

LEARNING UPGRADED TEMPLATE

AI Workflow Brief

Define one AI-supported L&D workflow, including source material, allowed tasks, review gates, risk checks, and the human decision owner.

Try this one thing today

Choose one low-risk workflow and mark where AI assists, where humans review, and who owns the final decision.

Use this when

- People are using AI differently across the same team.
- Prompt sharing is happening without workflow standards.
- A leader wants AI productivity without weakening review quality.

What to have ready

- One workflow where AI might help.
- The approved source material AI is allowed to use.
- The person who owns the final decision before anything goes live.

Start this in 15 minutes

1. Choose one low-risk workflow instead of trying to govern every AI use case at once.
2. Name allowed source material before writing prompts.
3. Separate what AI can help draft from what a person must approve.
4. Write the review gate before anyone publishes the output.

Blank working version

Fill only what you know. Mark missing information as Needs confirmation instead of guessing.

Workflow

Which L&D workflow will AI support?

Allowed source material

What can AI use as input?

Allowed AI tasks

What can AI help with?

Not allowed

What should AI not do in this workflow?

Review gate

Who reviews the output, and what do they check?

Human decision owner

Who owns the final call before the work goes live?

Filled example

Workflow

Drafting scenario questions from approved product documentation.

Allowed source material

Published SOPs, approved product notes, existing training examples, and SME-provided constraints.

Allowed AI tasks

Generate first-pass scenario questions and distractor options.

Not allowed

Do not invent policy details, approve accuracy, or publish final assessment items.

Review gate

Designer checks learning fit. SME checks facts and workflow accuracy.

Human decision owner

Program owner approves final scenario set after SME review.

Conversation script

- AI can help here, but we need to define the workflow before we define the prompt.
- What source material is allowed, what is AI allowed to do, and where does human judgment take over?
- If we cannot answer those questions, we are not ready to turn this into a team standard.

How to decide

Low-risk drafting from approved material

AI can assist with first drafts, outlines, summaries, and variants.

Medium-risk learning content

AI can draft, but SME and designer review are required before use.

High-risk policy, compliance, customer, or legal content

AI can help prepare questions, but owners approve all final wording.

Sensitive or private data is involved

Use only approved tools and follow the organization's data policy.

The workflow has no human owner

Do not standardize the AI step yet.

Microsoft 365 or Google Workspace

Use Word, Google Docs, SharePoint, Confluence, or a project brief template to document allowed inputs, source links, review criteria, and publish rules.

AI-assisted help

Use AI to draft a workflow brief, prompt checklist, review checklist, and risk questions from approved source material.

AI output validation

These prompt starters were created for the May 2026 model landscape. Verify all AI outputs before using them with learners, reviewers, leaders, customers, partner teams, or compliance-sensitive work. Do not paste sensitive or proprietary material into an AI tool unless your organization has approved that tool for that data.

Validation checklist

- Allowed source material is named.
- Not-allowed AI tasks are explicit.
- The review gate names who checks facts, learning fit, tone, accessibility, and risk.
- The final decision owner is a person, not the AI tool.
- Check every fact against an approved source.
- Mark anything AI guessed, inferred, or could not confirm.
- Remove private, sensitive, or customer-specific details that should not be in the working file.
- Confirm the right human owner approves the final decision.
- Review tone, accessibility, and learner impact before anything goes live.