



# AI Agent Workflow Planning Template

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## ✓ What's Inside:

- Step-by-step flow to define your AI task
  - Prompts for planning your workflow
  - Tools to integrate (Zapier, APIs, Docs, etc.)
  - An example workflow for clarity
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## Step-by-Step Workflow Planning

### 1. Define the End Goal

- What is the [AI agent](#) supposed to achieve?
- e.g., "Automatically send welcome emails to new newsletter subscribers."

### 2. Break It Down into Steps

- List each step the agent must complete.
- Example: Detect new subscriber → Generate email → Send via Gmail

### 3. Identify Inputs and Outputs

- Input: What data is required?
- Output: What should the result look like?



#### 4. **Select Tools/Integrations**

- Choose from tools like:
  - **Zapier, Make.com**
  - **OpenAI API, LangChain, AgentGPT**
  - **Google Sheets, Notion, Airtable**

#### 5. **Connect the Steps**

- Define how each step talks to the next.
- Example: Zapier catches webhook → OpenAI writes content → Gmail sends

#### 6. **Set Notifications & Logging**

- Add optional alerts for tracking
- Store results or logs in Notion or a spreadsheet

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### **Planning Prompts for Your AI Agent**

- "What should the AI do first?"
  - "What will trigger the agent?"
  - "Where does the output go?"
  - "Do I need any human input?"
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## Example: Lead Management Workflow

**Goal:** Handle new leads from a website automatically.

### Workflow:

- **Step 1:** New lead submits a form on your site (Input).
- **Step 2:** Zapier triggers and captures the form data.
- **Step 3:** ChatGPT (via API) generates a custom email reply.
- **Step 4:** Gmail sends the email.
- **Step 5:** Airtable records lead data + conversation log.

### Tools Used:

- Zapier, ChatGPT API, Gmail API, Airtable



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## Review & Refine

- Check your workflow weekly.
- Optimize any repetitive tasks.
- Update prompts to reflect current needs.
- Document any issues or successes to scale better.