



AI + Workflow Automation

The complete guide: philosophy, scope, tiers, and what happens at every phase.

This is the full reference for how AK Randall Digital scopes and builds automation — not a summary, but the actual reasoning behind the scope, the tier structure, and the boundaries we hold. Read it end to end, or jump to the section you need.



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01

Overview & Philosophy

AI + Workflow Automation replaces one specific manual bottleneck — an intake process, a follow-up sequence, a recurring document — with a built, tested automation that runs the same way every time. We don't sell automation as a general concept; every engagement starts from a real, painful, repeatable workflow and is scoped to fix that workflow specifically.

The core discipline is testing before trusting. Prompts and logic are built and tested against real examples from the business — not generic samples — before anything touches live work, because an automation that fails silently on a real edge case is worse than doing the task manually. As workflows connect — a lead that needs to hit the CRM, trigger a proposal, and show up in reporting — the automation layer grows with it, up to a fully built, custom system for operations complex enough to need one.

02

Why This Matters

Manual workflows don't fail loudly — they fail quietly, in the minutes lost re-typing the same intake information, the follow-up that goes out a day late, the report that takes an afternoon to assemble by hand every month.

None of that shows up as one dramatic cost, but multiplied across a year it's the difference between a team that can take on more work and one maxed out redoing the same manual steps. And badly-built automation, done without real testing, is often worse than none at all — silent failures and bad handoffs erode trust in the tools instead of building it, which makes the next automation attempt harder to get buy-in for, not easier.

03

How We Think About Automation

Three things shape how we scope every automation engagement, regardless of tier:

- **Start from one real workflow, never a vague strategy.**
"Automate our business with AI" isn't a scope; "automate how intake becomes a CRM record" is. Every engagement starts specific.
- **Test against real examples, not synthetic ones.**
Real intake forms, real proposals, real edge cases — an automation that only works on clean sample data isn't tested, it's demoed.
- **Failures should be loud, not silent.**
Error handling and logging aren't polish — they're what turns "the automation quietly stopped working three weeks ago" into "the automation flagged an issue this morning."

These are operating principles drawn from how we scope engagements, not third-party research citations — we'd rather tell you plainly how we think than dress up a generic statistic as if it were specific to your business.

04

Tiers in Depth

	Starter	Growth	Custom
BEST FOR	One painful manual workflow	Multiple workflows that need to connect	A built system, not a workflow tweak
SCOPE	One automated workflow (e.g. intake → CRM)	2-4 connected workflows, cross-tool automation	Full command-center-style tool with custom UI
BUILT ON	Prompt/template design, tested against real examples	Custom prompt library, basic error handling/logging	API integrations, logic refined during the build
HANDOFF	Handoff documentation	Training session	Full documentation + optional maintenance retainer

Custom tier is priced as a project fee, or as a \$750–\$2,000/month retainer where ongoing logic refinement is the better fit — the choice usually comes down to whether the system is finished at launch or expected to keep evolving with the business.

05

What's Not Included

- **Ongoing prompt or content writing beyond the workflows scoped.** New workflows or major prompt rewrites are a new scope, not a revision of the current one.
- **AI platform / API usage costs.** Billed directly to the client's own account with the provider, separate from our fee.
- **Redesign of processes outside the workflow(s) scoped.** We fix the workflow we mapped, not every adjacent process it touches.
- **24/7 monitoring or incident response outside the maintenance retainer.** Ongoing uptime support is an add-on, not a default.
- **Data cleanup of the source systems being connected.** We work with the data as it exists; large cleanup projects are scoped separately.

* These boundaries are inferred from what's in scope, not itemized separately in every contract — worth confirming case by case.

A FEW QUESTIONS WE GET

"Who pays for the OpenAI/Anthropic usage?"

You do, directly to the provider — we don't mark up or resell API usage.

"What happens if the automation breaks?"

Error handling and logging flag it; ongoing incident response is covered under the optional maintenance retainer, not by default.

"Can this expand to other workflows later?"

Yes — that's typically how Starter clients grow into Growth or Custom, scoped as a new phase.

06

How It Works, Phase by Phase

● 01

Map

We map the exact manual workflow — every step, decision point, and handoff — and identify where automation actually removes work versus where it would just move the problem.

From you: a walkthrough of the workflow, and a handful of real past examples.

● 02

Design

The automation logic and any prompts or templates are designed against that map, built around the language and documents the business already uses.

From you: sample documents/templates already in use.

● 03

Build

The workflow is built and tested against real historical examples, not synthetic test data, before anything touches live work.

From you: a review pass on test results before go-live.

● 04

Operate

The team is trained to run and adjust the system, with error handling and logging in place so failures are caught, not silent.

From you: attendance at the training session.

WHO THIS IS FOR

Businesses with a specific, repeatable manual workflow they're ready to hand to automation.

NOT A FIT IF

You're looking for a vague "AI strategy" with no defined workflow to start from.

Starter/Growth: project fee, discussed once mapped. Custom: project fee, or \$750-\$2,000/mo retainer.