

RESOURCE / PDF 01

Small-business AI workflow starter kit

Seven printable worksheets for planning one narrow AI experiment with the task, data boundary, human checkpoint, stop conditions, evidence, and exit visible.

HUMAN CHECKPOINT REQUIRED

The recipe anatomy

[]	Task: one repeatable slice with an owner
[]	Input: minimum approved data and exclusions
[]	Draft: a checkable output, not a final act
[]	Checkpoint: a person verifies before impact
[]	Exit: stops, evidence, fallback, and review date

Published by Small Business Tech AI

An owner-controlled publication powered by Bridgepath AI Solutions. No personal author name, client result, vendor endorsement, certification, or professional conclusion is claimed.

START / 00

Use the kit for one ordinary task.

Complete the worksheets in order with fictional or approved information. Keep the completed kit in a business-controlled location.

A good first task

- ☐ Already happens at least monthly
- ☐ Has a visible input and draft output
- ☐ Has a person who already reviews the result
- ☐ Can stop and return to the current manual process

Do not use this kit as permission

This worksheet cannot determine whether a provider, data use, output, or workflow is accurate, lawful, secure, private, fair, accessible, contractually allowed, or fit for a purpose. High-impact decisions involving people, money, rights, access, health, safety, or legal obligations need qualified fact-specific review.

The task I am evaluating

One sentence: trigger, draft, reviewer, final human action.

The person who owns this trial

WORKSHEET / 01

Draw the workflow boundary.

Describe the real process before adding AI. Keep the first trial narrow enough to observe, compare, and stop.

What starts the task?

Which approved source does it use?

What checkable draft may AI prepare?

Who reviews the draft, and what do they check?

Which final action stays human-owned?

What stays outside the trial?

Set the approved data boundary.

Use the minimum information the task needs. Start with fictional, public, or safely redacted examples.

Approved input categories
Information that may enter this exact trial.

Prohibited input categories
Consider customer, employee, financial, health, credential, contract, incident, and regulated information.

Redaction or minimization owner

Provider terms verified
Record date and source for access, retention, training use, deletion, and administrator controls.

Build a source-grounded prompt frame.

Write structure, not a magic phrase. Keep supplied facts, assumptions, unknowns, output rules, and review evidence separate.

Purpose in the real workflow

Approved source material and source-location rule

Task the model may perform

Required output format, length, and audience

Facts or commitments the model must not invent

How missing or uncertain information must appear

WORKSHEET / 04

Place the human checkpoint before impact.

Approval must be an active decision by someone with the source, time, authority, and ability to reject the draft.

Reviewer role

Facts, numbers, names, dates, source locations, and authority to verify

The exact action held for approval

Sending, publishing, paying, changing access, recording a decision, making a promise, or affecting a person.

How the reviewer rejects, rewrites, or escalates

Approval record required by the existing process

Write fail-closed stop conditions.

Return control to a person instead of forcing a best guess when the input, authority, output, or consequence leaves the approved boundary.

Stop on prohibited or unnecessary data

Stop on missing, stale, conflicting, or unreachable sources

Stop on invented facts, owners, dates, prices, promises, or authority

Stop on malformed output or failed validation

Stop on unusual consequence, exception, complaint, harm, or professional judgment

Named manual fallback

Evaluate ordinary and edge cases.

Define pass, revise, and reject criteria before running a small set of fictional or approved examples. Preserve failures.

Reference examples

Include routine, incomplete, edge, and must-stop cases.

Pass criteria

Revise criteria

Reject criteria

Measures

Factual support, omissions, formatting, correction effort, reviewer time, failure severity.

WORKSHEET / 07

Keep business-owned evidence.

Store only what the business needs to reproduce, correct, audit, or stop the workflow. The model draft is not automatically the official record.

Recipe and prompt version

Provider, model, account, and settings reviewed

Evaluation result and observed failures

Reviewer changes and final business action

Record location, owner, retention rule, and next review trigger

EXIT / 01

Plan the vendor, data, and process exit.

A reversible pilot preserves the underlying process, business-owned instructions, removable access, exportable records, and a practiced fallback.

Business-controlled recipe and instruction location

Account owner, billing owner, and administrator

Connected systems, permissions, and removal steps

Export, retention, and deletion routes

Manual fallback and last practice date

Continue, change, or stop decision date and owner

45-MINUTE / REVIEW

Run the first planning session.

Leave the meeting with one bounded trial or a clear decision not to proceed.

[]	0-5: name the existing task and owner
[]	5-12: draw trigger, source, draft, reviewer, and final action
[]	12-20: classify approved and prohibited data
[]	20-27: write the source-grounded prompt frame
[]	27-34: place checkpoint and stop conditions
[]	34-40: choose evaluation examples and evidence
[]	40-45: confirm fallback, exit, review date, and owner

Decision and reason

Next smallest action, owner, and date

SOURCES / REVIEWED JULY 22, 2026

Verify the source context.

The workflow structure is original Small Business Tech AI editorial synthesis. Sources support risk-management context and do not endorse this kit.

NIST AI Resource Center	https://airc.nist.gov/
NIST AI Risk Management Framework	https://www.nist.gov/itl/ai-risk-management-framework
NIST AI RMF Core	https://airc.nist.gov/airmf-resources/airmf/5-sec-core/
NIST Human-AI Interaction appendix	https://airc.nist.gov/airmf-resources/airmf/appendices/app-c-ai-risk-management-and-human-ai-interaction/
NIST Generative AI Profile	https://nvlpubs.nist.gov/nistpubs/ai/NIST.AI.600-1.pdf

Continue learning

<https://smallbusinesstechai.com/knowledge>

<https://smallbusinesstechai.com/guides>

<https://smallbusinesstechai.com/recipes>

Optional implementation help

The library stands alone. Bridgepath AI Solutions is the disclosed owner and optional external implementation path:
<https://www.bridgepathaisolutions.com/contact>