



QUICKMIND SOLUTIONS / AI PROFIT LAB

10 Draft-First AI Automations Checklist

A practical field guide for turning repetitive admin work into reviewable AI drafts without giving the tool authority it should not have.

FREE 5-PAGE FIELD GUIDE

Educational resource. No income, lead, booking, time-saving, accuracy, compliance, or business result is guaranteed. AI drafts; a human approves.



START SAFE

Use AI for the first draft, not the final decision

The best first workflow is repetitive, source-backed, easy to check, and low-risk when the draft is wrong. Choose one task from this guide, then test it with permitted information before it touches a customer.

The draft-first operating rule

The AI may organize, summarize, and format approved facts. A named person still verifies the source, resolves uncertainty, and decides whether anything is sent, published, scheduled, quoted, or entered into a system.

Five gates before the first test

1. Repetition Pick a task that happens at least twice a week and follows a recognizable pattern.	2. Source of truth Name the current document, transcript, export, or approved knowledge the draft must follow.
3. Permission Use fictional, consented, or properly redacted information in an approved tool and account.	4. Human owner Name the person who checks facts, claims, privacy, and next-step authority.
5. Failure route Define what happens when information is missing, conflicting, sensitive, or uncertain.	Minimum test Run ten supervised examples and log corrections before deciding whether to keep the workflow.

Paste this safety instruction first

Use only the information inside SOURCE. Do not add facts from memory or guess missing details. Write 'not provided' when a required fact is missing. Separate facts from suggestions. List missing facts and ambiguity under QUESTIONS. Do not make commitments about price, scope, timing, availability, policy, compliance, or outcomes. Return a draft for human review. Do not send, publish, schedule, or update any external system.

A useful first run

Use one fictional example. Compare every line of the draft to the source. Record what was wrong, what was missing, and how long the review took.

CHECKLIST 1-5

Customer intake and communication drafts

1

Inquiry to qualified brief**SOURCE** Original inquiry plus approved qualification fields and service-area rules.**DRAFT** A structured brief with stated needs, location, timing, budget, gaps, and questions.**HUMAN CHECK** Verify contact details and every field against the original inquiry.**NEVER DELEGATE** Do not infer fit, urgency, budget, price, availability, or appointment status.

2

Missed-call callback summary**SOURCE** Permitted call notes or transcript plus approved intake fields.**DRAFT** A callback record with request, location, urgency stated, open questions, and next step.**HUMAN CHECK** Check safety flags, callback details, consent, and unanswered questions.**NEVER DELEGATE** Do not confirm service, price, dispatch, availability, or an appointment.

3

Call transcript to recap**SOURCE** A permitted transcript and the team's approved recap format.**DRAFT** Purpose, decisions, open questions, explicit actions, owners, dates, and blockers.**HUMAN CHECK** Verify speaker attribution, commitments, dates, and what may be shared.**NEVER DELEGATE** Do not invent owners, due dates, commitments, or decisions.

4

Approved context to follow-up email**SOURCE** Recipient, purpose, confirmed facts, desired next step, and tone.**DRAFT** A concise subject, body, fact check, and items that still need verification.**HUMAN CHECK** Check names, facts, links, attachments, tone, timing, and send decision.**NEVER DELEGATE** Do not send or claim an attachment, outcome, deadline, or approval that is not confirmed.

5

Approved scope to proposal outline**SOURCE** Approved scope, deliverables, exclusions, pricing language, and terms.**DRAFT** A proposal outline with assumptions, client responsibilities, and unresolved questions.**HUMAN CHECK** Verify scope, price, timeline, terms, claims, links, and every fill-in field.**NEVER DELEGATE** Do not choose price or invent deliverables, dates, warranties, terms, or outcomes.

CHECKLIST 6-10

Knowledge, operations, and content drafts

6

Source documents to FAQ draft**SOURCE** Current policies, service descriptions, and approved answers.**DRAFT** Question-by-question answers with exact source section and support status.**HUMAN CHECK** Check source freshness, exceptions, regulated topics, pricing, and availability.**NEVER DELEGATE** Do not invent policy, legal guidance, exceptions, price, or service coverage.

7

Exports to weekly operations review**SOURCE** Permitted exports from the actual systems of record.**DRAFT** Source-backed counts, overdue items, blockers, missing owners or dates, and conflicts.**HUMAN CHECK** Reconcile every count and resolve conflicting source records yourself.**NEVER DELEGATE** Do not change records or decide priority, ownership, status, or truth when sources conflict.

8

Meeting notes to action register**SOURCE** Approved notes with explicit owners, dates, decisions, and open questions.**DRAFT** A reviewable action list with source references and missing-owner flags.**HUMAN CHECK** Confirm every owner and due date with the notes or a responsible person.**NEVER DELEGATE** Do not assign people, create deadlines, or mark work complete.

9

Approved insight to educational content angles**SOURCE** An anonymized, approved insight plus its intended audience.**DRAFT** Five ideas with hooks, lessons, evidence needs, confidentiality risks, and formats.**HUMAN CHECK** Check permission, confidentiality, evidence, originality, and claim support.**NEVER DELEGATE** Do not create quotes, imply endorsement, identify a customer, or invent a result.

10

Invoice export to follow-up draft queue**SOURCE** A permitted invoice export with verified customer and status fields.**DRAFT** A review queue plus factual, neutral reminder drafts for approved records.**HUMAN CHECK** Verify balance, due date, recipient, dispute status, policy, tone, and send decision.**NEVER DELEGATE** Do not threaten, add fees, decide collections action, alter records, or send automatically.

FIRST IMPLEMENTATION

Run one workflow in 20 minutes

Speed comes from narrowing the task, not skipping review. Use this sequence to learn whether one workflow is worth keeping.

MINUTES 0-3	Choose one task Pick one repeated job and one fictional or properly redacted sample.
MINUTES 3-6	Name the source Write the exact source of truth and the facts the AI may copy.
MINUTES 6-9	Set boundaries List prohibited commitments, missing-information behavior, and the human reviewer.
MINUTES 9-14	Generate a draft Use the universal safety instruction, one clear task, and a fixed output format.
MINUTES 14-18	Review line by line Mark source mismatches, missing facts, minor edits, and material corrections.
MINUTES 18-20	Make a decision Keep for more testing, revise the instructions, or reject the workflow.

Do not mistake one good result for a reliable workflow

Complete ten supervised runs using representative samples. Record manual time, draft time, review time, minor and material corrections, source mismatches, and prohibited commitments. Keep the workflow only when its review cost and error pattern are acceptable.

Want the complete build kit?

The Draft-First AI Workflow Starter Pack - Founding Edition expands this field guide into seven copyable prompts, a universal workflow canvas, an AI receptionist guardrail kit, a ten-run scorecard, fictional samples, and a claims/privacy QA checklist.

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