



TEMPLATE • WRITE IT DOWN

The Workflow Brief

One page that says how a workflow runs today, who owns it, and what would prove a fix.

StrikeArc Labs · October 2026

strikearc.ai/resources/workflow-brief

The Workflow Brief: write the workflow down before anyone automates it.

Before anyone automates a workflow, someone has to say how it runs today. The brief does that on one page: what starts it and what finishes it, who owns it, the steps and systems, the exceptions, the rules, and today's numbers with how sure you are of each.

STRIKEARC LABS · OCTOBER 2026 · ABOUT 20 MINUTES WITH THE PERSON WHO DOES THE WORK

The template [PDF](#) The template [DOCX](#)

Why the brief comes before any build.

Most automation projects stall on questions nobody wrote down. Who decides when an invoice is off by a few dollars? Which inbox do the orders really arrive in? What happens to the call that comes in at 9 at night? The brief puts those answers on one page while the people who know them are in the room.

It also fixes the baseline. Mark each of today's numbers as measured, estimated or a guess. A guess is fine to start with, as long as it is labelled. It tells you which number to measure first, and it keeps anyone, us included, from claiming a result against a figure nobody checked. The paper on [measuring AI in dollars](#) explains why that matters after launch.

Where the numbers come from.

Use the work itself. For calls and web inquiries, the [lead response audit](#) gives you the median and the slowest reply. For vendor invoices, two weeks of the [invoice exception log](#) gives you the exceptions and the hours they take. Not sure which workflow to brief? Start with [the Workflow Shortlist](#).

What we do with it on the call.

Bring the brief to a 30-minute intro call, or paste its one line into the notes when you book. We read it with you, ask about the exceptions, and tell you straight whether a play from the StrikeArc PowerPlays Library fits. If nothing in our library fits, we say so.

Bring the workflow that costs you the most.

Book a 30-minute intro call at strikearc.ai/book, or write to info@strikearc.ai.

The latest version of this piece lives at strikearc.ai/resources/workflow-brief.

The Workflow Brief

Workflow: _____ Owner: _____ Date: _____

01 The workflow in one line What starts it and what finishes it. If you cannot say both, the scope is not settled yet.	
02 Who owns it, and who does it One owner judges the result and can change the process. The people who do the work know where it really breaks.	
03 How often it happens Volume decides how fast a fix pays back. Note the busy days and anything that arrives after hours.	
04 The steps today Each step and the system it happens in, in order. Retyping between two systems usually shows up here.	1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____
05 The systems it touches A system can only work on what it can read. Name who can grant read access to each one.	
06 Real examples you can pull A month of real orders, invoices, calls or emails shows the work as it is, odd cases included.	
07 The exceptions The cases that do not fit, and who handles them. Most of the time goes here.	
08 The rules and approvals Limits, tolerances and who signs. These stay with your team whatever gets automated.	
09 Today's numbers Time per item, errors and delay, each marked measured, estimated or a guess. This is the baseline any result is judged against.	Time per item: _____ Errors: _____ Delay: _____ For each: measured, estimated or a guess

10 What would prove it worked The one number that would tell you, in three months, that the fix paid.	
11 What stays with a person The decisions nobody should hand to a system, written down before anyone builds.	