

AI COOKBOOK / PRACTICAL GUIDE

The AI Workflow Opportunity Guide

Find the work worth giving back to your team before you choose a tool, write a prompt, or start an automation project.

Look for capable time that keeps disappearing.

The best first AI opportunity is rarely the flashiest one. It is a workflow where good people repeatedly spend time collecting information, applying the same operating logic, producing a familiar output, and moving work between systems.

QUESTION 01

What does your team rebuild every week?

Look for preparation, follow-up, formatting, reporting, status work, and recurring client communication.

QUESTION 02

Where does work wait?

Pay attention to handoffs, missing information, approvals, and routine decisions that wait for the one person who knows the process.

QUESTION 03

What keeps coming back for rework?

Rework is often the signal that the right standard, template, context, or decision did not arrive early enough in the workflow.

A useful Recipe needs more than a prompt.

Before a workflow can become reliable, make its operating ingredients visible. This is the beginning of a Business Brain: the context and boundaries that make AI useful for your organization.

KNOWLEDGE

What information must be known?

Client context, standards, reference documents, past examples, proprietary methods, and the information a good decision depends on.

SKILLS

What logic does the team apply?

Rules, judgment, templates, approval requirements, quality standards, and the steps that experienced people follow without writing them down.

INTEGRATIONS

Where do the inputs come from?

Forms, email, calendar, files, CRM, project tools, and the systems where the finished work needs to go next.

HUMAN REVIEW

Where should people stay involved?

Identify the points where relationships, risk, nuance, or authority require a person to review, adjust, or approve the result.

Make one repeatable outcome easier to produce.

A Recipe is a workflow your team can run consistently. It brings the right ingredients together, follows your operating method, and gives people control at the right moments.

EXAMPLE / MEETING TO PROPOSAL

TRIGGER	A meeting ends or a transcript is uploaded.
INGREDIENTS	Meeting notes, client history, approved standards, pricing rules, and the proposal template.
METHOD	Extract the brief, identify gaps, assemble a first proposal draft, and flag the decisions that require attention.
REVIEW	A team member reviews and approves before anything leaves the organization.
RESULT	A confident next step, prepared faster, with a visible record of what happened.

Start with one workflow worth improving.

You do not need a massive AI roadmap to begin. Pick one process that returns capacity to your team, has clear inputs and outputs, and is valuable enough to improve.

Need help seeing the opportunity?

Start a free Workflow Discovery with Cookbook Studio. We will look at the work that repeats, waits, or depends too heavily on a few people, then help you decide whether a deeper audit is worth doing.

[START A WORKFLOW DISCOVERY](#)