

Process Audit Sheet

The five patterns and their conditions are quoted from Anthropic's engineering guidance on building effective agents, checked 1 August 2026. The rest is a way of structuring the conversation, not guidance from a source.

Fill it in for one process at a time.

1. Map The Process

- ☐ Name the process in one sentence.
- ☐ List every step, in order, one line each.
- ☐ For each step, name who does it.
- ☐ For each step, name what triggers it.
- ☐ For each step, name what it produces.
- ☐ Mark any step where two people who run it describe it differently. That is a disagreement to settle before anything is built.

2. Where The Time Actually Goes

- ☐ Estimate minutes per run, per step.
- ☐ Estimate runs per week.
- ☐ Multiply, and rank the steps by total time.
- ☐ Separately, list the steps people complain about.
- ☐ Compare the two lists. Where they differ, the ranking is the more useful one.

3. Workflow Or Agent

Anthropic states that workflows offer predictability and consistency for well-defined tasks, whereas agents are the better option when flexibility and model-driven decision-making are needed at scale. Both halves matter.

- ☐ Is the task well defined? If yes, the guidance points at a workflow.
- ☐ Are flexibility and model-driven decision making needed, at scale? If yes, that is when the guidance says an agent is the better option.
- ☐ If neither is clearly true, that is a finding. Record it rather than resolving it by picking the more interesting option.

4. The Five Patterns

Quoted from the source. Answer yes or no for the process, in writing.

PATTERN	THE SITUATION IT SUITS	Y/N
Prompt chaining	The task can be easily and cleanly decomposed into fixed subtasks	
Routing	Complex tasks where there are distinct categories better handled separately	
Parallelisation	Subtasks can be parallelised for speed, or multiple attempts give higher confidence	
Orchestrator workers	Complex tasks where you cannot predict the subtasks needed	
Evaluator optimiser	Clear evaluation criteria, and iterative refinement provides measurable value	

- ☐ All five answered.
- ☐ If several are yes, consider whether this is more than one process.
- ☐ If none is yes, note that anything built will be bespoke. That is a decision, not a failure.

5. Rules Or Model

Some steps do not need a model at all.

- ☐ For each step, ask whether it has a definite answer that could be looked up.
- ☐ Mark those as rules problems.
- ☐ Confirm nobody has scoped a model for them.

6. Context Load

Anthropic states context must be treated as a finite resource with diminishing marginal returns, and describes context rot, where a model's recall accuracy decreases as tokens increase.

- ☐ For each step, estimate how much material must be held at once.
- ☐ Mark any step needing a great deal held simultaneously.
- ☐ For those, note whether compaction, external note taking or sub agents would be needed. All three are named in the guidance for long horizon work, and all three are additional machinery.

7. Human Sign Off

- ☐ List every step that moves money.
- ☐ List every step that contacts a customer.
- ☐ List every step that deletes anything.
- ☐ For each, name the person who signs off, not the team.

8. What To Take To A Scoping Conversation

- ☐ The process map from section 1.
- ☐ The time ranking from section 2, and the complaints list beside it.
- ☐ The workflow or agent answer from section 3, with both halves.
- ☐ The five yes or no answers from section 4.
- ☐ The rules problems from section 5.
- ☐ The sign off list from section 7.

9. Sources

1. building effective agents
anthropic.com/engineering
2. effective context engineering for AI agents
anthropic.com/engineering

All checked 1 August 2026.

Free Scoping Audit

The form asks for your website or store URL and a note on what is eating the time. A process you are unsure about is a reasonable thing to put in that box. The scoping audit costs nothing.

edm-uk.com/#form-start

Expert Digital Marketing Ltd. Accompanies the article at
edm-uk.com/agent-ai/workflow-automation

Free audit:
edm-uk.com/#form-start