

AI Workflow Operating Checklist

Use one copy per run or reporting cycle. Mark each stage and record exceptions. Stop if required inputs or approvals are missing.

Project or record

Owner

Date

Before the run

☐

Check approved input/source, permissions, version, row counts, required fields, and tool limits.

During the run

☐

Monitor status, duplicate IDs, errors, connector failures, and credit or API usage.

Before acting on the result

☐

Check important facts and calculations. Obtain the named human approval before consequential actions.

After the run

☐

Save inputs/outputs, log corrections, confirm recipients/access, and record how to repeat or recover.

Stop and recovery instructions

State stop triggers, how to disable the workflow, restore inputs, and contact the owner.

Run outcome and approval

Record run ID/date, success/exception/stopped, reviewer, approval reference, and follow-up.