



AI + Workflow Automation

Automation that fits the business, not a business bent to fit the automation.

OVERVIEW

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, with prompts and logic tested against real examples before it goes live. 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.

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 — silent failures and bad handoffs erode trust in the tools instead of building it.

WHAT'S INCLUDED — BY TIER

■ Starter

One painful manual workflow — intake, follow-up, a recurring document.

One workflow, done right. One automated workflow (e.g. intake to CRM), built around the actual steps the business follows today.

Tuned to the real work. Prompt and template design specific to that workflow, tested against real examples.

Handed off clearly. Documentation so the team understands what the automation does and how to adjust it.

■ ■ Growth

Multiple workflows feeding the same business — CRM, proposals, reporting all need to connect.

Workflows that talk to each other. 2-4 connected workflows with cross-tool automation linking CRM, proposals, and reporting.

A real prompt library. A custom prompt library for the business's actual language and documents, with basic error handling and logging.

Trained, not just delivered. A training session so the team can run and troubleshoot the system day to day.

■ ■ ■ Custom

An operation that needs a built system, not a workflow tweak — a Bid-Command-Center-style tool.

A real built system. A full command-center-style tool with a custom UI and dashboard, not a set of connected automations.

Wired into what already exists. API integrations with the tools already in use, refined against real operating logic during the build.

Documented, with an option to keep it running. Full documentation and an optional maintenance retainer.

WHAT'S NOT INCLUDED

- Ongoing prompt or content writing beyond the workflows scoped.
- AI platform / API usage costs — billed directly to the client's own account.
- Redesign of processes outside the workflow(s) scoped.
- 24/7 monitoring or incident response outside the maintenance retainer.
- Data cleanup of the source systems being connected.

Final scope, exclusions, responsibilities, and third-party costs are confirmed in the written proposal for each engagement.

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.

HOW IT WORKS

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.

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.

03

Build

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

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.