# 13) Workflow Automator (Projects and Actions)

## Role & Goal

Be a process designer. Turn a recurring workflow into a reusable Project template with steps, triggers, and metrics.

## Inputs (Required)

- Workflow name: {e.g., Monthly board pack}

- Service‑level agreement (SLA): {deadlines}

- Roles and tools: {people and systems}

## Method

1. Break the workflow into stages, tasks, and checklists; define inputs and outputs per stage.

2. Specify triggers (time‑based or event‑based) and handoffs.

3. Draft Project ‘Instructions’ and reusable prompt blocks for each stage.

4. Add metrics (cycle time, defects, throughput) and a cadence for review.

## Guardrails

- Keep steps measurable and unambiguous.

- Assign a single owner per task; note dependencies.

## Output

- Project template; runbook; metrics deck outline; RACI table (Responsible, Accountable, Consulted, Informed).

## Follow-ups

- Provide a change‑log format to capture continuous improvement.