



AI Workflow Opportunity Canvas

Choose one worthwhile workflow, set the human boundary, and design a small pilot before a tool or vendor drives the decision.

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Use this canvas to turn a recurring operating frustration into a bounded, testable workflow opportunity. It helps a team separate the business problem from the technology and name the decision the work must improve.

BEST USED WHEN

Owners and small teams evaluating intake, quoting, scheduling, document review, follow-up, reporting, reconciliations, or other repeatable work.

WHO SHOULD BE IN THE ROOM

Complete it with the person who does the work, the person accountable for the outcome, and anyone who reviews, approves, or receives the result.

CANADIAN CONTEXT

Confirm applicable federal, provincial, territorial, sector, professional, contractual, accessibility, and bilingual-service requirements. Use this workbook as operational preparation, not legal advice.

A five-step working rhythm

01

Name the friction

Choose one repeated workflow that consumes attention, delays service, or causes avoidable rework.

02

Map the current path

Record the trigger, information, systems, handoffs, judgement points, and proof of completion.

03

Define the decision

State which decision should become faster, clearer, more consistent, or easier to explain.

04

Set the boundary

Separate what AI may draft or recommend from what a person must verify, approve, or escalate.

05

Pilot with evidence

Use representative cases, a manual fallback, success measures, and explicit stop conditions.

Map one workflow

Complete this page with the people who perform, review, and own the work.

PROMPT	YOUR WORKING NOTES
01 Business context, workflow, and accountable owner	
02 Trigger, expected outcome, and proof of completion	
03 Current steps, systems, handoffs, and delays	
04 Information required and information that must stay out	
05 AI-supported tasks and known limits	
06 Human review, approval, communication, and escalation	
07 Pilot measure, manual fallback, and stop condition	

Turn client intake into a decision-ready brief

STARTING FRICTION

Discovery notes, email threads, files, and promises are rebuilt manually before a proposal or first working session.

WORKFLOW MAP



AI-SUPPORTED ROLE

Draft a structured intake summary, identify missing information, and prepare follow-up questions.

HUMAN AUTHORITY

The consultant confirms scope, corrects the summary, decides fit, and approves any client-facing communication.

PILOT MEASURE

Time from complete intake to approved brief; number of clarification loops; material errors found during review.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Connect inventory signals to the next order

STARTING FRICTION

Sales patterns, waste notes, supplier messages, and stock counts live in separate places, so ordering depends on memory.

WORKFLOW MAP



AI-SUPPORTED ROLE

Combine approved operating data, surface unusual demand, and draft a replenishment recommendation.

HUMAN AUTHORITY

The owner considers events, weather, promotions, cash position, and supplier realities before placing the order.

PILOT MEASURE

Stock-outs, spoilage, emergency purchases, and the time required to prepare an order.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Prepare a consistent client business summary

STARTING FRICTION

Staff spend time locating prior notes, current documents, open questions, and financial signals before each client review.

WORKFLOW MAP



AI-SUPPORTED ROLE

Assemble source-linked changes, anomalies, open items, and questions from the permitted client record.

HUMAN AUTHORITY

The accountant verifies every material figure, applies professional judgement, and owns advice given to the client.

PILOT MEASURE

Preparation time, unsupported statements caught, unresolved items, and client follow-up after the meeting.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Before the pilot grows

Use these prompts to test whether the proposed workflow can operate responsibly in its Canadian business context.

01

Start with a decision

A workflow is not ready if no accountable person can name the decision or outcome it supports.

02

Use the minimum information

Identify what the pilot truly needs. Exclude SIDs, payment credentials, health information, privileged material, and other sensitive data unless a lawful, necessary use is established.

03

Reflect Canadian operating reality

Include representative English and French material where relevant, regional terms, seasonal patterns, taxes, and the actual documents your team receives.

04

Design review into the work

A reviewer needs the source, the draft, the known limits, and a clear way to correct or reject the result.

05

Keep a fallback

The current process must remain available while the pilot is uncertain, unavailable, or outside its approved scope.

06

Expand only with evidence

Compare the pilot with the current process using time, error, rework, service quality, exceptions, and staff experience.

CANADIAN REFERENCE POINTS

Office of the Privacy Commissioner of Canada - Privacy and artificial intelligence
priv.gc.ca/en/privacy-topics/technology/artificial-intelligence/

Government of Canada - Artificial Intelligence guidance, principles, and policy
canada.ca/en/services/science/innovation/artificial-intelligence.html

General operational guidance only. Confirm applicable legal, privacy, cybersecurity, professional, contractual, and regulatory requirements with qualified advisors.