



FREE STARTER GUIDE

# AI Workflow Starter Checklist

Choose one useful task. Make it repeatable.

Practical AI  
with Dave

One task.  
A better prompt.  
A useful result.

FREE AI CHECKLIST



YOUR FIRST WORKFLOW STARTS HERE

01

**Choose a task**

A quick readiness check

02

**Build your prompt**

A fill-in starter template

03

**Try it for a week**

A seven-day action plan

# Start with one workflow

You do not need to master every AI tool. You need one repeatable win that saves time, improves a draft, or helps you make a better decision. Use this checklist to choose a good first workflow and set it up safely.

## 1. Pick the right kind of task

- ☐ It happens more than once a week.
- ☐ It has a clear beginning and a clear finish.
- ☐ A human can review the result before it is sent or used.
- ☐ The task does not require private information to get started.
- ☐ Success can be described in one sentence.

## 2. Give the AI enough direction

- ☐ I can explain the context in a few sentences.
- ☐ I know who the result is for.
- ☐ I can name the format I want: bullets, table, email, checklist, or plan.
- ☐ I can set a length, tone, or other useful constraint.
- ☐ I will ask for questions if important context is missing.

### 3. Build the first version

Fill in the blanks, run the prompt, and edit the result. The goal is not a perfect first answer; it is a workflow you can improve next time.

**My workflow:**

I want AI to help me \_\_\_\_\_

**The context it needs:**

\_\_\_\_\_

**The result should be:**

\_\_\_\_\_

**I will review it for:**

\_\_\_\_\_

#### Starter prompt

Help me with [TASK]. Context: [WHAT IS GOING ON]. The result is for [AUDIENCE]. Return it as [FORMAT]. Keep it [CONSTRAINT]. Before you answer, ask me any questions that would materially improve the result.

### 4. Safety check before you reuse it

☐ I removed passwords, private client details, protected health information, and confidential files.

☐ I checked names, dates, numbers, links, and claims.

☐ I edited the result so it sounds like me and matches the real situation.

☐ I saved the prompt only after I understood what it does.

# Your next seven days

Choose a small experiment. Run it twice, improve the prompt once, and decide whether the workflow deserves a permanent place in your week.

- ☐ Day 1: choose one recurring task.
- ☐ Day 2: run the starter prompt on a real example.
- ☐ Day 3: edit the output and note what was missing.
- ☐ Day 4: add one constraint or example to the prompt.
- ☐ Day 5: run the improved version.
- ☐ Day 6: save the prompt where you will find it again.
- ☐ Day 7: decide: keep, change, or stop.

## **Want help choosing your first workflow?**

Practical AI with Dave offers workshops and hands-on AI Systems Setup for people and small businesses. Visit [PracticalAIwithDave.com](https://PracticalAIwithDave.com).