

FROM TASKS TO SYSTEMS: USING AI FOR REPEATABLE WORK

Audience: Builders | Type: Skill building

Why this matters

Once teams are comfortable using AI for individual tasks, the next opportunity is making good use repeatable. This is not about automation or bots. The place to start is designing repeatable workflows, where AI supports the work and helps with consistency and humans stay responsible.

When AI use is consistent, predictable, and reviewed, teams save more time with less risk.

What's the difference?

- A **task** happens once.
- A **repeatable workflow** happens again and again.

Where to look for opportunities

Good candidates share three traits:

- They happen on a regular schedule (weekly, monthly).
- They use similar inputs each time.
- They still need human judgment at the end.

Examples:

- Monthly reports or updates
- Intake or case summaries
- Volunteer or donor communications

For advanced teams (optional exploration)

Teams with strong governance and technical support may explore:

- Maintaining prompt libraries or templates
- Using basic automation to move drafts between tools
- Piloting agent-style workflows only with clear owners, review points, and the option to stop

Advanced approaches should always start small, stay observable, and keep humans in control.

How to move from a task to a repeatable workflow

1. Clarify the goal

What does a good outcome look like? Faster drafts? Clearer summaries?

2. Understand the inputs

What information goes in every time? Notes, forms, metrics, templates?

3. Standardize the use

Use a saved prompt or checklist, so AI is used consistently each time.

4. Define the human review

Who checks the output, and what are they responsible for catching?



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