monday summary into a workflow Hana can run. Here's how I do it
now: every Monday I copy each shop's daily totals from last week's till reports into
the sales sheet. I profile the new rows, fix anything odd, and work out sales,
drinks sold and new Pine Points members against the week before. Then I write the
summary from the skeleton in this project's instructions, check the numbers and send
it to Hana. List the steps in order, one line each, verb first, with who does each
one now and what it uses. Ask me about anything you'd need to do it the same way
every time. Don't suggest improvements yet.
```

P23-07 Write the workflow card

```
Turn the canvas above into a one-page workflow card that Hana could run without
asking me anything. Parts, in order: NAME, VERSION, OWNER, LAST REVIEWED; TRIGGER;
OUTCOME and DONE MEANS; STEPS (number, WHO, DO THIS, USES, CHECK); RULES THAT CARRY
THROUGH; MEASURES; WHERE IT LIVES. Use only what's in the canvas and write [CHECK]
for anything it doesn't settle. Keep each step to one line.
```

T23-01 Workflow canvas

```
I'm designing a workflow for this job: [THE JOB]. It starts when [TRIGGER, AND HOW
OFTEN]. It delivers [OUTCOME] to [WHO]. Done means: [CRITERIA SOMEONE COULD CHECK].
It needs [INPUTS, AND WHERE EACH LIVES]. Fill a workflow canvas with eight zones:
TRIGGER, OUTCOME, INPUTS, STEPS (verb first, each with input, process and output),
LANES (me or ChatGPT, as a suggestion), CHECKS, TOOLS, MEASURES. Write [CHECK] for
anything I haven't settled.
```

T23-02 Input, process, output check

```
Here are my workflow's steps: [STEPS]. Rewrite each as INPUT (exactly what, and where
it lives), PROCESS (one verb) and OUTPUT (its shape). Then mark every step whose
input isn't the output of an earlier step or something I supply, and every process
with more than one verb. List the gaps; don't fill them in.
```

T23-03 Swimlane split

```
Here are my workflow's steps: [STEPS]. Put each in a lane, ME or CHATGPT. Keep in my
lane anything that supplies facts only I have, decides, sends, pays, publishes,
deletes, checks an earlier step, or is rung 4 of the risk ladder. For each ChatGPT
step, name the lowest rung of the automation ladder that would save real time. List
every handoff and the check that goes there.
```

T23-04 Workflow card

```
Turn this canvas into a one-page workflow card: [PASTE THE CANVAS]. Parts, in order:
NAME, VERSION, OWNER, LAST REVIEWED; TRIGGER; OUTCOME and DONE MEANS; STEPS (number,
WHO, DO THIS, USES, CHECK); RULES THAT CARRY THROUGH; MEASURES (baseline, latest
run, quality test); WHERE IT LIVES. Someone who has never done this job should be
able to run it from the card alone. Write [CHECK] for anything the canvas doesn't
settle.
```