



Find your first high-value AI workflow

An interactive workbook for small businesses
to use with ChatGPT Work

OpenAI

How to use this workbook

Small-business owners need more time for the work that matters most. This workbook helps you use ChatGPT Work to find one high-value workflow, run a small test, and turn what works into repeatable support for your business—without first researching AI models or reading technical documentation.

Start with one question: Where could AI make the biggest difference in how my business actually works?

You can read this workbook on your own, following a fictional small business as it chooses and tests a workflow. Or add the workbook to ChatGPT Work and use the starting prompt below to work through the same decisions for your business, one question at a time.

Start here in ChatGPT Work

Prompt

I want to identify one valuable workflow to test in ChatGPT Work. Use this workbook to guide me step by step.

Ask only a few questions at a time, and wait for my answers before moving on. Use Ledger & Lane only as an example; do not assume my business works the same way.

Do not recommend a workflow until we have identified my business priority, recurring friction, available information, what success would mean, and what a person must review or decide. Keep the first test small and reversible.

What you'll do

1. **Start with what matters.** Choose an immediate business priority and a recurring point of friction.
2. **Find workflows in the work you already do.** Map how the work happens and where AI may help.
3. **Choose where to start.** Compare each possibility on business value and delivery readiness.
4. **Run a small, reversible test.** Define the baseline, necessary context, human review, and success criteria.
5. **Build on what works.** Adopt, refine, expand, pause, or stop—then make a successful workflow repeatable when it is ready.

Meet Ledger & Lane

Ledger & Lane is a fictional four-person bookkeeping and accounting practice. Its owner, Maya, leads client work and sales. Two bookkeepers manage recurring accounts, while an operations generalist handles scheduling, onboarding, and client communications.

About the practice

Who they serve: Solo professionals, local service businesses, and growing small companies.

What they offer: Monthly bookkeeping, tax preparation, payroll coordination, and a new advisory package.

Where they're stuck: The firm is busy and winning new clients, but Maya cannot see clearly which customers and services are the best use of her team's limited capacity.

What Maya needs: A clearer picture of where the firm creates value, so she can make deliberate choices about growth.

Possible uses

Maya could ask ChatGPT to help the team:

- Draft a week of marketing content.
- Turn meeting notes into client follow-ups and assigned actions.
- Find unanswered messages and prepare responses for Maya's approval.
- Prepare one-page briefs for client meetings.
- Analyze clients, services, revenue, retention, and team time.
- Identify clients who may benefit from the new advisory package.
- Create a repeatable onboarding checklist and communications sequence.

The trap: choosing the easiest demo

Marketing content is easy to imagine and quick to try. But Maya still does not know whom to target or which offer matters most. A more valuable starting point may be the analysis that helps Ledger & Lane understand customer and service value first.

That is the choice this workbook will follow: begin with the business question, then decide which workflow is worth testing.

All company names, people, data, and results are fictional. Ledger & Lane illustrates the method; it is not a template for the reader's business.

Step 1: Start with what matters

Before you look for AI use cases, name the business outcome that matters now. A workflow is valuable only if it helps you make progress on something the business actually needs.

Choose one priority

Choose one priority for the next 30–90 days: growth, customer experience, capacity, cost, quality, or risk. If several matter, choose the one that would most change where you spend time or attention.

Find the friction behind it

Look for recurring work that makes the priority harder to achieve. Friction often appears as work that is slow, inconsistent, hard to analyze, repeatedly delayed, or dependent on one person.

Complete this sentence

We are trying to [desired outcome], but [recurring barrier] keeps getting in the way because [root cause].

Keep the language focused on the business problem. “We need to understand which clients are the best use of our time” is useful. “We need an AI tool to analyze clients” jumps to the solution too early.

EXAMPLE: LEDGER & LANE

Business priority: Grow deliberately without overloading the team.

Desired outcome: Understand which customers and services make the best use of the firm's limited capacity.

Recurring friction: Client and service information is spread across spreadsheets, invoices, and Maya's memory. She can see revenue, but comparing revenue with retention and team effort takes manual work.

Human decision: Maya must decide which kinds of customers and services the firm should prioritize.

Her business question is simple: Which kinds of clients are best for my business—not just who pays us the most?

WORKBOOK

Try it in ChatGPT Work

Prompt

I want to identify one business problem that may be worth addressing with ChatGPT Work. Ask me up to three questions at a time about:

- The business priority that matters most in the next 30–90 days
- The outcome I want
- Recurring work that gets in the way
- The decision a person must make

Do not suggest workflows or tools yet. When you have enough context, summarize my business priority, desired outcome, recurring friction, business question, and human decision.

Step 2: Find workflows in the work you already do

A workflow is more than a prompt. It is a repeatable path from a trigger and inputs, through steps and decisions, to an output that matters. ChatGPT may support one step or several, but people remain responsible for goals, judgment, review, and action.

Map the work before improving it

Choose one recurring task connected to the priority and friction you identified in **Step 1**. Answer the following five questions.

Questions

1. What starts the work?
2. What information or tools does it use?
3. What happens today, and where does the work slow down or become inconsistent?
4. What must a person review or decide?
5. What useful output should the workflow produce?

You do not need a perfect process map. You need enough detail to see where ChatGPT might help and where human judgment belongs.

Five ways AI can help

Use these five possibilities to generate ideas without jumping to a specific product feature:

Possibilities

1. **Answer a question:** Explain, summarize, or retrieve information.
2. **Analyze evidence:** Find patterns, compare options, or develop a recommendation.
3. **Create an asset:** Produce a defined deliverable, such as an email, brief, presentation, or campaign.
4. **Run a repeatable process:** Follow the same known steps whenever a trigger occurs.
5. **Complete a multi-step goal:** Plan and coordinate several steps, with human approval at defined points.

A useful workflow may combine more than one of these. For now, the goal is to create a short list—not choose the winner.

EXAMPLE: LEDGER & LANE

Maya starts by mapping how she evaluates customer and service value today

- **Trigger:** Maya needs to decide where the firm should focus its growth and limited capacity.
- **Inputs:** A client spreadsheet containing services, revenue, estimated team time, and retention.
- **Current process:** Maya reviews revenue by client. She considers team effort and retention informally, using information from spreadsheets, invoices, and her own memory.
- **Human judgment:** Maya defines what “valuable” means for the firm, checks the data and assumptions, and decides what action to take.
- **Useful output:** A clear comparison of customer groups that shows the calculations, assumptions, and tradeoffs.

Looking across the firm's recurring work, Maya identifies four possible workflows:

Workflows

1. Draft weekly marketing content.
2. Analyze client and service value.
3. Identify clients who may benefit from the advisory package.
4. Streamline client onboarding.

She will compare these possibilities in the next step. She does not need to choose yet.

WORKBOOK

Try it in ChatGPT Work

Use the business priority, recurring friction, and business question we identified in **Step 1**.

Prompt

Ask me up to three questions at a time to map one recurring area of work. Help me identify its trigger, inputs, current steps, points of friction, human judgment, and useful output.

Then suggest three to five possible workflows using the five ways AI can help. For each candidate, explain:

- The problem it addresses
- Its trigger
- The minimum inputs
- The useful output
- What a person must review or decide
- Known evidence
- An important assumption
- The smallest reversible version

Do not rank the candidates yet. We will compare their business value and delivery readiness in the next step.

Step 3: Choose where to start

You do not need a complicated scorecard to choose your first workflow. Compare each candidate on two dimensions: **business value** and **delivery readiness**.

Business value

Ask

- Does this workflow support the priority you identified in Step 1?
- Does it address recurring, meaningful friction?
- Would improving it make a difference in time, quality, revenue, cost, or customer experience?

Delivery readiness

Ask

- Do you have representative, approved information to work with?
- Is the desired output clear?
- Can a knowledgeable person review the result?
- Can you run a small test without disrupting the business?

Plot the candidates

Place each workflow on this quadrant:

	Low delivery readiness	High delivery readiness
High business value	Invest to unlock <i>These could create meaningful value, but something needs to change before they are easy to test.</i>	Start here <i>These offer the biggest bang for your buck.</i>
Low business value	Park for now <i>Keep these ideas, but do not spend time on them yet.</i>	Easy wins <i>These are ready to test, but may not address your most important priority.</i>

The quadrant is a decision aid, not a precise measurement. Use the evidence you have and your knowledge of the business.

EXAMPLE: LEDGER & LANE

Maya plots candidates

Maya plots the firm’s four candidates

- **Start here — Analyze client and service value:** It could directly inform the firm’s growth decisions, and Maya already has a useful spreadsheet and a clear business question.
- **Easy win — Draft weekly marketing content:** It would be straightforward to test, but its value is limited until the firm knows which customers and services it wants to promote.
- **Invest to unlock — Identify clients who may benefit from the advisory package:** It could support growth, but Maya first needs to define what makes a client valuable and what signals a good fit for the package.
- **Park for now — Streamline client onboarding:** The opportunity is broad and touches several tools and sensitive steps. Maya may revisit a narrower part of it later.

Maya chooses to **analyze client and service value** as the first workflow to test.

Move a promising idea to the right

A high-value workflow with low readiness is not necessarily a bad idea.

Ask what would make it easier to test:

- Could you narrow the scope?
- Could you clean up or organize the inputs?
- Could you define the desired output more clearly?
- Could you name the person who will review or approve the result?
- Could you test one step before attempting the entire workflow?

WORKBOOK

Try it in ChatGPT Work

Use the candidate workflows we identified in **Step 2**.

Prompt

Ask me up to three questions at a time to understand their business value and delivery readiness. Then place each candidate on a business value versus delivery readiness quadrant.

Do not assign numerical ratings. Explain each placement using the information I provided.

If no candidate is both high value and ready for a safe test, say so. Recommend the smallest readiness-building action instead of forcing a workflow selection.

Recommend:

- One high-value, high-readiness workflow to test first
- One easy win, if there is one
- What would need to change to make any high-value, low-readiness workflow easier to test

Step 4: Run a small, reversible test

Your first test should answer one useful question without disrupting the business. The goal is to learn—not to prove the entire workflow will work at scale.

Create a simple test card

Define five things before you begin:

- **Baseline:** What happens today?
- **Test question:** What should this test help you learn?
- **Inputs:** What is the minimum approved information or context required?
- **Human review:** Who will review the result, and what does a good result look like?
- **Next decision:** Will you adopt, refine, expand, pause, or stop?

A useful first test can fail. Learning that a workflow is not valuable or ready can save you from scaling the wrong thing.

Run the test in ChatGPT Work

Start your first test in ChatGPT Work when you're delegating a fuller goal that requires business context, multiple steps, and a reviewable output you can steer. Keep the workflow bounded at first: provide only the context it needs, require human review, and expand it only after it proves useful. Use ChatGPT for quick questions and lightweight drafting, and add connected tools only when the workflow genuinely needs their context—starting with approved files or a bounded example, then adding only the approved connections required as the workflow matures.

Connected tools can make a workflow more useful when they provide context the work actually needs. Use only approved connections, and connect only the tools the workflow requires. You can begin with uploaded files or a bounded example, then add a connection after the workflow proves useful.

EXAMPLE: LEDGER & LANE

Maya creates a test card

Maya creates a test card for the client and service analysis workflow.

- **Baseline:** Maya reviews revenue by client and informally considers team time and retention.
- **Test question:** Which kinds of clients appear most valuable to the firm—not simply which generate the most revenue?
- **Inputs:** A fictional spreadsheet containing customer groups, services, revenue, estimated team time, margin, and retention.
- **Test:** ChatGPT checks the data, asks about missing context, and compares the customer groups. It shows its calculations, assumptions, and tradeoffs but does not make the final business decision.
- **Human review:** Maya checks the calculations and context. She decides what “valuable” means for the firm.
- **Good result:** The analysis is accurate, the assumptions are visible, and Maya can use the same approach again.
- **Next decision:** Maya will decide whether to refine the analysis, use it in the business, or stop.

Use only the information you need

Begin with the minimum information required to run the test. Remove identifying details where possible. Do not provide passwords, bank credentials, tax identification numbers, API keys, or information you are not authorized to use. Follow your company policies and professional obligations, and have a person review the result before acting on it.

Try it in ChatGPT Work

Use the workflow we selected in **Step 3**.

Prompt

Help me create a one-page test card that includes:

- The current baseline
- The question the test should answer
- The minimum approved inputs required
- The person responsible for reviewing the result
- Clear success criteria
- The decision we will make after the test

Keep the test small, safe, and reversible. Ask only for the context or files required to answer the test question. Do not run the test until I approve the test card.

After I approve the test card, ask whether I want to run the approved test now. Execute only the scope and actions authorized in the card. Return the test output with an evidence log showing the sample used, observed results, errors or exceptions, missing information, required reviewer checks, and comparison with the baseline. Do not take any external action unless I separately and explicitly approve it.

Step 5: Build on what works

A successful first test is not a reason to automate everything. It is evidence that one part of the work may be worth repeating, improving, or connecting to the next step.

Engineer the growth loop

A growth loop turns the result of one workflow into a useful input for the next. The outcome of that work then creates new information that improves the original workflow.

In simple terms: Analyze → Review → Act → Learn → Analyze again.

Each pass through the loop should make the next decision better. People remain responsible for deciding what enters the loop, reviewing its outputs, and approving consequential actions.

The beginning of a growth loop

Maya's client and service analysis can become the beginning of a growth loop:

1. **Analyze:** The workflow identifies customer groups and services that appear valuable.
2. **Review:** Maya checks the analysis and decides which insights are meaningful.
3. **Act:** Once Maya approves an opportunity, ChatGPT prepares a short outreach brief or draft message for the right audience. Maya reviews it before anything is used or sent.
4. **Learn:** Responses, conversations, and conversions show which opportunities have genuine potential.
5. **Improve:** Those signals become inputs for the next client and service analysis.

The first workflow creates value on its own. Connecting it to the next decision makes it more useful over time.

Add one step at a time

Before extending the loop, ask:

- Did the previous step produce a result people used?
- Did it improve the work or the decision?
- Is the next input clear and available?
- Who will review and approve the next output?
- Can you add the step without making the workflow difficult to understand or reverse?

Begin with a review-only cadence. Let ChatGPT prepare the analysis or asset, then have a person decide what happens next. Introduce more automation only when the workflow is reliable, useful, and appropriately supervised.

When a workflow becomes reliable, save its instructions, inputs, and review points so the team can reuse it in ChatGPT Work. If your approved tools support recurring or triggered work, it can prepare the next analysis, brief, or follow-up and bring it to a person for approval. That is when a useful test starts to feel like a dependable member of the team—and gives the owner time back for other work.

Measure whether the loop is working

Look for evidence in three areas:

- **Use:** Are people actually using the workflow?
- **Work quality:** Is it saving time, improving consistency, or supporting better decisions?
- **Business value:** Is it contributing to the priority you identified in Step 1?

You do not need an elaborate measurement system. Choose a few signals that will help you decide whether to continue, change, or stop.

WORKBOOK

Try it in ChatGPT Work

Prompt

Review the results of my first test with me.

First summarize the evidence: the baseline, observed result, sample size, errors or exceptions, reviewer judgment, and assumptions that remain untested. Separate observations from interpretations. Then recommend one decision—adopt, refine, expand, pause, or stop—and explain what evidence supports it. Do not recommend expansion if the sample is too small, a success criterion failed, or a consequential assumption remains untested.

Ask me up to three questions at a time to separate what we observed from what we assumed. Help me decide whether to adopt, refine, expand, pause, or stop the workflow.

If the evidence supports continuing, show me how this workflow could become the first step in a simple growth loop. Identify:

- The next useful decision or action
- The information that should pass to the next step
- What a person must review or approve
- What result would become a signal for the next cycle
- One small, reversible step to add next

Do not recommend expanding the workflow unless the first test produced evidence that it is useful and ready.

Apply the method to your business

Add the workbook to ChatGPT Work, then paste the prompt below.

Start here in ChatGPT Work

Prompt

I want to identify and test one valuable workflow in ChatGPT Work for my business.

Use this workbook to guide me through the process one step at a time.

Use Ledger & Lane only as an example; do not assume my business works the same way.

Guide me through five steps:

1. Understand my business priority, recurring friction, and the question I need to answer.
2. Map how the work happens today and identify three to five possible workflows.
3. Plot the candidates on the business value versus delivery readiness quadrant. Do not use numerical ratings.
4. Help me create a small, reversible test card. Do not run the test until I approve it.
5. Review the evidence from the test and help me decide whether to adopt, refine, expand, pause, or stop. If continuing makes sense, help me design one small next step in a growth loop.

Ask no more than three questions at a time, and wait for my answers before moving on.

Treat each numbered step as a separate stage. At the end of each stage, summarize:

- Known facts
- Assumptions
- Missing or unapproved information
- What a person must review or decide

Ask me to confirm or correct the summary before moving to the next stage. Do not recommend a workflow until my business priority, desired outcome, recurring friction, business question, approved inputs, success criteria, and human decision are clear.

At every step:

- Separate what we know from what we are assuming.
- Ask only for the minimum approved information required.
- Identify what a person must review or decide.
- Keep recommendations proportionate to a small business. Prefer a review-only workflow that one owner can test in a week using existing tools and roughly five to ten representative examples. Do not recommend new software, integrations, automation, or broad process redesign unless the smaller test proves useful but insufficient.
- Prefer a small, reversible test over a large implementation.

Begin by asking what my business does, what matters most right now, and what recurring work gets in the way.

Information you may want nearby

You do not need to prepare everything before you begin. It may help to have:

- A short description of your business and customers
- Your most important priority right now
- An example of the recurring work you want to improve
- Representative files or information you are approved to use
- Relevant tools, policies, or professional obligations
- A rough description of what happens today
- The person who will review the result

ChatGPT can help you identify what is missing as you work through the steps.

What you should have at the end

By the end of the process, you should have:

- A short list of possible workflows
- A business value versus delivery readiness quadrant
- One workflow chosen for a first test
- A test card with a baseline, reviewer, and success criteria
- A clear decision about what to do next
- If the test succeeds, one small step toward a growth loop

Current guidance and resources

The method in this workbook does not depend on a particular model or feature. ChatGPT capabilities, plans, settings, and availability will continue to change.

Use current official guidance when deciding which tools to use and what information to provide.

Before you begin

Confirm

- Which ChatGPT features, apps, or plugins are available to you
- Whether your workspace administrator has approved the connections you need
- How uploaded and connected information will be handled
- Which company policies or professional obligations apply
- Whether a person is responsible for reviewing consequential outputs and actions

Official OpenAI resources

- [OpenAI Academy small-business resource hub](#): Tutorials, prompt starters, examples, and additional learning for small-business owners.
- [Apps in ChatGPT](#): Current availability, setup, permissions, and workspace controls for connected tools.
- [Data analysis with ChatGPT](#): Guidance for analyzing spreadsheets and other uploaded information.
- [File Uploads FAQ](#): Supported files, limits, and retention considerations.
- [Business data privacy, security, and compliance](#): OpenAI's current commitments for business data.
- [OpenAI Learning Hub](#): Current guides, tutorials, demonstrations, and business resources from OpenAI.
- [Small Business Prompt Pack](#): Ready-to-use prompts for planning, marketing, customer communication, operations, and other everyday work.
- [ChatGPT 101 and 102 resource guides for small businesses](#): Guided videos and examples covering prompting, data analysis, research, connected tools, projects, and reusable assistants.
- [Four GPT templates for small businesses](#): Step-by-step templates for turning a proven recurring workflow into a reusable assistant for marketing, customer feedback, communications, or operations.

Links reviewed July 2026.

Keep the method consistent

Product details may change, but the core process remains the same:

Start with the business question → Map the work → Choose using value and readiness → Run a small test → Review the evidence → Build on what works



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