



Prompt-to-System Transition Planner

A worksheet for moving from ad hoc prompting into structured systems with tools, memory, roles, validation, and governance.

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Identify when a useful prompt has become an operating pattern that deserves a system, workflow, or agentic architecture. Use this guide to make the operating choice explicit, test it with evidence, and record who owns the next decision.

BEST USED WHEN

Teams turning architecture work into a reusable operating artifact.

WHO SHOULD BE IN THE ROOM

Include the workflow owner, a person who performs the work, a reviewer with authority to approve or stop it, and the relevant data or tool owner.

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

Prompt pattern

What does the prompt consistently ask the model to do?

02

Context package

What inputs are repeatedly copied, summarized, or attached?

03

Output shape

What format, decision, or action does the output need?

04

Tool need

Which steps should become deterministic reads, writes, or validations?

05

Governance need

What review, permission, or logging is missing today?

Build the working record

Complete one record for one workflow. Write enough to support a decision, not a generic technology wish list.

PROMPT	YOUR WORKING NOTES
01 Repeated prompt or task	
02 Who repeats it	
03 Why it matters	
04 Prompt pattern	
05 Context package	
06 Output shape	
07 Decision, owner, evidence, and review date	

Turn intake prompts into a workflow

STARTING FRICTION

Consultants paste the same intake notes repeatedly and manually check omissions each time.

WORKFLOW MAP



AI-SUPPORTED ROLE

Document the useful prompt pattern, inputs, outputs, failure cases, and handoffs for system design. Flag uncertainty around prompt pattern.

HUMAN AUTHORITY

The owner decides when repeated work merits governed integration rather than another saved prompt. Resolve the prompt pattern question for this case.

PILOT MEASURE

Track repeat frequency, manual fixes, context assembly time, and value after systemization. Record prompt pattern exceptions separately.

DISCUSSION PROMPT

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

Turn weekly ordering prompts into a system

STARTING FRICTION

The owner reconstructs sales, waste, and supplier context by hand every Monday.

WORKFLOW MAP



AI-SUPPORTED ROLE

Document the useful prompt pattern, inputs, outputs, failure cases, and handoffs for system design. Flag uncertainty around context package.

HUMAN AUTHORITY

The owner decides when repeated work merits governed integration rather than another saved prompt. Resolve the context package question for this case.

PILOT MEASURE

Track repeat frequency, manual fixes, context assembly time, and value after systemization. Record context package exceptions separately.

DISCUSSION PROMPT

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

Turn review prompts into a governed process

STARTING FRICTION

Staff use a successful summary prompt, but the source and reviewer trail is inconsistent.

WORKFLOW MAP



AI-SUPPORTED ROLE

Document the useful prompt pattern, inputs, outputs, failure cases, and handoffs for system design. Flag uncertainty around output shape.

HUMAN AUTHORITY

The owner decides when repeated work merits governed integration rather than another saved prompt. Resolve the output shape question for this case.

PILOT MEASURE

Track repeat frequency, manual fixes, context assembly time, and value after systemization. Record output shape exceptions separately.

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

Prompt pattern

The prompt supports a recurring business workflow. Name the owner and the operating decision before selecting a tool.

02

Context package

The same context is repeatedly gathered manually. Record the approved sources, permissions, and missing information.

03

Output shape

Outputs require review, formatting, routing, or action. Test this boundary with representative and adverse cases.

04

Tool need

The workflow would benefit from shared memory or tools. Preserve review, escalation, and correction evidence.

05

Governance need

The risk of inconsistent prompting is visible. Set a measurable stop condition and the next review date.

06

Readiness to proceed

A prompt becomes infrastructure when it is repeated, context-heavy, business-relevant, and risky to keep informal.

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.