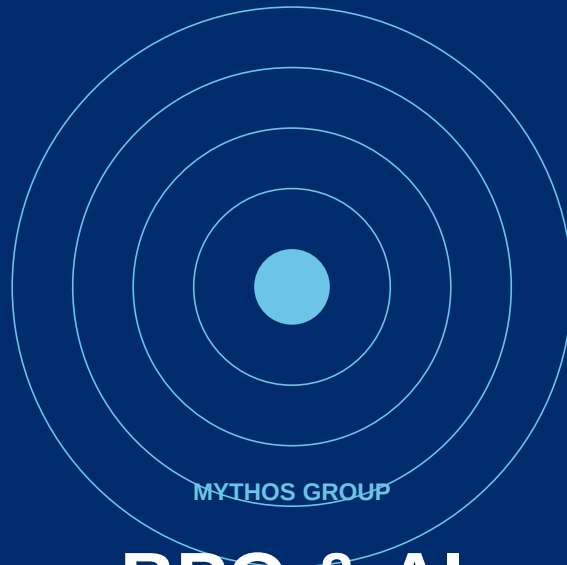




BPO & AI Resource Toolkit

Four practical tools to assess opportunities, document workflows, apply AI responsibly and plan useful automation.

AI WORKFLOW CHECKLIST • PROCESS TEMPLATE • RESPONSIBLE AI GUIDE • AUTOMATION
ASSESSMENT

TOOLKIT OVERVIEW

Use technology where it creates a clear operational benefit.

This toolkit is designed for teams evaluating everyday workflows. It helps separate useful opportunities from unnecessary complexity, while keeping people, review and accountability at the centre.

01 AI Workflow Readiness Checklist

Check whether your team, process and information are ready for AI-assisted work.

02 Process Documentation Template

Capture how work moves today before attempting to improve or automate it.

03 Responsible AI Guide

Apply practical safeguards for privacy, accuracy, transparency and human review.

04 Automation Opportunity Assessment

Score a task's suitability and define a sensible next step.

Recommended approach

- Choose one defined workflow rather than trying to transform an entire department.
- Document the current process and identify the real source of delay or inconsistency.
- Test a limited solution with clear ownership, review criteria and success measures.
- Expand only after the pilot produces a reliable operational benefit.

Important: This toolkit provides general operational guidance. It does not replace legal, privacy, security, employment or industry-specific advice.

RESOURCE 01

AI Workflow Readiness Checklist

Use this checklist before introducing AI into a workflow. A strong use case should have a clear purpose, reliable inputs and defined human oversight.

Workflow / task

Process owner

Date

1. Purpose and process

Statement	Yes	Partly	No
The task and desired outcome are clearly defined.	☐	☐	☐
The current process is documented and understood.	☐	☐	☐
The main problem is known: time, cost, quality, capacity or consistency.	☐	☐	☐
The workflow is repeated often enough to justify improvement.	☐	☐	☐

2. Information and inputs

Statement	Yes	Partly	No
The required information is available and reasonably accurate.	☐	☐	☐
Sensitive, confidential or personal information has been identified.	☐	☐	☐
The team knows which information may and may not be entered into a tool.	☐	☐	☐
Access permissions and information ownership are clear.	☐	☐	☐

RESOURCE 01 / CONTINUED

AI Workflow Readiness Checklist

3. People, review and accountability

Statement	Yes	Partly	No
A named person remains accountable for the final output.	■	■	■
A qualified reviewer can identify inaccurate or inappropriate results.	■	■	■
The team understands that AI output may be incomplete or incorrect.	■	■	■
There is a clear route for correcting errors and escalating concerns.	■	■	■

4. Pilot and measurement

Statement	Yes	Partly	No
The workflow can be tested with a limited, low-risk pilot.	■	■	■
Success measures have been defined before testing.	■	■	■
A manual fallback exists if the tool fails or produces poor results.	■	■	■
The team will review quality, time saved and unintended consequences.	■	■	■

Readiness result

Mostly Yes Ready for a controlled pilot.	Several Partly Strengthen the process or safeguards first.	Any critical No Do not proceed until the gap is resolved.
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Decision

Next action

RESOURCE 02

Process Documentation Template

Document the workflow as it operates today. Keep the description practical enough that another team member could follow it without relying on hidden knowledge.

Process name

Owner

Department

Version / date

Process purpose

What outcome does this process produce, and for whom?

Trigger and completion

What starts the process?	What confirms it is complete?

People and systems involved

Statement	Yes	Partly	No
Process owner:	■	■	■
Contributors / reviewers:	■	■	■
Tools or systems used:	■	■	■
Information or files required:	■	■	■

RESOURCE 02 / CONTINUED

Map the current workflow

Step	Action	Owner	Input / tool	Output / decision
1				
2				
3				
4				
5				
6				
7				

Improvement notes

- Where does work wait, repeat or move between too many people?
- Which decisions require judgement, and which follow a clear rule?
- Which steps create the most errors, rework or missing information?
- Which steps could be simplified before considering automation?

RESOURCE 03

Responsible AI for Everyday Operations

Responsible use begins with a simple principle: technology can support the work, but accountability remains with people.

1. Use an approved purpose

Define what the tool is supporting. Avoid using AI simply because it is available.

2. Protect information

Do not enter confidential, personal or restricted information without appropriate approval and safeguards.

3. Verify important output

Check facts, calculations, sources, tone and context before relying on or sharing a result.

4. Keep human accountability

A named person should review and remain responsible for consequential decisions and final outputs.

5. Be transparent

Disclose material AI assistance when required by policy, contract, law or audience expectations.

6. Monitor performance

Review errors, bias, quality and operational impact throughout the life of the workflow.

Before using AI, ask:

- Am I permitted to use this information and this tool?
- Could an incorrect result harm a person, customer, supplier or business decision?
- Who will review the output, and what must they verify?
- Can the result be explained, corrected and traced if a problem occurs?

RESOURCE 03 / QUICK REFERENCE

Information and review guide

Information type	Default approach	Examples
Public	Generally suitable for approved tools, subject to accuracy and usage rights.	Published webpages, public product information, approved marketing copy.
Internal	Use only in tools approved for internal business information.	Internal procedures, drafts, non-public operational information.
Confidential or personal	Do not use unless specifically approved with appropriate privacy and security safeguards.	Customer data, employee records, contracts, pricing, credentials.
Restricted	Do not enter into general AI tools.	Passwords, payment data, health records, legal privilege, regulated secrets.

Minimum review by output type

Statement	Yes	Partly	No
Research summary: verify important facts and original sources.	■	■	■
Written content: review accuracy, tone, claims, rights and context.	■	■	■
Data analysis: validate inputs, calculations, assumptions and exceptions.	■	■	■
Visual content: review rights, representation, brand fit and misleading details.	■	■	■
Business decision support: require qualified human judgement and documentation.	■	■	■

RESOURCE 04

Automation Opportunity Assessment

Use this worksheet to compare operational value with implementation risk. Score each factor from 1 (low) to 5 (high).

Workflow / task

Owner

Current frequency

People involved

Value factor	1	2	3	4	5	Notes
Volume or frequency	■	■	■	■	■	
Time currently required	■	■	■	■	■	
Level of repetition	■	■	■	■	■	
Potential consistency gain	■	■	■	■	■	
Operational importance	■	■	■	■	■	

Risk / complexity factor	1	2	3	4	5	Notes
Sensitivity of information	■	■	■	■	■	
Impact of an incorrect result	■	■	■	■	■	
Number of exceptions	■	■	■	■	■	
Integration difficulty	■	■	■	■	■	
Change and training required	■	■	■	■	■	

RESOURCE 04 / DECISION

Choose the right next step

High value / Low risk

Prioritize for a controlled pilot with clear success measures.

High value / High risk

Investigate carefully. Add expert review, safeguards and stronger governance.

Low value / Low risk

Consider only if implementation is very simple or supports a wider improvement.

Low value / High risk

Do not automate. Simplify, redesign or leave the process manual.

Pilot definition

Pilot objective

Scope

Owner

Reviewers

Start / end date

Manual fallback

Success measures

■ Time saved: _____

■ Quality or consistency: _____

■ Error / rework reduction: _____

■ User or team experience: _____

■ Other: _____

NEXT STEP

Turn one workflow into a practical pilot.

Start with a clearly defined task, document how it works today and identify where technology can create a measurable benefit. Keep the pilot limited, review the result and expand only when the process is reliable.

Need support?

Mythos Group helps teams structure workflows, apply practical automation and introduce AI-assisted tools with clear human oversight.

Contact Mythos Group