Before the whole team *runs it.*

Someone on the team has built a workflow in Claude, and it works. Building it was the right call. These are the seven things to settle before the rest of the team uses it on client work. Answer each one for the last real piece of work it produced, and tick only what's true today.

1 ☐ **The steps are written down**

The workflow follows the same steps whoever runs it, and those steps are written somewhere other than one person's head or one chat history.

CHECK Could a colleague run it on a new job tomorrow, without asking the builder anything?

2 ☐ **One named person signs off**

Nothing goes to a client until a named person approves it, and the approval is recorded, not a reply saying "looks good".

CHECK Who signed off the last piece that went out, and which version did they see?

3 ☐ **The review has one home**

Drafts, edits and comments are kept together in one place the team can see, so a correction is made once and reaches the next draft.

CHECK Where did the reviewer's comments on the last draft end up?

4 ☐ **The sources sit beside the draft**

The reviewer can see which files each draft was built from, without asking whoever ran it. Otherwise the senior person re-checks every figure.

CHECK Pick one figure in the last draft. How long does it take to find where it came from?

5 ☐ **Every run leaves a record**

Which version of the workflow ran, on which files, when, and what the reviewer saw. Workflows get improved, so the version matters.

CHECK If a client queried a report from three months ago, could the firm say exactly what produced it?

6 ☐ **The cost of one run is known**

Building happens once and running happens every week. Routine steps rarely need the strongest model, but someone has to decide that on purpose.

CHECK What did the last run cost, and which model ran each step?

7 ☐ **It survives the builder**

It doesn't run on one personal account or one laptop, and someone other than the builder can fix it when it breaks.

CHECK What happens to it if the builder leaves next month?

0–3

Still one person's tool

Useful, and worth keeping. Not yet ready to put in front of a client under the firm's name.

4–6

Nearly there

Close the gaps before it touches client work. Start with 2 and 5.

7

Ready for the team

Roll it out, then pick the next piece of weekly work. The method carries over.

What this costs

Writing the steps down and agreeing who signs off takes a senior person a few hours. The first month is slower while the team gets used to reviewing in one place, and some people will resent the extra step.

When to stop

If the workflow only ever helps one person think or draft for themselves, none of this is needed. Keep it as a personal skill. This list matters once the work goes to a client.